

July 2023



Country Opinion Surveys

FY 2023 **Serbia** Country Opinion Survey – Pulse Report

ECR Business Intelligence Team



WORLD BANK GROUP

Acknowledgements

The Serbia Country Opinion Survey is part of the Country Opinion Survey Program series of the World Bank Group. This report was prepared by the Business Intelligence (BI) team, led by José De Buerba (Senior External Affairs Officer) and Svetlana Markova (Senior External Affairs Officer). Yulia Danilina, Jessica Cameron, Nan Lin, and Sofya Gubaydullina oversaw the design, reporting, and analysis. 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 about how stakeholders in Serbia 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, and alignment with Serbia's development priorities, as well as other key indicators? Are opinions improving or worsening?
2. How is the WBG is perceived as a development partner? Are opinions improving or worsening?
3. What key topics of WBG communications do stakeholders recall? Is there a relationship between message recall and views of the WBG's work?

Overall Context

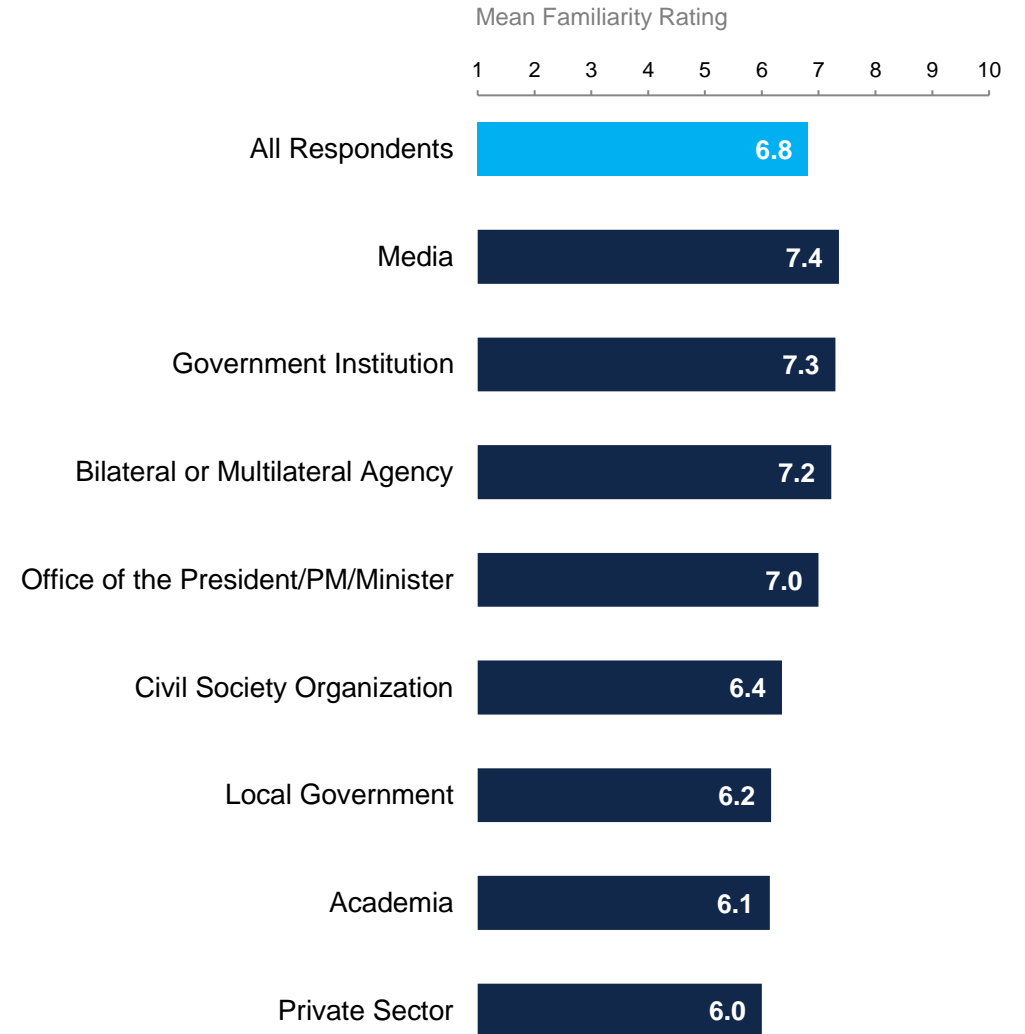
Familiarity with the World Bank Group

Year comparison: Respondents in this year's Country Survey reported significantly higher levels of familiarity with the World Bank Group than in FY20:

Mean familiarity: FY23 = **6.8**
FY20 = **5.7**.

Collaboration: Respondents who indicated that they collaborate with the WBG in FY23 reported significantly higher levels of familiarity with the institution's work:

Mean familiarity: WBG collaborators = **7.3**
Non-WBG collaborators = **5.9**



Statistically similar across stakeholder groups



How familiar are you with the work of the World Bank Group in Serbia?
Scale: 1-10 (1: Not familiar at all – 10: Extremely familiar) (FY23 N=90; FY20 N=258)

Trust in Institutions

The WBG and the International Monetary Fund (IMF) continued to be the most trusted institutions in Serbia among those studied.

Media, local government, and the national government were the least trusted institutions, according to respondents.

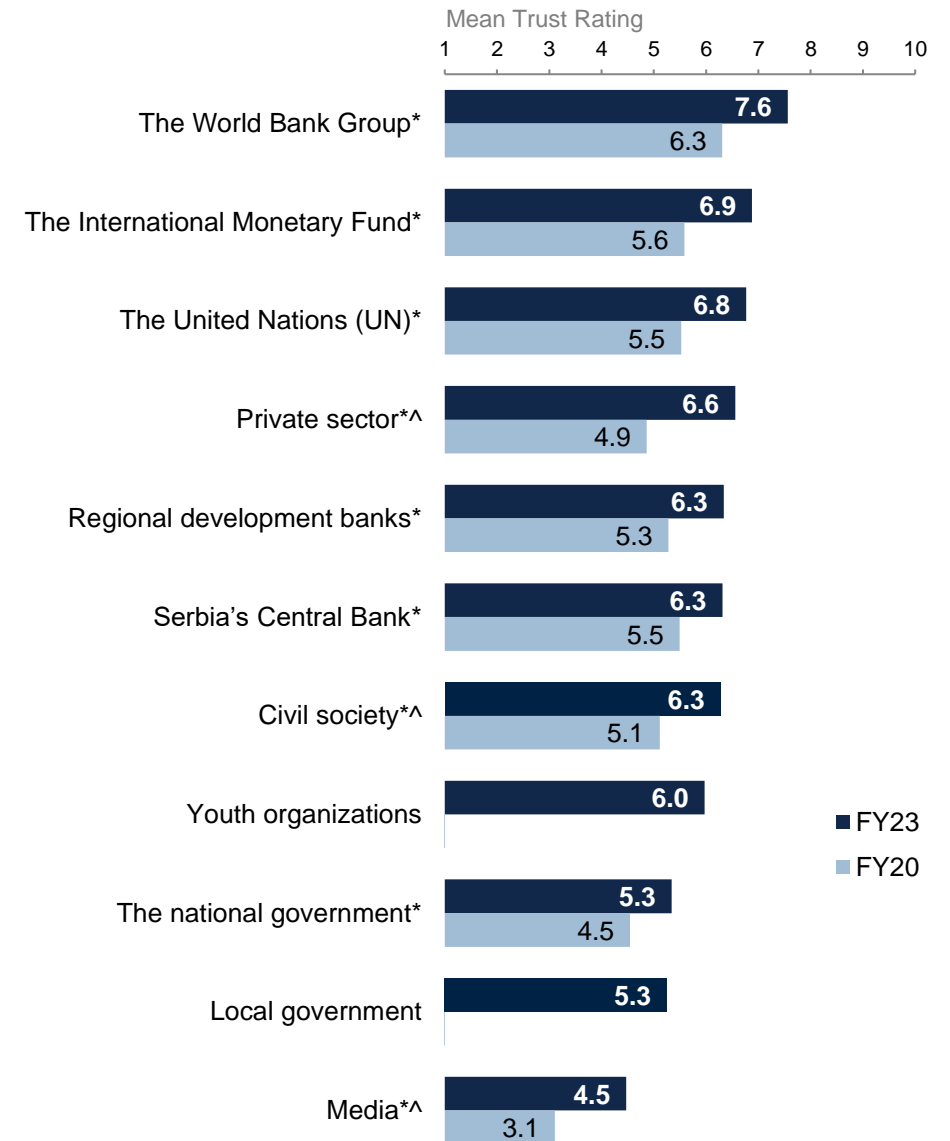
In this year's survey, 66% of respondents indicated that they collaborated with the WBG as opposed to just 28% in FY20. Because respondents who collaborate with the WBG tend to rate it more positively, analyses were conducted comparing collaborators in FY20 to collaborators in FY23 to ensure that the increased ratings over time were not due to the greater number of collaborators in the sample for this year's survey. Indeed, even when just looking at ratings among those who collaborate with the WBG, respondents in FY23 rated their trust in the WBG, the IMF, the United Nations (UN), regional development banks, the private sector, civil society, and the media significantly higher than in FY20.



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)

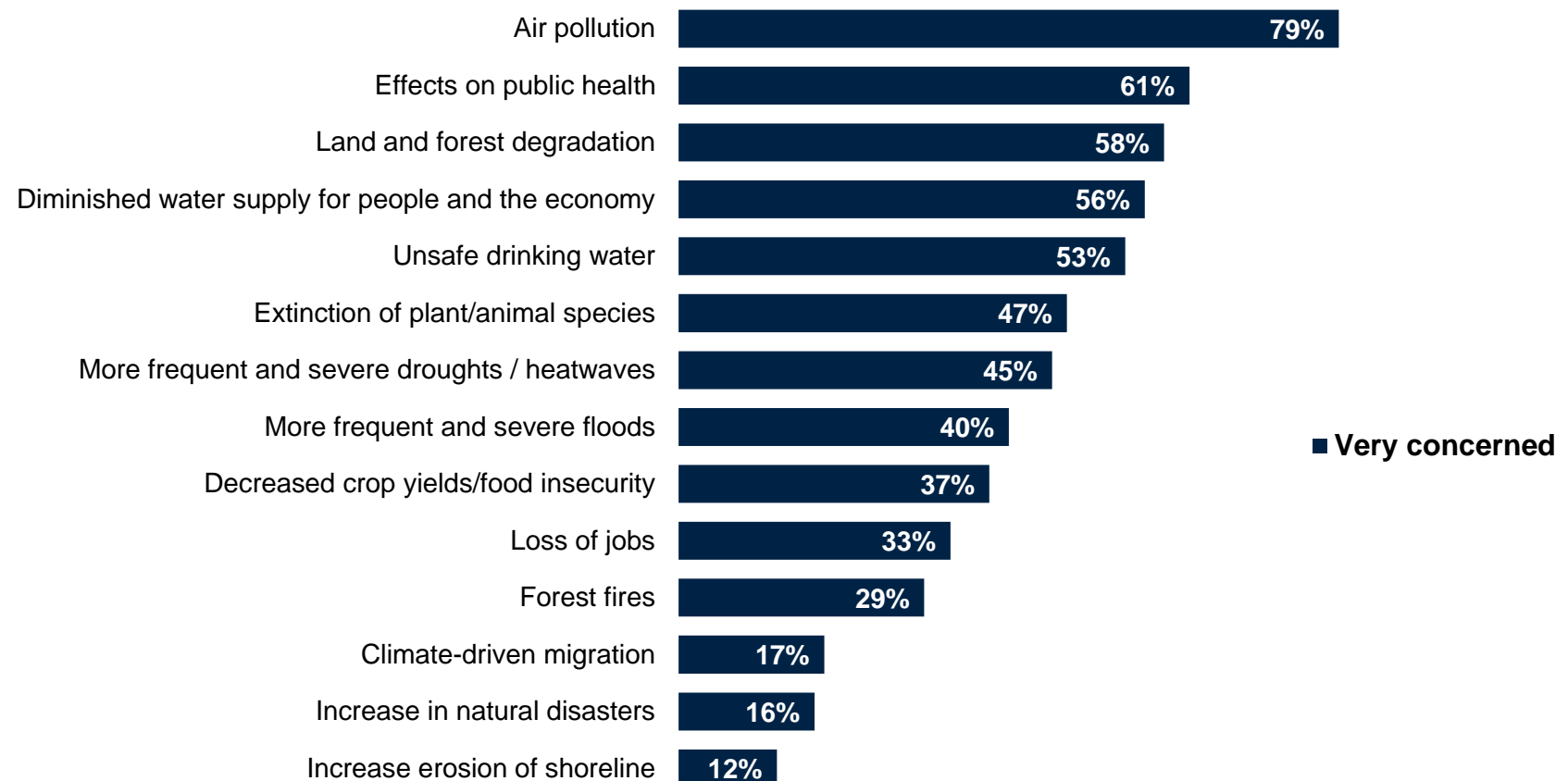
^In FY23, "Private sector" was compared with the mean score of "International private sector" and "Domestic private sector", "Civil society" was compared with the mean score of "International civil society" and "Domestic civil society", and "Media" was compared with the mean score of "Domestic traditional media", "International media", and "Web-based media" as asked in FY20.



*Significantly different between years

Air Pollution is Top Concern in Relation to Climate Change

Eight of 10 respondents were very concerned about **air pollution** (79%) in terms of the potential impacts of climate change in Serbia. Over half of respondents were also very concerned about the potential impact of climate change on **public health** (61%); **land and forest degradation** (58%); **diminished water supply** (56%); and **unsafe drinking water** (53%).

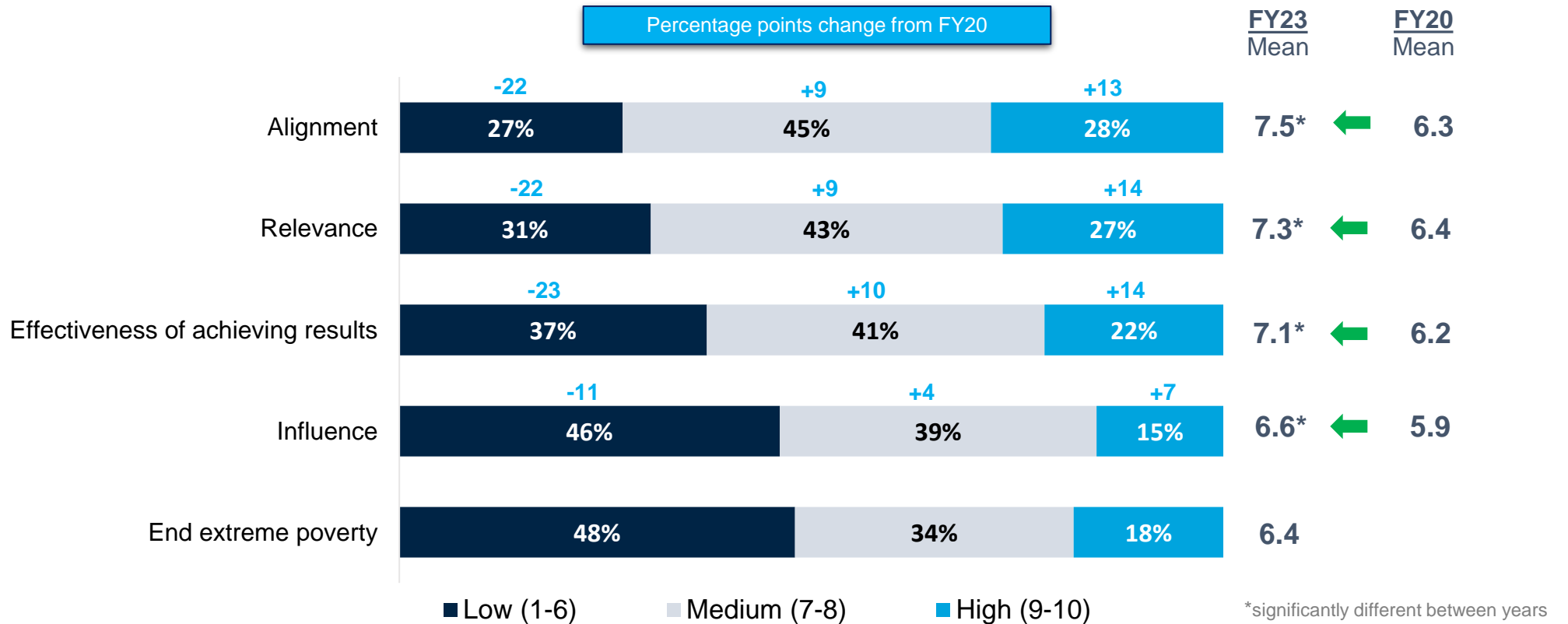




Overall Attitudes toward the World Bank Group

Key Performance Indicators

In FY23, respondents gave significantly higher ratings for the WBG's **effectiveness in achieving results, relevance and alignment** with development priorities – as well as its **influence** on the development agenda in Serbia – as compared to FY20.



The World Bank Group's work is aligned with what I consider the development priorities for Serbia. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)
 To what extent does the World Bank Group influence the development agenda in Serbia? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)
 The World Bank Group currently plays a relevant role in development in Serbia. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)
 The World Bank Group's work is well aligned with what I consider the development priorities for Serbia. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

^In FY23, Effectiveness was compared with the mean score of the two questions asked in FY20:

Overall, please rate your impression of the World Bank Group's effectiveness in Serbia. 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 Serbia? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

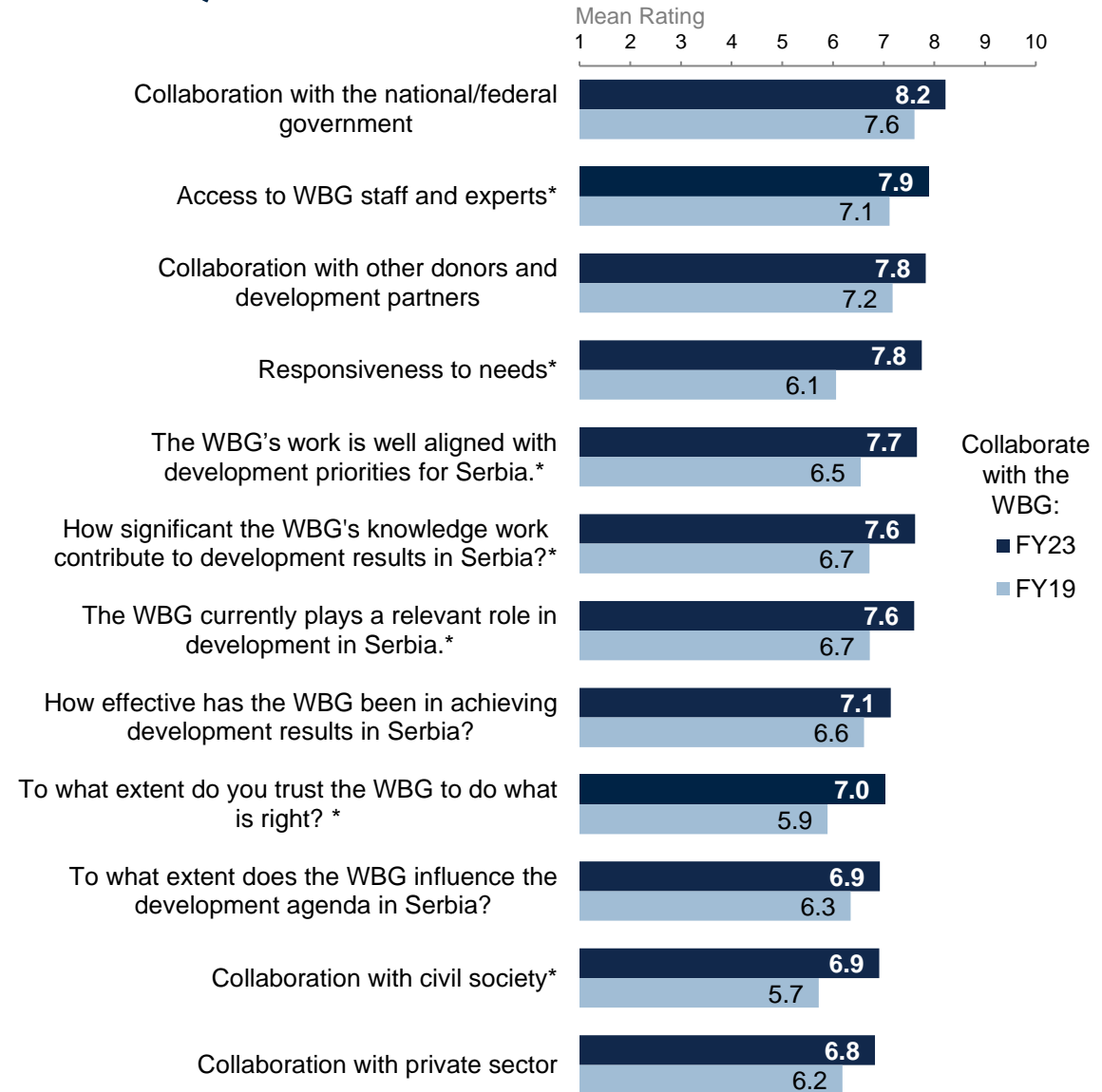
Overall Ratings for Indicator Questions

Collaboration: Respondents who collaborate with the WBG had significantly higher mean ratings for the twelve indicator questions asked in the FY23 survey compared to respondents who do not collaborate with the WBG. Aggregated mean rating across all:

Collaborate with WBG (mean rating) = **7.5**

Do not collaborate (mean rating) = **6.8**.

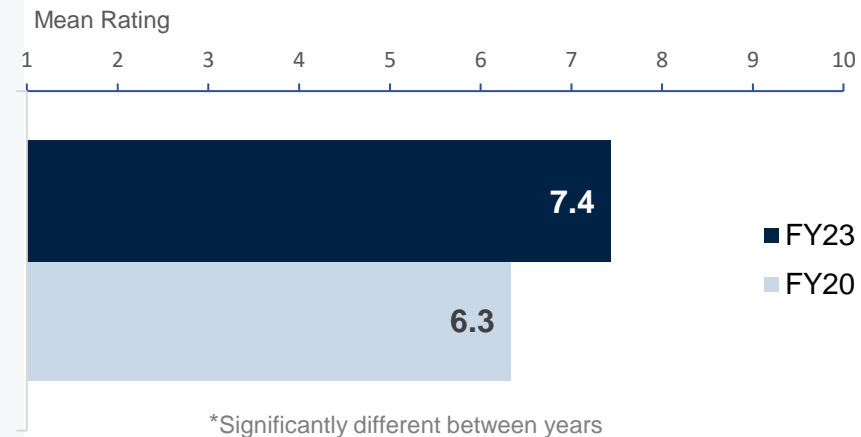
Because 66% of respondents indicated that they collaborate with the WBG in FY23 compared to just 28% in FY20, analyses were conducted comparing only those who collaborated with the WBG in FY20 to those who collaborated with the WBG in FY23. This was done to ensure that the increased ratings over time were not due to this difference in the sample composition in this year's survey. When looking at ratings among just those who collaborated with the WBG, respondents in FY23 reported higher ratings for most of the indicator questions (see chart at right).



WBG's Knowledge Work

Perceptions of the significant contribution of the WBG's knowledge work and activities to development results in Serbia have significantly improved compared to FY20. When examining only those respondents who collaborate with the WBG, perceptions still improved significantly (FY23 mean rating = 7.6; FY20 mean rating = 6.7).

Significant contribution of
the WBG's knowledge work and activities*



How significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in Serbia?
Scale: 1-10 (1: Not significant at all– 10: Very significant)



World Bank Group's Work and Engagement on the Ground

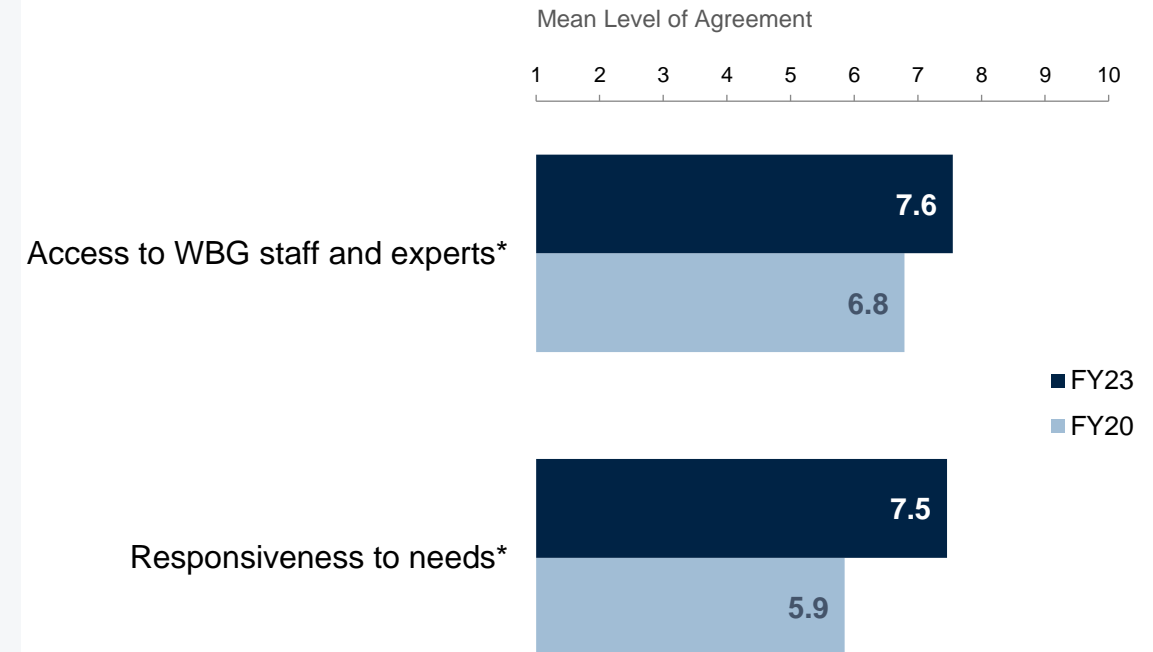
The WBG's Accessibility and Responsiveness

Perceptions about **access to WBG staff and experts** and **responsiveness to needs** significantly improved compared to FY20.

When examining only those respondents who collaborate with the WBG, perceptions still improved significantly:

Mean accessibility rating: FY23 = **7.9**
FY20 = **7.1**.

Mean responsiveness rating: FY23 = **7.8**
FY20 = **6.1**.



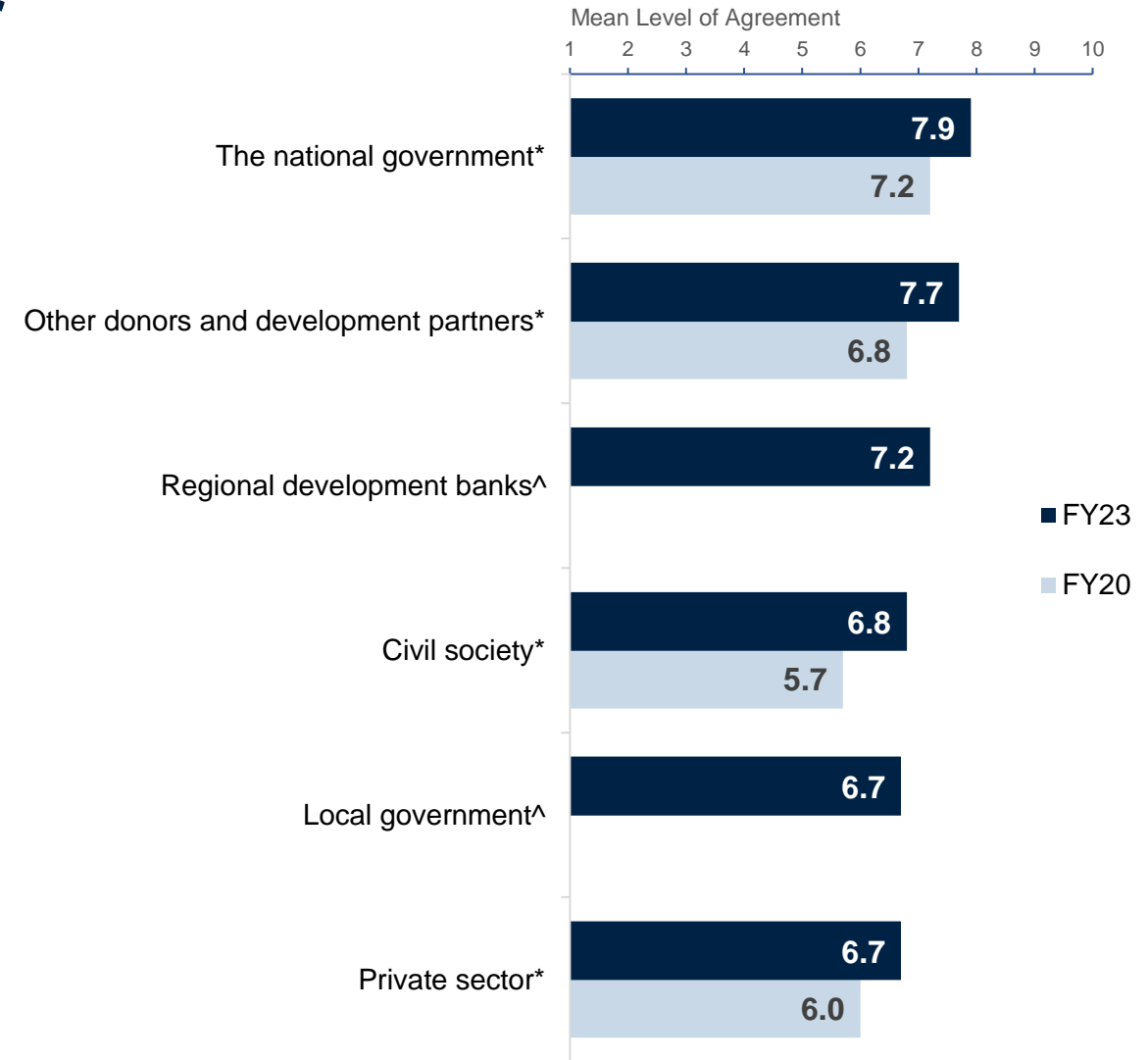
*Significantly different between years

WBG as a Development Partner and Collaborator

Respondents gave the highest mean ratings for the WBG's collaboration with the **national government**, closely followed by **other donors and development partners**.

In addition, perceptions about the WBG's collaboration with the government, other donors and development partners, civil society, and the private sector significantly improved compared to FY20.

When examining only those respondents who collaborate with the WBG, perceptions of the WBG's collaboration with civil society still improved significantly (FY23 mean = 6.9; FY20 mean = 5.7). Ratings for the WBG's collaboration with the national government and other donors trended in the same direction, but they did not reach statistical significance.



*Significantly different between years

^Not asked in FY20



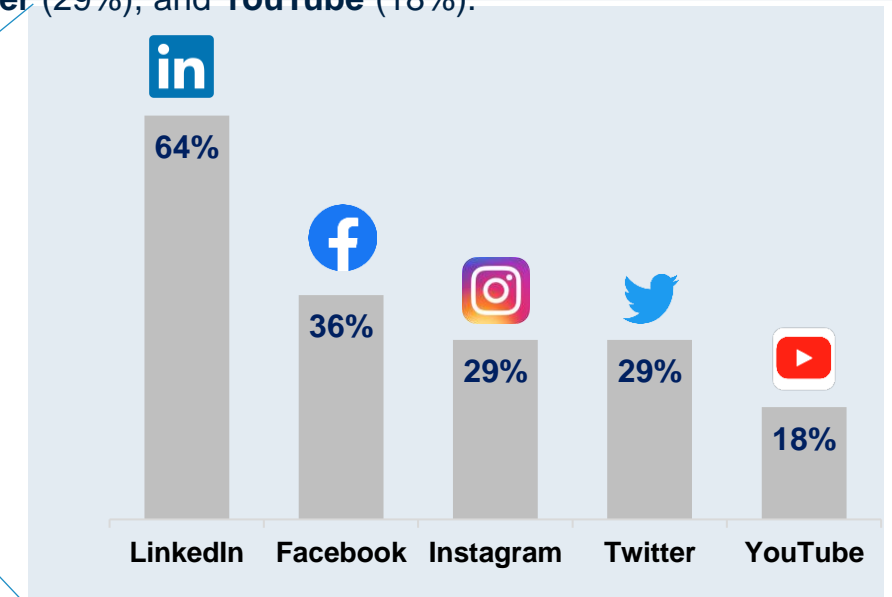
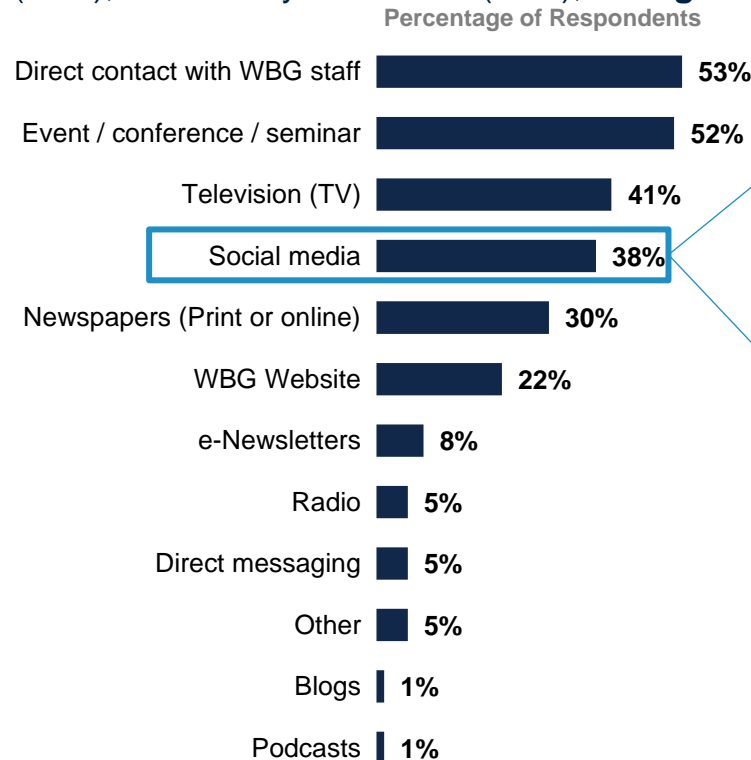
Communications and Outreach

Recent Engagement with the WBG

Eight-six percent of respondents recalled hearing or seeing something about the WBG in the last 30 days. Those who collaborate with the WBG were significantly more likely to recall hearing or seeing something (95%) than those who do not collaborate (68%).

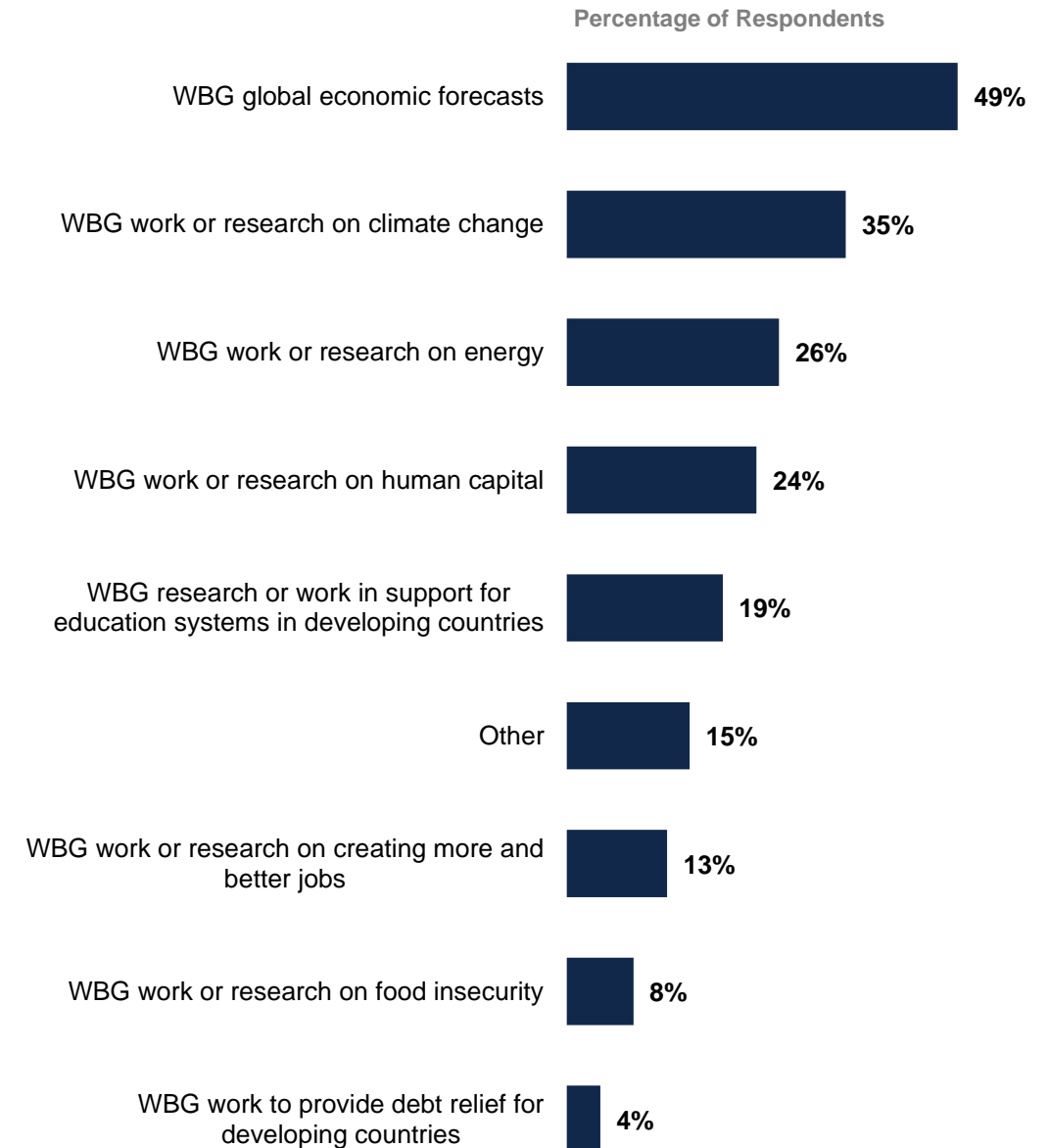
Over half of respondents (53%) recalled having **direct contact with WBG staff** (for example, in person, virtually, by phone, or email) or recalled receiving information about the WBG at its **event/conference/seminar** (52%).

About 4 of 10 respondents reported seeing information on **social media** (38%). Among those respondents, **LinkedIn** was used most often (64%), followed by **Facebook** (36%), **Instagram** (29%), **Twitter** (29%), and **YouTube** (18%).



Topics Recalled

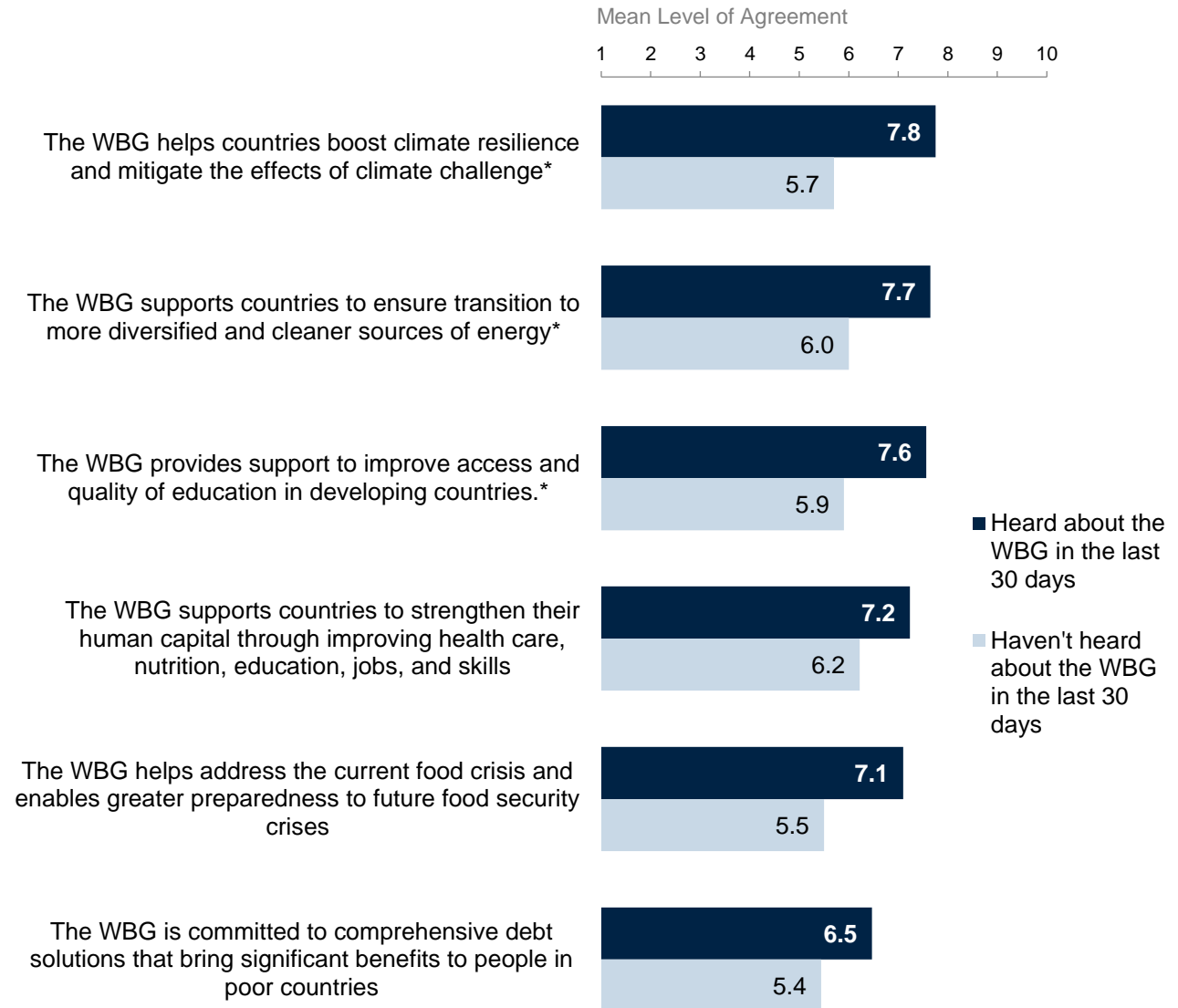
Of those respondents who recalled seeing or hearing something about the WBG in the last 30 days, approximately half recalled seeing or hearing about the **WBG's global economic forecasts** (49%). A third of respondents recalled **WBG work or research on climate change** (35%).



Message Recall and Perceptions about the WBG's Work

Agreement that the WBG **helps countries boost climate resilience and mitigate the effects of climate challenge** was highest across all respondents (mean rating = 7.5).

Those respondents who recalled seeing or hearing something about the WBG in the last 30 days tended to have higher levels of agreement about key messages regarding the WBG's work (see the chart on the right) – significantly so for messages about the WBG's work on **climate, energy, and education**.



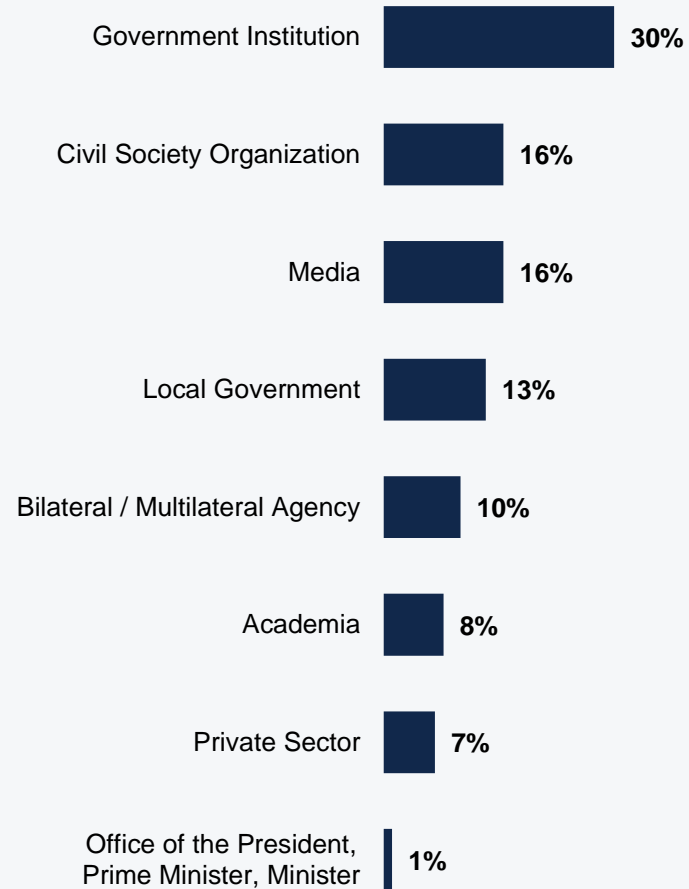
*Significant difference between groups

Sample Demographics

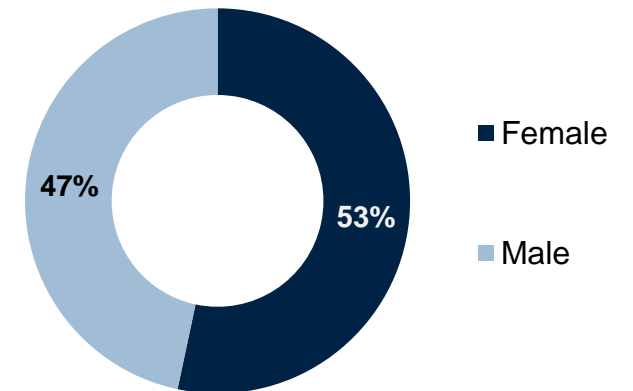
Respondent Profile: Affiliation, Gender

Current Affiliation

Percentage of Respondents



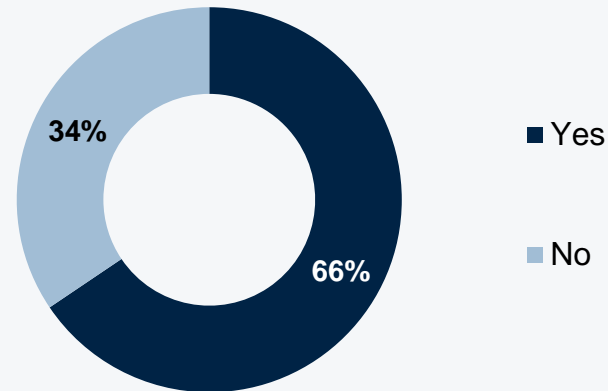
Gender



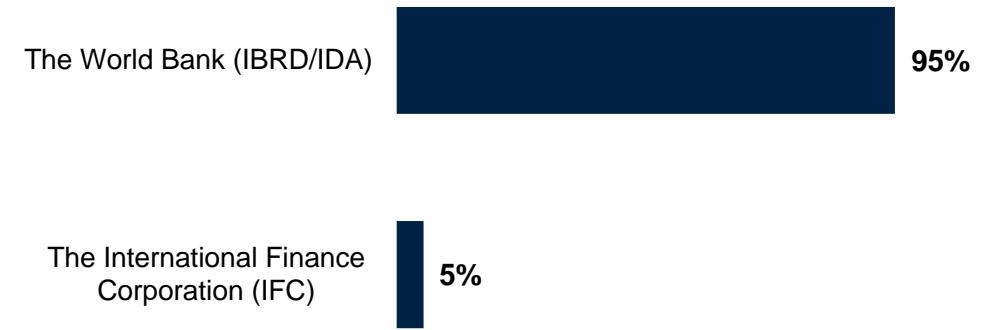
Which of the following best describes your current affiliation? (Select only 1 response) (N=90)
What's your gender? (N=90)

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=90)
Which of the following agencies of the World Bank Group do you primarily collaborate/work with in Serbia? (Select only 1 response) (N=59)



Methodology

Methodology

From March 2023 to May 2023, a total of **244** stakeholders of the WBG in Serbia were invited to provide their opinions about the WBG's work in the country by participating in a Country Opinion Survey (COS) . Participants were drawn from the Office of the President, Prime Minister, or Minister; government institutions; local governments; bilateral / multilateral agencies; the private sector; civil society; academia, research institutes, think tanks, and the media.

A total of 90 stakeholders participated in the survey (36.9% 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).

Statistical Analysis

Scale bucketing:

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

Statistical significance:

Key statistically significant findings are denoted with an asterisk (*) throughout the report or discussed in the descriptions to the charts. Significance is measured at $p\text{-value} < .05$

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 16%, N=258).

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.

Additionally, for this year, the COS project utilized the Pulse Survey format, which is a shorter version conducted entirely online by the COS team. The list of respondents was identified and provided solely by the country team, which indicates a shift in the stakeholder composition compared to FY20. In the previous survey, at least 20% of the respondents were provided by a local fielding agency.

These differences in the stakeholder composition between the two years should be taken into consideration when interpreting the results of the previous year comparison analyses.

Percentage of Respondents	FY 2020	FY 2023
High-level government office: Office of the President, Prime Minister, Minister, Parliamentarian	7%	1%
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	28%	30%
Local government	11%	13%
Bilateral/multilateral agency: embassy, development organization, development bank, UN agency	11%	10%
Civil Society Organization: NGO/ community-based organization, private foundation, faith-based group, professional/trade association, and youth group	16%	16%
Private Sector: private company, financial sector organization, private banks	14%	7%
Academia/Research Institute/Think Tank	8%	8%
Media	6%	16%
Other	0%	0%
Total Number of Respondents	258	90

Indicator questions

A1_4. 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)

A2. How effective has the World Bank Group been in achieving development results in Serbia?

A3. The World Bank Group currently plays a relevant role in development in Serbia, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

A4. The World Bank Group's work is aligned with what I consider the development priorities for Serbia, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

A6. To what extent does the World Bank Group influence the development agenda in Serbia? 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 Serbia, in terms of each of the following? – Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

B1. Responsiveness to needs, **B2.** Access to WBG staff and experts,

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

B3. Collaboration with the national government

B4. Collaboration with the private sector

B5. Collaboration with civil society

B6. Collaboration with other donor and development partners

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