

July 2023



Country Opinion Surveys

FY 2023 **Zimbabwe** Country Opinion Survey Report

ECR Business Intelligence Team



WORLD BANK GROUP

Acknowledgements

The Zimbabwe Country Opinion Survey is part of the Country Opinion Survey Program series of the World Bank Group (WBG). 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 of the survey results. Noreen Wambui and Irina Popova provided data support.

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Contents

Objectives

Overall Context

Overall Attitudes Toward the World Bank Group

World Bank Group's Support in Development Areas

World Bank Group's Work and Engagement on the Ground

World Bank Group's Knowledge Work and Activities

The Future Role of the WBG in Zimbabwe

Communication and Outreach

Sample Demographics

Methodology

Objectives

This survey was designed to assist the World Bank Group (WBG) in gaining a better understanding about how stakeholders in Zimbabwe perceive the WBG. The survey explored the following questions:

1. What areas of development are perceived to be the most important? Have the priorities changed over the past three years?
2. What opinion do key stakeholders have of the WBG when it comes to its effectiveness, relevance, alignment with Zimbabwe's development priorities, as well as other key indicators? Are opinions improving or worsening?
3. How is the WBG perceived as a development partner? Are opinions improving or worsening?
4. What do key stakeholders value the most and the least when it comes to the WBG's work at the country level? What are the priorities for the future?
5. What opinion do key stakeholders have of the WBG's knowledge products and their quality? Are opinions improving or worsening?
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 of WBG communications do stakeholders recall? Is there a relationship between message recall and views of the WBG's work?

Overall Context

“Enhance collaboration with other development partners and co-finance operations in anticipation ... [of] a post-arrears clearance scenario. ...Support CSO and accountability structures of the Government.”

Bilateral / Multilateral Agency Respondent

“[Support] financial inclusion for vulnerable groups in the society. You can't talk of empowerment without making access to financial services easier.”

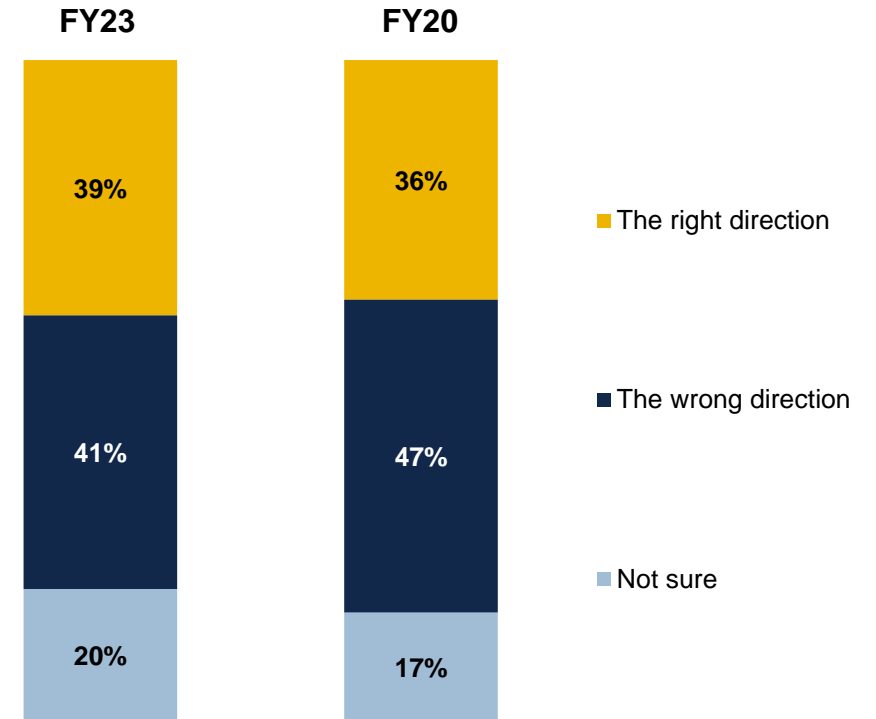
Academia Respondent



Respondents are Divided about whether Zimbabwe is Headed in the Right Direction

Similar to FY20, 4 in 10 respondents in Zimbabwe indicated that the country is headed in the right direction and a similar number indicated the country is headed in the wrong direction.

In FY23, there were significant stakeholder group differences in perceptions of the country's direction. Specifically, respondents from government principals (59%), government institutions (52%), and local governments (55%) were significantly more likely to feel Zimbabwe is headed in the right direction compared to respondents from bilateral/multilateral agencies (38%), civil society (28%), the private sector (19%), academia (15%), and the media (31%).



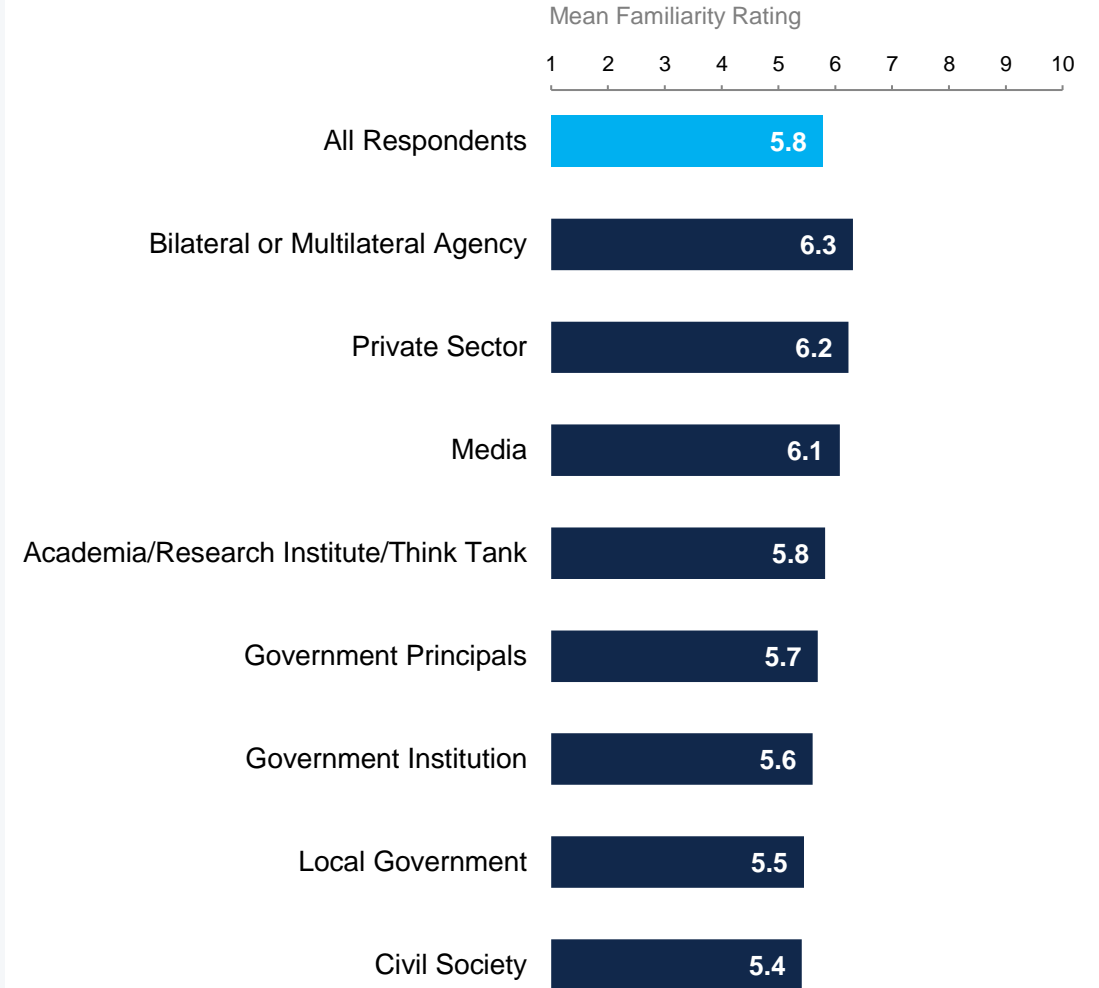
Familiarity with the World Bank Group

Year comparison: Respondents in this year's Country Survey reported significantly lower levels of familiarity with the World Bank Group as compared to FY20:

Mean familiarity rating: FY23 = **5.8**;
FY20 = **6.2**.

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

Mean familiarity rating: Collaborate with WBG = **6.1**
Do not collaborate = **5.0**



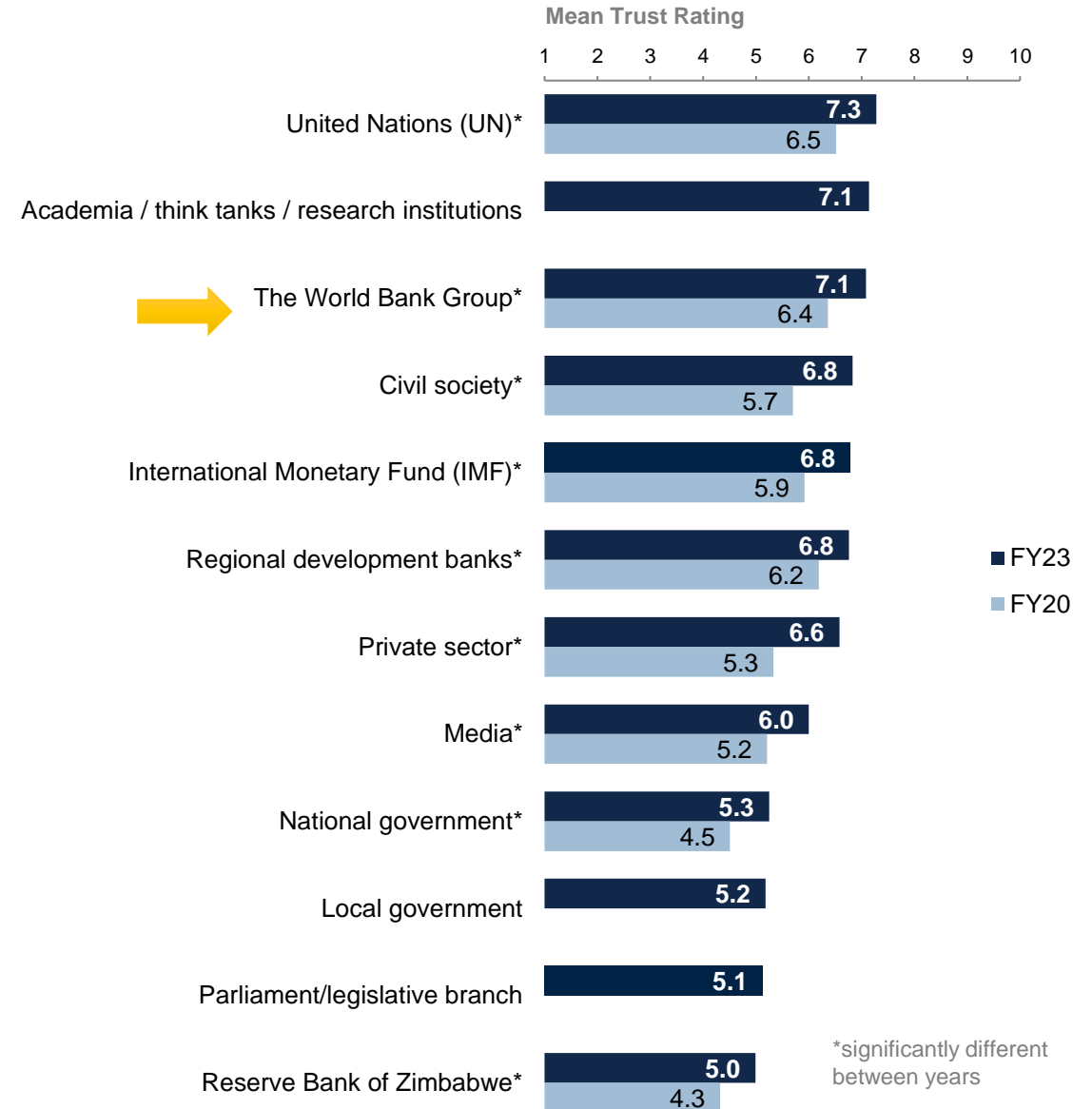
Statistically similar across stakeholder groups

Trust in Institutions

The United Nations (UN), academia, and the World Bank Group were the most trusted institutions in Zimbabwe among those studied.

At the same time, government institutions in Zimbabwe were the least trusted among respondents, including the national government, local governments, the Parliament, and the Reserve Bank.

Of note, ratings of trust were significantly higher in FY23 than in the FY20 survey for all institutions that could be compared, including the national government and the Reserve Bank.



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

World Bank Group's Support in Development Areas

“Assist developing platforms ... [in] sharing experiences and draft effective policies in agriculture which support sustainable development. [Support] capacity building of government employees (for example, short courses or post graduate courses) which address Zimbabwean challenges. Offer loans as opposed to grants in development initiatives. Loans make ownership and sustainability easier.”

Government Institution Respondent

“[The WBG] should finance government ... infrastructure development, such as hospitals, resuscitation of industries, equipping hospitals, and [place an] emphasis on governance ... accountability.”

Civil Society Respondent



Development Areas for WBG Focus

Macroeconomic stability and **health** were the top areas in FY23 where stakeholders would like the WBG to focus its resources, followed by **public sector governance** and **job creation**.

In FY20, respondents identified public sector governance (29%) and economic growth (29%) as top development priorities in Zimbabwe, followed by health (27%), water and sanitation (26%), and agriculture/rural development (20%).

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

“Work closely with central government to identify areas needing development.”
Government Institution Respondent

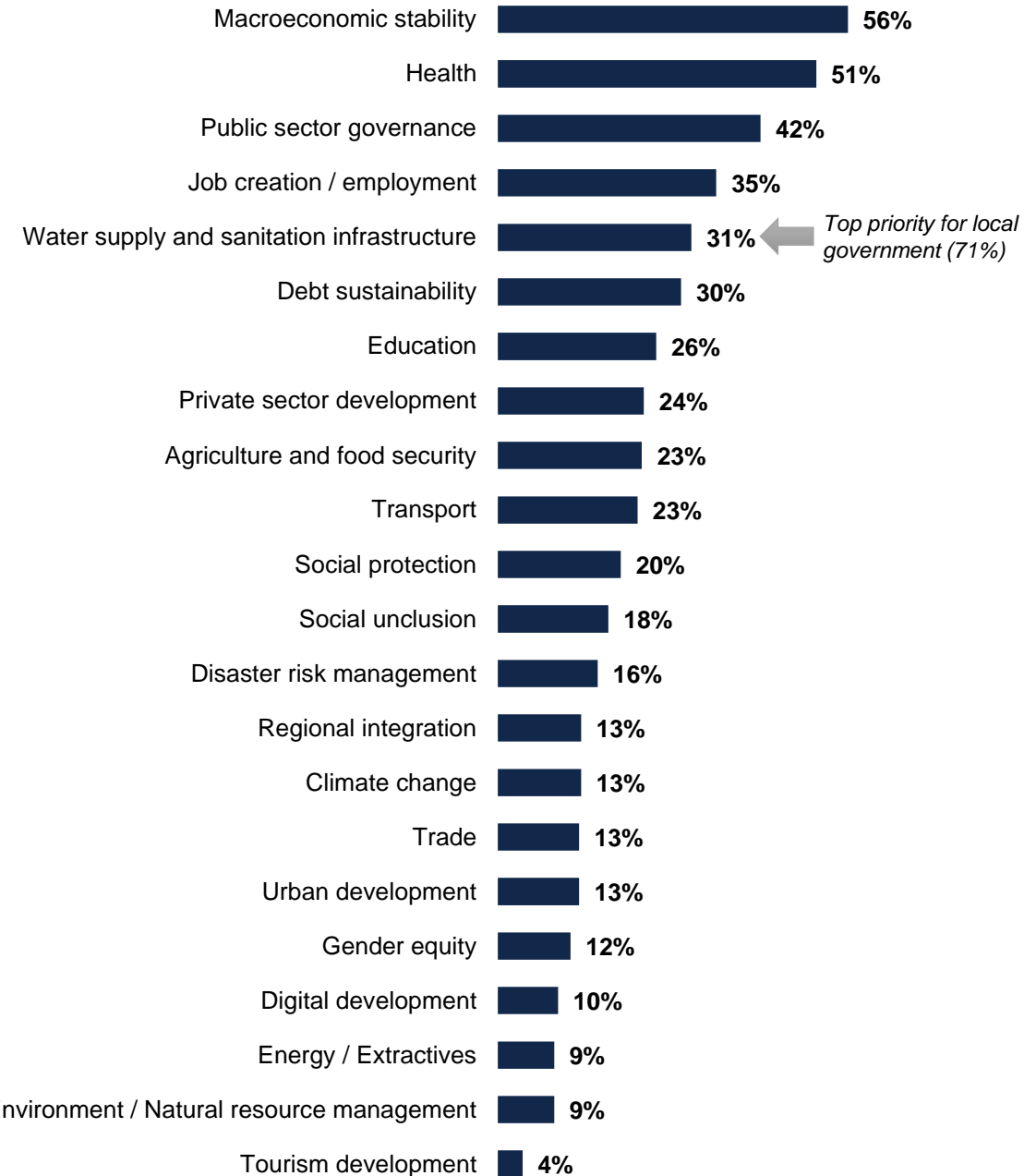
“Support gaps in health, [gender-based violence] GBV response services and education.”
Civil Society Respondent

“Increase consultation and assist more on issues around healthy and water supply and sanitation.”
Government Institution Respondent

“Help resuscitate the economy through loans and funding relevant projects.”
Private Sector Respondent



Which areas should the World Bank Group prioritize in its work in Zimbabwe to have the most impact on development results in the country? (Choose no more than 5) (N=298)



Effectiveness of WBG's Support in Sectoral Areas

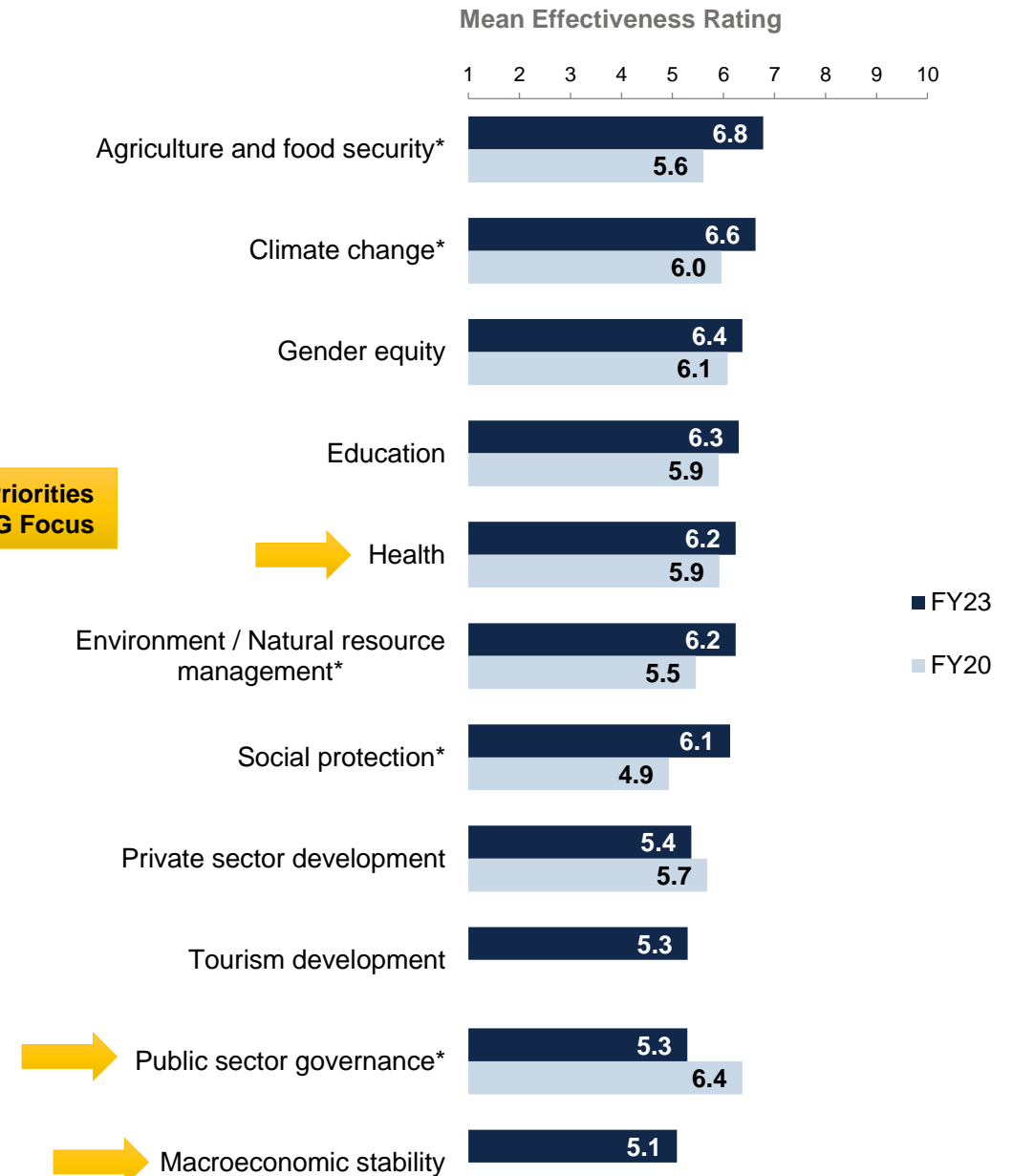
The WBG's work in the area of **agriculture and food security** and **climate change** in Zimbabwe received the highest ratings of effectiveness, and both significantly improved compared to FY20.

However, the ratings for the WBG's effectiveness in **public sector governance** and **macroeconomic stability** – two of the top 3 areas respondents wanted the WBG to focus on – were much lower. Indeed, ratings for the WBG's effectiveness in public sector governance were significantly lower in FY23 compared to FY20.

It should be noted that, although ratings for macroeconomic stability were the lowest across all sectors, respondents from government principals, government institutions, bilateral/multilateral agencies, and the private sector rated the WBG's work in this area significantly more effective (mean ratings =5.6, 5.5, 5.3, and 5.4, respectively) than respondents from local governments, civil society, academia, or the media (mean=4.7, 4.9, 4.1, and 4.5, respectively).

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

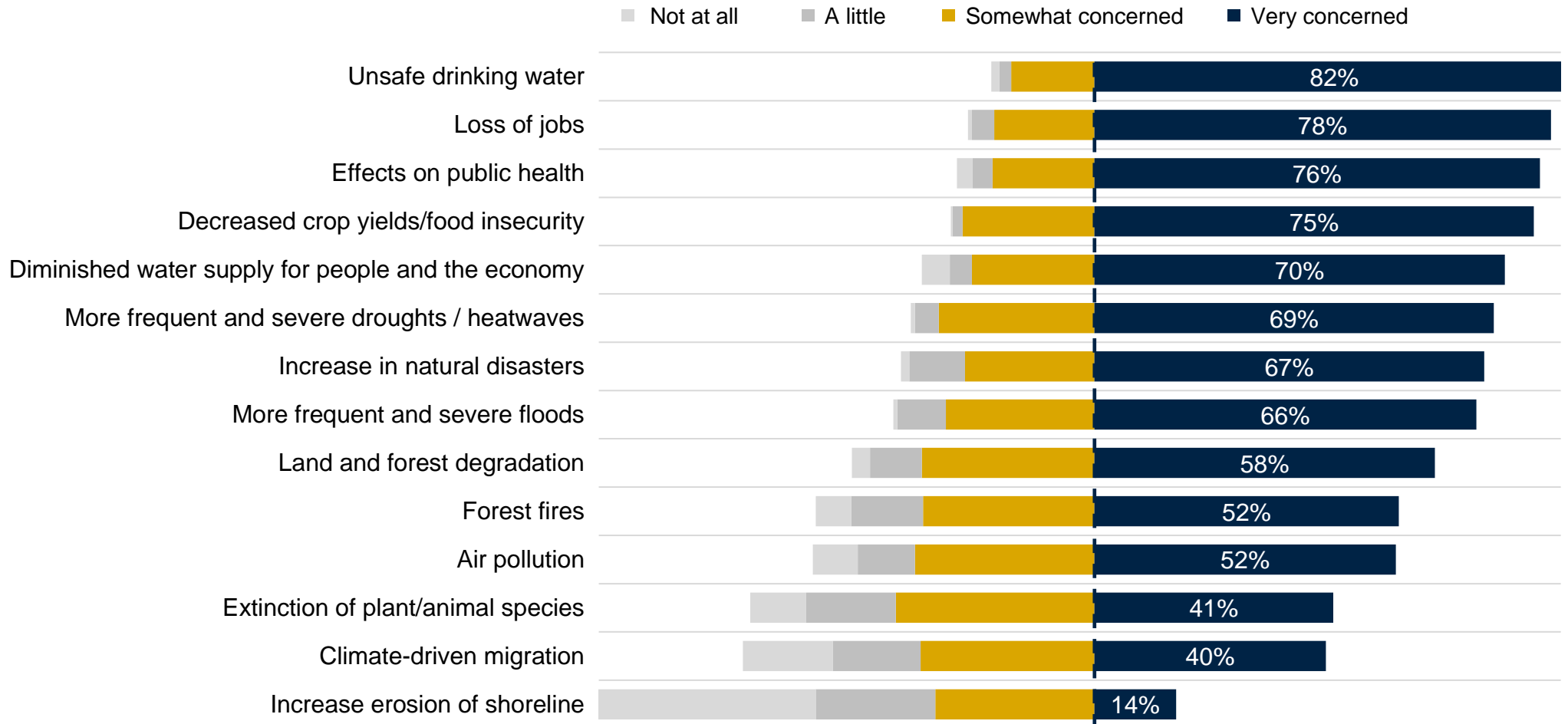
Top 3 Priorities for WBG Focus



*Significantly different between years

Unsafe Drinking Water was the Top Concern for Climate Change

More than 8 in 10 respondents were very concerned about **unsafe drinking water** (82%) when it comes to the potential impacts of climate change in Zimbabwe. The loss of jobs, public health, and decreased crop yields were also of great concern to respondents.



Overall Attitudes toward the World Bank Group

“Assist in poverty alleviation by providing health facilities, bringing clean water to the people, [and] providing the following:

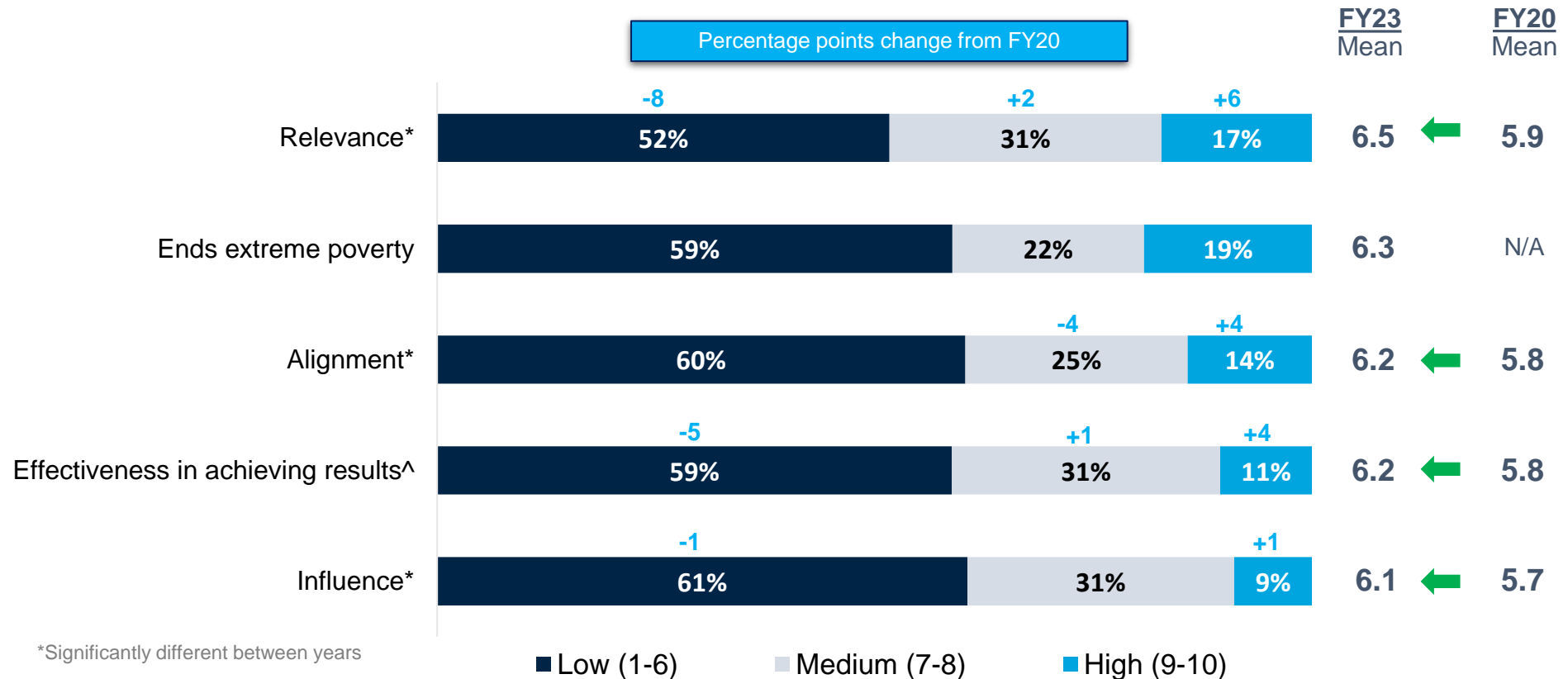
- decent housing,*
- quick affordable transport systems,*
- providing pensions for [the] elderly who cannot work any more,*
- providing education,*
- empowering communities to be self-reliant, and*
- open[ing] up industries where people can work.”*

Government Institution Respondent



Key Performance Indicators

In FY23, there was improvement across all key performance indicator questions, significantly so for the WBG's **relevance**, **alignment**, and **influence**. (Although ratings for the WBG's **effectiveness in achieving development results** showed a strong trend in improvement, it did not reach statistical significance).



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

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

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

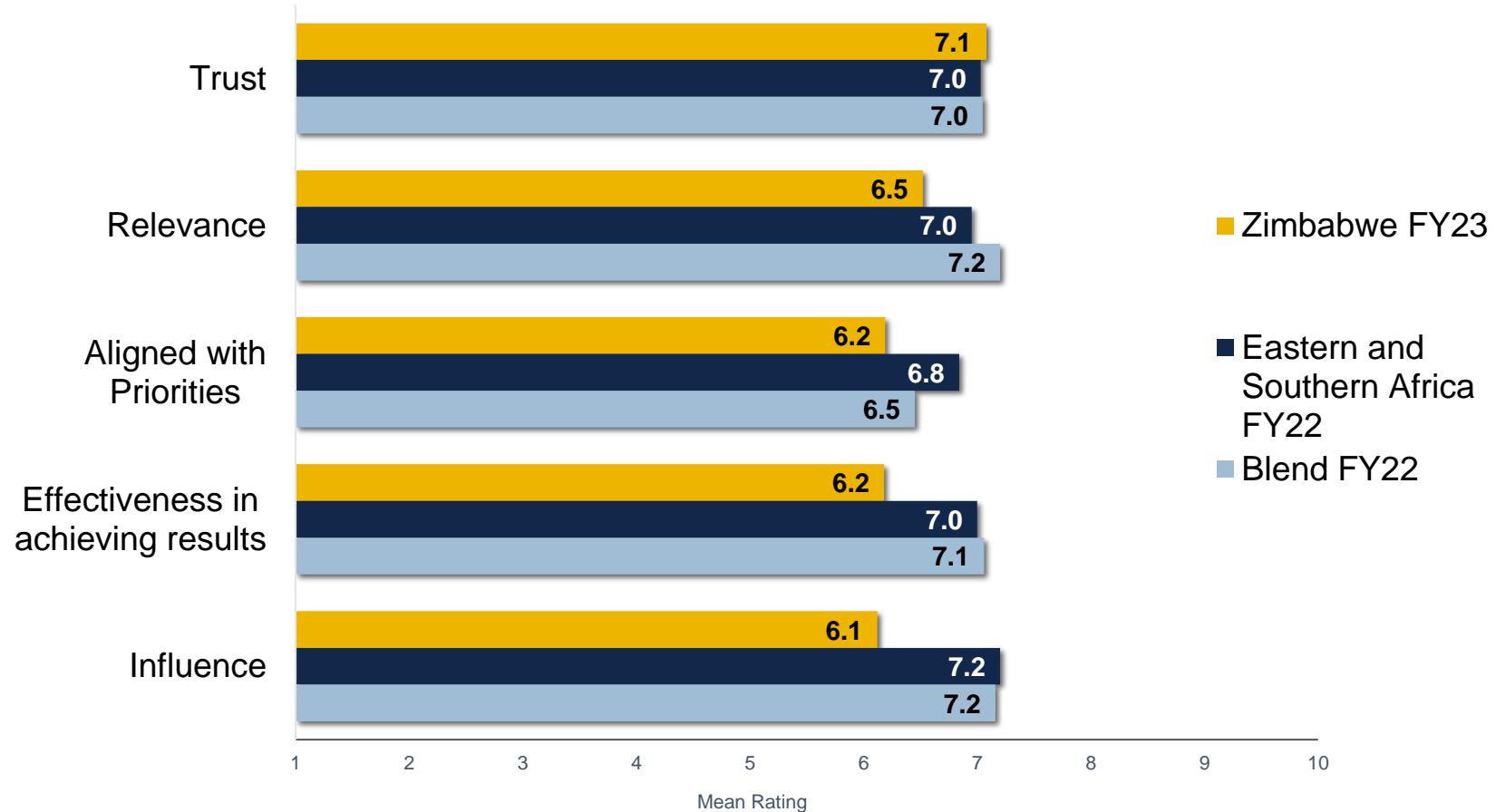
How effective has the World Bank Group been in achieving development results in Zimbabwe? Scale: 1-10 (1: Not effective at all– 10: Very effective)

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

^A mean score of the two questions asked in FY20: Overall, please rate your impression of the World Bank Group's effectiveness in Zimbabwe. 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 Zimbabwe? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

Key Performance Indicators: Regional Comparison

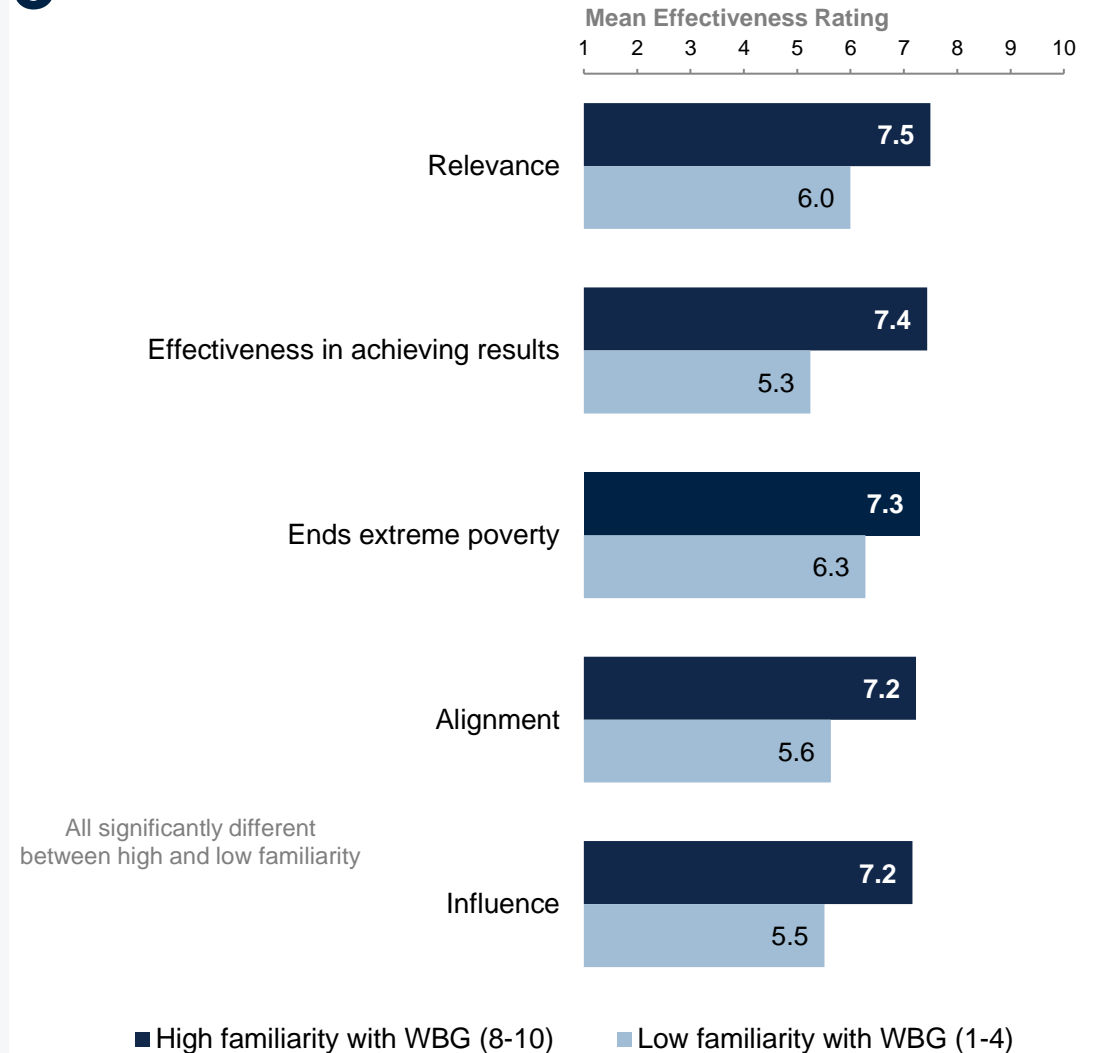
The mean ratings for respondents' **trust** in the WBG in Zimbabwe were statistically similar to those in **Eastern and Southern Africa**, and **Blend** countries surveyed in FY22; however, ratings for the WBG's effectiveness, relevance, alignment, and influence were significantly lower in Zimbabwe than in other Eastern and Southern Africa, and Blend countries.



Familiarity Leads to More Positive Perceptions

Comparing ratings of key performance indicators among respondents highly familiar with the WBG (ratings of 8-10 on a 10-point scale) and those with little familiarity with the WBG (ratings of 1-4 on a 10-point scale), the impact that familiarity has on perceptions of performance becomes evident.

Those who were highly familiar with the WBG had significantly more positive perceptions of the WBG's work in Zimbabwe.



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

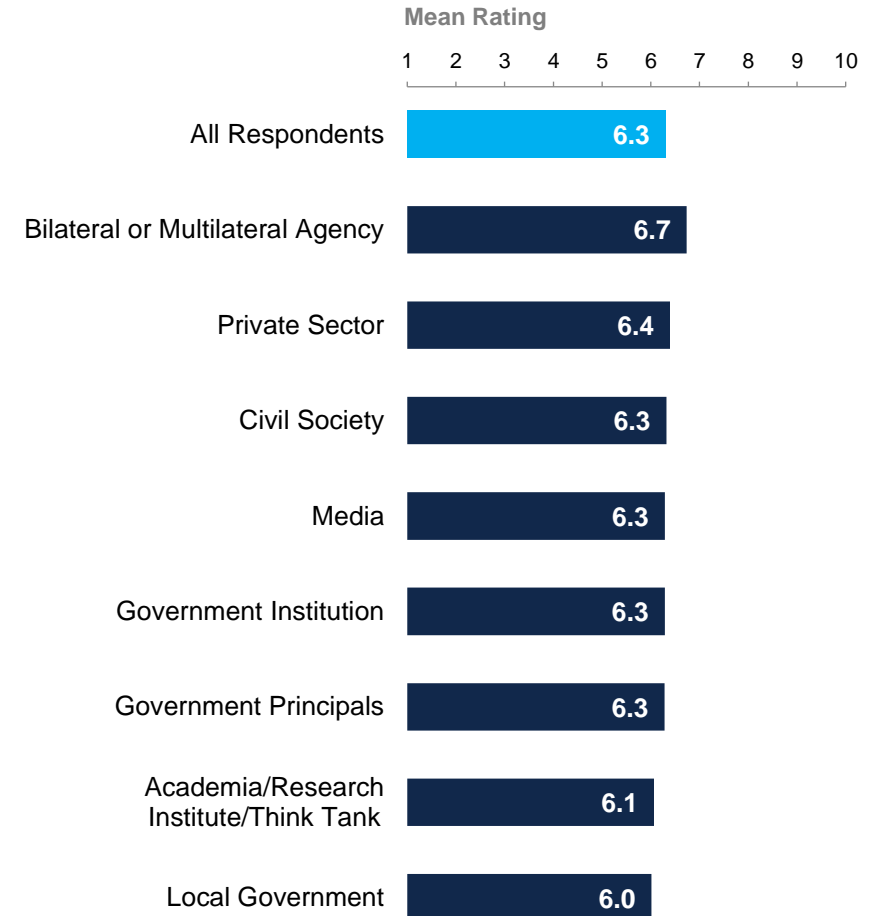
Overall Ratings for Indicator Questions

Respondents from **bilateral/multilateral agencies** had the highest mean ratings for the aggregated responses to the sixteen [COS indicator questions](#), whereas respondents from **academia** and **local governments** had the lowest mean ratings. However, this did not reach statistical significance.

Collaboration: Respondents who collaborate with the WBG had higher mean ratings for the aggregated responses to the sixteen indicator questions compared to respondents who do not collaborate with the WBG. However, it did not reach statistical significance:

Collaborate with WBG = **6.4**;

Do not collaborate with the WBG = **6.2**



World Bank Group's Work and Engagement on the Ground

“Increase WBG visibility in engaging and collaborating more with the private sector, civil society, and [the] national government, providing evidence-based analytical reports that may help in building confidence among the parties and in coming up with appropriate policies.”

Respondent from Civil Society

“Consult widely, for example, with local businesses, local authorities, local NGOs; ... fund and assist technically as they do their work because they are the ones on the ground. They know the local conditions better.”

Government Institution Respondent



Greatest Value

Financial resources, bringing together stakeholders, and advisory services and analytics continued to be the most valued activities of the WBG in Zimbabwe.

The perceived value of the WBG's **financial resources** and **bringing together stakeholders** increased in FY23, that is, from 25% to 41% and from 7% to 37%, respectively, in FY20.

In contrast, **capacity development** decreased from 33% in FY20 to 24% in FY23; however, it was still particularly valued among respondents from government institutions and the media.

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

"Continue to train staff on poverty issues, data analysis and data anonymization. The World Bank should continue to provide technical and financial support to Zimbabwe."

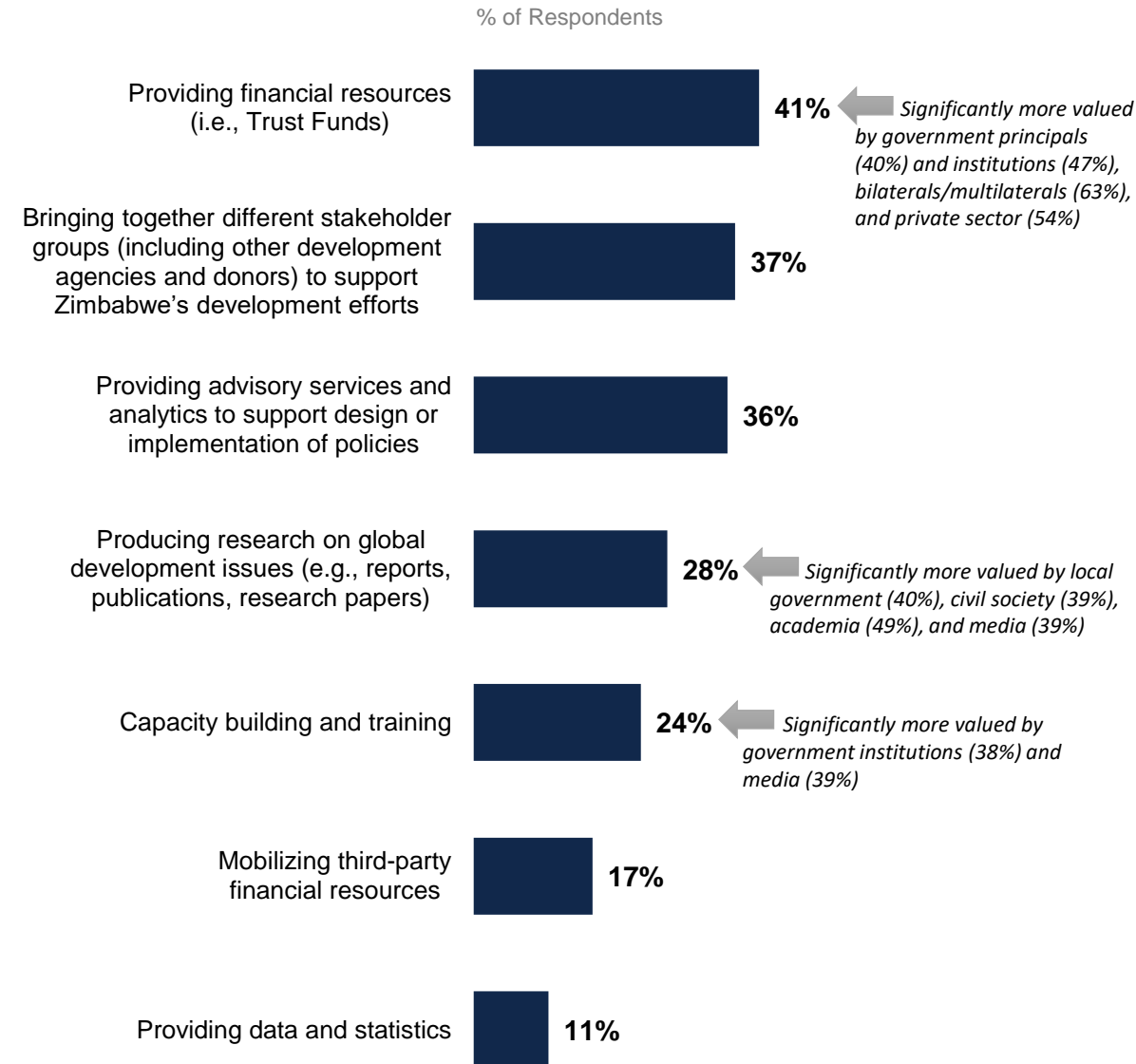
Government Institution Respondent

"1. provide funds and grants for development projects; 2. leverage additional resources for projects; 3. [provide] capacity building for government officials."

Government Institution Respondent

"Reengagement of the state, provision of trust funds, [and] supporting critical studies."

Bilateral/Multilateral Agency Respondent



The WBG as a Development Partner

The WBG was seen as a **responsive, long-term partner** in Zimbabwe.

In FY23, perceptions of the WBG's **responsiveness** to needs and **flexibility** when circumstances change were significantly higher than in FY20.

In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Zimbabwe?

"Provide capacity building services to service providers, fund research to do conservation and human capacitation to alleviate poverty, fund developmental projects, fund policy formulation and enforcement strategies to curb corruption. Please focus on key water and sanitation, service provision matters in growing rural centers and institution. Assist in the regulation of water tariffs to enable utilities to be viable."

Utility Company Respondent

"To be responsive to the requests by agents seeking assistance from the WBG."

Government Institution Respondent



*Significantly different between years

The WBG should Collaborate More with Civil Society according to Respondents

A majority of respondents indicated that the WBG should collaborate more with **civil society**, followed by the **national government**, and **private sector**.

In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Zimbabwe?

"Collaborating more with other development agencies and donors so that the work is more impactful (greater reach or more resources)."

Bilateral / Multilateral Agency Respondent

"Engage university hubs."

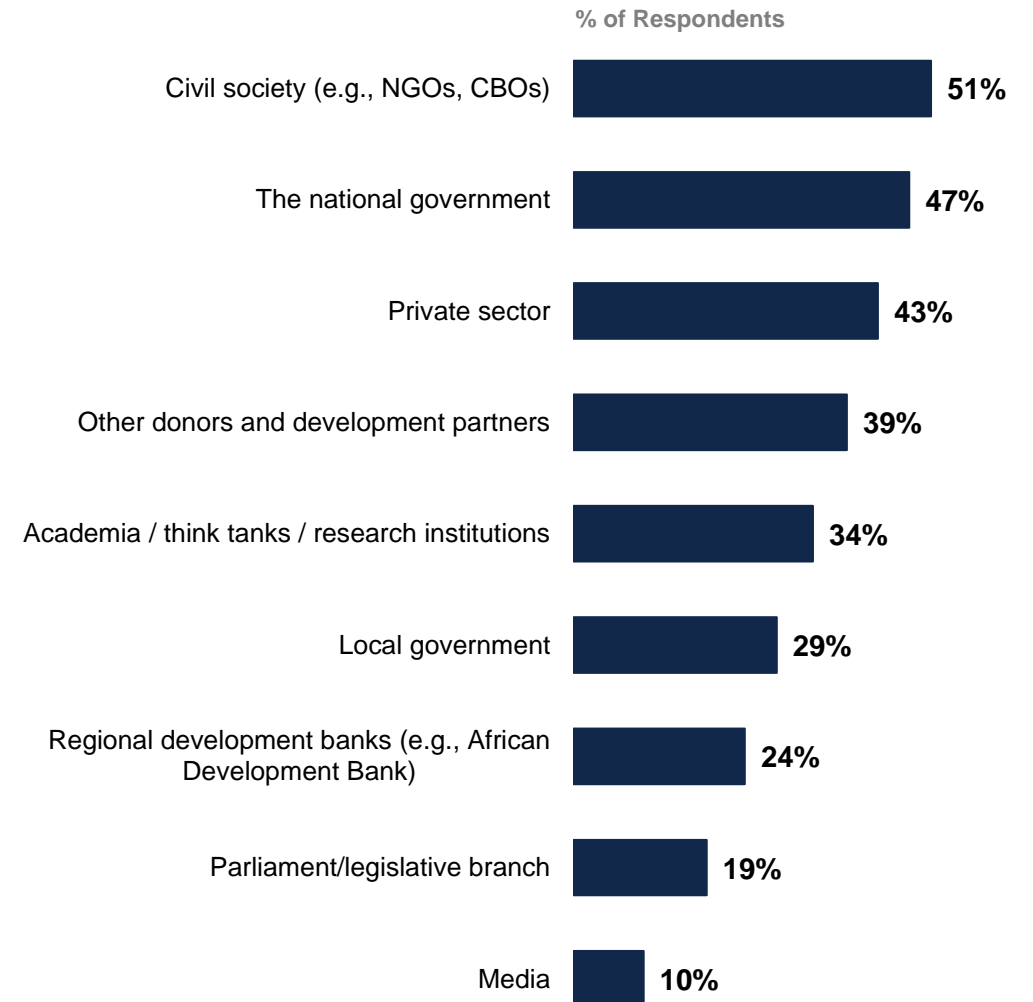
Government Institution Respondent

"To work more with the media through engagements, updates, upskilling and resource support. More engagements and support for [civil society organizations] CSOs involved in community development [is also needed]."

Media Respondent

"Direct [the] WBG's actions, contributions and support directly to beneficiaries such as [the] private sector, civil society, etc."

Bilateral / Multilateral Agency Respondent



WBG as a Development Partner in Terms of Collaboration with Stakeholders

The WBG received the highest mean ratings for its collaboration with **other donors and development partners** in Zimbabwe.

In addition, respondents rated the WBG's collaboration with other donors, civil society, and the private sector significantly higher this year as compared to FY20.

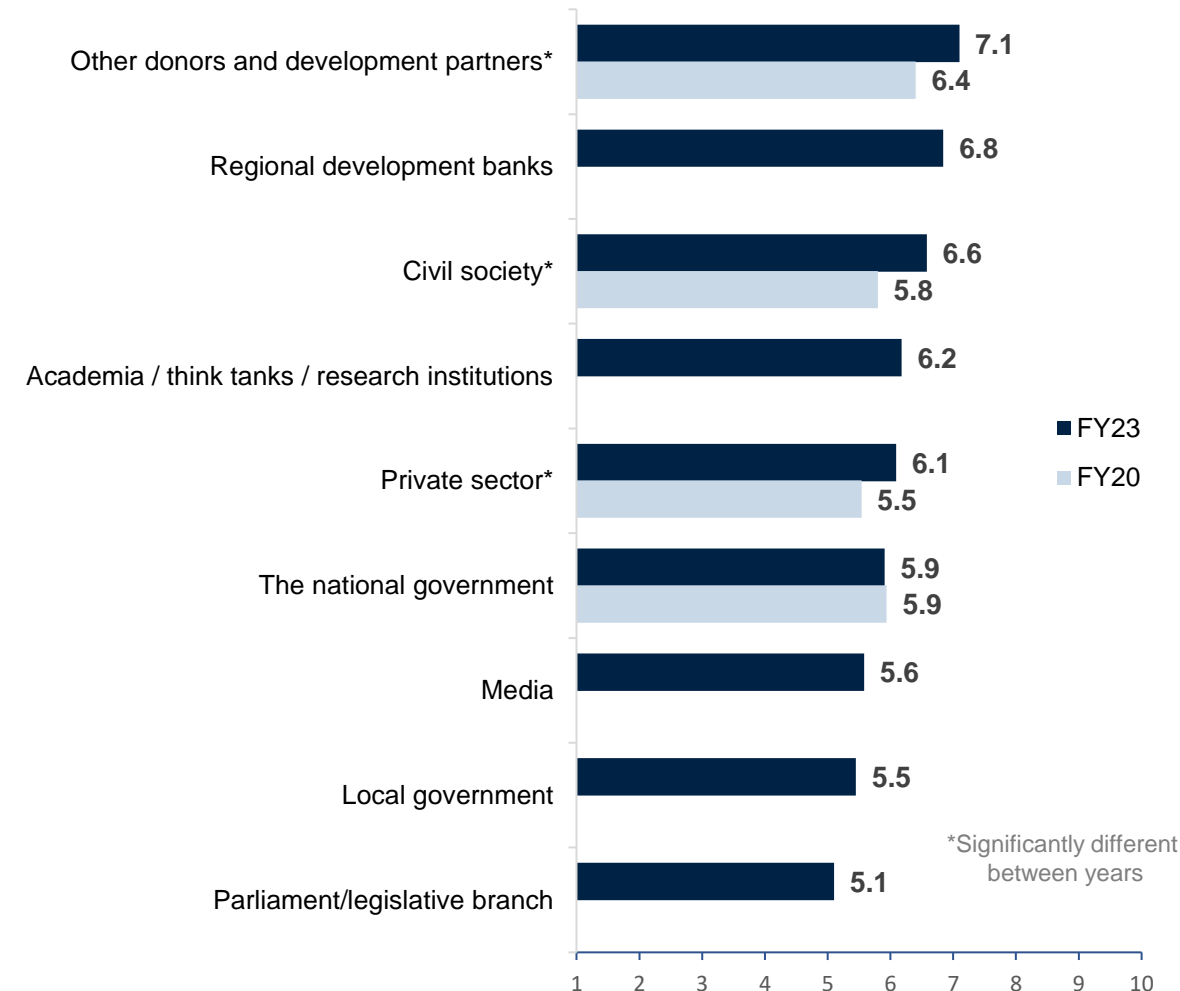
Of note, ratings for the WBG's collaboration with the **national government** of Zimbabwe received similar ratings to FY20. These ratings were lower than for several other key stakeholder groups.

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

"Consult with communities more than the Government [including]: people with disabilities, rural communities, people in poverty including the urban poor."
Civil Society Respondent

"Increased engagement and programming with CSOs and [non-governmental organizations] NGOs to assist in areas of deep need, unlike the current position where because of the national government's issues, underlying participants are also punished through [the] withdrawal ... of funding for programs."

Civil Society Respondent



World Bank Group's Knowledge Work and Activities

“[Ensure] more and regular communication[s] with target[ed] interest parties on ongoing activities and sharing of knowledge and comparative developments from other countries.”

Private Sector Respondent

“[The] WBG needs need to listen to the concerns of communities in their diversity. An intervention that might work for one community, like in Binga, might not work in Muzarabani, because of things like different cultures.”

Academia Respondent



WBG's Knowledge Work

The majority of respondents reported that they had used the WBG's knowledge work.

Respondents from **government principals** and the **media** were significantly less likely to have used the WBG's knowledge work (46% and 54%, respectively) compared to respondents from other stakeholder groups.

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

"Assist entities like ZIMSTAT to come up with data that is bespoke to [the] Provinces. The entity's data is often two-three years behind; ... hence, it would be difficult to use it."
Government Principal Respondent

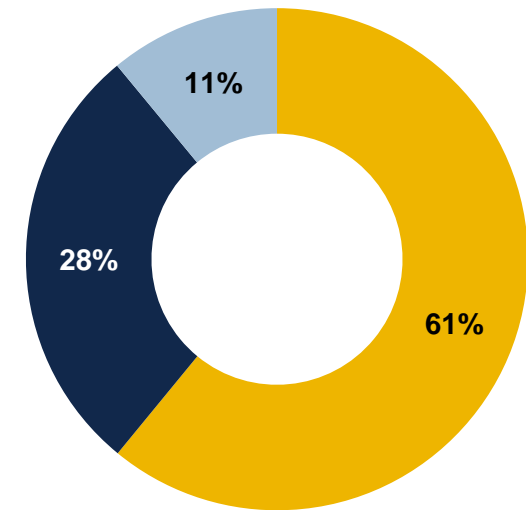
"Alignment of global policies to the national policies, for example, environmental safeguards, resettlement issues, etc."

Government Institution Respondent

"It could place more researchers in Zimbabwe."

Parliament Respondent

Use of the WBG's advisory services and analytics



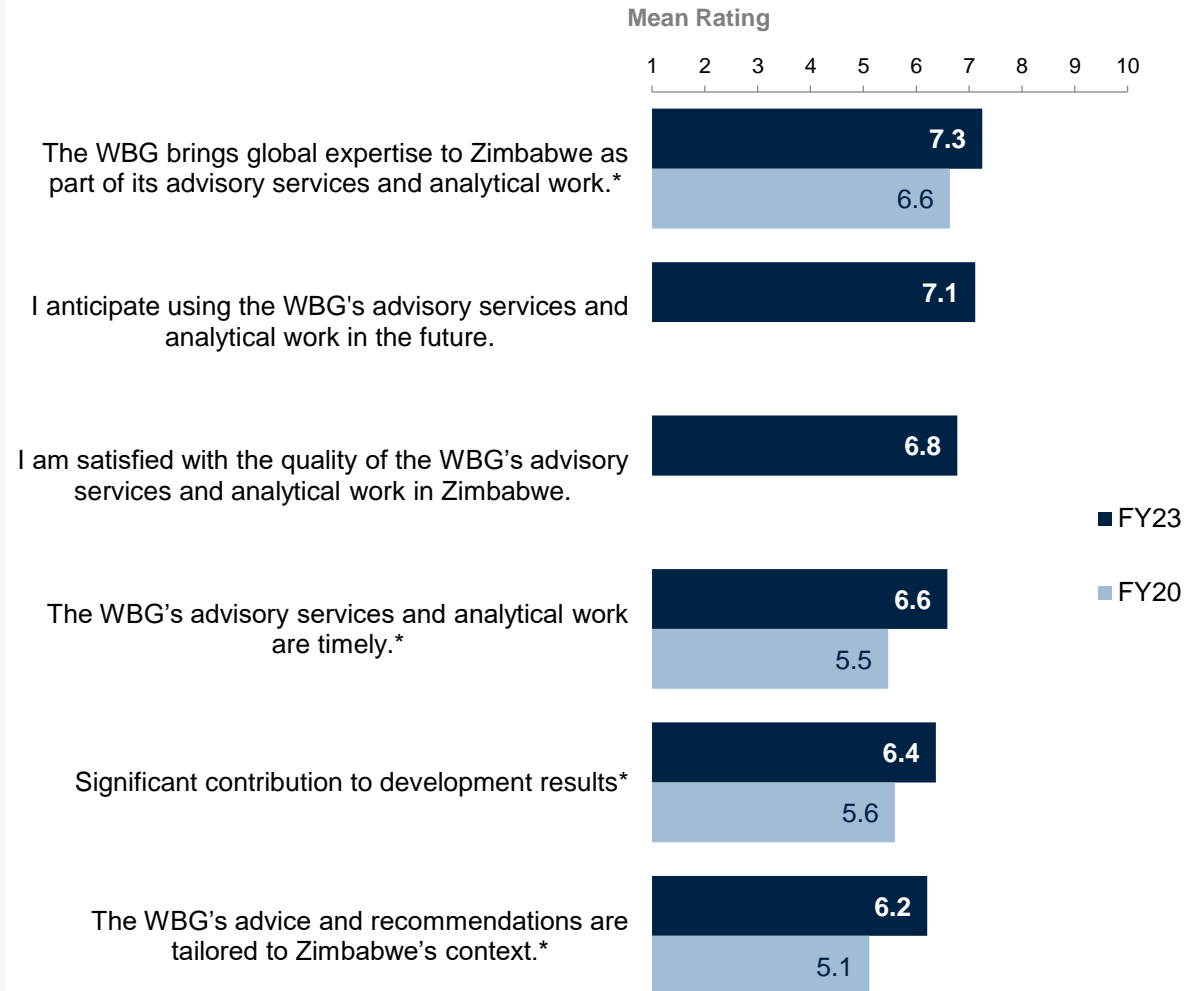
■ Yes ■ No ■ Not sure

WBG's Knowledge Work

Respondents had the highest levels of agreement that the WBG brings its **global expertise**, and that they plan to use the WBG's knowledge work **in the future**.

Respondents gave the lowest ratings for the **contribution significance** of the WBG's knowledge work to development results and for the WBG's advice and recommendations being **tailored to Zimbabwe**. However, both ratings significantly improved since FY20.

It should be noted that respondents who had used the WBG's knowledge work in the past had significantly higher levels of agreement that they were satisfied with the quality (mean=7.1); that the work was timely (mean=6.8); and that it was tailored to Zimbabwe (mean=6.4); and that they anticipate using WBG knowledge work in the future (mean=7.3) as compared to respondents who had not used the WBG's knowledge work (means=3.5; 3.8; 3.9; and 6.3, respectively).



*Significantly different between years



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

^In FY20, this option was "Are adaptable to Zimbabwe's specific development challenges and country circumstances"

The Future Role of the World Bank Group in Zimbabwe

“It is important to assist in building capacity so that the country can be self-sustaining and not rely on donor funds. [The] WBG can also ensure that there are proper structures, systems and corporate governance pillars in place to ensure that all initiatives move in the right direction to benefit those they are supposed to.”

Government Institution Respondent

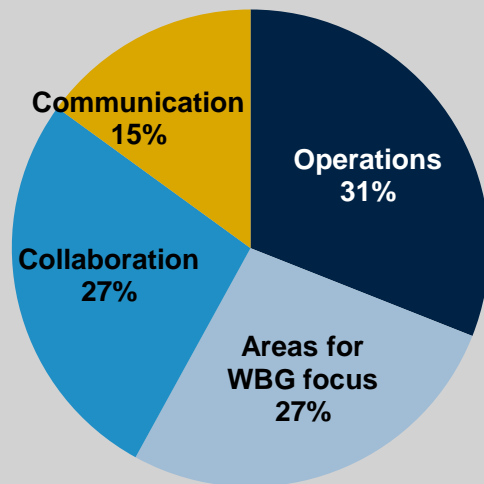
“There is [a] need to enhance the Bank's assistance to the country through debt relief so that the economy can reset. Information ... [about] the role of the Bank should be widely available.”

Private Sector Respondent



What the World Bank Group could Do to Increase its Effectiveness in Zimbabwe

Categories of responses to the qualitative question about what the WBG could do to help increase its effectiveness in Zimbabwe



Collaboration and Communication: Responses mainly focused on the need for more effective collaboration with various stakeholder groups and effective communications with the media and the public. For the most part, these responses are covered in their respective sections of this report.

Focus/Operations: Respondents highlighted the need for the WBG to **focus on the unique financial situation in Zimbabwe to make development possible**. These suggestions included assistance with debt repayment, sanctions negotiations, funding outside the government, and providing more financial support for investment.

“Engagement with the national government and Western countries to remove sanctions.”

Local Government Respondent

“Bring financial resources for third-party implementation of programmes in [the] absence of [the] ability to finance [the] Government...”

Bilateral/Multilateral Agency Respondent

“Help with debt repayment.”

Government Principal Respondent

“Cancel the debt owed and start lending funds for developmental purposes.”

Academia Respondent

“Loan Zimbabwe money for development purposes at a low interest rate.”

Civil Society Respondent

“... Unlock financial support for infrastructure and other long-term development projects in Zimbabwe. This will go a long way in stabilizing the macroeconomic environment and support [for] all other economic activities.”

Government Institution Respondent

“Zimbabwe's major challenge is in accessing private capital because the majority of its investment opportunities are not bankable (that is, properly packaged). Therefore, the starting point for [the] WBG is to come up with a mechanism that avails project preparation funding to the Zimbabwean market, through grants which can be managed through local [development finance institutions] DFIs.”

Government Institution Respondent

Communications and Outreach

“More public awareness of World Bank operations in Zimbabwe and partnership[s] with key stakeholders, such as the private sector, councils, and small ... [and] medium enterprises.”

Media Respondent

“Visibility ensures greater audience reach. Liaise with other stakeholders to help people understand the importance of the Bank’s support.”

Private Sector Respondent



General Information Sources

Respondents reported using a variety of sources to obtain information about socioeconomic development issues in Zimbabwe, but most relied on **newspapers, social media, research papers, and television**.

Although respondents from all stakeholder groups indicated that they obtain most of their information from newspapers, social media, or research papers, government principals indicated that they were significantly more likely to utilize TV than respondents from other stakeholder groups.

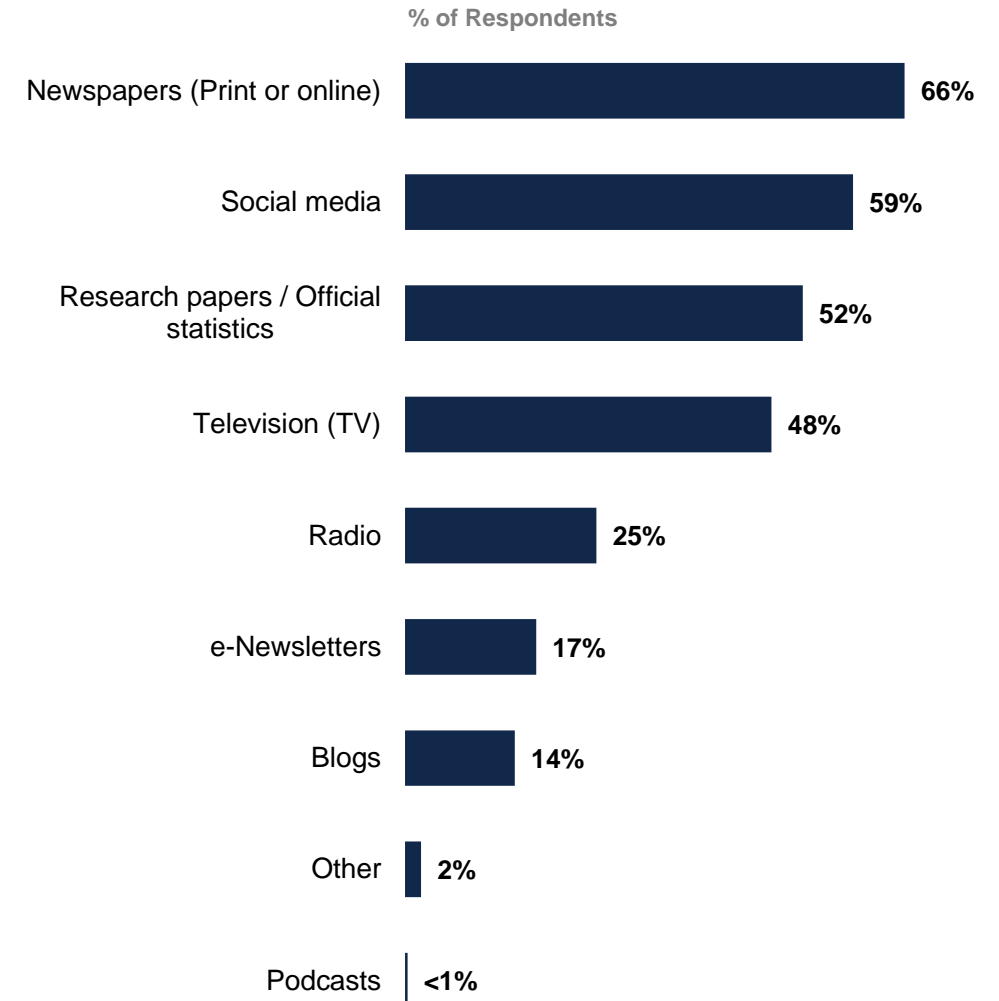
In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Zimbabwe?

"Be more visible."

Government Principal Respondent

"Strengthen the Bank's visibility and communication strategy through effective engagement with the media."

Media Respondent



Preferred WBG Information Sources

Most respondents reported that they preferred to obtain information about the WBG and its work through the **WBG website, social media, and e-Newsletters.**

In addition to these top three sources, respondents from government institutions were significantly more likely to prefer events/conferences/seminars (53%). Respondents from the media were significantly more likely to prefer interviews (54%) as compared to respondents from other stakeholder groups.

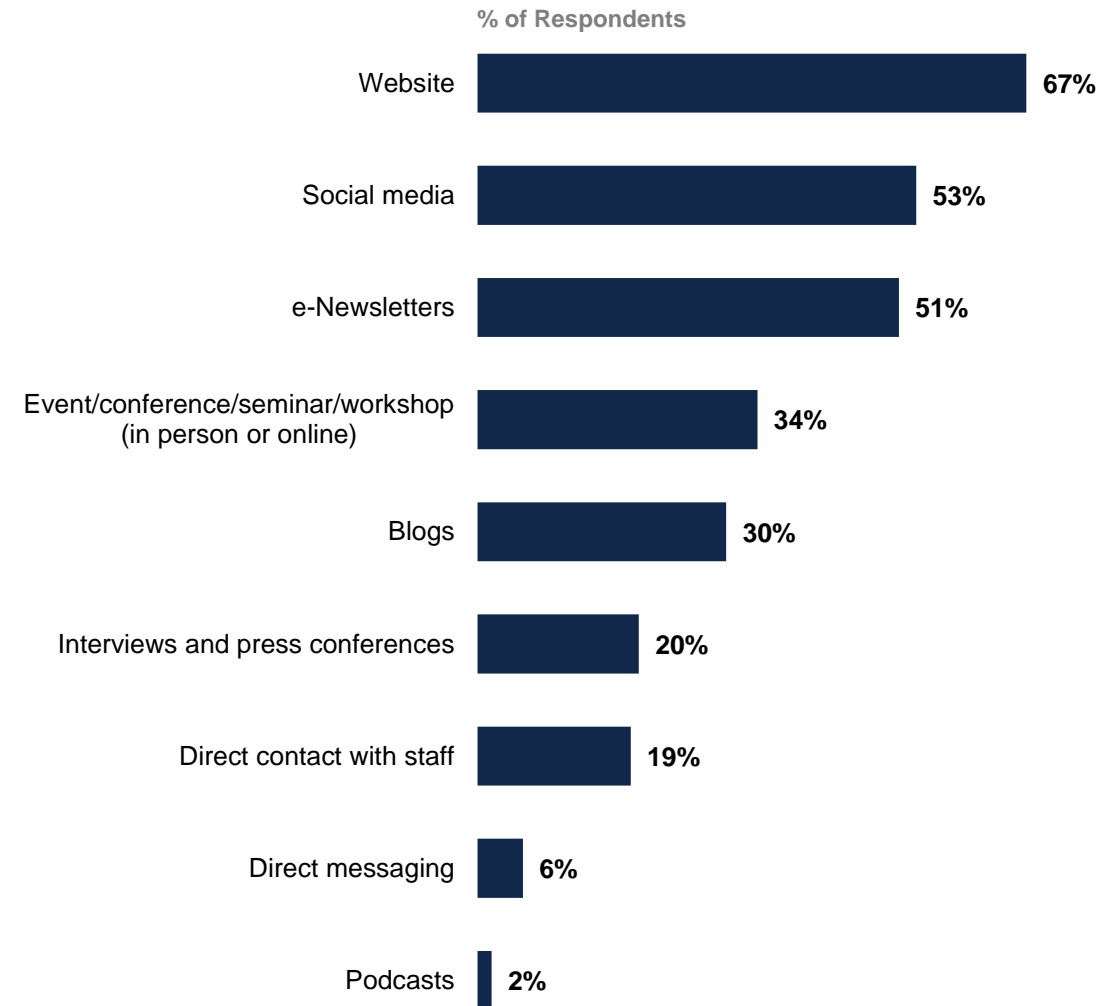
In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Zimbabwe?

"Increase awareness [among] both [the] public and private sector in Zimbabwe. Attend expos so that many can get to know more information about [the] WBG."

Local Government Respondent

"They should move in different sectors educating people on their aims and goals."

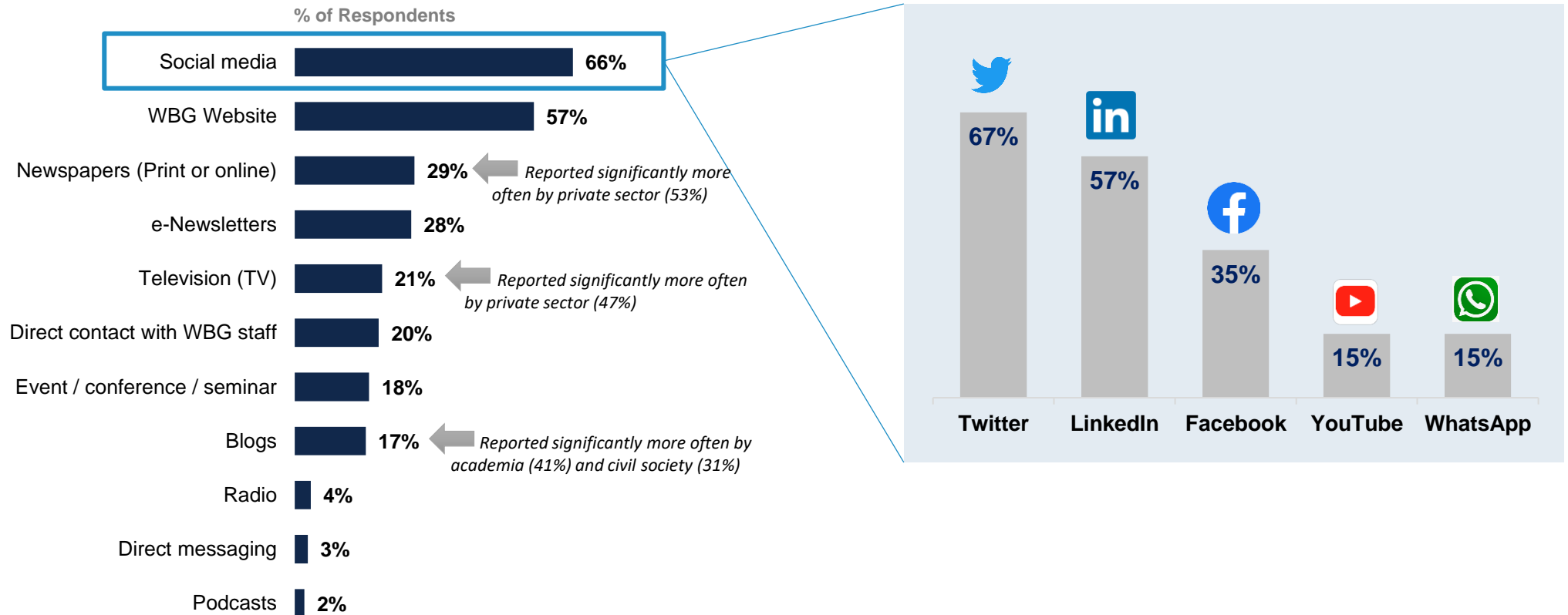
Local Government Respondent



Recent Interactions with the WBG

45% of respondents recalled hearing or seeing something about the WBG in the last 30 days.

Respondents reported seeing that information most often on **social media** and on the **WBG website**. Among those who selected “Social media”, respondents most commonly reported seeing something on **Twitter**, closely followed by **LinkedIn**.

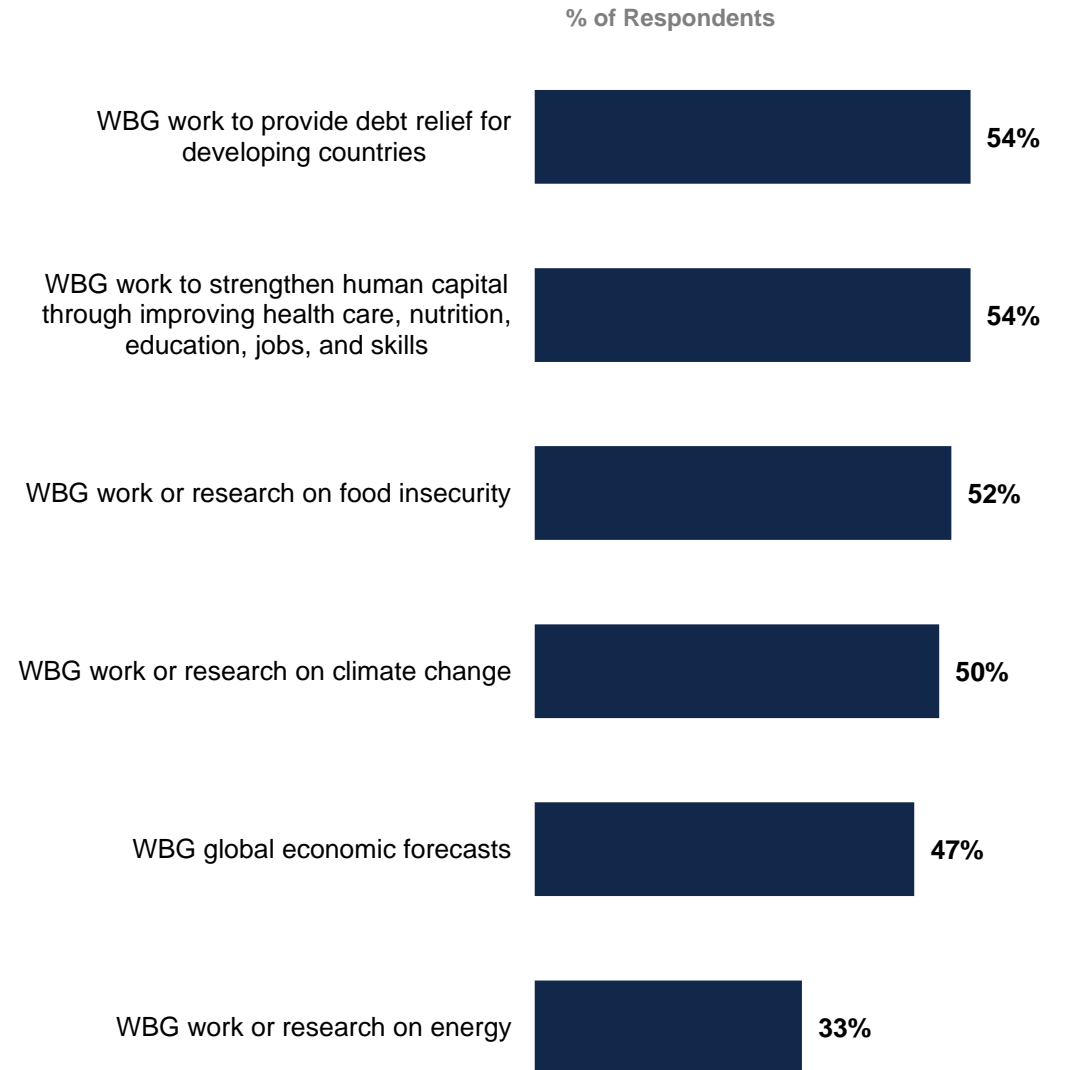


Topic Recall in the Last 30 Days

In terms of the topics recalled, the WBG's work on **debt relief**, **human capital**, **food insecurity**, **climate change**, and **global economic forecasts** were all recalled by about half of the respondents who had seen or heard something about or in relation to the WBG in the last 30 days.

In terms of stakeholder groups, respondents from government principals and the media were significantly more likely to recall messages related to **human capital** (80% and 83%, respectively); respondents from academia and the media were significantly more likely to recall messages related to **climate change** (82% and 83%, respectively); and respondents from civil society, academia and the media were significantly more likely to recall messages related to **food insecurity** (73%, 94% and 83%, respectively) as compared to other stakeholder groups.

In contrast, respondents from local governments, government institutions, and government principals were significantly less likely to recall messages related to **global economic forecasts** (13%, 28%, and 30%, respectively) as compared to other stakeholder groups.



Message Recall and Perceptions of WBG Work

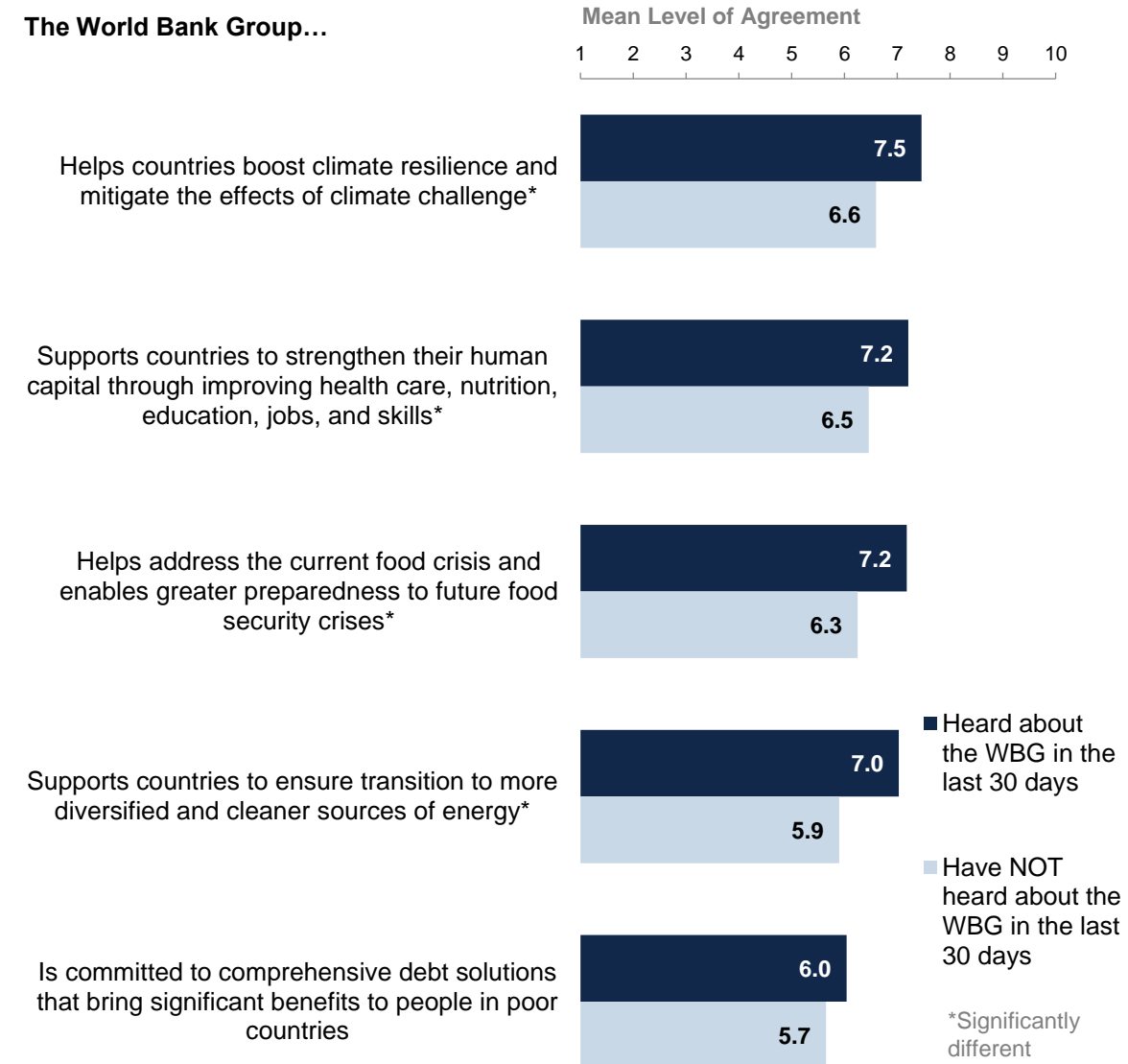
Respondents who recalled seeing or hearing something about the WBG in the last 30 days **gave higher ratings to key messages** regarding the WBG's work – and significantly so for messages related to its work on climate, human capital, food security, and energy.

Respondents who recalled seeing or hearing something about the WBG also reported significantly **higher levels of familiarity** (mean=6.4) and **trust** in the WBG (mean=7.8) compared to those who reported not hearing or seeing anything about the WBG recently (mean=5.3 and 6.5, respectively).

In addition, respondents who recalled seeing or hearing something about the WBG gave significantly higher ratings for the WBG's **effectiveness** (mean=6.7), **relevance** (mean=7.2), **alignment** (mean=6.8), and **influence** (mean=6.6) compared to those who reported not hearing or seeing anything about the WBG recently (means=5.7, 6.0, 5.7, and 5.8, respectively).

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

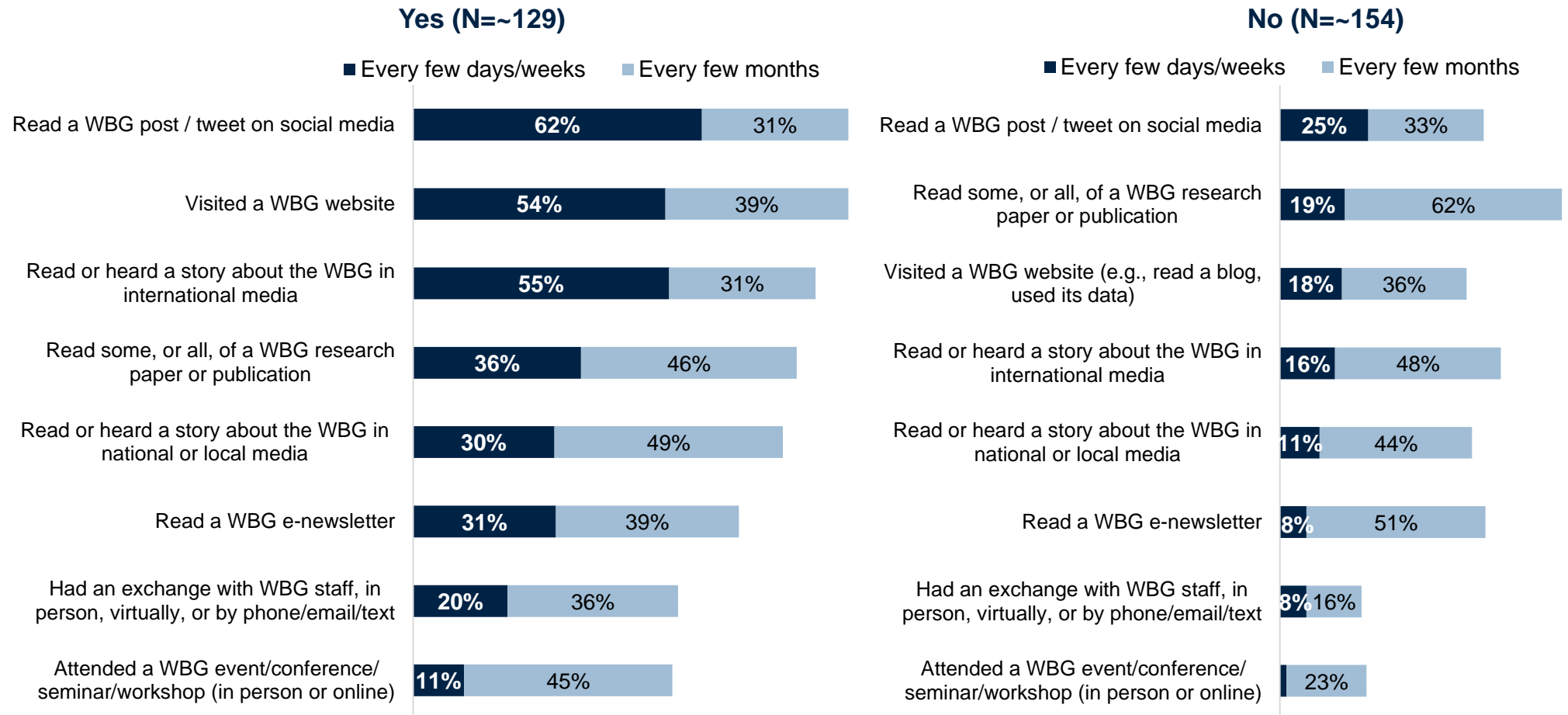
The World Bank Group...



Frequency of Engagement → Message Recall

Respondents who recalled hearing something about the WBG in the last 30 days had significantly more frequent interactions with the institution **across all channels**.

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

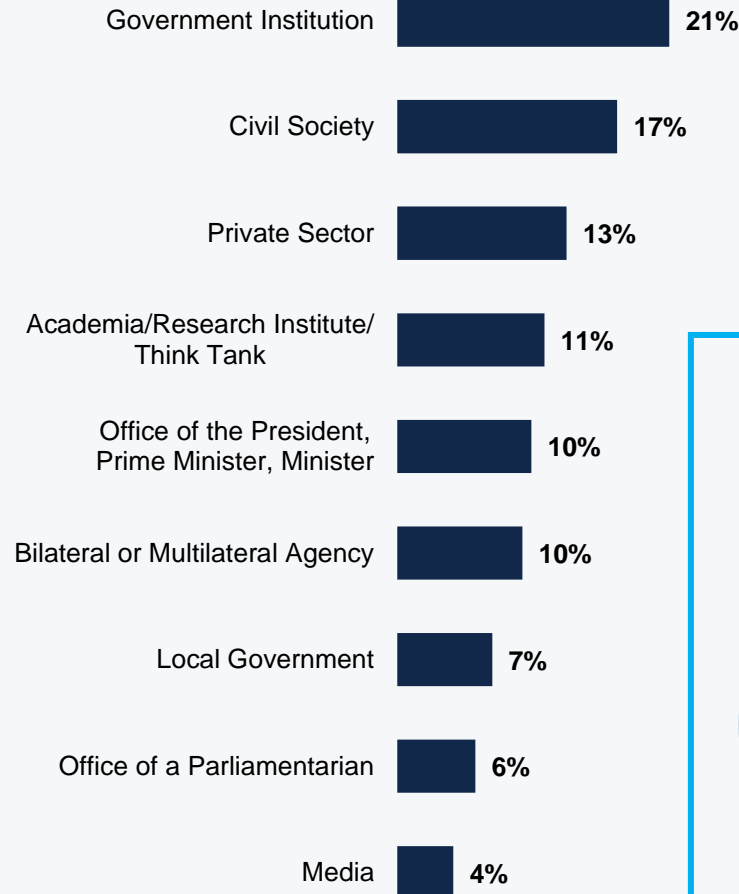


Sample Demographics

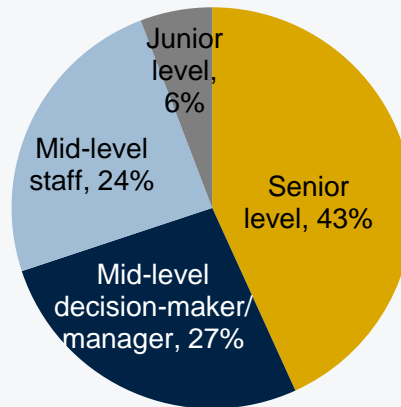
Respondent Profile: Affiliation, Specialization and Status

Current Affiliation

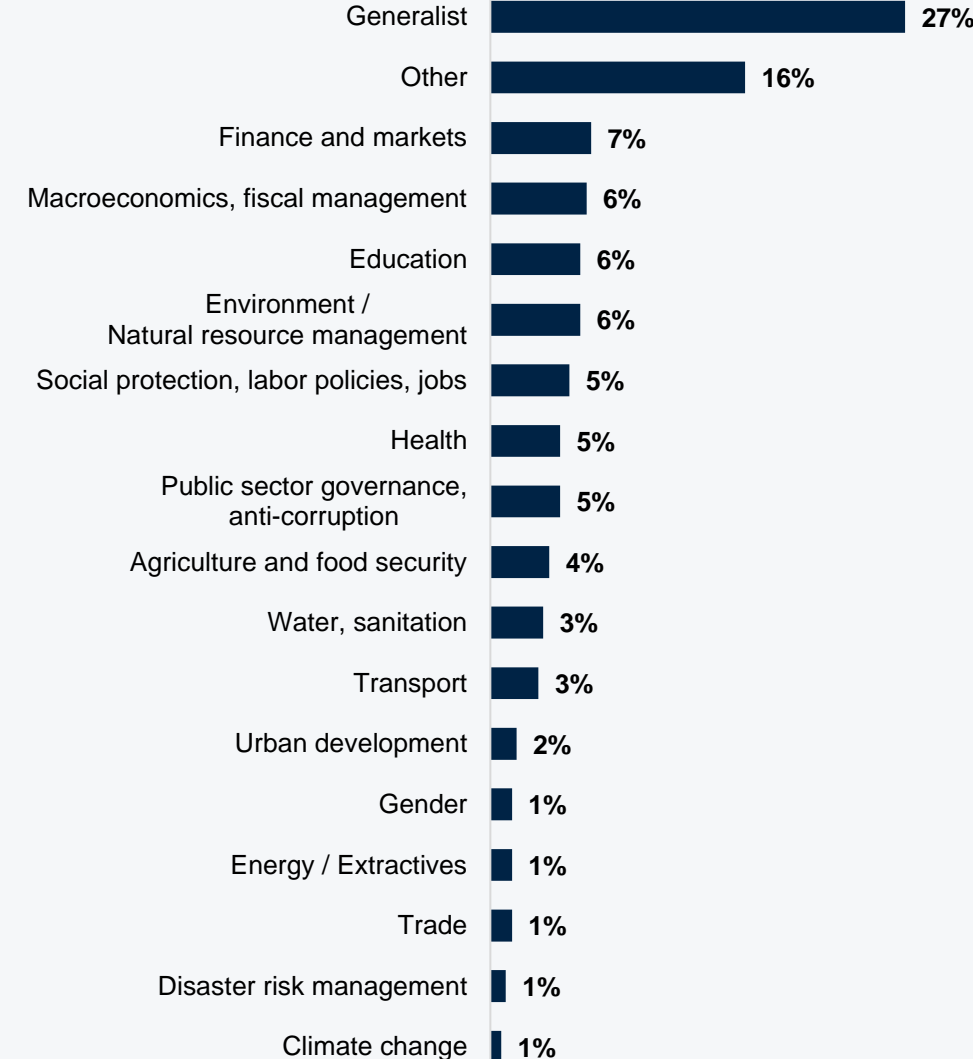
% of Respondents



Self-identified status



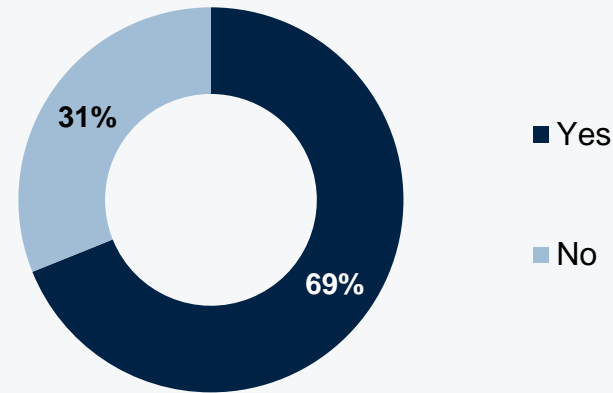
Specialization



Which of the following best describes your current affiliation? (Select only 1 response) (N=301)
 Please identify the primary specialization of your work. (Select only 1 response) (N=292)
 Within your organization, would you describe yourself as (N=292)

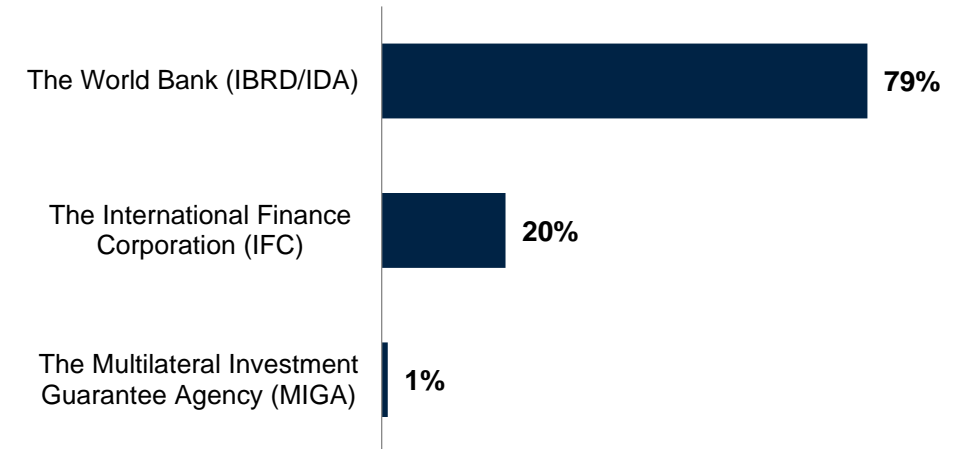
Respondent Profile: Collaboration with the WBG

Collaboration with the WBG



Respondents from private sector (50%), academia (56%) and civil society (61%) were significantly less likely to indicate that they collaborate with the WBG

Collaboration Institution



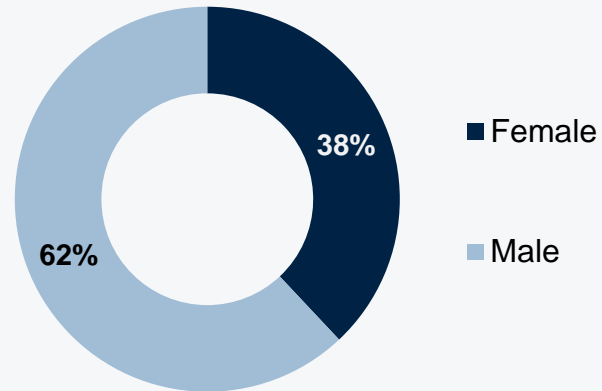
Respondents from private sector were significantly more likely to indicate that they collaborate with the IFC (68%) and significantly less likely to collaborate with the World Bank (26%).



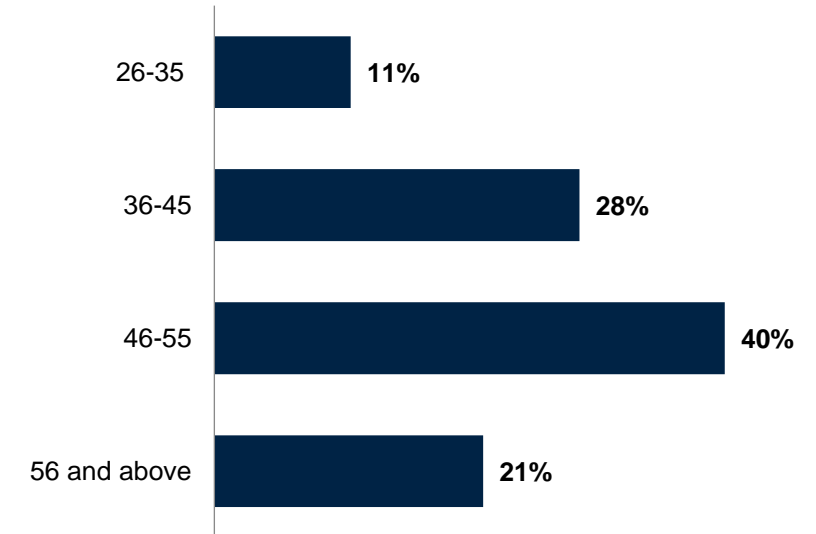
Currently, do you professionally collaborate/work with the World Bank Group (IBRD, IFC, MIGA, ICSID) in your country? (N=296)
Which of the following agencies of the World Bank Group do you primarily collaborate/work with in Zimbabwe? (Select only 1 response) (N=204)

Respondent Profile: Demographics

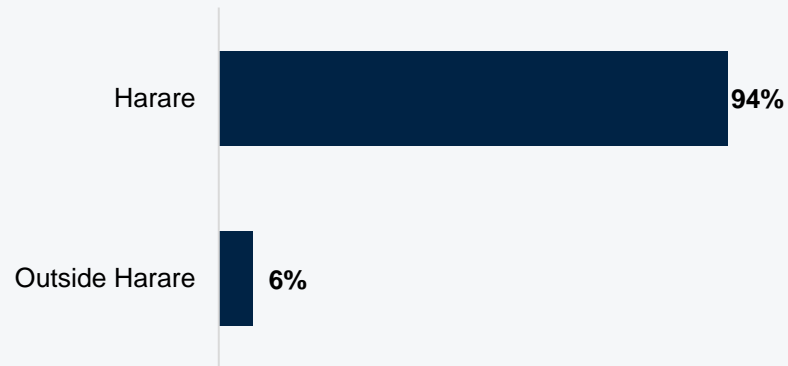
Gender



Age



Location



What's your gender? (N=292)

What's your age? (N=292)

Which best represents your geographic location? (N=290)



Methodology

Methodology

From April 2023 to May 2023, 420 stakeholders of the WBG in Zimbabwe were invited to provide their opinions on the WBG's work in the country by participating in a Country Opinion Survey. Participants were drawn from the Office of the President, Prime Minister, Minister, Parliamentarian, government institutions; local governments; bilateral / multilateral agencies; private sector; civil society organizations; academia, research institutes, and think tanks, and the media.

A total of 301 stakeholders participated in the survey (72% response rate). Respondents completed the questionnaire via post, face-to-face interviews, or an online platform.

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

Year Comparison

The results of this year's Country Survey were compared to those of the Country Survey conducted in FY20 (response rate was 65%, N=196).

Comparing responses across Country Surveys reflects the 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 in the FY20 and FY23 Country Surveys are listed in the table on the right.

This year's Survey saw an increased outreach to and/or response from bilateral/multilateral agencies and high-level government offices. However, there was a decrease in outreach to and/or 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 past-year comparison analyses.

| Percentage of Respondents | FY 2020 | FY 2023 |
|--|---------|---------|
| Government Principals: Office of the President, Prime Minister, Minister, Parliamentarian | 12% | 16% |
| Government Institutions: Employee of a Ministry, Department, Project Implementation Unit, Independent Government Institution, Judiciary, State-Owned Enterprise | 34% | 21% |
| Local Government | 5% | 7% |
| Bilateral/Multilateral Agency: Embassy, Development Organization, Development Bank, UN Agency | 5% | 10% |
| Civil Society Organization: NGOs, Community-Based Organization, Private Foundation, Professional /Trade Association, Faith-Based Group, Youth Group | 15% | 17% |
| Private Sector: Private Company, Financial Sector Organization, Private Bank | 11% | 13% |
| Academia/Research Institute/Think Tank | 11% | 11% |
| Media | 6% | 4% |
| Other | 2% | <1% |
| Total Number of Respondents | 191 | 301 |

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 “Zimbabwe COS FY23 Tables with data breakdowns.xlsx” file published in the WBG Microdata Library, along with the survey microdata and this report.

Scale bucketing:

When mentioning **Low**, **Medium**, and **High** for 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 $p\text{-value} < .05$

| Stakeholder groups | n | % |
|---------------------------------|-----|------|
| Government Principals | 49 | 16% |
| Government Institutions | 63 | 21% |
| Local Government | 22 | 7% |
| Bilateral / Multilateral Agency | 29 | 10% |
| Civil Society | 51 | 17% |
| Private Sector | 39 | 13% |
| Academia | 34 | 11% |
| Media | 13 | 4% |
| Total | 300 | 100% |

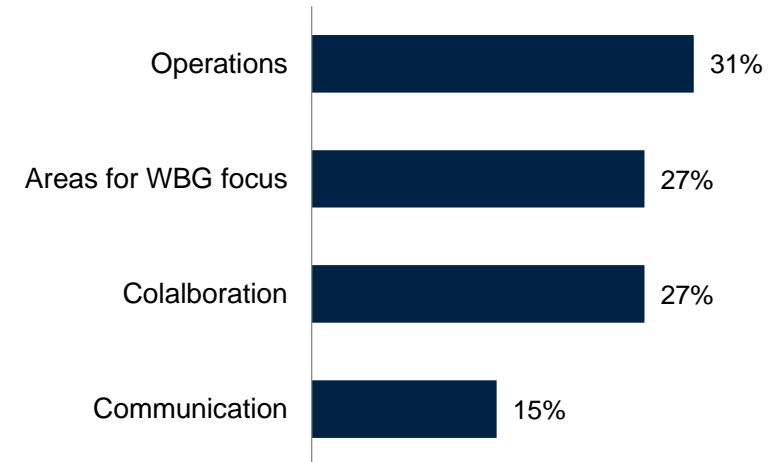
Qualitative Analysis

In 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 Zimbabwe in the future:

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

A total of 59 responses were received; they varied in length from a few words to a few sentences. The comments were broadly grouped in four categories based on their main theme (please see the chart to the right) and summarized in the section “The Future Role of the World Bank Group in Zimbabwe”. 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 Zimbabwe? Scale: 1-10 (1: Not effective at all – 10: Very effective)

To what extent do you agree/disagree with the following statements about the WBG's work in Zimbabwe? Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

A4. The World Bank Group currently plays a relevant role in development in Zimbabwe

A5. The World Bank Group's work is aligned with what I consider the development priorities for Zimbabwe

A7. To what extent does the World Bank Group influence the development agenda in Zimbabwe?

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

A8. How significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in your country?

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

To what extent is the World Bank Group an effective development partner in Zimbabwe, 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 Zimbabwe, 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

To what extent do you agree/disagree with the following statements? Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

C9_1. I am satisfied with the quality of the WBG's advisory services and analytical work in Zimbabwe.

C9_4. The WBG's advice and recommendations are tailored to Zimbabwe's context.

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

Thank you.



Country Opinion Surveys



WORLD BANK GROUP