



Country Opinion Surveys

FY 2023 **Nepal** Country Opinion Survey Report

Acknowledgements

The Nepal Country Opinion Survey is part of the County 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.

BI acknowledges the significant contribution from the Nepal country team and independent fielding agency, Blitz Media Private Limited. In particular, BI is grateful for the support from Bigyan Pradhan (Senior Operations Officer) and Akash Babu Shrestha (External Affairs Officer) who coordinated the survey-related activities from Kathmandu, Nepal.



Contents

Objectives

Methodology Overview

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 in Nepal

World Bank Group's Financial Instruments and Knowledge Work

The Future Role of the World Bank Group in Nepal

Communication and Outreach

Demographics of the Sample and Detailed Methodology



Objectives

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

- 1. Overall Context:** How do stakeholders perceive the country's direction? How familiar are they with the WBG? How much do they trust the WBG?
- 2. Key Indicators:** What opinion do key stakeholders have of the WBG when it comes to its effectiveness, relevance, alignment with Nepal's development priorities, and other key indicators? Are opinions improving or declining?
- 3. Development Priorities:** What areas of development are perceived to be the most important? Have the priorities changed over the past three years? How effective is the WBG perceived to be in these areas?
- 4. Engagement and Work on the Ground:** What do key stakeholders value the most and the least when it comes to the WBG's work in Nepal? How is the WBG perceived as a development partner? Are opinions improving or declining?
- 5. Financial Instruments and Knowledge Work:** What opinion do key stakeholders have of WBG financial instruments and knowledge products? Are opinions improving or declining? What are stakeholders' suggestions to improve WBG's effectiveness?
- 6. Communication and Outreach:** 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. Message Recall:** What key topics that the WBG communicates do stakeholders recall? Is there a relationship between message recall and views of the WBG's work?



Methodology Overview

■ Fielded June through August 2023

- 1,106 potential participants were asked to complete a mostly quantitative survey
- Respondents completed the questionnaires online or on paper
- List of names provided by the WBG country team and supplemented by the fielding agency
- Process managed on the ground by the fielding agency

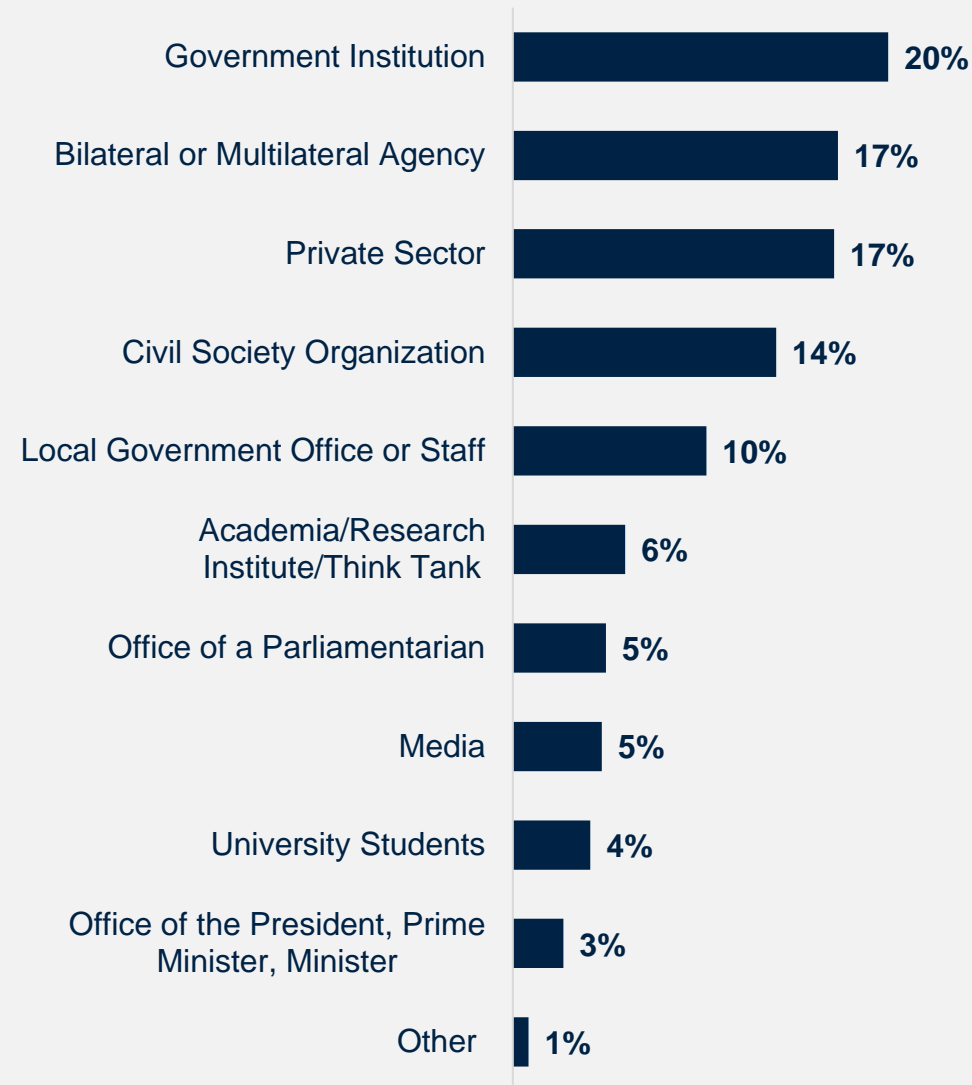
■ 497 participants (45% response rate)

- 43% from Bagmati Province, 23% from Kathmandu
- 39% currently collaborate with the WBG
- 12% specialize in governance, 9% in education

■ Compared to FY19 Country Survey

- 421 participants (65% response rate)
- Surveys completed with a representative from the local fielding agency
- 27% collaborated with the WBG

Click [here](#) for details of the Respondent Sample and Methodology.



Overall Context

“[The WBG should] ensure effective utilization of resources. Focus on fewer but priority areas rather than spread the resources in almost all sectors.”

(Bilateral / Multilateral Agency Respondent)

“To enhance effectiveness in Nepal, the WBG should prioritize inclusive projects that address the specific needs of vulnerable groups. Active community engagement during planning and implementation will foster ownership and local participation. Building capacity in Nepali institutions enables better project management. Data-driven approaches are crucial for informed decision-making and tracking progress. Emphasizing climate change resilience helps tackle vulnerabilities to disasters. Public-private partnerships bring additional resources and expertise. Knowledge sharing among stakeholders ensures best practices and lessons learned. Effective coordination with other development partners avoids duplication and maximizes impact. Through these strategies, the WBG can better support sustainable development and poverty reduction in Nepal.”

(Local Government Respondent)



WORLD BANK GROUP

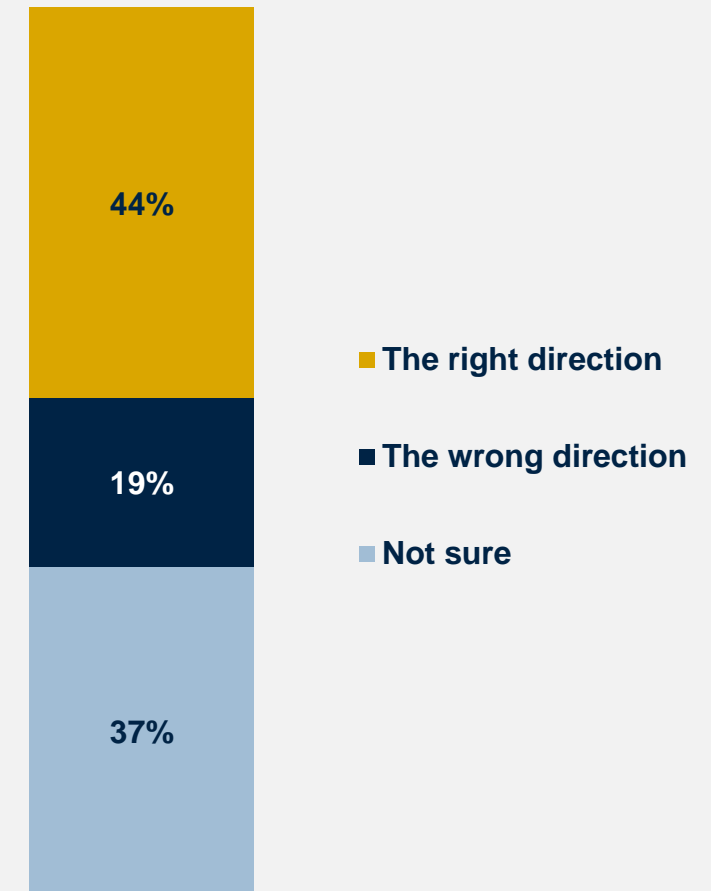


In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Nepal? (N=274)

Respondents are Split Over Nepal's General Direction

In FY23, less than half of all respondents felt that Nepal was headed in the right direction (44%), and a third of them were unsure.

- Respondents from government institutions were significantly more likely to indicate that the country was headed in the right direction (67%) while respondents from the private sector were most likely to say that the country was on the wrong track (35%).
- Over half of the respondents from bilateral/multilateral organizations, the media, and particularly university students (60%) were unsure about Nepal's direction.



Familiarity with the World Bank has Improved

- **Year comparison:** Respondents in this year's Country Survey reported somewhat higher levels of familiarity with the World Bank Group compared to FY19:

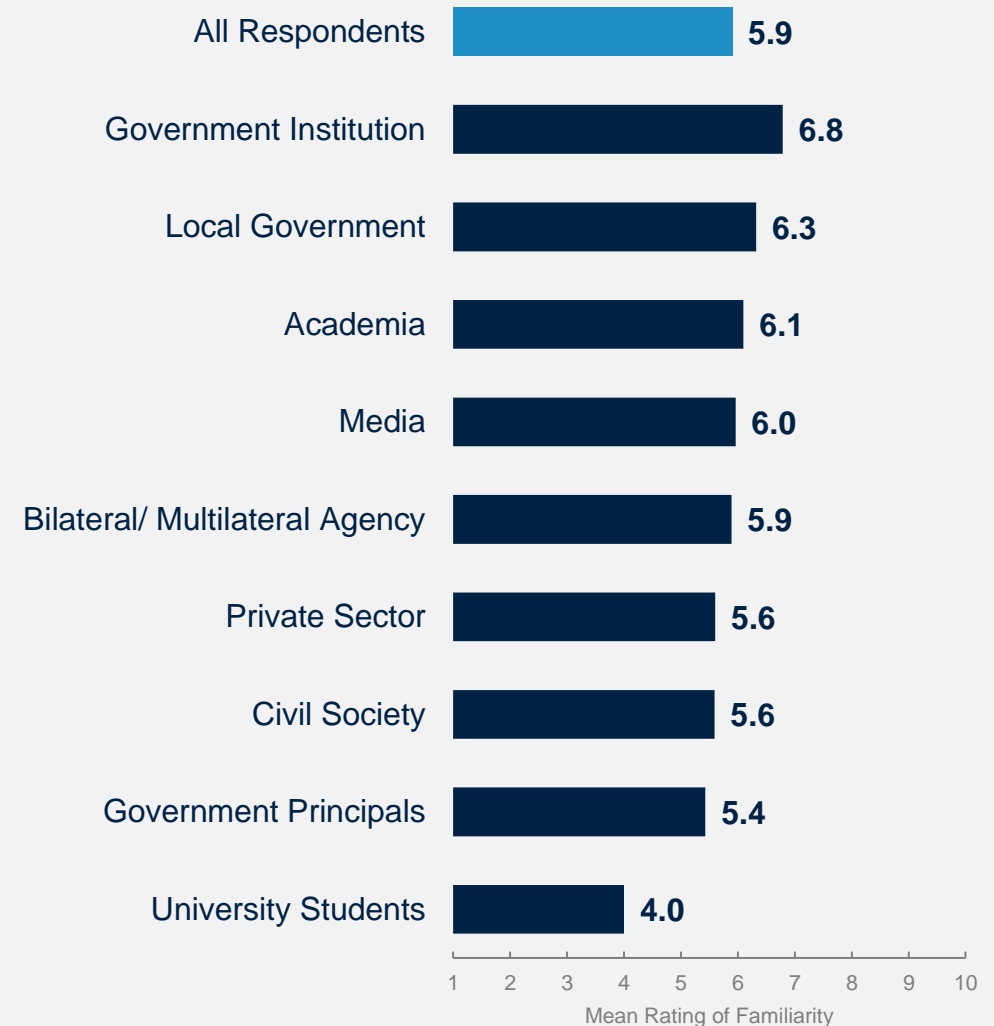
Mean familiarity: **FY23 = 5.9**

FY19 = 5.6

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

Mean familiarity: **Collaborate with WBG = 6.9**

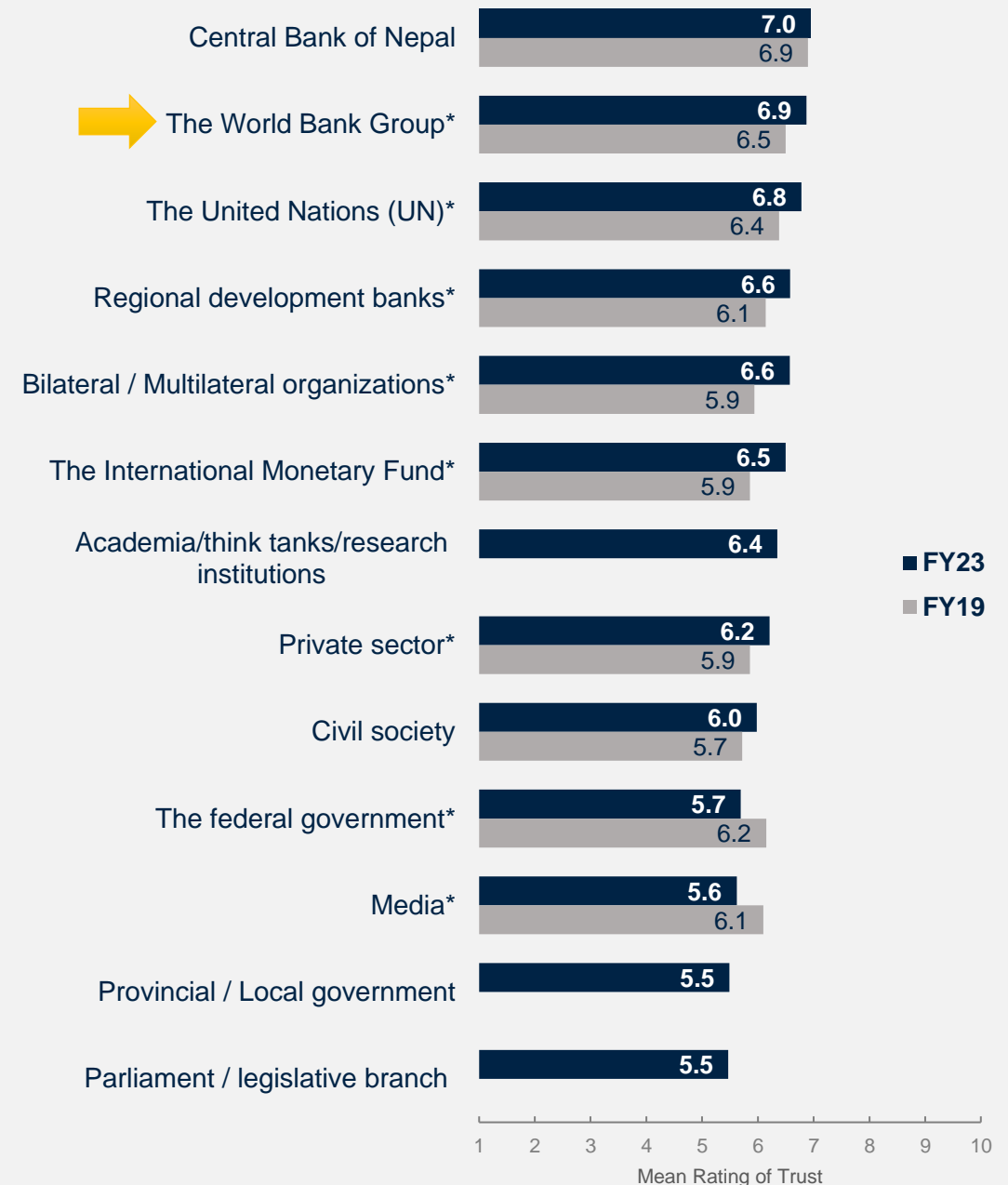
Do not collaborate = 5.3



The WBG is One of the Most Trusted Institution in Nepal

Respondents gave the highest ratings of trust for the Central Bank of Nepal, the World Bank Group, and the UN. At the same time, the Parliament and provincial/local government in Nepal received somewhat lower trust ratings among the institutions studied.

- Ratings of trust were significantly higher for most of the institutions in FY23 than in the FY19 survey, except for the federal government and the media whose ratings of trust dropped significantly since FY19.
- In FY23, respondents from the local government gave the highest ratings of **trust for the WBG** (mean=7.8), whereas respondents from academia (mean=5.8) and university students (mean=6.1) gave significantly lower ratings of trust.



Overall Attitudes toward the World Bank Group

“WBG needs to bring global expertise and customize [the expertise] to the context and needs of the Nepali people.”

(Academia Respondent)

“WBG should be able to provide support by influencing the policy which supports grassroots-level people. WBG should help create equitable opportunities, capacity development, and access for poor and marginal people.”

(Civil Society Respondent)



WORLD BANK GROUP

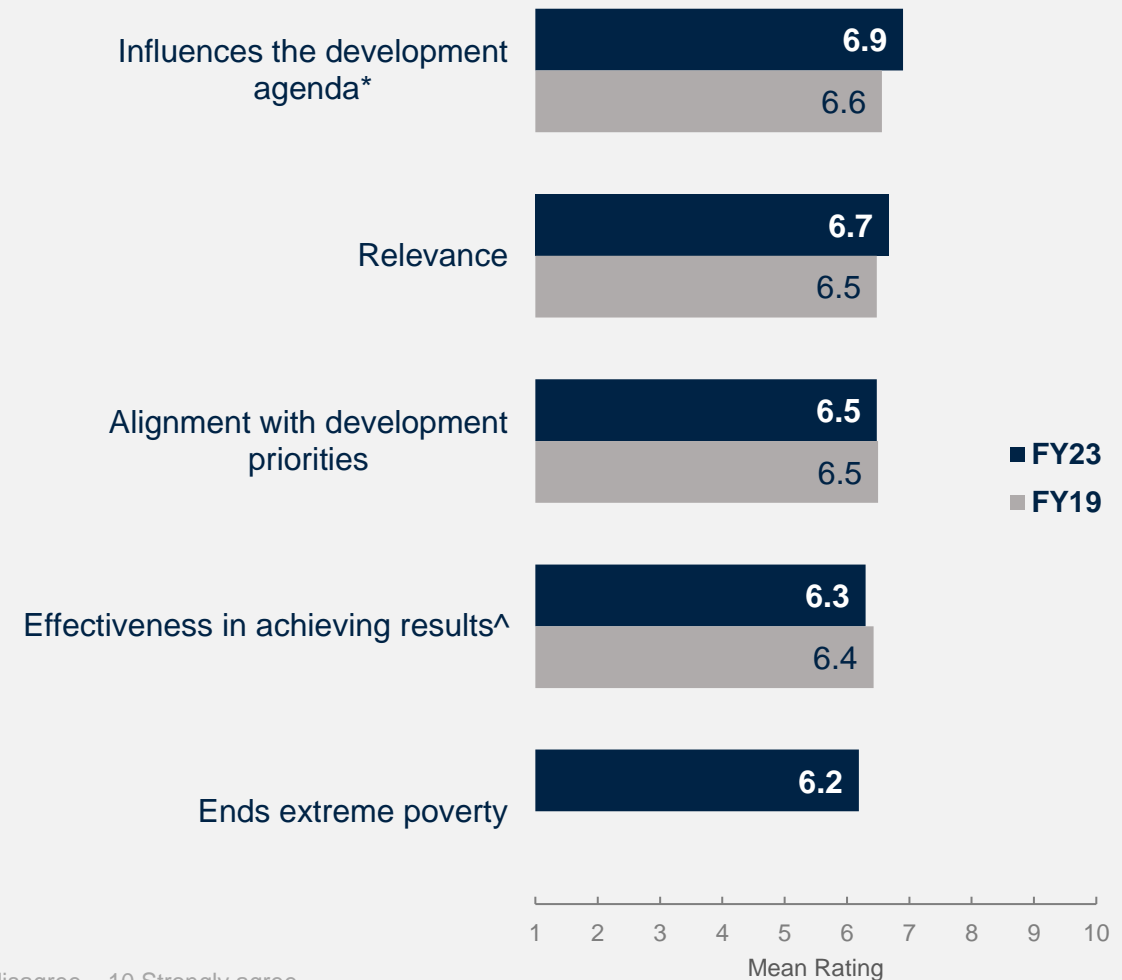


In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Nepal? (N=274)

Improvement in a Key Performance Indicator

In FY23, ratings for the key areas of the WBG performance were similar to those reported in FY19, except for the perceptions of the Bank's **influence** on the development agenda, which has improved significantly since FY19.

- Respondents from **local governments** gave the highest ratings (mean across all five questions=7.4) while **university students** gave significantly lower ratings across all of these performance indicators (mean=5.6). University students also reported the lowest levels of familiarity with the WBG compared to other stakeholder groups.



The WBG currently plays a relevant role in development in Nepal. Scale: 1 Strongly disagree – 10 Strongly agree
 To what extent does the WBG influence the development agenda in Nepal? Scale: 1 To no degree at all – 10 To a very significant degree
 How effective has the WBG been in achieving development results in Nepal? Scale: 1 Not effective at all – 10 Very effective
 The WBG's work is aligned with what I consider the development priorities for Nepal. Scale: 1 Strongly disagree – 10 Strongly agree
 The WBG's work helps end extreme poverty in Nepal. Scale: 1 Strongly disagree – 10 Strongly agree
 ^ Compared to a mean score of the two questions asked in FY19: "Overall, please rate your impression of the WBG's effectiveness in Nepal. Scale: 1 Not effective at all – 10 Very effective; To what extent does the WBG's work help to achieve development results in Nepal? Scale: 1 To no degree at all – 10 To a very significant degree"

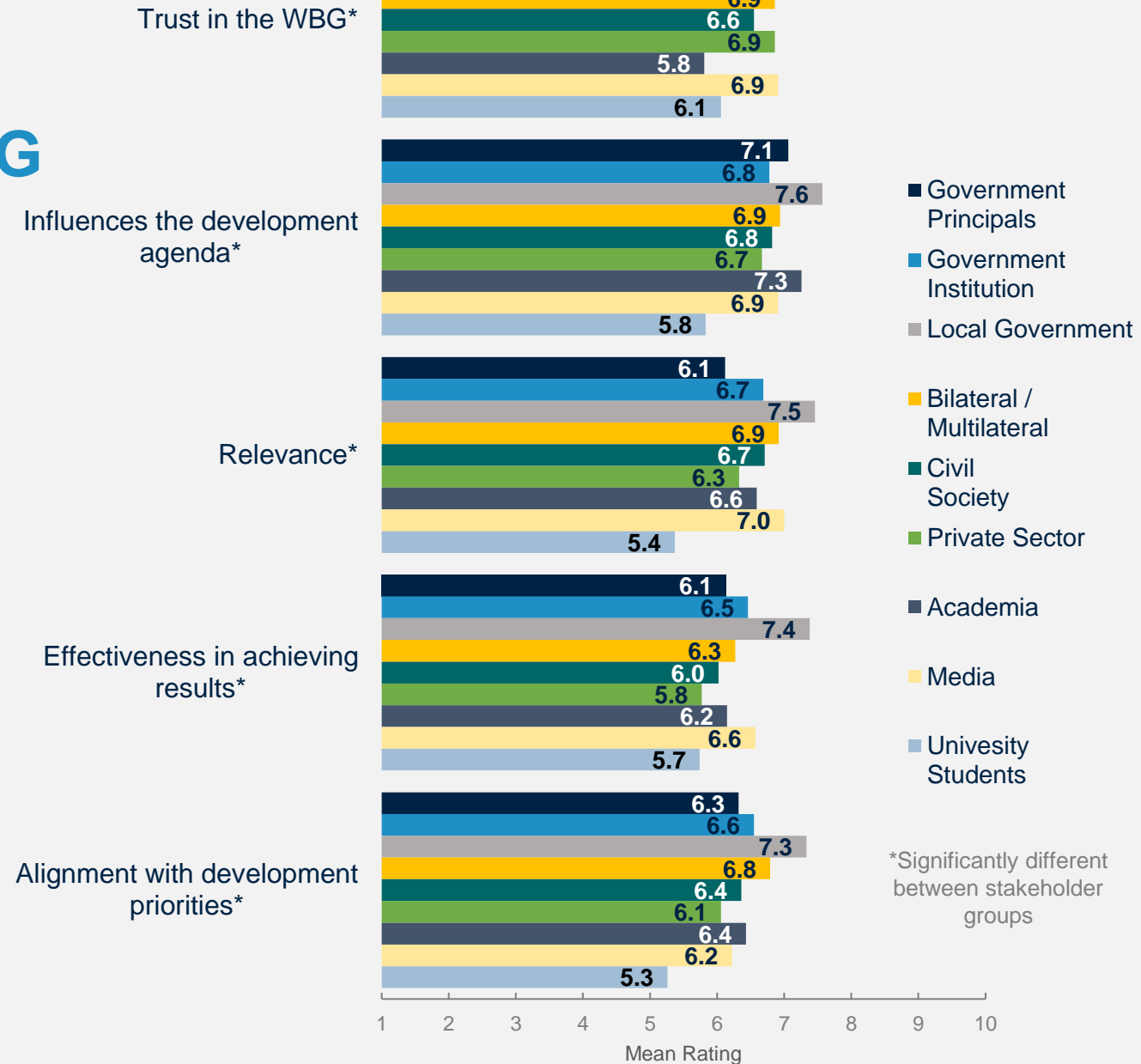
*Significantly different between years

Local Government Respondents Have More Positive Perceptions of the WBG

Comparing ratings of key performance indicators between stakeholder groups, clear patterns emerge in their perceptions of the WBG and its work. Respondents from **local governments** tend to have the most positive perceptions while **university students** give significantly lower ratings of the WBG and its work.



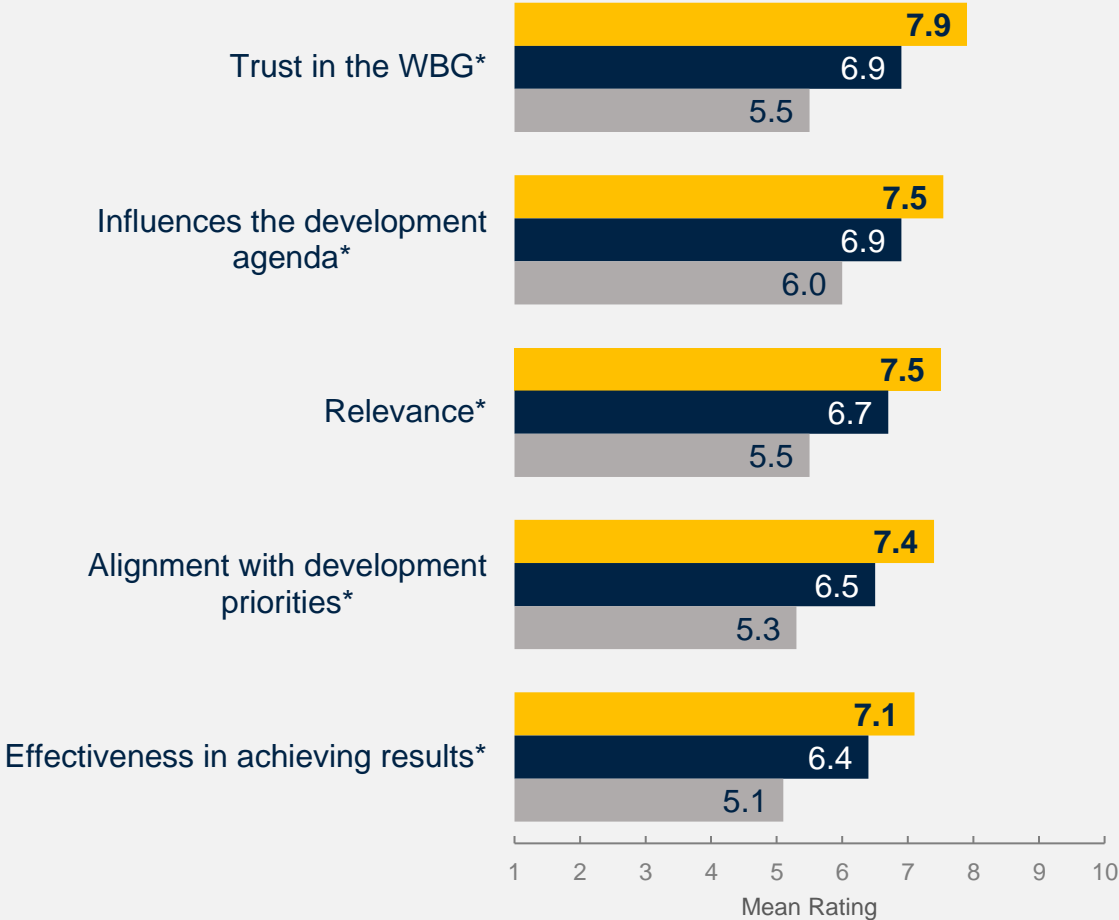
The WBG currently plays a relevant role in development in Nepal. Scale: 1 Strongly disagree – 10 Strongly agree
 To what extent do you trust the WBG to do what is right? Scale: 1 To no degree at all – 10 To a very significant degree
 To what extent does the WBG influence the development agenda in Nepal? Scale: 1 To no degree at all – 10 To a very significant degree
 How effective has the WBG been in achieving development results in Nepal? Scale: 1 Not effective at all – 10 Very effective
 The WBG's work is aligned with what I consider the development priorities for Nepal. Scale: 1 Strongly disagree – 10 Strongly agree



Familiarity Leads to More Positive Perceptions

When 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), one can see that the more familiar stakeholders are with the WBG, the more positive perceptions they have of the WBG and its work.

Meaningful engagement and outreach can continue to increase positive perceptions.



How familiar are you with the work of the WBG in Nepal?

■ High Familiarity (8-10) ■ Some Familiarity (5-7) ■ Low Familiarity (1-4)

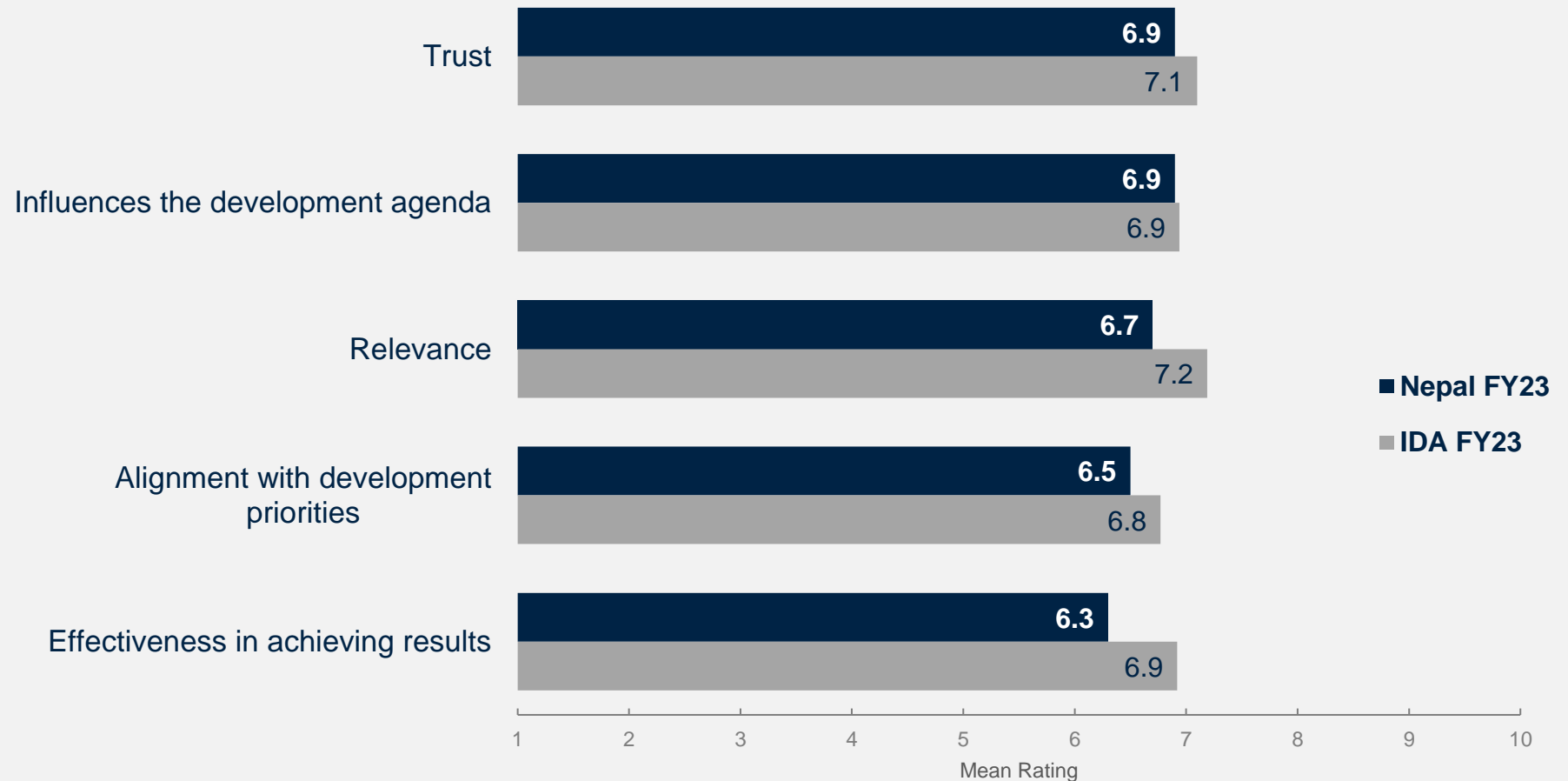
*Significantly different between levels of familiarity



The WBG currently plays a relevant role in development in Nepal. Scale: 1 Strongly disagree – 10 Strongly agree
To what extent do you trust the WBG to do what is right? Scale: 1 To no degree at all – 10 To a very significant degree
To what extent does the WBG influence the development agenda in Nepal? Scale: 1 To no degree at all – 10 To a very significant degree
How effective has the WBG been in achieving development results in Nepal? Scale: 1 Not effective at all – 10 Very effective
The WBG’s work is aligned with what I consider the development priorities for Nepal. Scale: 1 Strongly disagree – 10 Strongly agree

Nepal Rated Lower than other IDA Countries in FY23 on Key Performance Indicators

The mean ratings for relevance, alignment, and effectiveness in achieving results, as well as the trust rating, were **somewhat lower in Nepal** compared to those in **other IDA** countries^ surveyed in FY23, except for the influence rating, which was on par with other IDA countries.



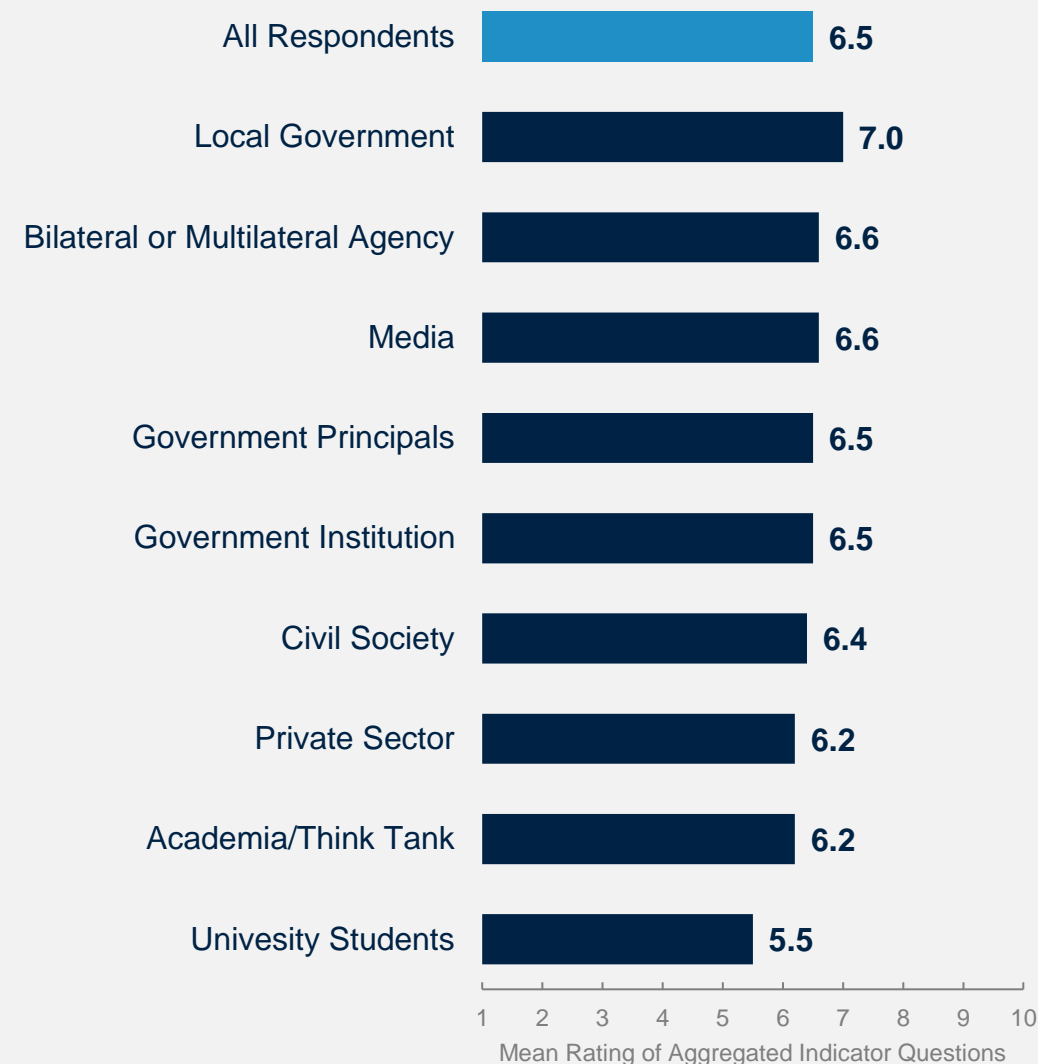
Stakeholder Trends across Performance Indicators

Respondents from **local governments** had the highest mean rating across the aggregated responses to the seventeen COS indicator questions whereas **university students, academia, and the private sector** had significantly lower ratings.

- **Collaboration with the WBG:** Respondents who collaborate with the WBG gave significantly higher ratings across the aggregated indicator questions compared to respondents who do not collaborate with the WBG:

Mean rating: **Collaborate with WBG = 6.7**

Do not collaborate = 6.3



World Bank Group's Support in Development Areas

- “- Partnership with local government for urban planning and development, Waste management, Tourism development, and promotion etc.*
- Work focuses on strengthening local CSOs and community mobilization and partnership for sustainable development*
 - GRID*
 - Support to local government for educational sector improvement plan.”*

(Local Government Respondent)



WORLD BANK GROUP

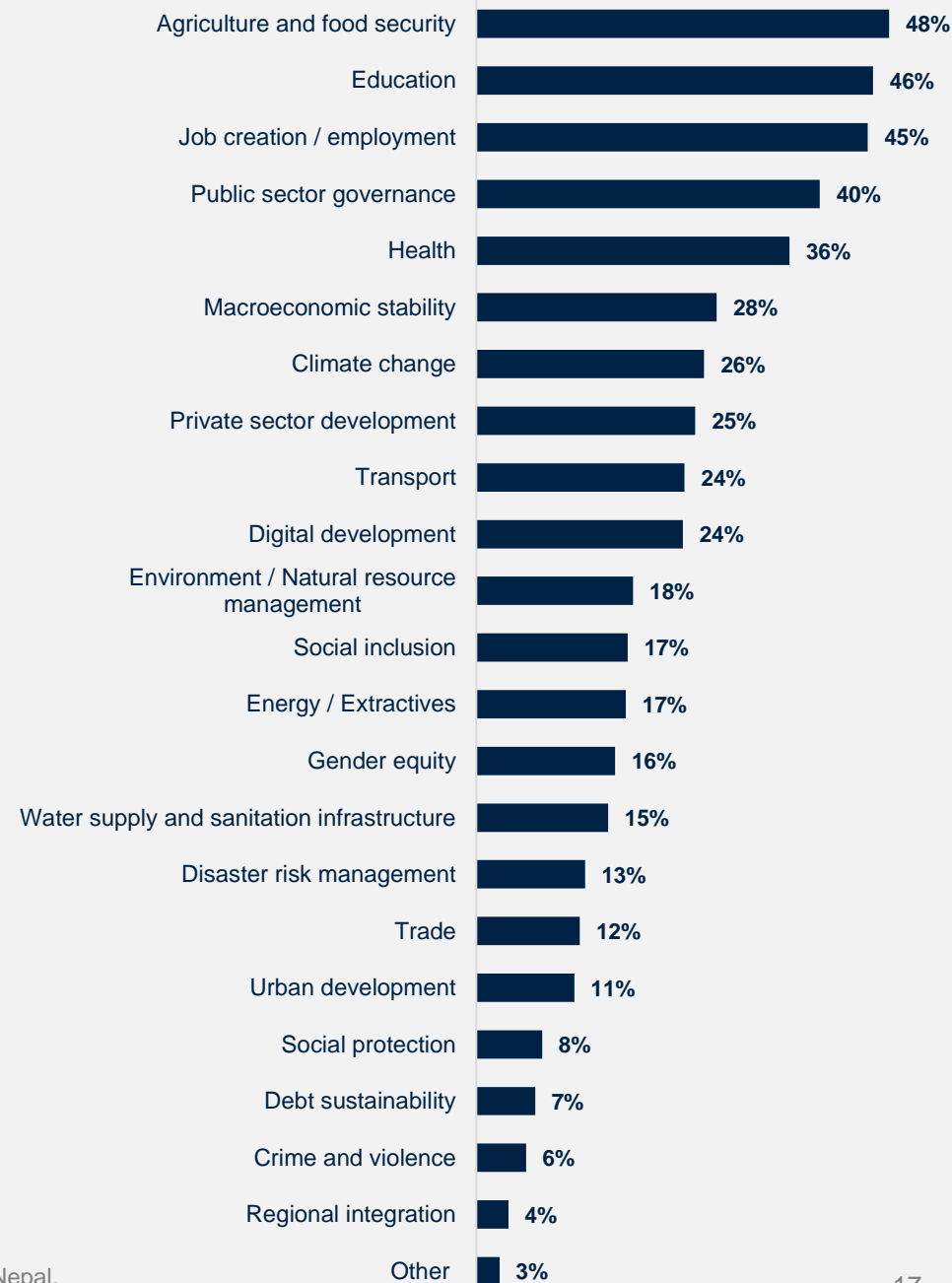


In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Nepal? (N=274)

Development Priorities for Nepal

Agriculture and food security, education, and job creation were the top areas in FY23 where stakeholders would like the WBG to focus its resources.

- Respondents from **local government** and **government principals** were most likely to select **agriculture and food security** as a top development priority in Nepal (67% and 64%, respectively)
- **University students** were significantly more likely to select **education** (85%) and **job creation/employment** (60%) as their top development priorities in Nepal.
- **Climate change** has increased in priority from just over 2% in FY19 to 26% in FY23. Respondents from civil society (46%) and academia (48%) were most likely to select climate change among their top development priorities.



Poverty Reduction

As in FY19, **agriculture and food security, education, and job creation** were the top areas in FY23 that stakeholders believe would contribute the most to reducing poverty in Nepal.

- **Private sector development** was more likely to be chosen by respondents from media, the private sector, and academia (52%, 49%, and 38%, respectively).

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

“The World Bank will be effective if it works in the following areas in Nepal:

Implement tailored initiatives that integrate marginalized communities like Dalits with others, rather than employing generic programs.

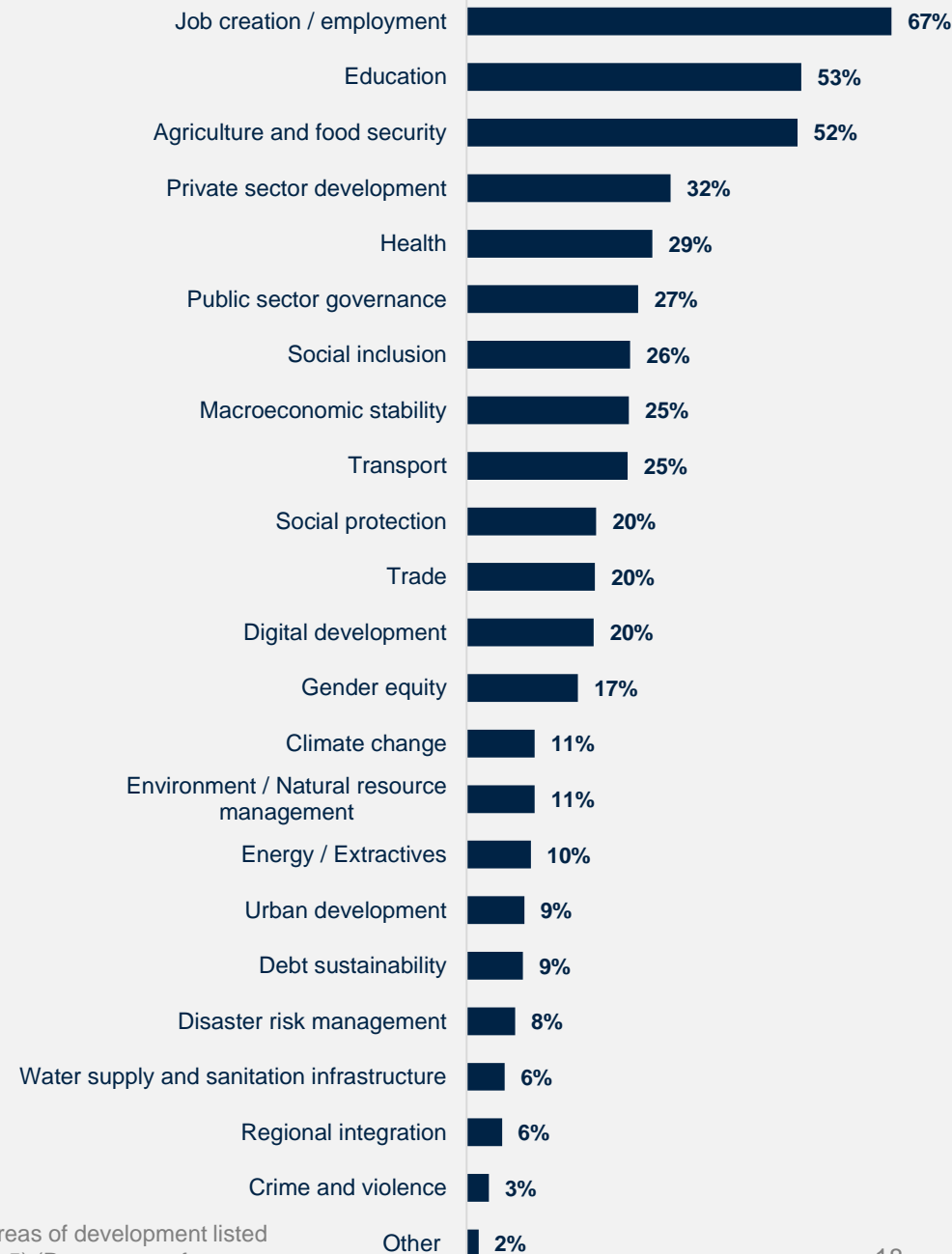
To achieve holistic progress in the political, economic, and social aspects of the Dalit community, efforts should focus on scientific reservation

Emphasis should be placed on the unity and inclusion of marginalized communities in Nepal.

Efforts should be made to address and rectify the inequality issues in Nepal

Once all forms of discrimination are eradicated, it is appropriate to implement inclusive programs”

(Civil Society Respondent)



Poverty reduction is a broad term that encompasses work in many different areas. Which FIVE areas of development listed below do you believe would contribute most to reducing poverty in Nepal? (Choose no more than 5) (Percentage of Respondents, N=487)

Areas for the WBG to Prioritize

The areas the WBG should prioritize in its work were well aligned with the development priorities identified by the stakeholders: **job creation, agriculture and food security, and education.**

- University students were significantly more likely to prioritize **job creation/employment** compared to other stakeholder groups (75%).
- Respondents from bilateral/multilateral agencies were most likely to select **public sector governance** as a top area for the WBG to focus (54%). **Climate change** was also a relatively high priority for this group (36%).

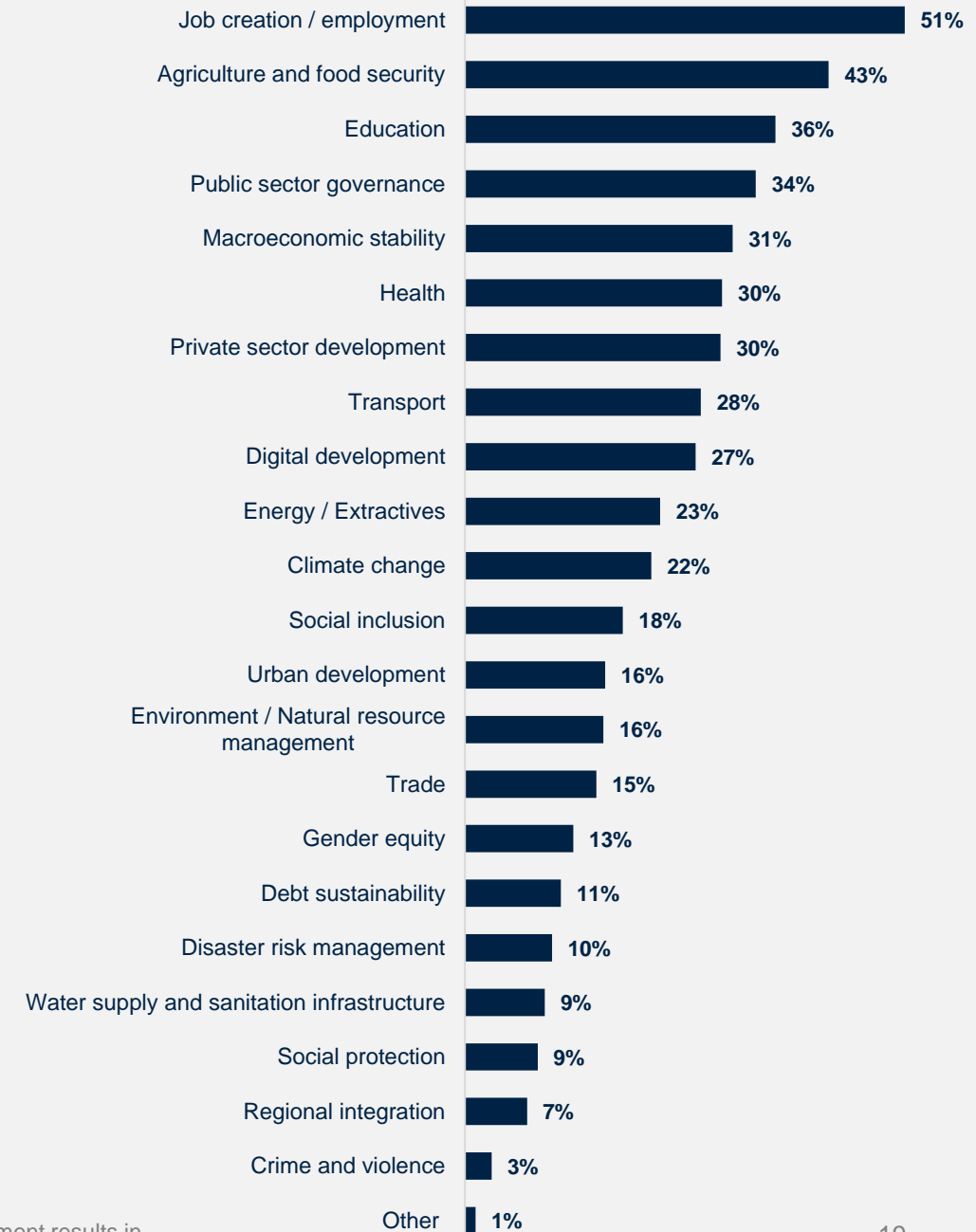
In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Nepal?

*"Promote policy stability (both fiscal as well as monetary), supporting long-term broad-based development agendas
Focus on large infra projects in sectors such as energy, transport, etc.*

Promote sustainable agriculture to curb agro-based imports and explore export potential.

Engage in job creation-based projects; promote SME ecosystem etc."

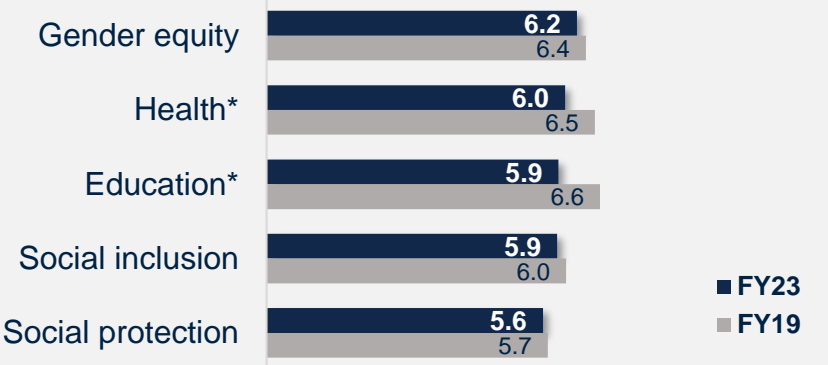
(Private Sector Respondent)



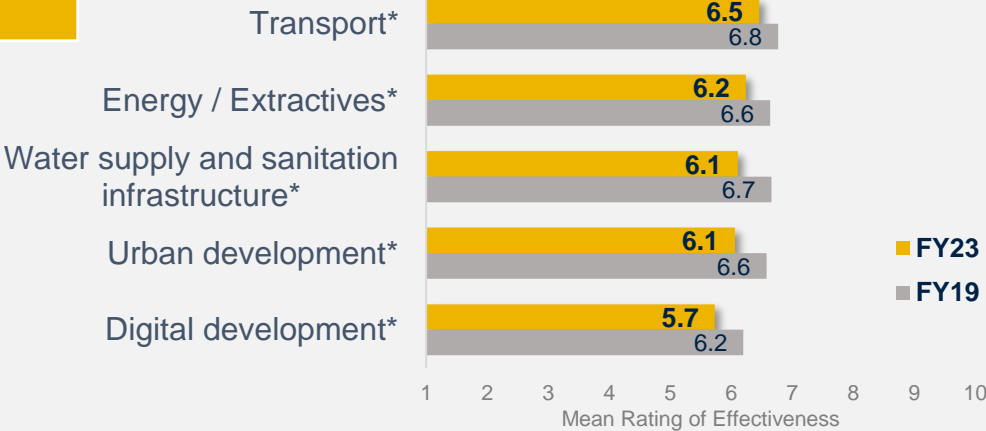
Effectiveness of WBG's Support in Sectoral Areas

The WBG’s work in the area of **transport** received the highest ratings of effectiveness in Nepal, although rated significantly lower compared to FY19. Almost all sectoral areas witnessed a decline in the perception of effectiveness since FY19, especially the key areas of **education**, **public sector governance**, and **agriculture and food security**.

Human Development



Infrastructure

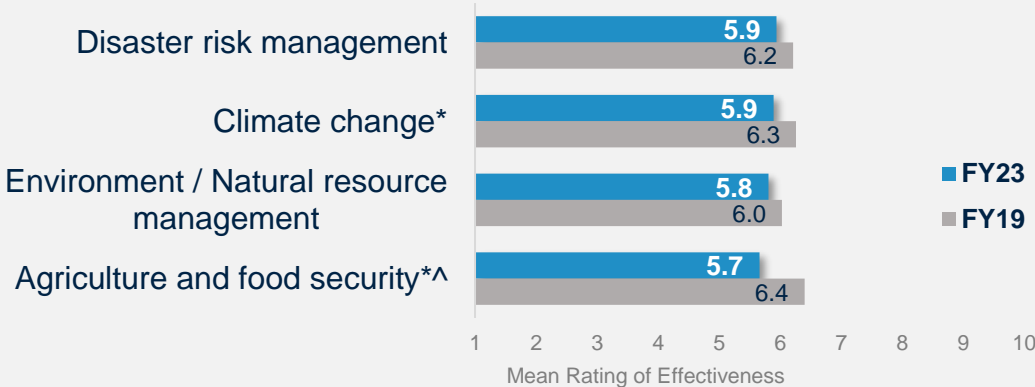


*Significantly different between years

Finance / Institutions / Economic Growth



Environmental Sustainability



Green, Resilient, and Inclusive Development (GRID) of Nepal

Almost half of the respondents (45%) reported knowing a lot or a fair amount about the GRID objectives.

Respondents from **government organizations** and **bilateral/multilateral agencies** tended to be more aware of the GRID action plan (50% and 55% of these stakeholders, respectively, reported knowing a lot or a fair amount about the GRID objectives).

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

"...the concept of Gender-Responsive Inclusive Development (GRID) should be central to the WBG's efforts. By designing and implementing projects that consider the diverse needs and contributions of all genders, the WBG can promote gender equality and social inclusion. This would involve initiatives such as empowering women economically, challenging gender norms, and ensuring access to education and healthcare for all.."

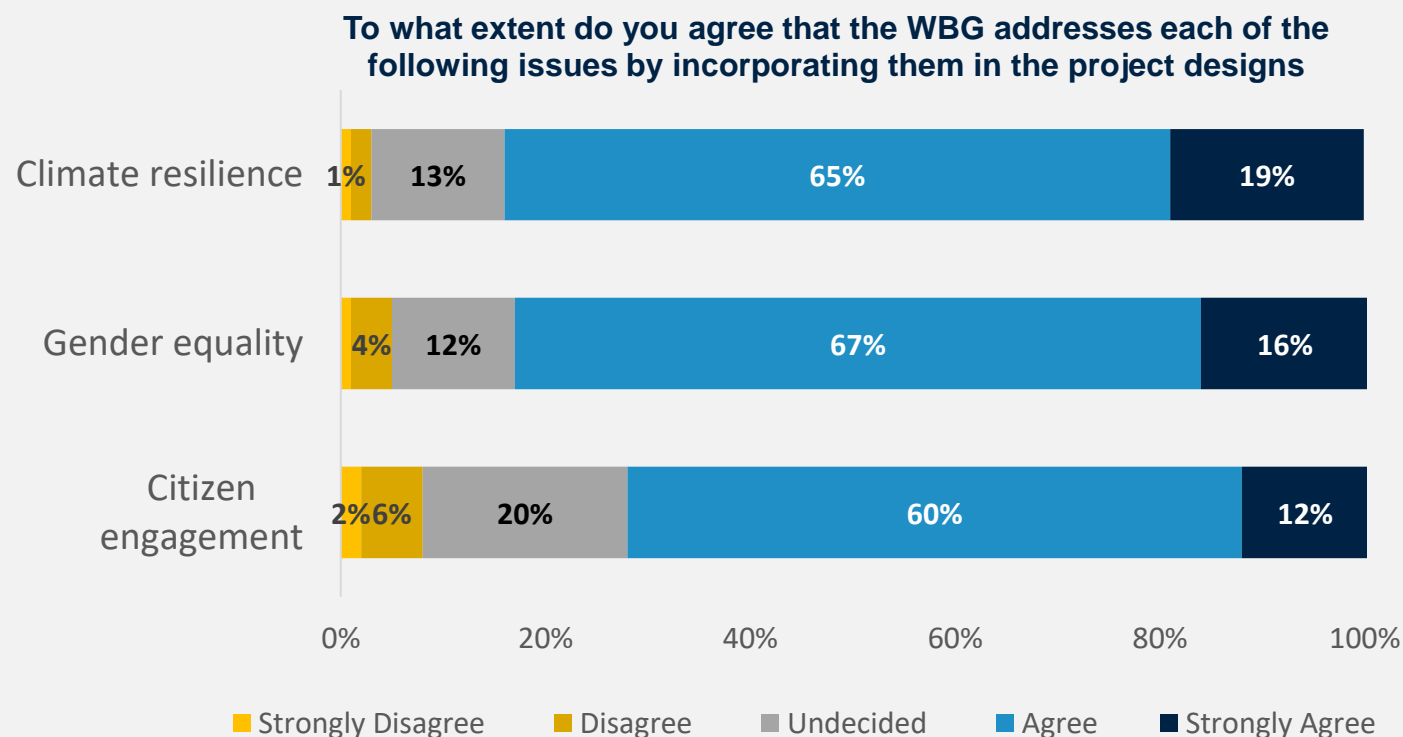
(Bilateral/Multilateral Agency Respondent)

How familiar are you with the GRID objectives?



Most Respondents Agree that the WBG Addresses Climate, Gender, and Citizen Engagement in its Project Designs

When asked if the WBG incorporates climate resilience, gender equality, and citizen engagement in its project designs in Nepal, a vast majority of respondents agreed or strongly agreed on all three issues. However, more respondents tended to disagree or strongly disagree that the Bank includes **citizen engagement** in its project designs (8%), and 20% of respondents remained undecided about the incorporation of citizen engagement issues in the WBG project designs suggesting that this is a less known aspect of the WBG's work in Nepal than climate resilience or gender equality.



World Bank Group's Work and Engagement on the Ground in Nepal

"1. Engage as much as possible with local stakeholders 2. Ensure effective monitoring 3. Focus on more continuity in Nepali public policies."

(Bilateral/Multilateral Agency Respondent)

"WBG should seriously understand the needs of Nepal rather than just introducing a global approach. There is a lack of pragmatic and issue-based collaboration with Nepal."

(Media Respondent)



WORLD BANK GROUP



In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Nepal? (N=274)

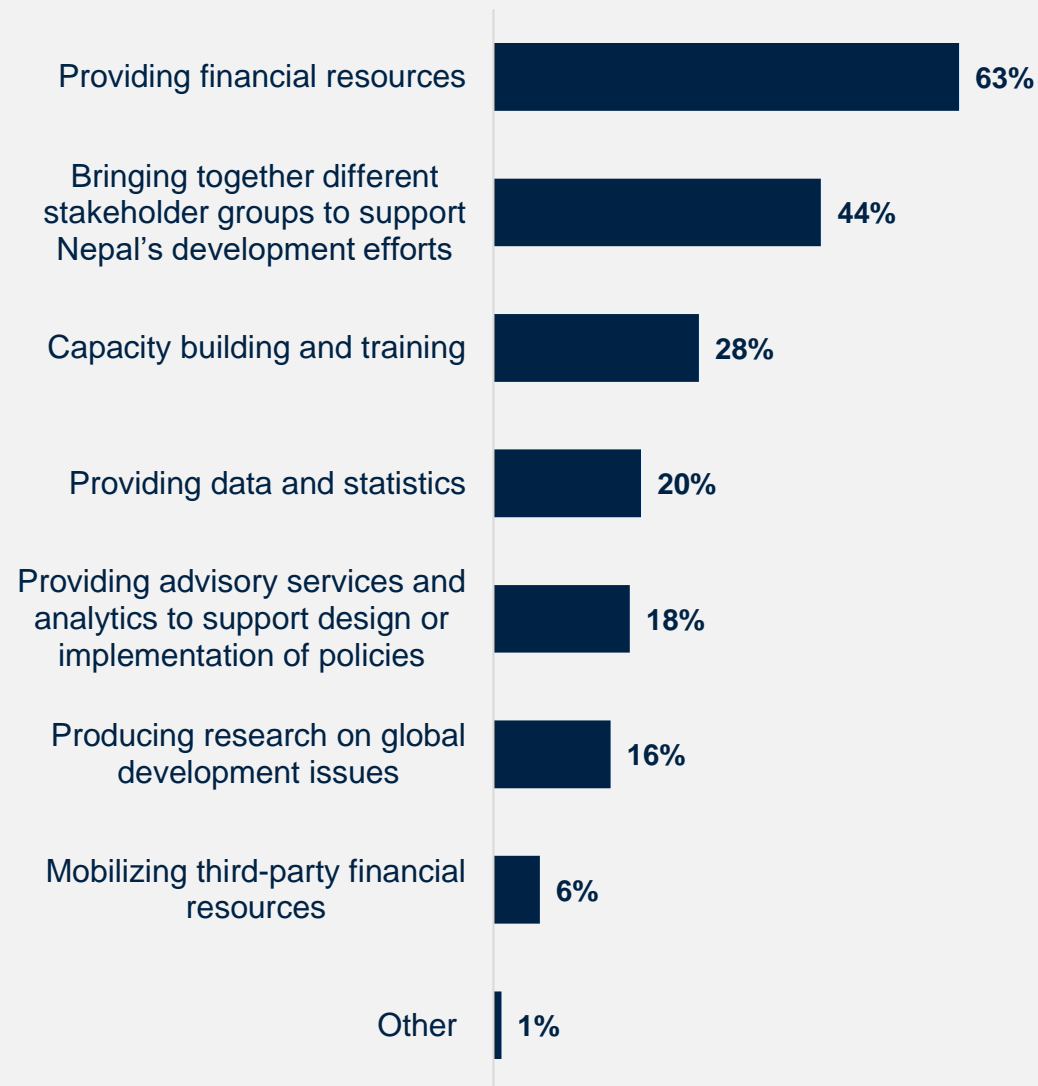
Financial Resources are the Bank's Greatest Value

In FY23, **financial resources** were considered the WBG's greatest value to Nepal by respondents. In addition, respondents in this year's survey considered the WBG's **bringing together different stakeholder groups** of much greater value, being identified by almost twice as many respondents as in FY19 (24%).

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

"Giving financial support and access to finance for development projects is a crucial component. Additionally, assistance must be based on a results-based strategy such as employment."

(Bilateral/ Multilateral Agency Respondent)



The WBG is Increasingly Seen as a Responsive and Flexible Institution

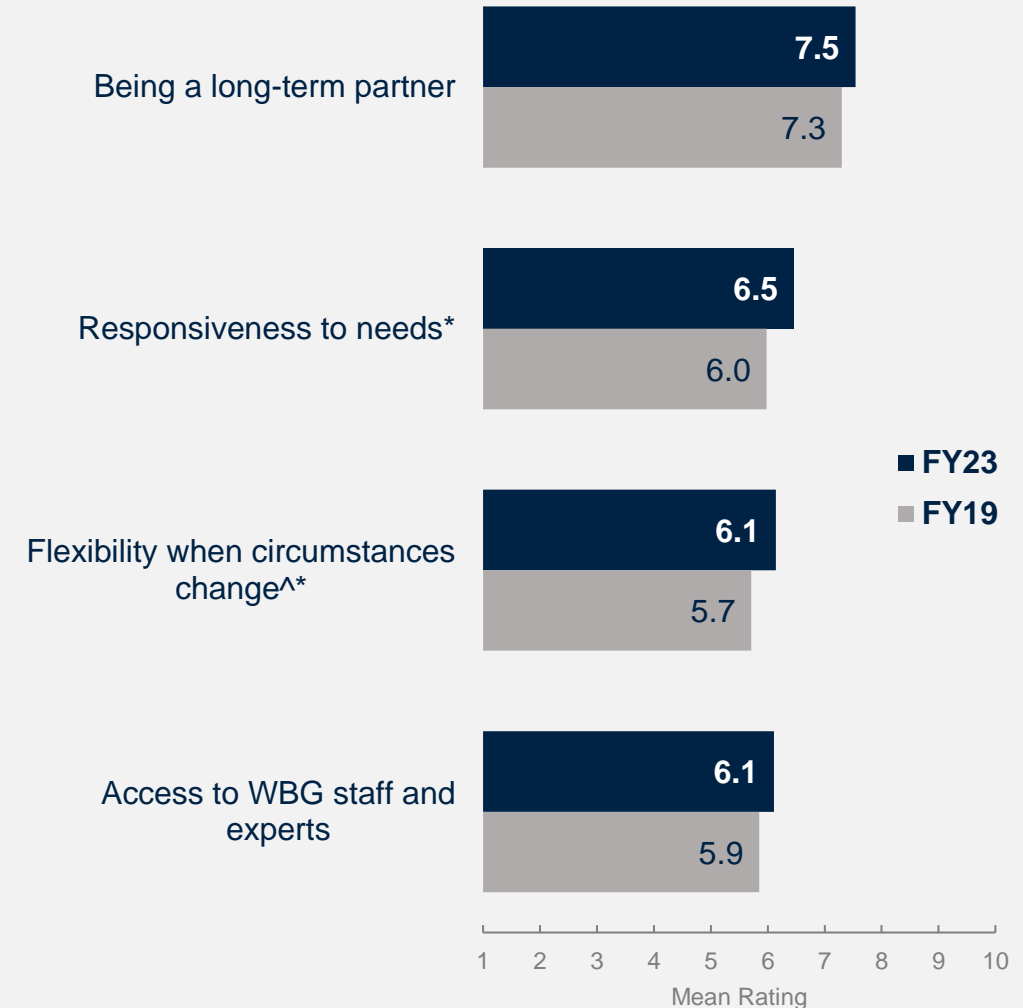
In FY23, respondents perceived the WBG as a significantly more **flexible** and **responsive** partner than in FY19. Perceptions of the Bank being a long-term partner with accessible staff have also improved, although not significantly.

- As with other aspects of the WBG's work in Nepal, **university students** tended to be more critical of the WBG than other stakeholder groups (mean across all questions=5.6).

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

“World Bank brings global expertise to Nepal for research and operation, which is a plus to Nepal. However, unless Nepali experts work in the core team as leaders or co-leaders it will be hard to cater the recommendations to Nepal's development needs. So, it is imperative that WB includes local experts in leading roles not just as supporting consultants/staff. Also, it is important that local experts, consultants, and staff that WB recruits represent different social, economic, and ethnic classes in Nepal society. Also, overemphasis on fluency in the English language shouldn't be the barrier for candidates who are very motivated otherwise.”

(Government Institution Respondent)



To what extent is the WBG an effective development partner in Nepal, in terms of each of the following?

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

^Compared to the mean of institutional flexibility and flexibility to changes in country context asked in FY19.

*Significantly different between years

The WBG Increasingly Seen as Effectively Collaborating with the Private Sector

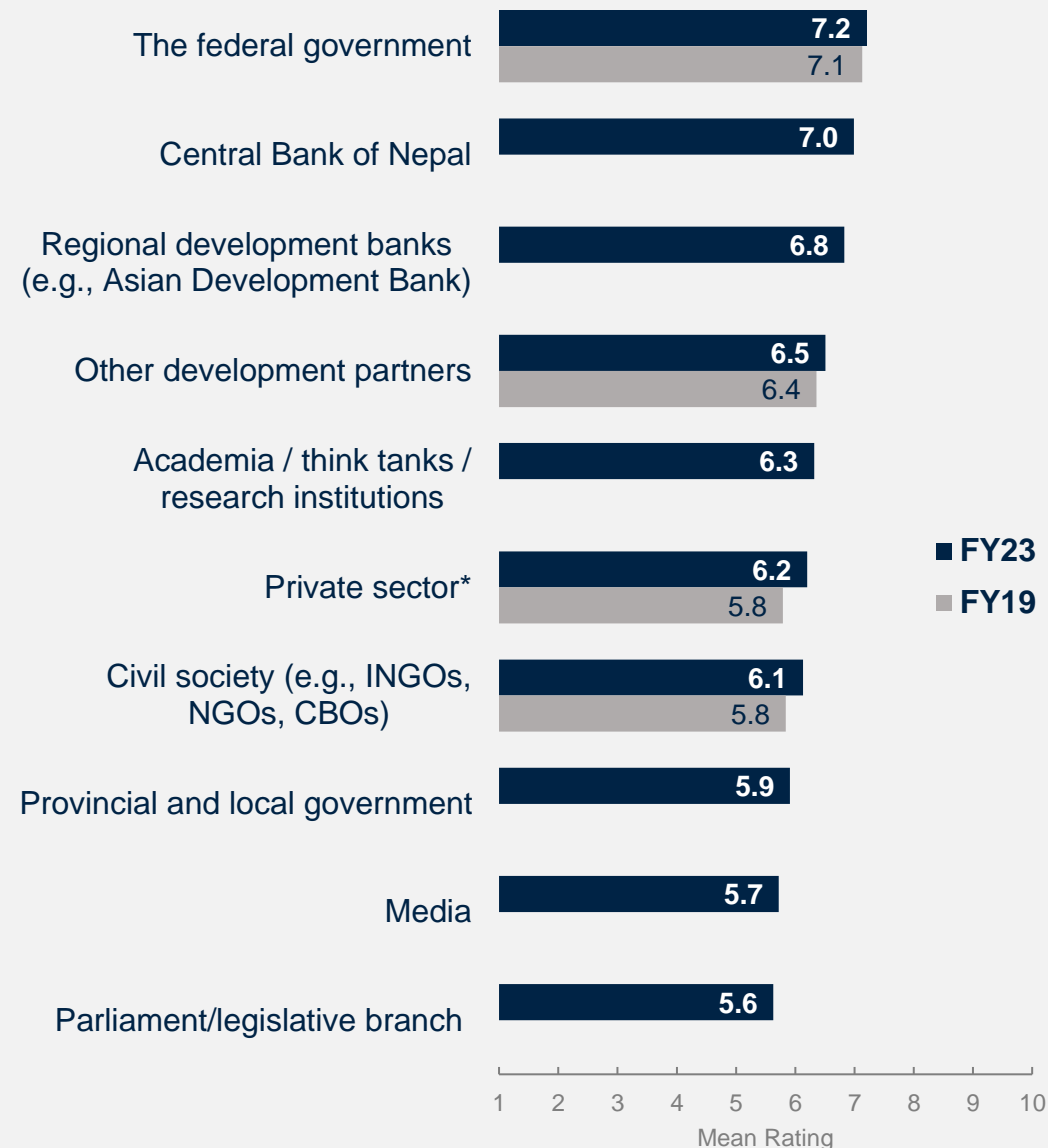
In FY23, respondents perceived the WBG as collaborating significantly more with **the private sector** than in FY19, although the rating is still rather moderate.

Notably, respondents from **academia** and **university students** tended to give some of the lowest ratings for the WBG's collaboration with all stakeholder groups (mean across all groups = 5.7 and 5.9, respectively).

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

“WBG should increase its engagement and collaborative work with local government, as well as local NGOs ensuring democratic and inclusive participation of community people, CBOs, and private sector in the local development process that could increase the effectiveness of WBG work in Nepal.”

(Civil Society Respondent)



Stakeholders Want the Bank to Collaborate More with the Federal Government, Local Government, and Private Sector

In FY23, respondents suggested that the WBG should increase its collaboration with **the federal government, provincial and local governments**, and the **private sector**. Notably, perceptions of the current level of collaboration with **provincial and local governments** are among the lowest (mean = 5.9).

Respondents also indicated that the WBG should collaborate more with **academia/think tanks/research institutes**, the **Central Bank of Nepal**, and **civil society**.

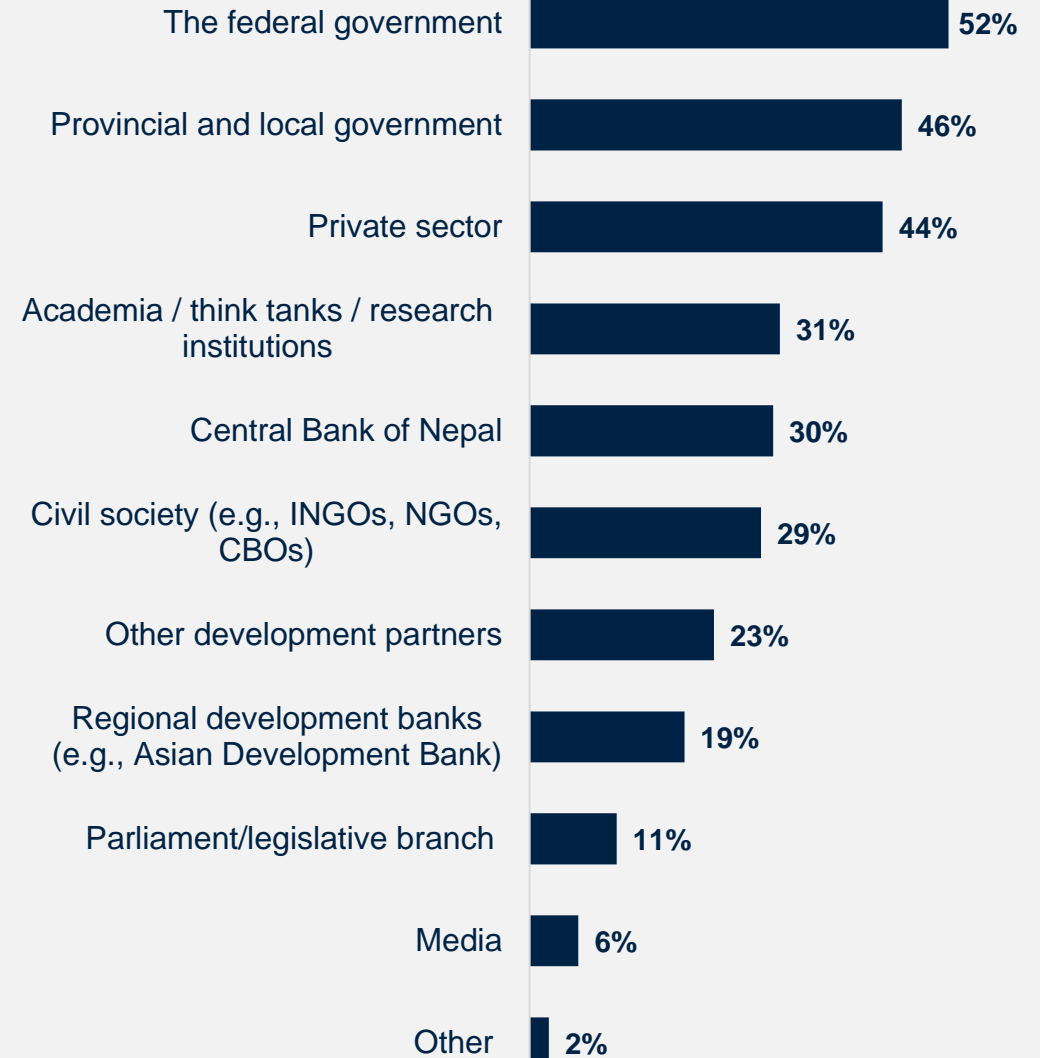
In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Nepal?

“Work in collaboration with Provinces and local governments to operate cohesively in social development initiatives, including education, healthcare, and employment generation.”

(Government Institution Respondent)

“The WBG can collaborate with local institutions, academia, and civil society organizations to enhance technical skills and knowledge transfer. This could involve workshops, training programs, and knowledge-sharing platforms to empower Nepali stakeholders for development.”

(Private Sector Respondent)



Which THREE of the following groups should the WBG collaborate with more in Nepal? (Choose no more than 3)
(Percentage of Respondents, N=465)

World Bank Group's Financial Instruments and Knowledge Work

“Expect more accountability from the GON, and build that into all projects, transactions, and engagements. Better use its leverage of the substantial amount of funding, mostly loans, that are provided, and place more expectations of good governance on those funds. Find a way to incorporate subnational governance and federalism into all efforts. Examine processes that undermine GON responsibility and governance, including the provision of salary supplements, high per diem rates, and other extras to government employees for doing their jobs.”

(Bilateral/Multilateral Agency Respondent)



WORLD BANK GROUP



In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Nepal? (N=274)

WBG Lending Most Seen as Insisting on Accountability, Perceptions of Timeliness Have Improved

Respondents gave the highest ratings for the WBG **insisting on accountability through its lending**. In addition, respondents perceived the **timeliness of the Bank's financial support** as significantly higher than in FY19.

However, respondents provided multiple qualitative comments on the WBG's current operational work, focusing on the issues of corruption, inefficiency, the need for a greater understanding of the local context, and more focus on development outcomes.

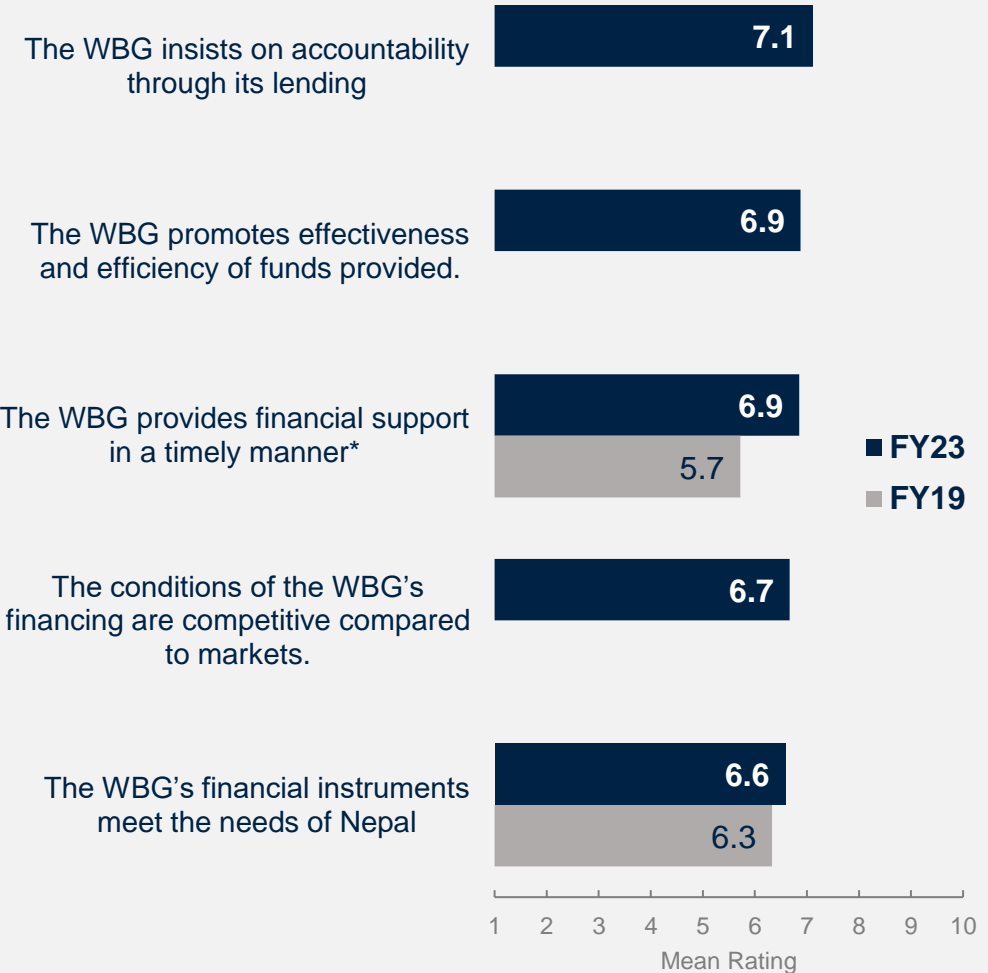
In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Nepal?

"Make sure that the grants/loans reach the desired target groups. More stringent on monitoring of PDOs and make PDOs measurable and the PIUs accountable."

(Government Institution Respondent)

"Stress in efficiency. Be accountable and acknowledge your weaknesses or mistakes made in the past including some of the failed projects. Focus on your comparative advantage vis a vis other development partners-- Private sector development, good governance, infrastructure, among others. Engage a wider section of stakeholders while designing projects and deciding on supporting."

(Civil Society Respondent)



Most Respondents Have Not Used the WBG's Knowledge Work

Only **one-third** of all respondents reported using WBG's knowledge work.

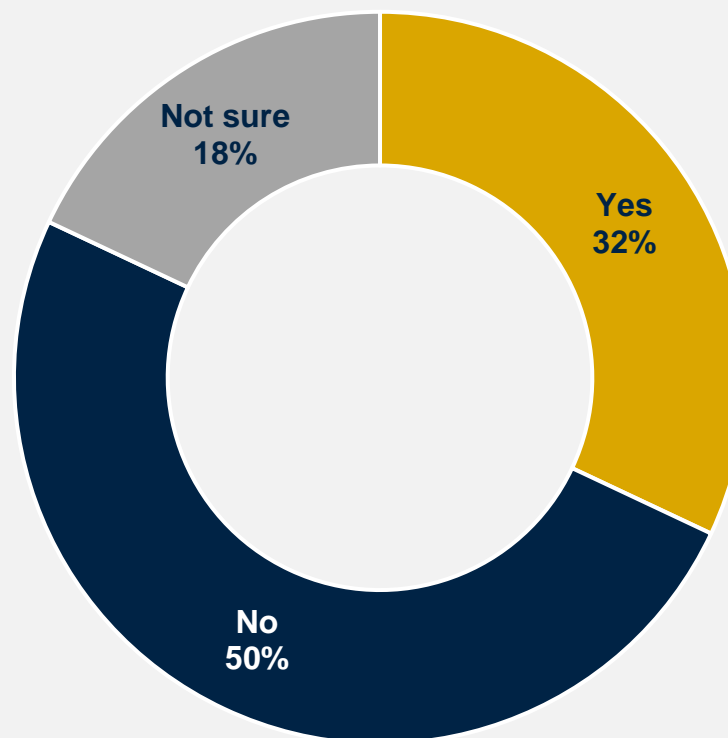
- Respondents from the **media** and **academia** were more likely to have used WBG's knowledge work (48% and 43%, respectively) compared to respondents from other stakeholder groups.

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

"Strengthening the capacity of local institutions, government agencies, and civil society organizations is essential for sustainable development. The WBG could invest in programs that provide technical assistance, training, and knowledge-sharing to enhance the skills and capabilities of local stakeholders. This would empower Nepal to better manage and implement development projects, rather than wasting the funds received in unnecessary things."

(Civil Society Respondent)

Have you used the WBG's advisory services and analytics in the past?

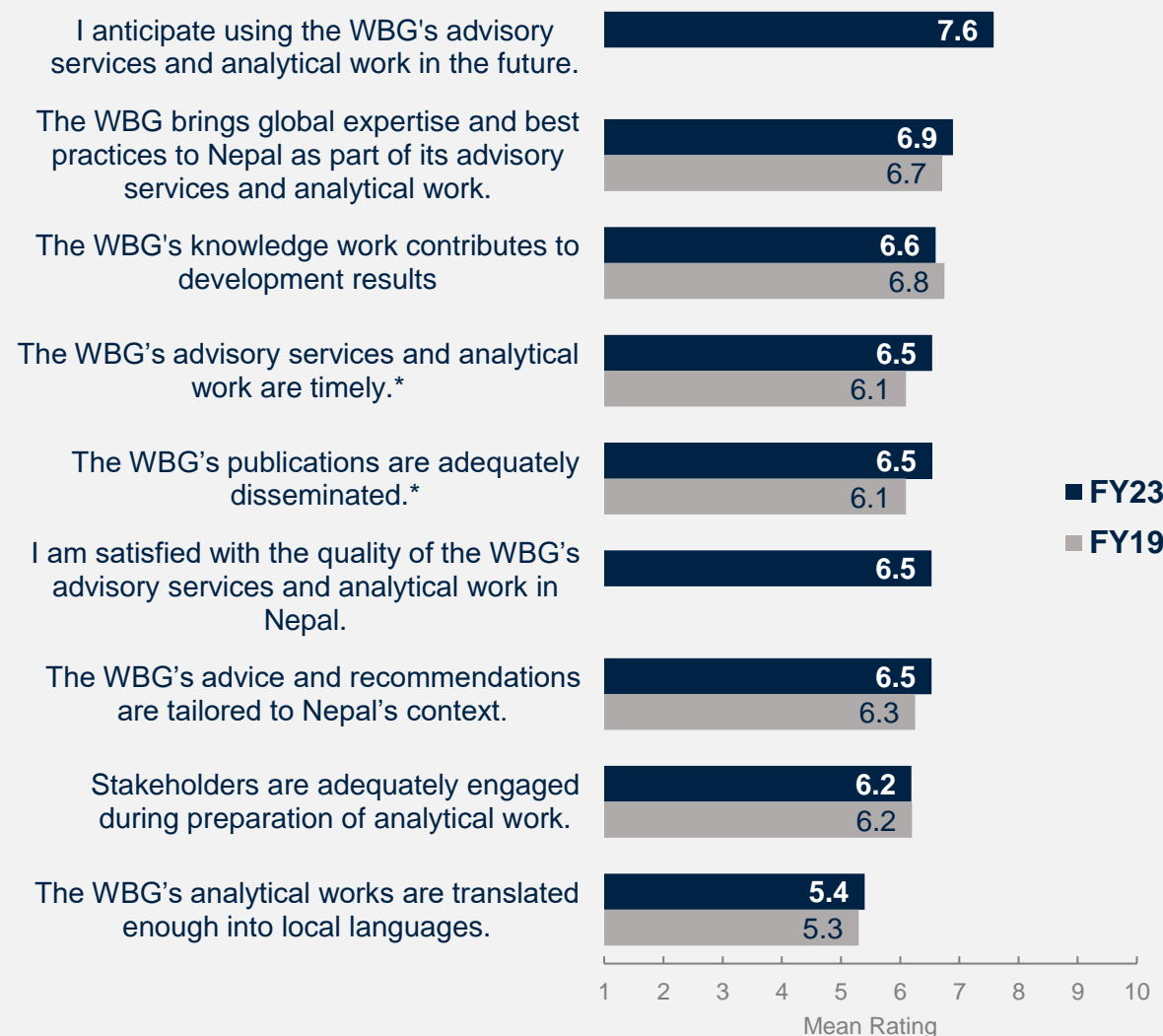


Stakeholders Anticipate Using WBG Knowledge Work

In terms of the WBG's knowledge work, respondents had the highest levels of agreement that they **anticipate using the WBG's advisory services** and analytical work in the future. Respondents who had used the WBG's knowledge work in the past had significantly higher levels of agreement for most of these aspects of the WBG's knowledge work compared to respondents who had not used it.

In addition, respondents had significantly higher levels of agreement that the WBG advisory services and analytical work **are timely** and that **publications are adequately disseminated** than respondents in FY19.

The ratings for the **WBG's analytical works being translated into local languages** remained the lowest through the years and across stakeholder groups.



To what extent do you agree/disagree with the following statements? Scale: 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 Nepal?
Scale: 1 Not significant at all – 10 Very significant

^Compared to "Are a source of relevant information on global good practices" and "Are adaptable to Nepal's specific development challenges and country circumstances", respectively, asked in FY19. *Significantly different between years

The Future Role of the World Bank Group in Nepal

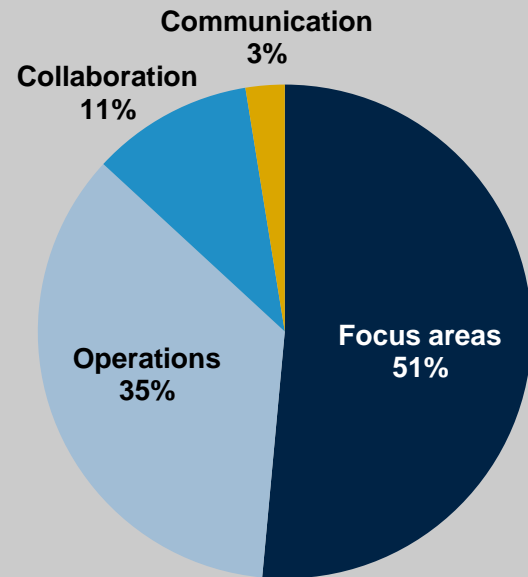


WORLD BANK GROUP

What the WBG could do to Increase its Effectiveness in Nepal

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

Categories of responses



Operations: Respondents across all stakeholder groups highlighted the need for the WBG to **incorporate more accountability and transparency** in how WBG funds are used to ensure that they lead to tangible development results. Respondents touched upon the need for a better understanding of the **local context** when preparing interventions, as well as greater engagement of stakeholder groups outside the government and at the local level.

"In my opinion, corruption is the main reason amongst all why Nepal is not developed. Therefore, the World Bank can prove to be a partner in the development of Nepal by conducting effective programs to control corruption."

(Local Government Respondent)

"Insist on "inclusion" of all residents in Nepal before providing funding. Introduce indicators on the inclusion of each of the (vulnerable) groups in Nepal and how development funding has reached all those groups, including a large number of undocumented people in Nepal (in particular women and children/youth are negatively impacted)."

(Bilateral/Multilateral Respondent)

"World Bank should recruit more national technical specialists to engage with Government, civil society, and society at large. Expats are good for advisory; however, they need national capacity-building efforts to localize the expertise and know-how."

(Private Sector Respondent)

"Adapting actions to the unique circumstances of Nepal would be a more suitable approach."

(Government Institution)



Communication and Outreach

“Reach out to as many primary and secondary stakeholders as possible. Make public dissemination and spread information through different means of media including social media handles.”

(Bilateral/ Multilateral Agency Respondent)

“WBG's presence seems concentrated in certain areas and a lot of people do not feel the impact or do not understand the impacts WBG is making in Nepal. While it is very important to focus on the developmental goals in various sectors, it is also important to share these impacts. So, communicating through various channels and letting people know about the group, its activities, and its impact will help increase its effectiveness.

(Private Sector Respondent)



WORLD BANK GROUP



In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Nepal? (N=274)

Newspapers were the Most Common Information Source

Respondents most relied on **newspapers, research papers/official statistics, and social media** to get information about economic and social development issues. However, there were some significant differences between stakeholder groups in their most utilized information sources.

Top 2 Information Sources

	All Respondents	Government Principals	Government Institution	Local Government	Bilateral / Multilateral Agency	Civil Society	Private Sector	Academia	Media	University Students
Newspapers (Print or online)*	63%	77%	64%	47%	68%	60%	63%	82%	74%	26%
Research papers / Official statistics*	61%	63%	66%	53%	66%	72%	43%	79%	57%	37%
Social media*	60%	53%	48%	72%	61%	69%	71%	50%	43%	74%
Television (TV)*	33%	63%	45%	53%	17%	18%	26%	21%	17%	47%
e-Newsletters	31%	20%	28%	40%	32%	34%	35%	25%	35%	26%
Radio*	8%	13%	11%	17%	1%	2%	8%	4%	9%	16%
Blogs*	6%	3%	3%	2%	1%	9%	11%	11%	0%	16%
Other	5%	7%	3%	0%	9%	3%	7%	7%	9%	11%
Podcasts*	5%	0%	3%	2%	5%	6%	10%	0%	0%	26%



How do you get most of your information about economic and social development issues in Nepal?

(Choose no more than 3) (Percentage of Respondents, N=461)

*Significantly different between stakeholder groups



WORLD BANK GROUP

WBG Website, Events, and Social Media were Most Preferred for Obtaining WBG Information

Respondents reported using a variety of sources to obtain information from the WBG, but most preferred the **WBG Website, events,** and **social media**. However, there were some significant differences between stakeholder groups in their most preferred sources.

**Preferred
WBG Source**

	All Respondents	Government Principals	Government Institution	Local Government	Bilateral / Multilateral Agency	Civil Society	Private Sector	Academia	Media	University Students
WBG Website*	52%	57%	65%	50%	46%	55%	38%	79%	43%	26%
Event/conference/seminar/workshop	49%	53%	62%	48%	45%	49%	46%	43%	39%	26%
Social media *	47%	40%	39%	35%	49%	55%	61%	29%	48%	63%
Media*	38%	47%	35%	63%	23%	32%	33%	39%	61%	58%
e-Newsletters	34%	43%	32%	27%	35%	35%	36%	50%	17%	37%
Direct contact with staff	34%	40%	35%	44%	35%	29%	26%	21%	43%	32%
Interviews and press conferences	12%	13%	6%	17%	13%	9%	17%	4%	26%	5%
Podcasts*	8%	0%	2%	0%	17%	9%	10%	7%	4%	26%
Blogs	5%	3%	1%	2%	4%	8%	11%	11%	0%	11%
Other	2%	0%	2%	2%	0%	3%	3%	0%	4%	0%



How would you prefer to obtain information about the World Bank Group and its work? (Choose no more than 3) (Percentage of Respondents, N=469)

*Significantly different between stakeholder groups

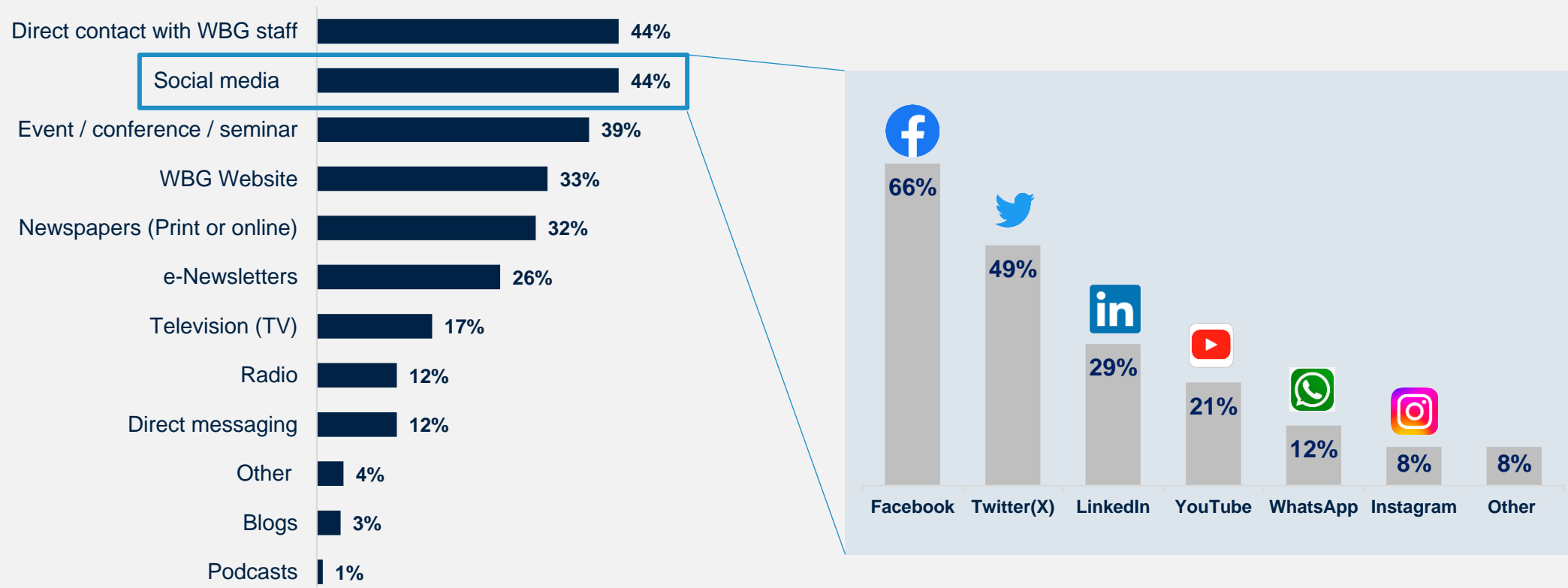


WORLD BANK GROUP

5 in 10 Engaged with the WBG in the Last 30 Days

51% of respondents recalled hearing or seeing something about the WBG in the last 30 days.

Respondents reported seeing that information most often via **direct contact with the WBG staff**, on **social media**, and **during WBG events**. Among those who selected “Social media”, respondents most commonly reported seeing something on **Facebook**, followed by **Twitter (X)**, and **LinkedIn**.



WBG Work on GRID was the Most Commonly Recalled Topics

Respondents most frequently recalled messages related to the WBG's **support to the Government's priority on GRID**, the WBG's work on **climate**, followed by **economic forecasts**.

- Respondents from academia, civil society, and local government were significantly more likely to recall WBG work on human capital (53%, 47%, and 40%, respectively) 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 Nepal?

"... WBG hasn't been very effective in reaching out to credible new media sources."

(Media Respondent)

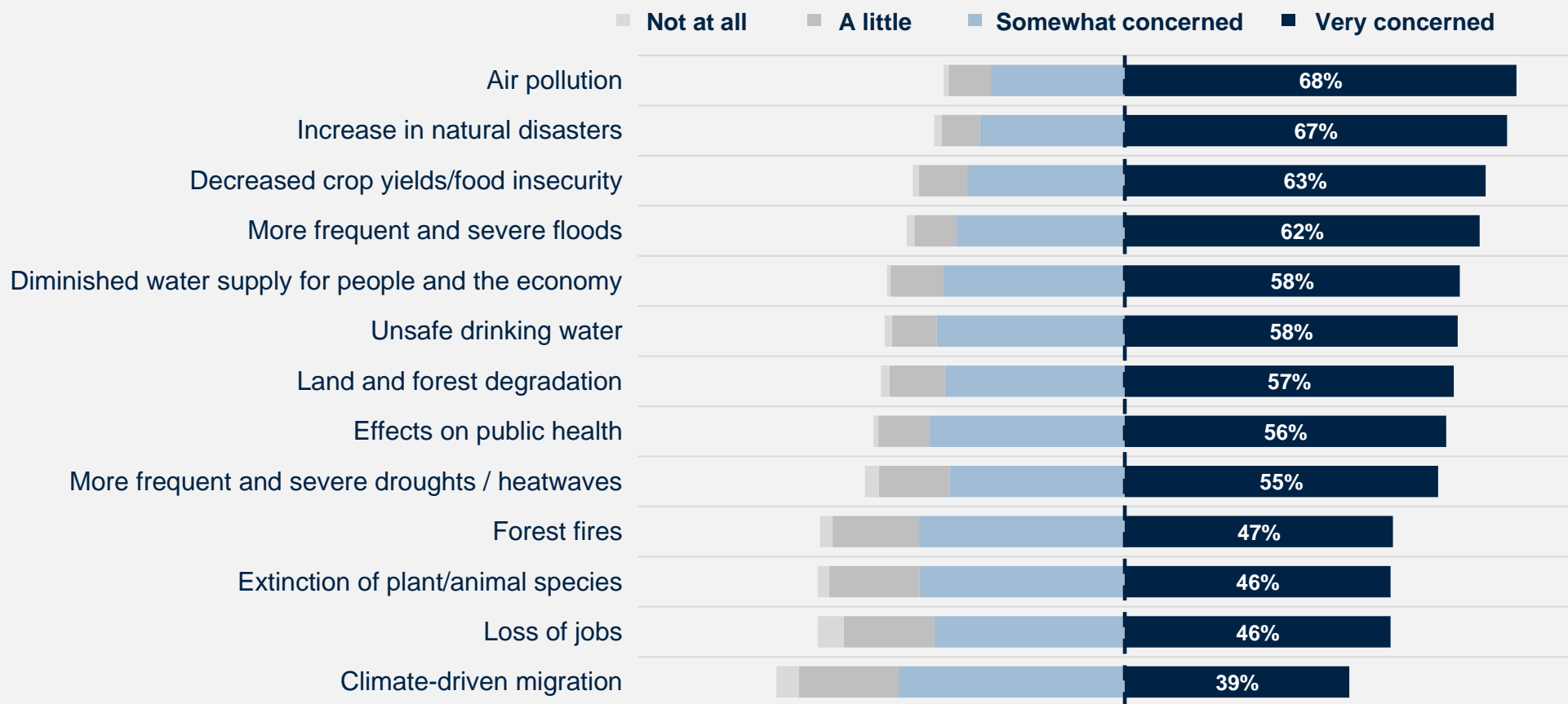
"WBG should be working directly to reach the community. Its activities are to be communicated through various platforms to reach the information regarding the activities undertaken by WBG."

(Private Sector Respondent)



Climate Change Communications can be More Impactful when Related to Stakeholders' Top Concerns: Air Pollution and Increase in Natural Disasters

Nearly 7 in 10 respondents were very concerned about **air pollution** and the **increase in natural disasters** when it comes to the potential impacts of climate change in Nepal. **Decreased crop yields/food insecurity** and **more frequent and severe floods** were also of great concern to respondents. These key areas of concern should be taken into consideration to make communications about climate change more impactful in Nepal.



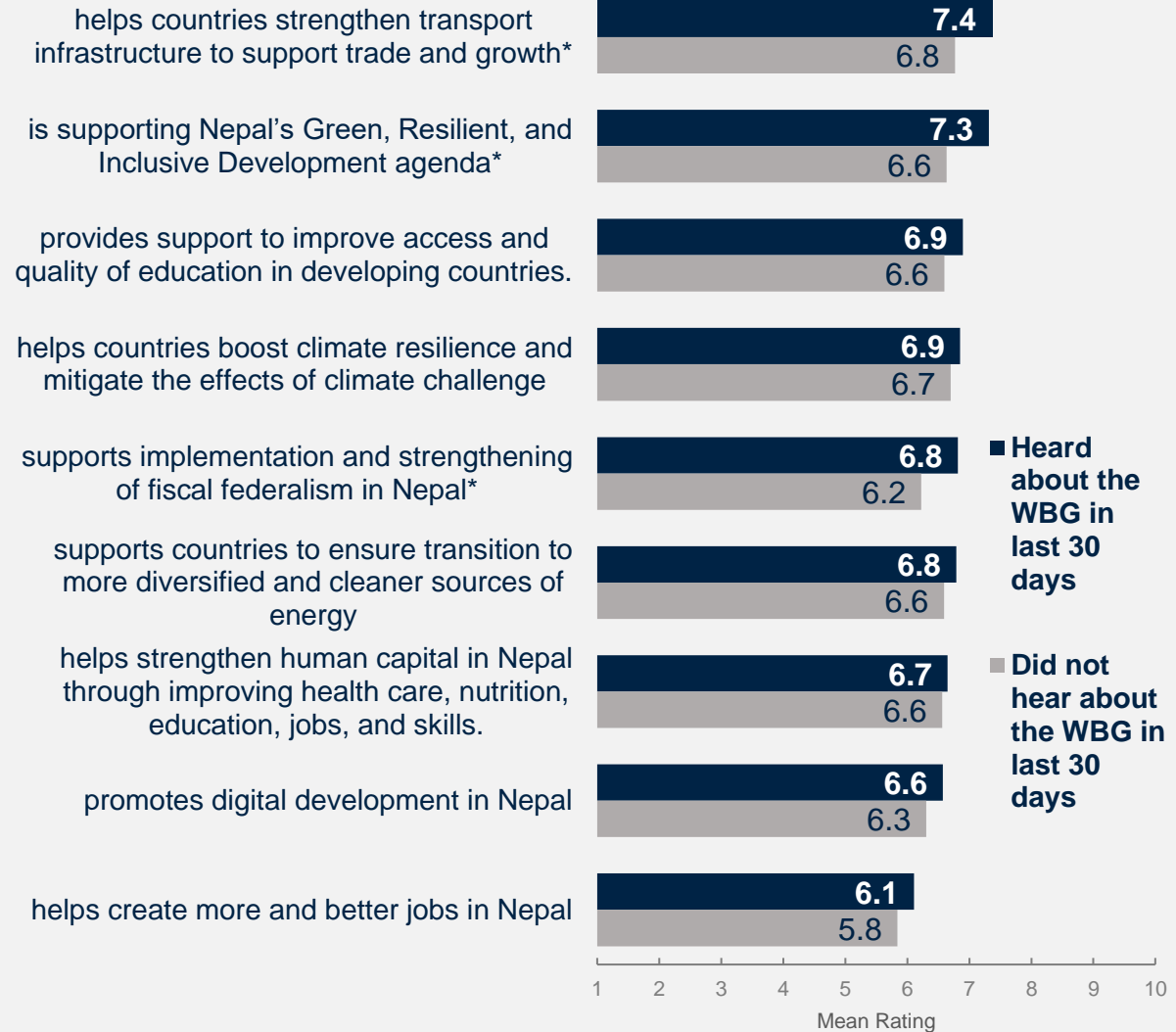
Message Recall Leads to Message Agreement and More Positive Perceptions of the WBG

Respondents who recalled seeing or hearing something about the WBG in the last 30 days **gave higher ratings on most of the key messages** regarding the WBG's work.

Respondents who recalled seeing or hearing something about the WBG recently also reported significantly **higher levels of familiarity** (mean=6.6) and gave significantly higher ratings for the WBG's **effectiveness** (mean=6.7) and **relevance** (mean=7.0) compared to those who reported not hearing or seeing anything about the WBG (means=5.3, 6.0, and 6.4, 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.

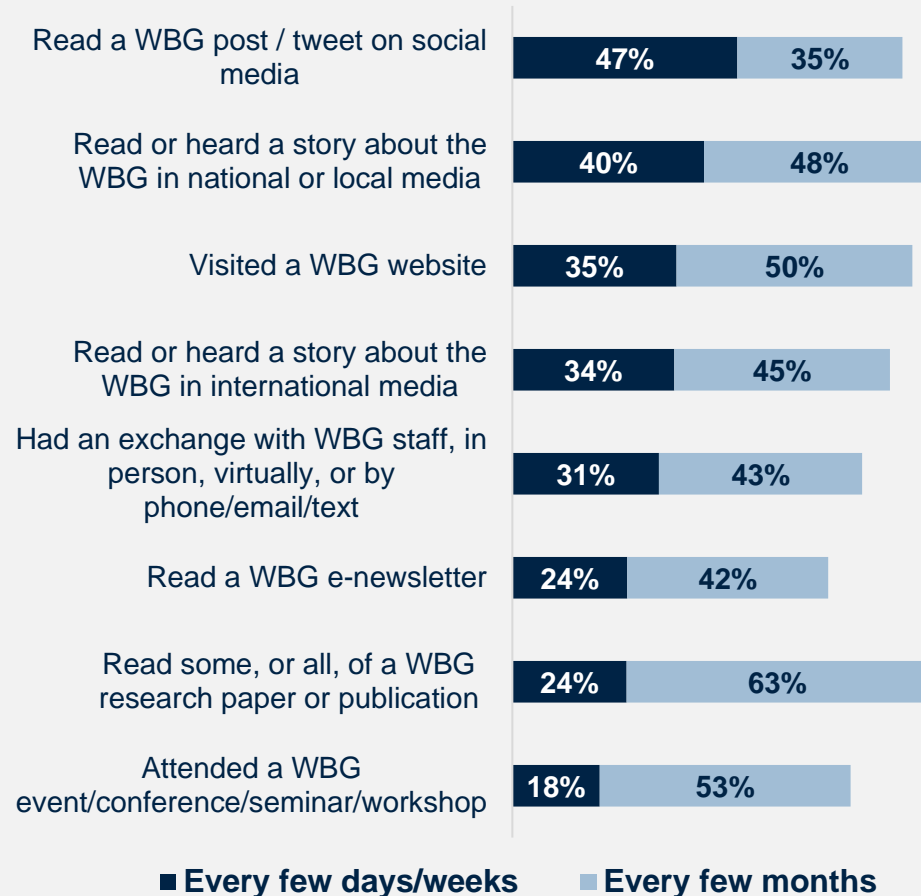
The World Bank Group...



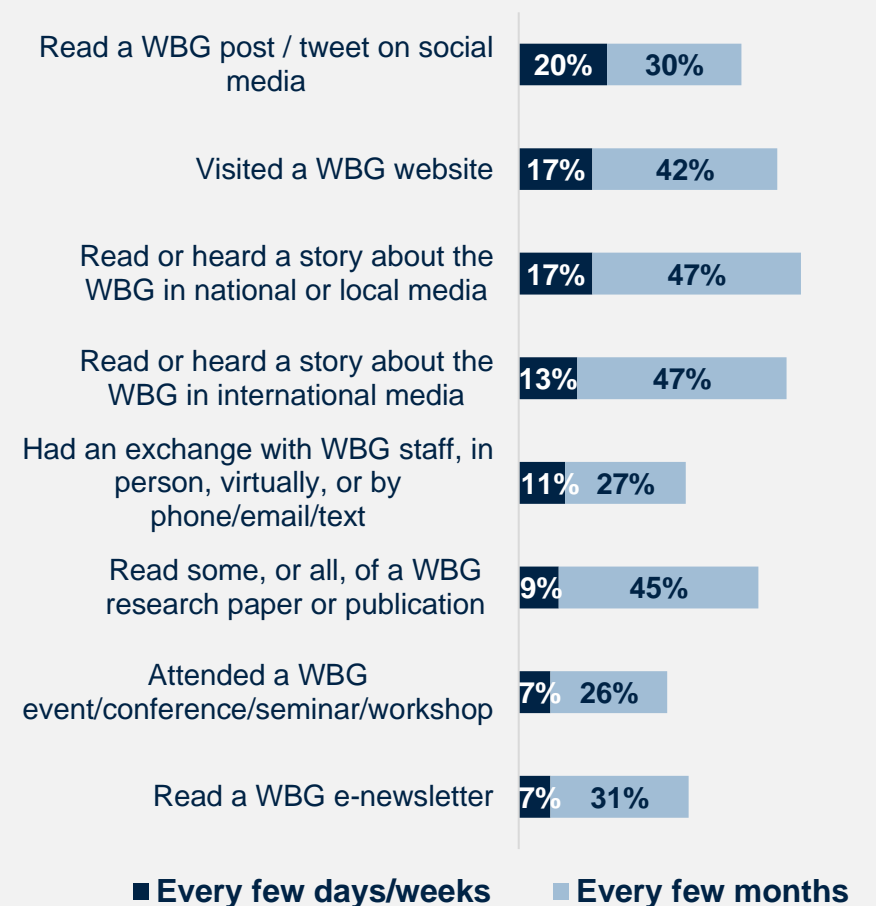
More Frequent Engagement → More Message Recall

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

Yes – Recalled seeing/hearing something about the WBG in last 30 days



No – Did not recall seeing/hearing something about the WBG in last 30 days

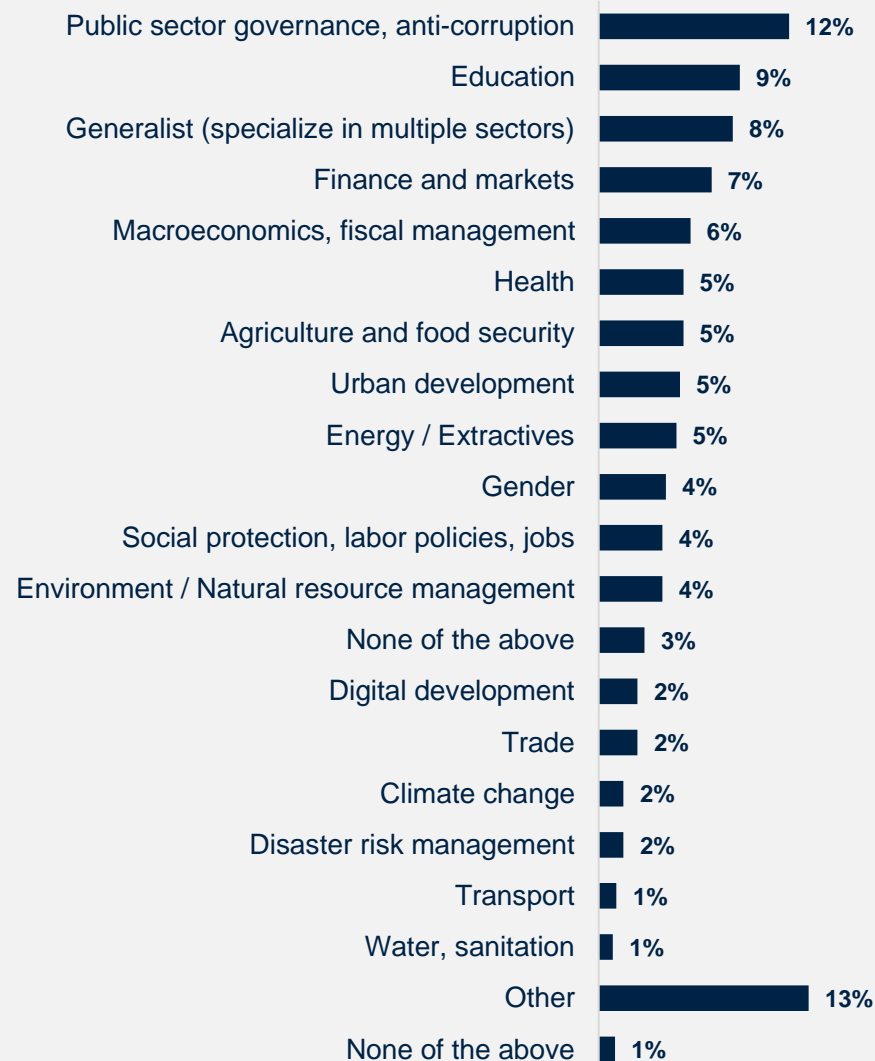


Demographics of the Sample and Detailed Methodology

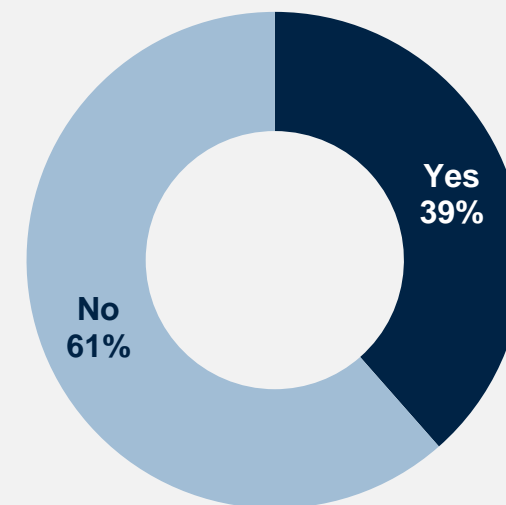


Demographics of the Sample

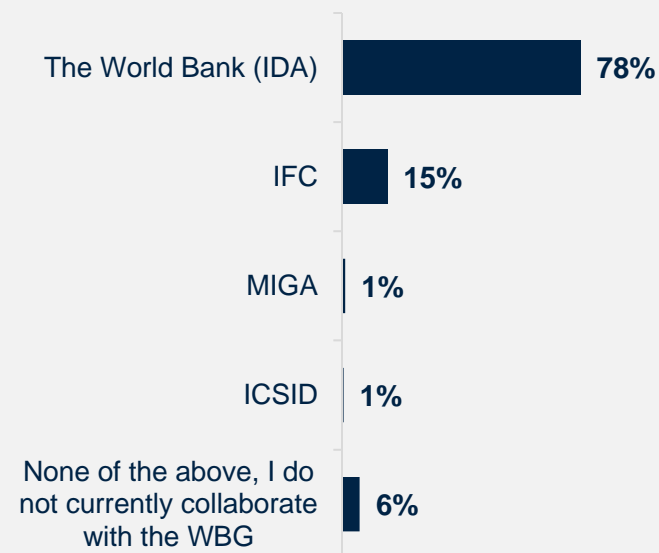
Which of the following best describes your current affiliation? (N=458)



Currently, do you professionally collaborate/ work with the WBG in your country? (N=496)

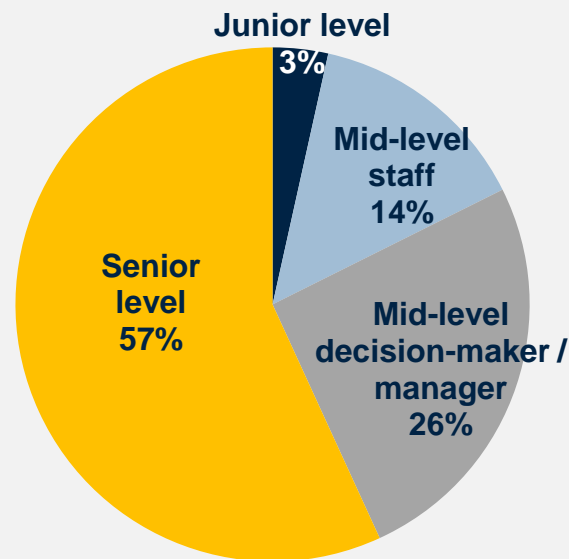


Which of the following agencies of the WBG do you primarily collaborate/work with in Nepal? (N=189)

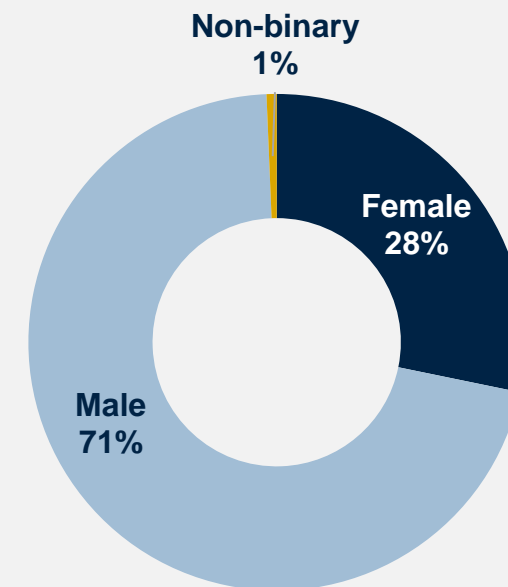


Demographics of the Sample

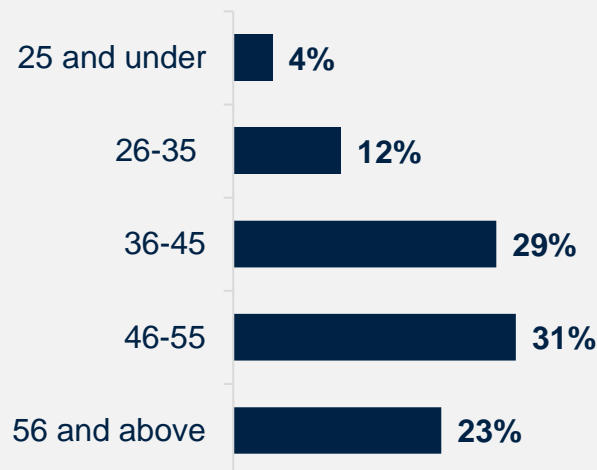
Within your organization, would you describe yourself as... ?
(N=431)



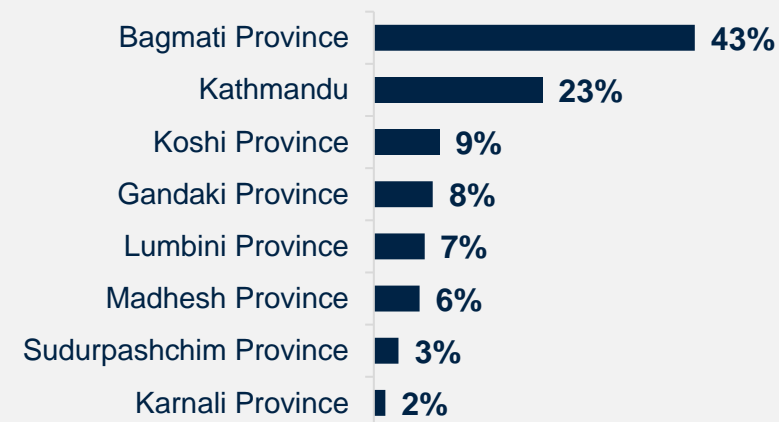
What's your gender?
(N=457)



What's your age?
(N=459)



Which best represents your geographic location?
(N=456)



Detailed Methodology

From **June 2023** to **August 2023**, a total of 1,106 stakeholders of the WBG in Nepal were invited to provide their opinions about the WBG’s work in the country by participating in a Country Opinion Survey (COS). A list of potential participants was compiled by the WBG country team and the fielding agency. Participants were drawn from the Office of the President, Prime Minister, Minister, and Parliament, Government Institutions, Local Governments, Bilateral/ Multilateral Agencies, Private Sector, Civil Society, Academia, University Students and the Media.

Of these stakeholders, **497 participated in the survey (45% response rate)**. Respondents completed the questionnaires online or through computer-assisted interviews.

The results of this year’s survey were compared to the FY19 Survey with a response rate of 65% (N=421).

Comparing responses across Country Surveys reflects changes in attitudes over time, but also changes in respondent samples, changes in methodology, and changes to the survey instrument itself. Only questions with similar response scales/options were analyzed to reduce the latter factor's influence. This year’s survey saw an increased outreach to and/or response from bilateral/multilateral agencies, but a decrease from local governments and civil society. Additionally, a new group of university students was invited to participate in the survey. These differences in stakeholder composition between the two years should be taken into consideration when interpreting the results of the past-year comparison analyses.

Key statistically significant findings (tested at the research standard of $p < .05$) are noted throughout the report.

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

Percentage of Respondents	FY 2019	FY 2023
Government Principals: Office of the President, Prime Minister, Minister, Parliamentarian	15%	7%
Government Institutions: Employee of a Ministry, Department, Project Implementation Unit, Independent Government Institution, Judiciary, State-Owned Enterprise	15%	20%
Local Government	20%	10%
Bilateral/Multilateral Agency: Embassy, Development Organization, Development Bank, UN Agency	5%	17%
Civil Society Organization: NGOs, Community-Based Organization, Private Foundation, Professional /Trade Association, Faith-Based Group, Youth Group	21%	14%
Private Sector: Private Company, Financial Sector Organization, Private Bank	12%	17%
Academia/Research Institute/Think Tank, University Students	7%	10%
Media	2%	5%
University Students	-	4%
Other	3%	1%
Total Number of Respondents	404	495

Indicator Questions

Every country that engages in the Country Opinion Survey (COS) must include specific indicator questions, several of which are aggregated for the World Bank Group's annual Corporate Scorecard is highlighted in **red** below.

A2_5. To what extent do you trust the World Bank Group to do what is right? Scale: 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 Nepal? Scale: 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 Nepal? Scale: 1 Strongly disagree – 10 Strongly agree

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

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

A7. To what extent does the World Bank Group influence the development agenda in Nepal? Scale: 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 Not significant at all – 10 Very significant

To what extent is the World Bank Group an effective development partner in Nepal, in terms of each of the following?

Scale: 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 Nepal, in terms of collaborating with the following groups:

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

C7_1. Collaboration with the national government

C7_6. Collaboration with the private sector

C7_7. Collaboration with civil society

C7_8. Collaboration with other donor and development partners

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

C8_1. The WBG's financial instruments meet the needs of Nepal (i.e., investment lending, Development Policy Loan, Trust Funds, Program-for-Results).

C10_1. I am satisfied with the quality of the WBG's advisory services and analytical work in Nepal.

C10_4. The WBG's advice and recommendations are tailored to Nepal's context.





Country Opinion Surveys

Thank you

*For more information about this report
or the Country Opinion Survey program,
please contact:*

Svetlana Markova

smarkova@worldbankgroup.org

