



CountryOpinionSurveys

FY 2023 South Africa Country Opinion Survey Report

Acknowledgements

The South Africa Country Opinion Survey is part of the Country Opinion Survey Program series of the World Bank Group. This report was prepared by the Business Intelligence (BI) team, led by José De Buerba (Senior External Affairs Officer) and Svetlana Markova (Senior External Affairs Officer). Yulia Danilina, Jessica Cameron, Nan Lin, and Sofya Gubaydullina oversaw design, reporting, and analysis of the survey results. Noreen Wambui and Irina Popova provided data support.

BI acknowledges the significant contribution from the South Africa country team and independent fielding agency, Ipsos Africa Center for Development Research and Evaluation. In particular, BI is grateful for the support from Lavinia Thoriso Engelbrecht (Senior External Affairs Officer), Ruth Connick (Operations Officer), and Maria Mboono Nghidinwa (External Affairs Officer) who coordinated the survey-related activities from Pretoria, South Africa.



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Objectives

This survey was designed to assist the World Bank Group (WBG) in gaining a better understanding of how stakeholders in South Africa 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 South Africa'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 South Africa? 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 July 2023 thru October 2023

- 1,313 potential participants were asked to complete a mostly quantitative survey
- Respondents completed the questionnaire online or in person
- List of names provided by the WBG country team and supplemented by the fielding agency
- Process managed on the ground by the fielding agency

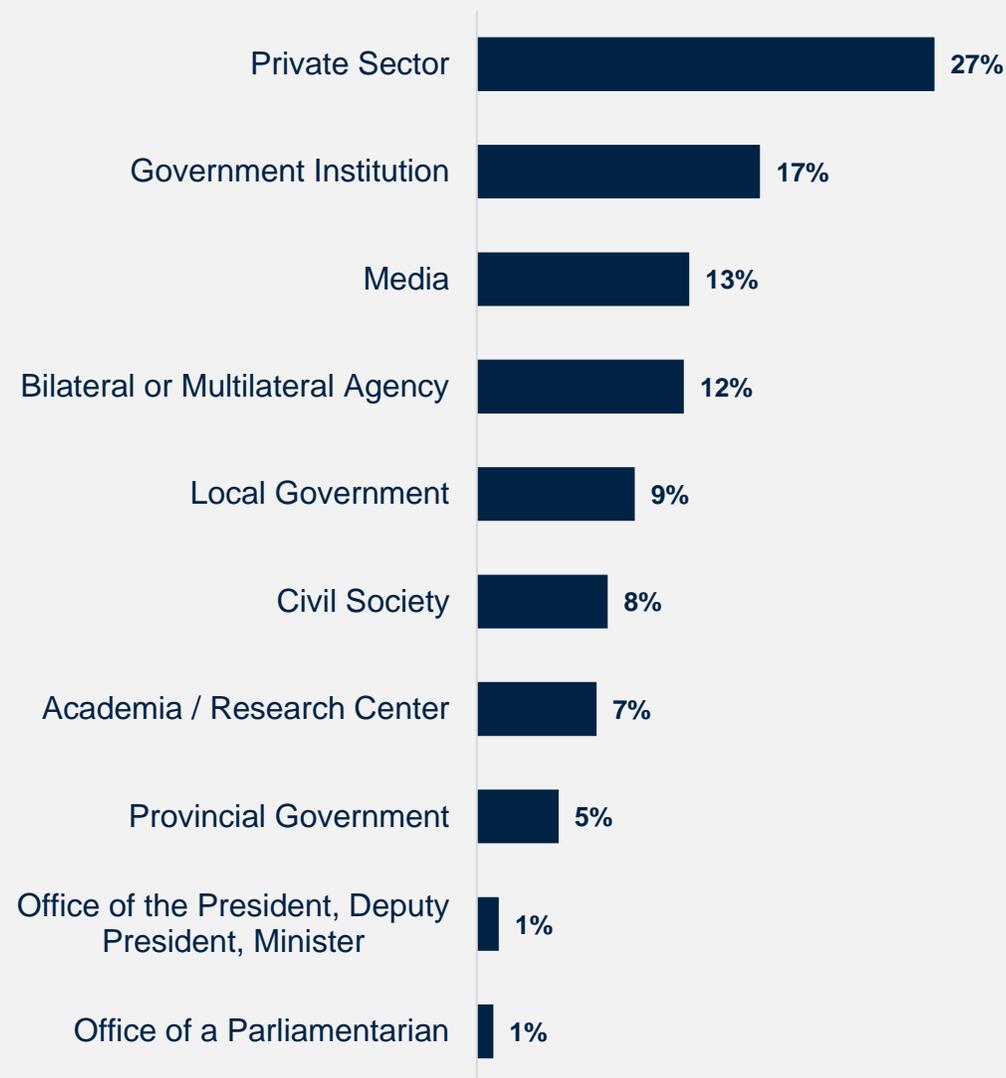
■ 310 participants (24% response rate)

- 61% from KwaZulu-Natal, 25% from Gauteng
- 34% currently collaborate with the WBG

■ Compared to FY19 Country Survey

- 96 participants (20% response rate)
- Respondents completed the questionnaire online
- 58% collaborated with the WBG

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



Which of the following best describes your current affiliation?
(Select only 1 response) (Percentage of Respondents, N=310)

Overall Context

“Support for the creation of job opportunities, especially for youth. Strengthening the leadership competencies in the national and local governments. Minimization of the inequality in South Africa.”
(Provincial Government Respondent)

“Support Departments addressing poverty reduction, broadening social protection measures, digital technology, and government measures to be responsive to shocks as a result of climate change. The main contribution would also be to assist [the] government in [the] creation of jobs in order to employ the majority of the youth.”
(Government Institution Respondent)



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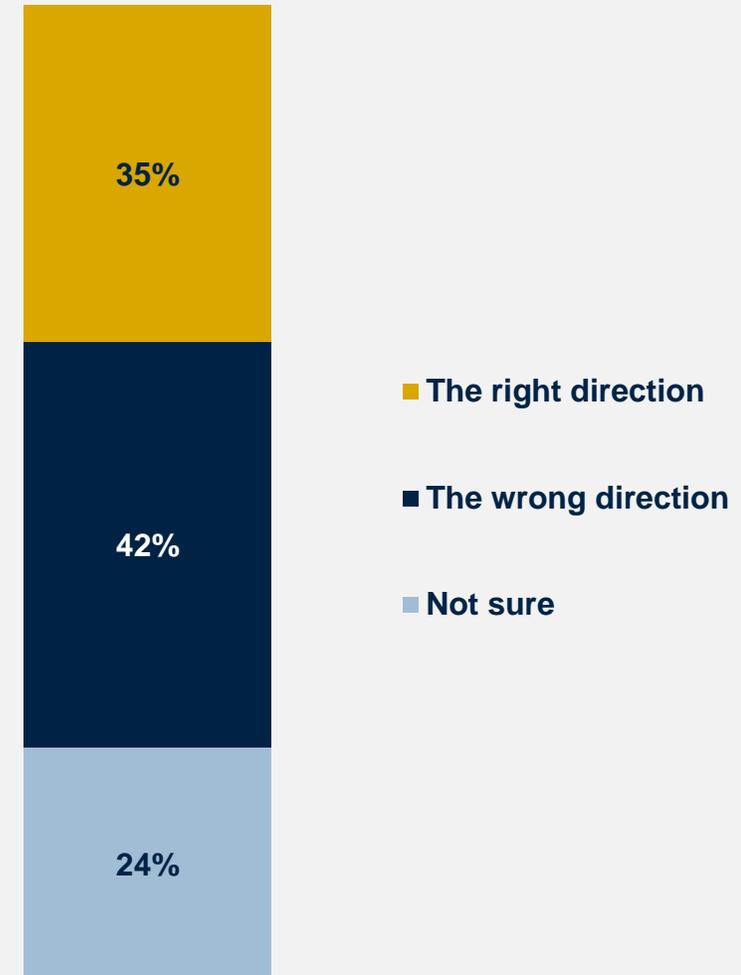


In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in South Africa? (N=249)

Respondents in South Africa are Concerned about the Country's Direction

A plurality of respondents felt that South Africa was headed in the wrong direction. Just over a third felt that the country was headed in the right direction.

- In contrast, a majority of respondents in the FY19 Country Survey were “somewhat optimistic” (59%) or “very optimistic” (14%) about the future of South Africa, and just under a quarter of respondents were “somewhat pessimistic” (19%) or “very pessimistic” (3%) about the future.



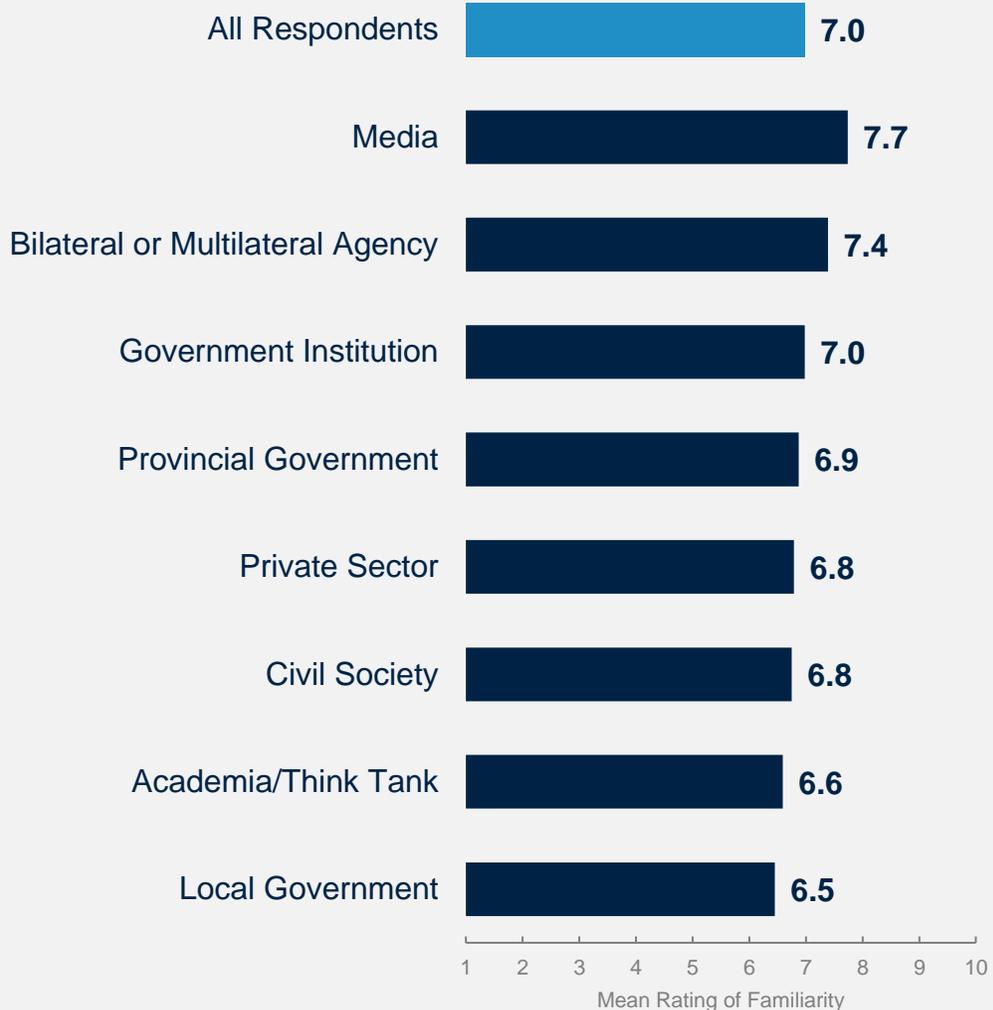
Consistent Familiarity with the World Bank

- **Year comparison:** Respondents in this year’s Country Survey reported the same level of familiarity with the World Bank as respondents in the FY19 Survey:

Mean familiarity: **FY23 = 7.0**
 FY19 = 7.0

- **Collaboration with the WBG:** Respondents who indicated that they collaborate with the WBG reported significantly higher levels of familiarity with the institution’s work:

Mean familiarity: **Collaborate with WBG = 7.7**
 Do not collaborate = 6.6

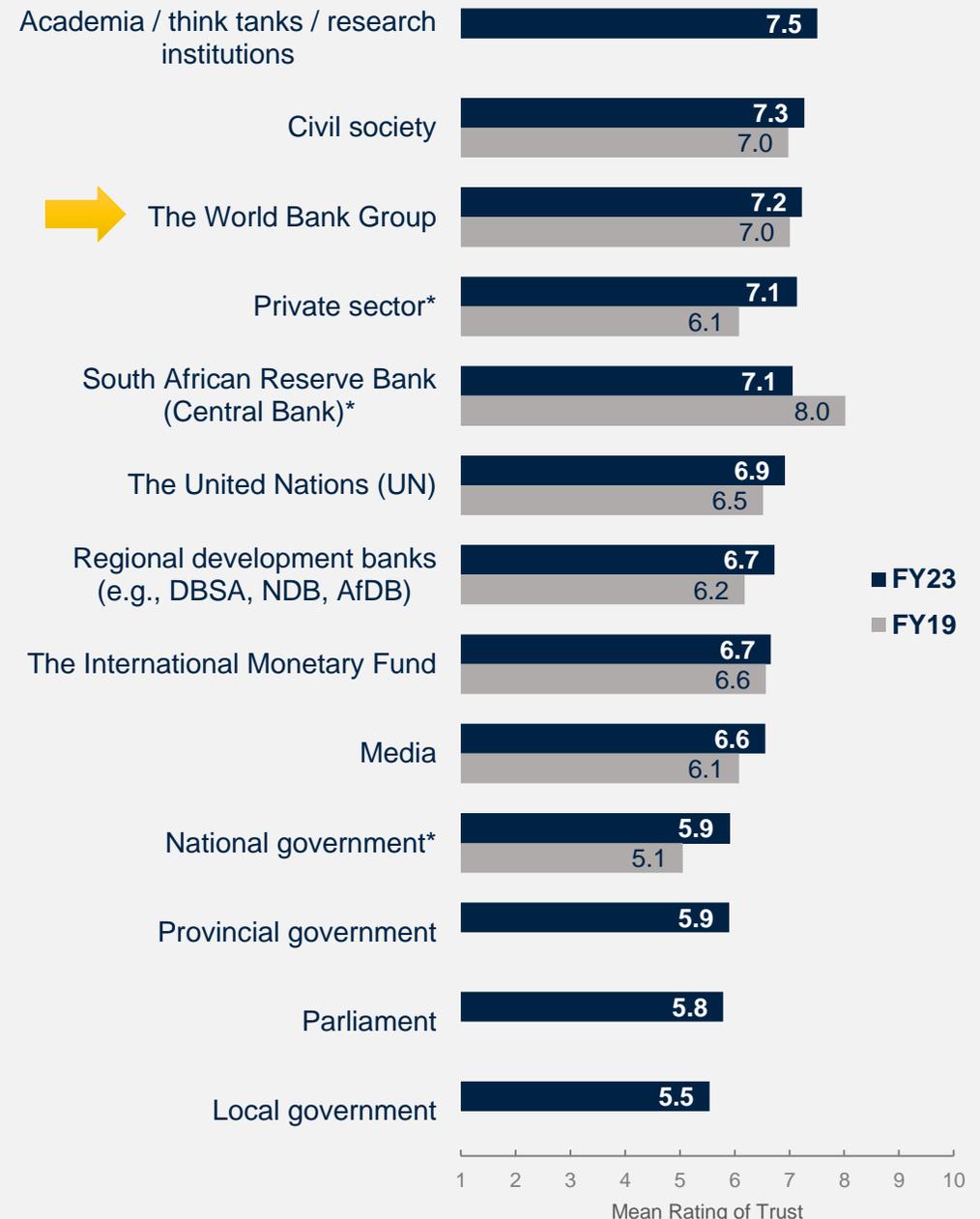


The WBG is the 3rd Most Trusted Institution in South Africa

Respondents in South Africa gave the **highest ratings of trust for academia, civil society, the World Bank Group, the private sector, and the South African Reserve Bank.**

At the same time, **government institutions in South Africa were the least trusted** among the institutions studied, including the national government, provincial government, Parliament, and local government.

- Of note, ratings of trust were significantly higher in FY23 than in the FY19 survey for the private sector and national government. In contrast, although still among the top 5 most trusted institutions, the South African Reserve Bank received significantly lower ratings of trust in this year's survey compared to FY19.



Overall Attitudes toward the World Bank Group

“The work done by the World Bank is commended; however, the following areas need to be strengthened: 1) Capacity building and development, 2) Climate change and energy efficiency funding, 3) Provision of support for the Smart City initiatives in municipalities, 4) Support for sourcing funding from similar partners or institutions, and 5) Infrastructure refurbishment and planning for sustainability.”

(Local Government Respondent)

“By working closely with the South African government, the World Bank Group can align its strategies and programs with national development priorities. This will ensure that resources are directed towards areas of greatest need and have a meaningful impact on poverty reduction. Additionally, close collaboration will enable better coordination between different development partners, avoiding duplication of efforts and maximizing efficiency.”

(Academia Respondent)



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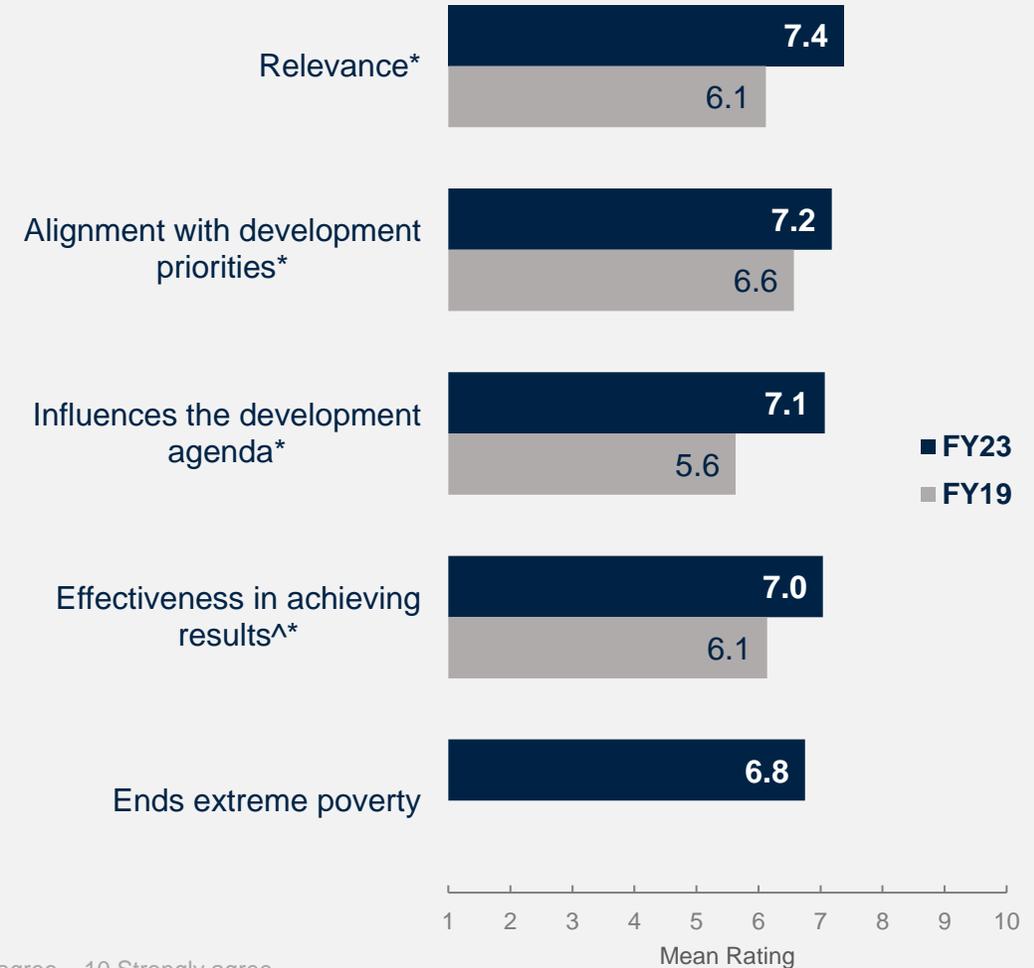


In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in South Africa? (N=249)

Improvement across Key Performance Indicators

In FY23, respondents perceived the WBG as significantly more **relevant** to development in South Africa, more **aligned** with their development priorities for the country, having more **influence** on the development agenda, and being more **effective** at achieving development results in South Africa.

- Of note, respondents from bilateral/multilateral agencies and the media gave the highest ratings for the WBG's work helping to end extreme poverty in South Africa while those from provincial government and civil society gave significantly lower ratings.



The WBG currently plays a relevant role in development in South Africa. Scale: 1 Strongly disagree – 10 Strongly agree
 To what extent does the WBG influence the development agenda in South Africa? Scale: 1 To no degree at all – 10 To a very significant degree
 How effective has the WBG been in achieving development results in South Africa? Scale: 1 Not effective at all – 10 Very effective
 The WBG's work is aligned with what I consider the development priorities for South Africa. Scale: 1 Strongly disagree – 10 Strongly agree
 The WBG's work helps end extreme poverty in South Africa. 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 South Africa. Scale: 1 Not effective at all – 10 Very effective; To what extent does the WBG's work help to achieve development results in South Africa? Scale: 1 To no degree at all – 10 To a very significant degree"

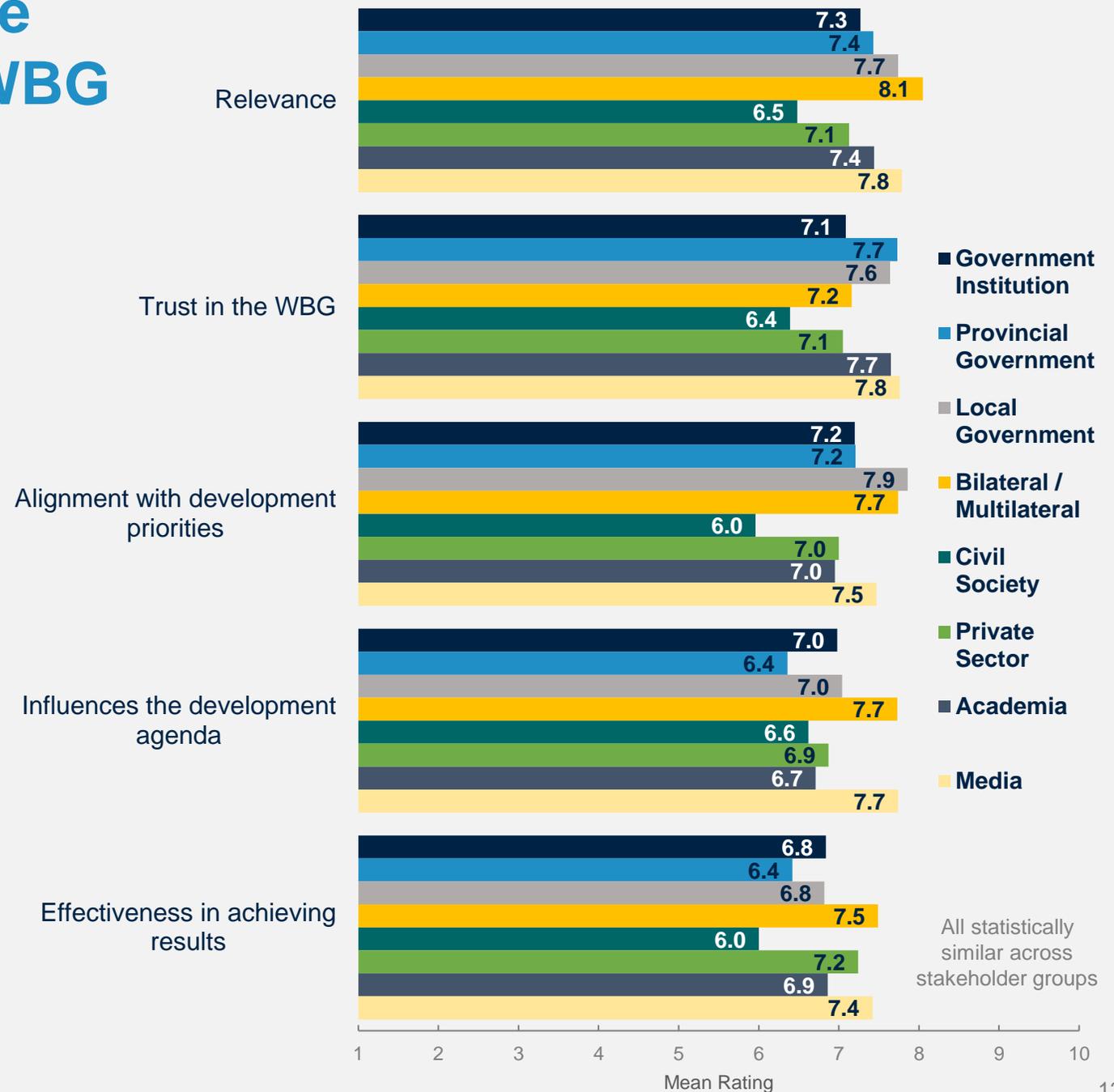
*Significantly different between years

Consistently Positive Perceptions of the WBG Across Stakeholder Groups

Comparisons of ratings for key performance indicators between stakeholder groups suggest that respondents from civil society have less trust in the WBG and less positive perceptions of the WBG's relevance, alignment, and effectiveness compared to respondents from other stakeholder groups; however, this difference did not reach statistical significance.



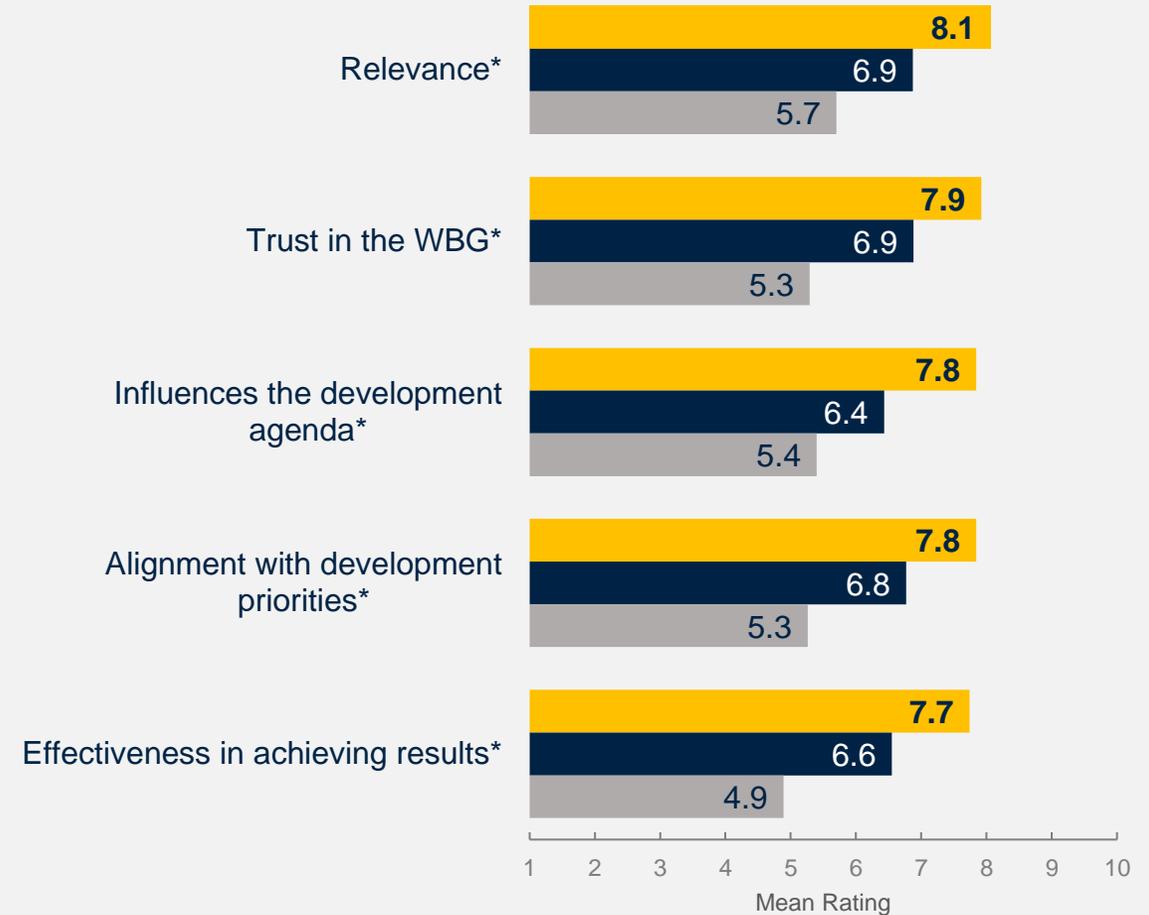
The WBG currently plays a relevant role in development in South Africa. Scale: 1 Strongly disagree – 10 Strongly agree
 To what extent do you trust the WBG to do what is right? Scale: 1 To no degree at all – 10 To a very significant degree
 To what extent does the WBG influence the development agenda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



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), 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 South Africa?

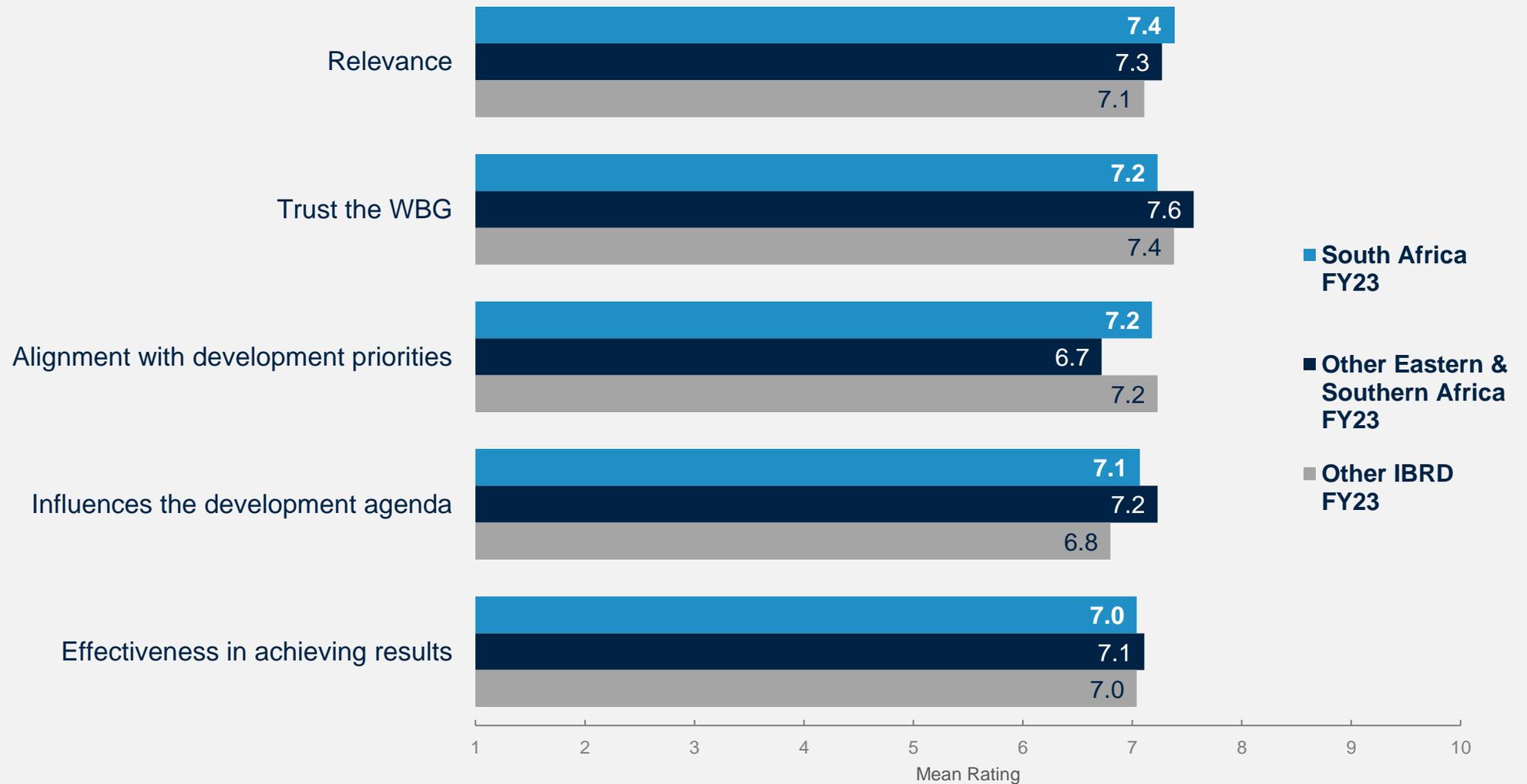
■ High Familiarity (8-10) ■ Some Familiarity (5-7) ■ Low Familiarity (1-4)



The WBG currently plays a relevant role in development in South Africa. 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 South Africa? Scale: 1 To no degree at all – 10 To a very significant degree
 How effective has the WBG been in achieving development results in South Africa? Scale: 1 Not effective at all – 10 Very effective
 The WBG's work is aligned with what I consider the development priorities for South Africa. Scale: 1 Strongly disagree – 10 Strongly agree

*Significantly different between levels of familiarity

South Africa On Par with other FY23 Eastern and Southern Africa and IBRD Countries on Key Performance Indicators

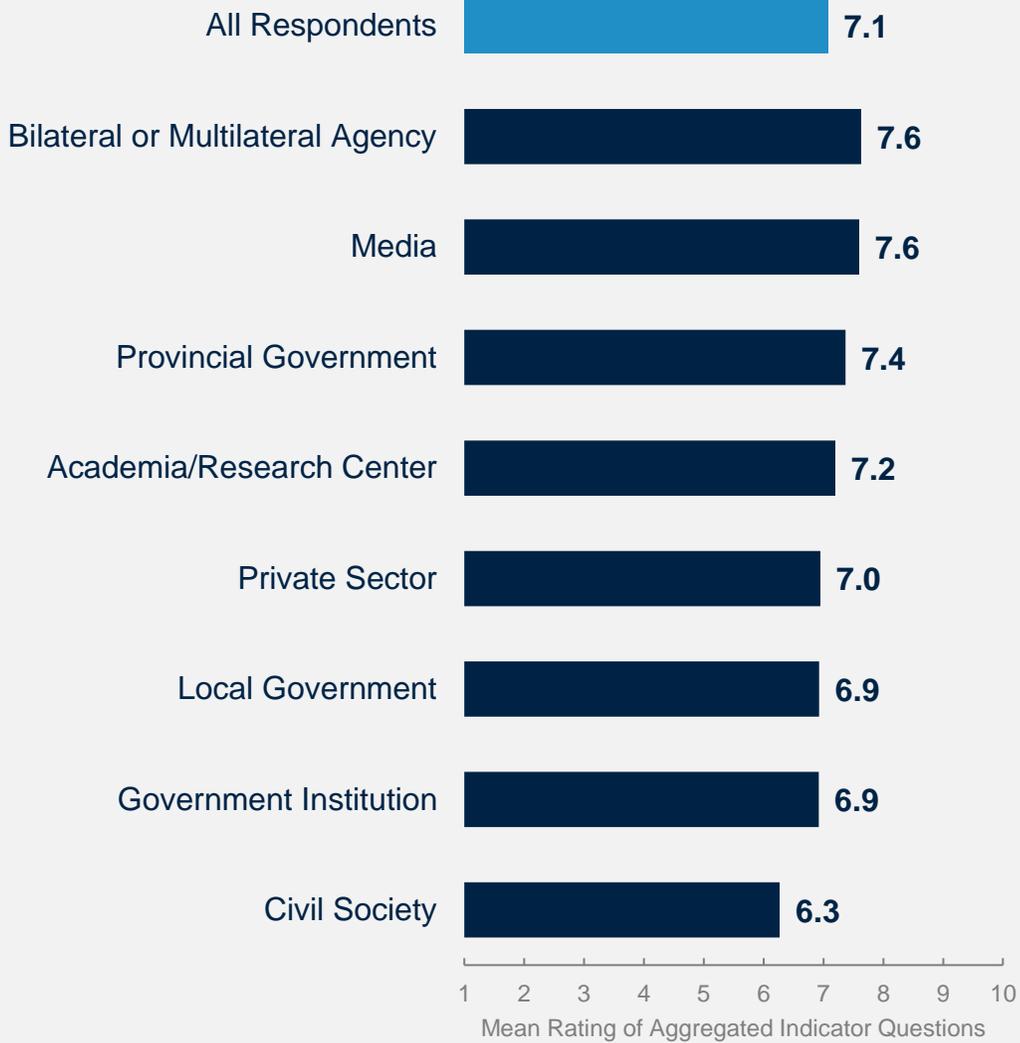


Stakeholder Trends across Performance Indicators

Respondents from bilateral/multilateral agencies and media had the highest mean rating across the aggregated responses to the seventeen COS indicator questions whereas respondents from civil society had the lowest ratings; however, this difference did not reach statistical significance.

- **Collaboration with the WBG:** Respondents who indicated that they 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 = 7.6**
 Do not collaborate = 6.8



World Bank's Support in Development Areas

“The World Bank needs to allocate its resources strategically to support projects and initiatives that address South Africa's most pressing development needs, such as infrastructure development, education, healthcare, and job creation.”

(Civil Society Respondent)

“They can develop an inclusive South Africa by tackling the root causes of poverty, inequality, and unemployment through coordinated reforms that could help South Africa make further progress towards its 2030 vision in the National Development plan.”

(Private Sector Respondent)



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In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in South Africa? (N=249)

Development Areas for WBG Focus

Job creation was by far the top area in FY23 where stakeholders would like the WBG to focus its resources, followed by **health**, **public sector governance**, **education**, and **energy**.

- Although job creation, education, and public sector governance were among the top priorities for the WBG identified in the FY19 survey, respondents in this year's survey considered health and energy of much greater priority, both being identified by three times as many respondents.

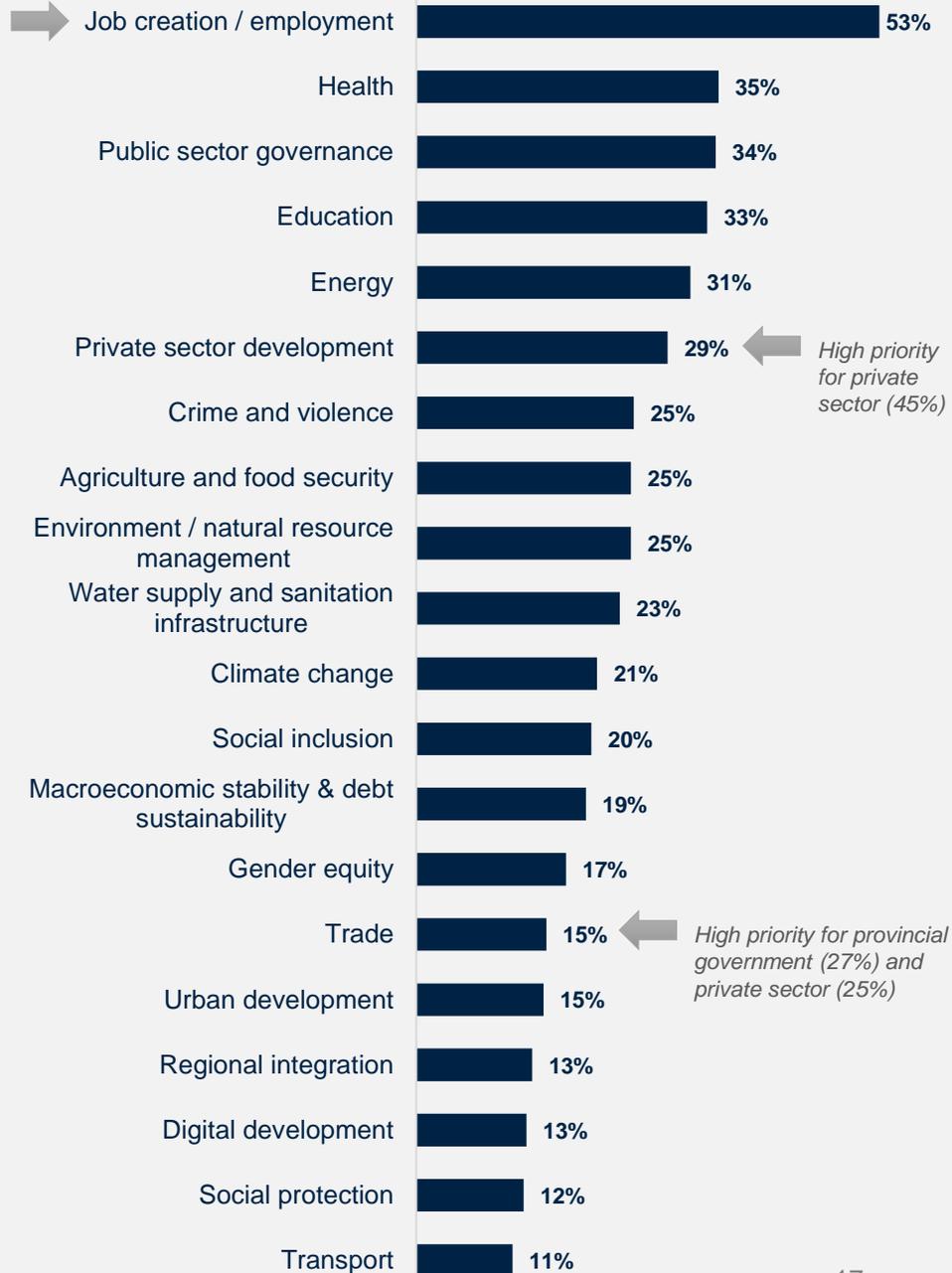
In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in South Africa?

"Strengthen World Bank work with the private sector to support competition, access to markets, and development of the SMME sector. Support regional integration through development and funding support of large infrastructure projects in road, water, and rail." (Government Principal Respondent)

"Providing and equipping South African youth with the necessary skills and employment to effectively participate in the economy. ... Youth make up the majority of the population. If we can invest in the youth and decrease the unemployment levels in this country, then we can achieve all other set economic objectives and goals." (Academia Respondent)

"Stop load shedding, strengthening the ecosystem for micro, small, and medium enterprises, creating growth and increased opportunities for jobs." (Media Respondent)

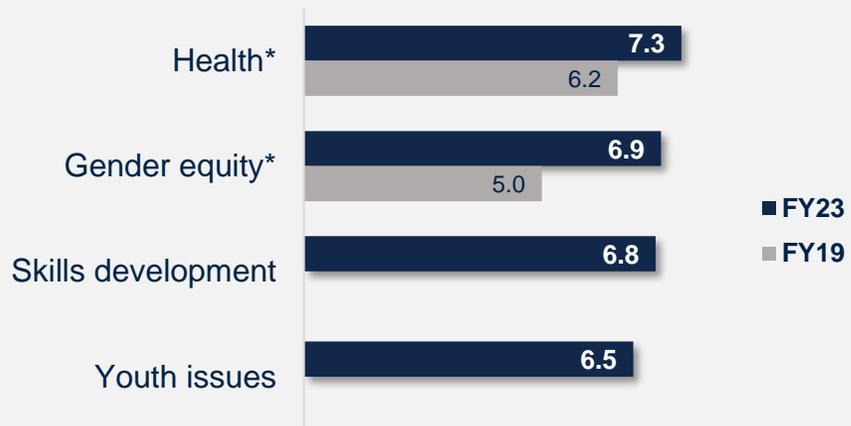
High priority for government institutions (71%)



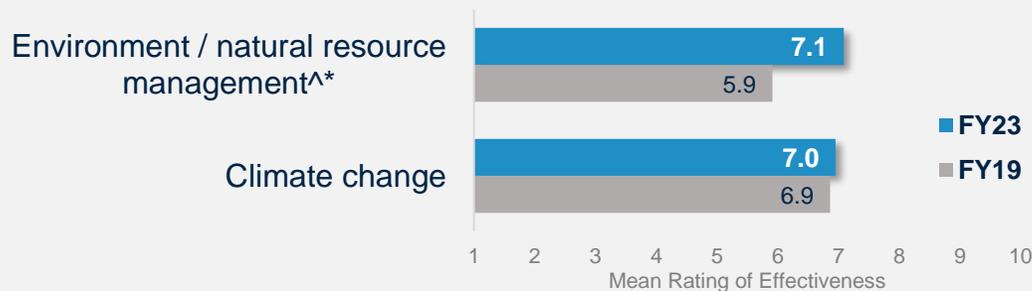
Effectiveness of WBG's Support in Sectoral Areas

The WBG's work in health received the highest ratings of effectiveness and was significantly improved compared to FY19. In addition, ratings for the WBG's effectiveness in gender equity, environment/natural resource management, job creation, urban development, and digital development significantly improved.

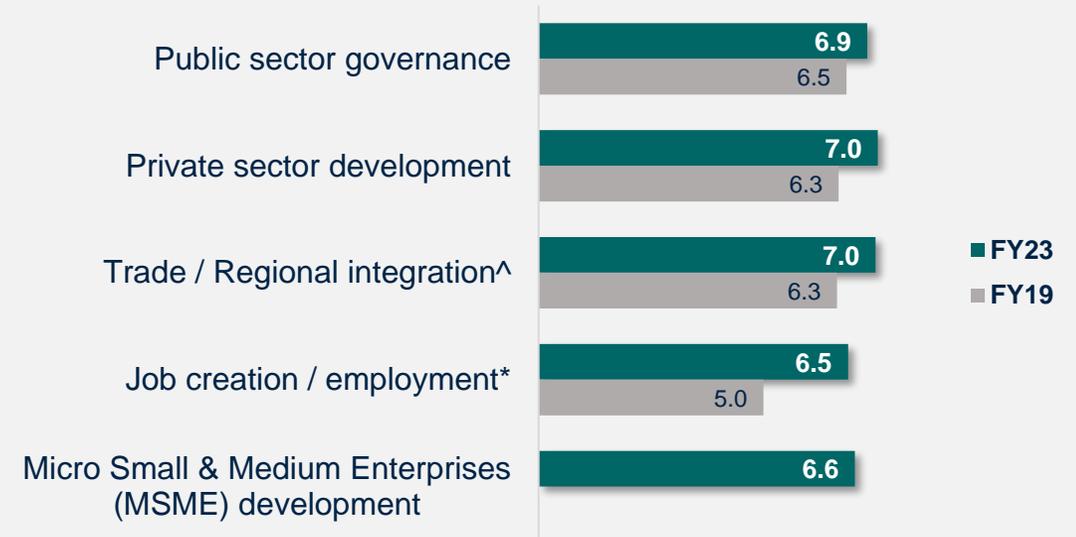
Human Development



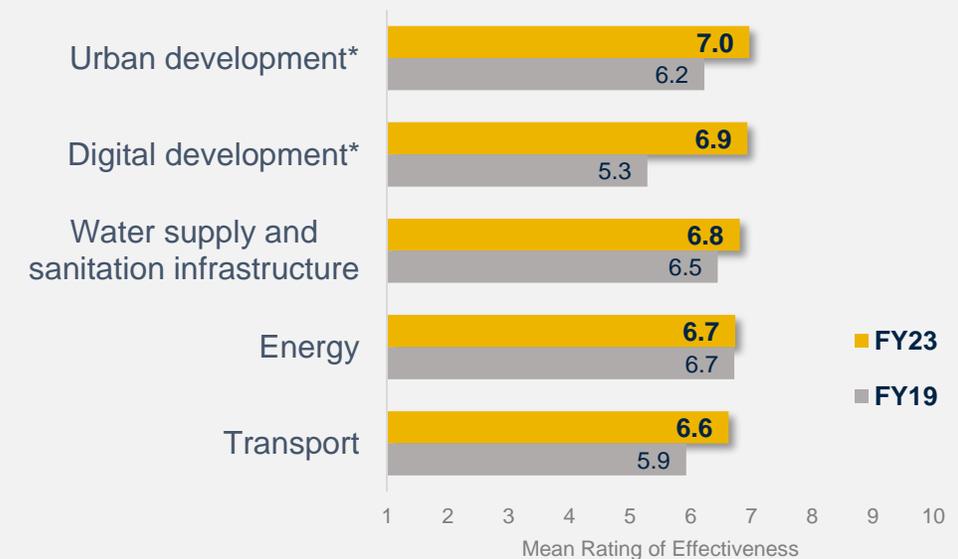
Environmental Sustainability



Finance / Institutions / Economic Growth



Infrastructure



*Significantly different between years



How **effective** do you believe the WBG is in terms of the work it does in the following areas of development in South Africa? Scale: 1 Not effective at all – 10 Very effective (If you have NO exposure to/experience in working in any of the sectors listed below, please respond "Don't know") ^The mean effectiveness of the separate items asked in FY19 were taken for this comparison analysis.

Perceptions of the Eskom Just Energy Transition Project (EJETP) are Increasingly Positive

In FY23, respondents gave significantly higher ratings that the EJETP will have a **positive impact on sustainable economic development** and that **the WBG’s support is very beneficial** compared to respondents in FY19.

There was also significantly more agreement that there was no value added by WBG involvement; however, it should be noted that respondents from civil society and bilateral/ multilateral agencies were significantly more likely to agree with this (means = 7.3 and 7.0, respectively) compared to those from government institutions and academia (means = 2.4 and 3.4, respectively).

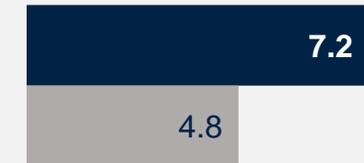
In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in South Africa?

“Fund the Eskom project – load shedding is really a huge issue in the country at the moment.” (Government Institution Respondent)

“The World Bank should improve on providing people with job opportunities, health issues, and electricity – Eskom, because this load shedding is making things go slower and with more crime rate.” (Bilateral/Multilateral Respondent)

“Balance the Just Energy Transition by utilizing both renewable energy sources and coal because the transition is badly affecting the provinces that rely on coal. Furthermore, assist the authorities with technologies that would assist in reducing the toxicity of emissions.” (Local Government Respondent)

EJETP will have a positive impact on sustainable economic development in South Africa*



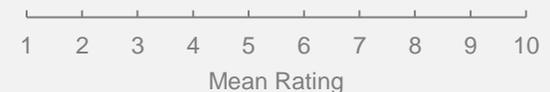
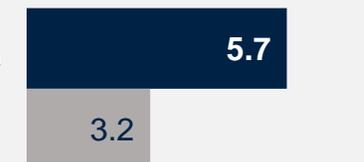
The kind of support that the WBG is providing to the EJETP would be very beneficial to large infrastructure projects in South Africa in the future*



The WBG’s support for the EJETP & renewables project will be beneficial for the long-term carbon mitigation strategy of South Africa and for the diversification of the sources of energy generation



There is no value added in South Africa from the WBG involvement in large infrastructure projects such as EJETP*



■ FY23
■ FY19



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

"Collaborating with all stakeholders. Clearly understanding the social, political, economic, and demographic conditions of South Africa for fit-for-purpose interventions."

(Government Institution Respondent)

"I think the World Bank needs to better recognise local expertise including technical expertise, research, and analysis as well as the importance of local knowledge and support greater involvement of local experts in providing the necessary guidance and support for sustainable development and recognise the historical experience and knowledge."

(Private Sector Respondent)



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In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in South Africa? (N=249)

Financial Resources and Convening considered the Bank's Greatest Values

In FY23, **financial resources** and **bringing together different stakeholder groups** were considered the WBG's greatest values to South Africa, identified by twice as many respondents as in FY19 (23% and 21%, respectively).

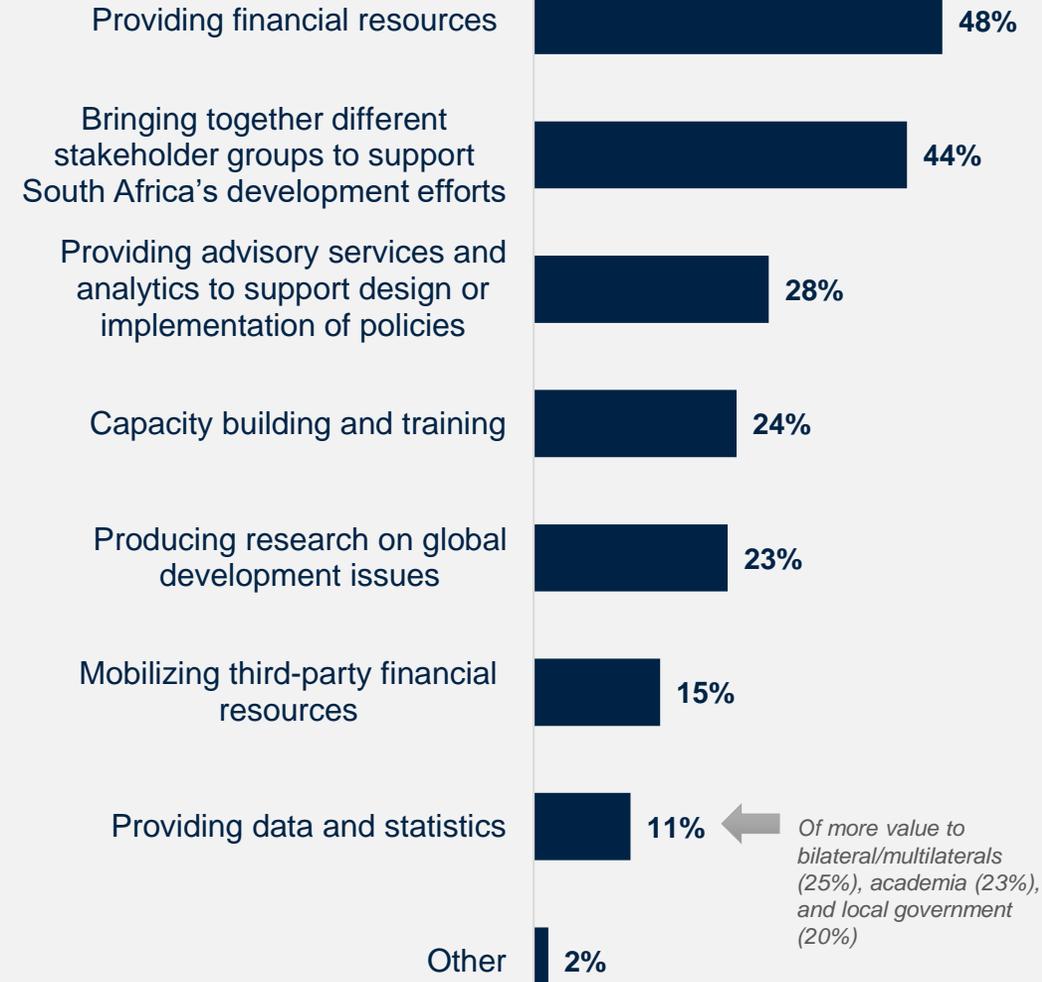
In contrast, the WBG's greatest value identified in FY19, **policy advice** (45%), dropped to #3 according to respondents in this year's survey (it should be noted that respondents were only allowed to select two options from the list of possible activities).

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

"Align to national priorities and support delivery against them by unblocking key barriers." (Government Principal Respondent)

"Engage more directly with affected stakeholders to enable their input on priorities well before deciding on what to fund/support and increase investment in policy development and project implementation skills. The skills base for social protection and social security in South Africa is very limited, so the World Bank should increase its support for training and project implementation in this area."

(Government Institution Respondent)



The WBG Increasingly Seen as Responsive and Flexible

In FY23, respondents perceived the WBG as a long-term partner that was significantly more **responsive to needs** and **flexible** than in FY19.

- It should be noted that respondents from government institutions gave the highest ratings for the WBG **being a long-term partner** (mean = 8.4) whereas those from civil society gave significantly lower ratings (mean = 6.6).

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

“I think they have done significantly well over the few years if they can just maintain the relationship.”

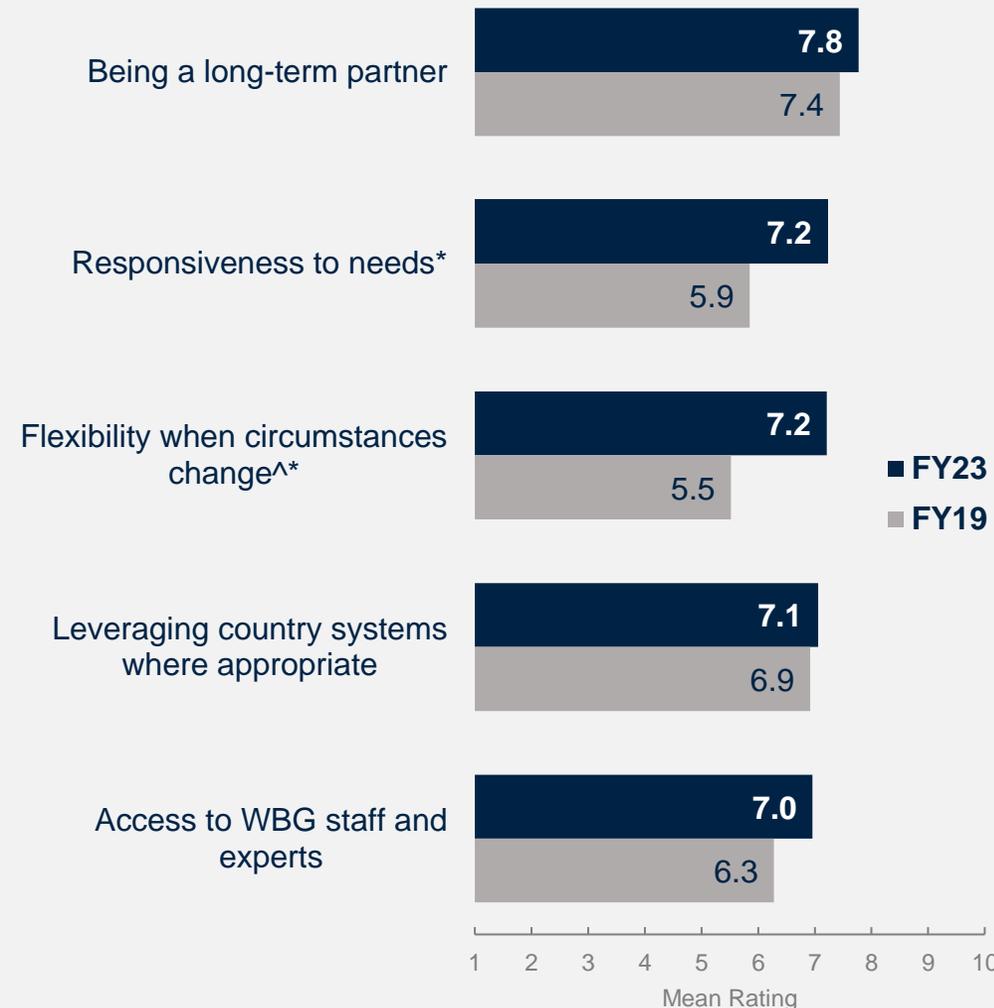
(Private Sector Respondent)

“Before developing any specific programs and interventions it is critical to develop greater awareness and appreciation of the social, political, and institutional structures and powers shaping South African society currently.”

(Provincial Government Respondent)

“Contingency planning for continued support when the project and funding dries up. The value of many projects is short-lived due to a lack of taking ownership by local South Africans.”

(Academia Respondent)



The WBG Increasingly Seen as Effectively Collaborating with Stakeholders

In FY23, respondents perceived the WBG as collaborating significantly more with **the national government, other donors/development partners, the private sector, and civil society** than in FY19. Respondents also perceived the WBG's collaboration with **regional development banks and academia/think tanks/research institutes** as on par with its collaboration with other development partners.

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

“Engage more with NGOs. Be part of the socio-economic development and poverty alleviation support. Engage, support, and propaganda for the youth, women, people with disabilities and social inclusion and cohesion.”

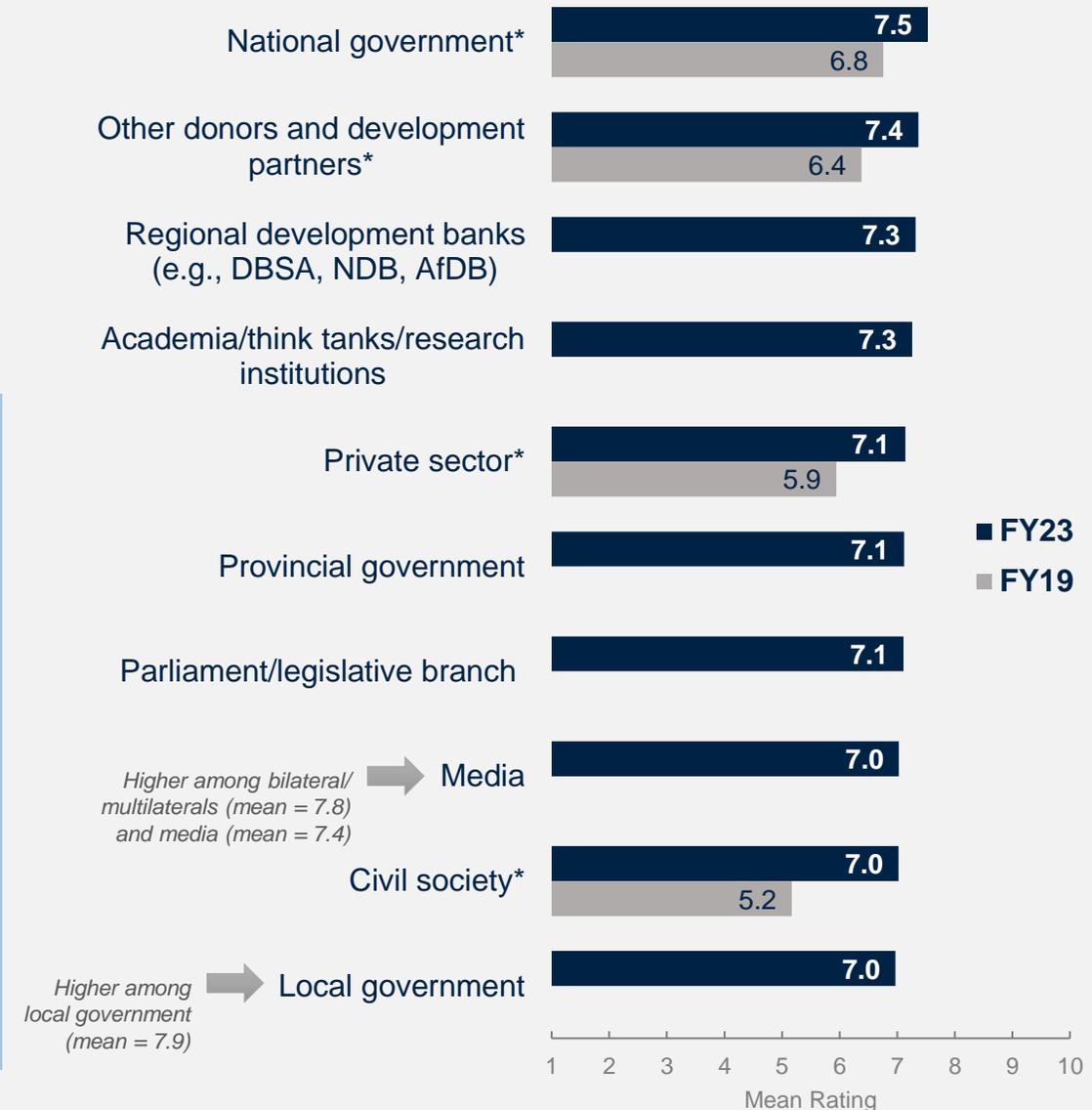
(Government Institution Respondent)

“Bring together different stakeholder groups to support South Africa’s development efforts to fight poverty.”

(Private Sector Respondent)

“Be more visible in the local government space where processes that drive change like data analytics, importance of data gathering and processing and storage are key. Local governments lack skills in this area...”

(Local Government Respondent)



To what extent is the WBG an effective development partner in South Africa, in terms of collaborating with the following groups? Scale: 1 To no degree at all – 10 To a very significant degree *Significantly different between years

Stakeholders want the Bank to Collaborate More with Government and Groups Outside of Government

Respondents in this year's survey indicated that the WBG should collaborate more with **national government**, **private sector**, **academia**, **local government**, and **civil society**, closely followed by **regional development banks** and **other donors/development partners**.

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

“Partnership with the people on the ground, who are experiencing challenges on the daily. Those people have the solutions, they just need financial support.”

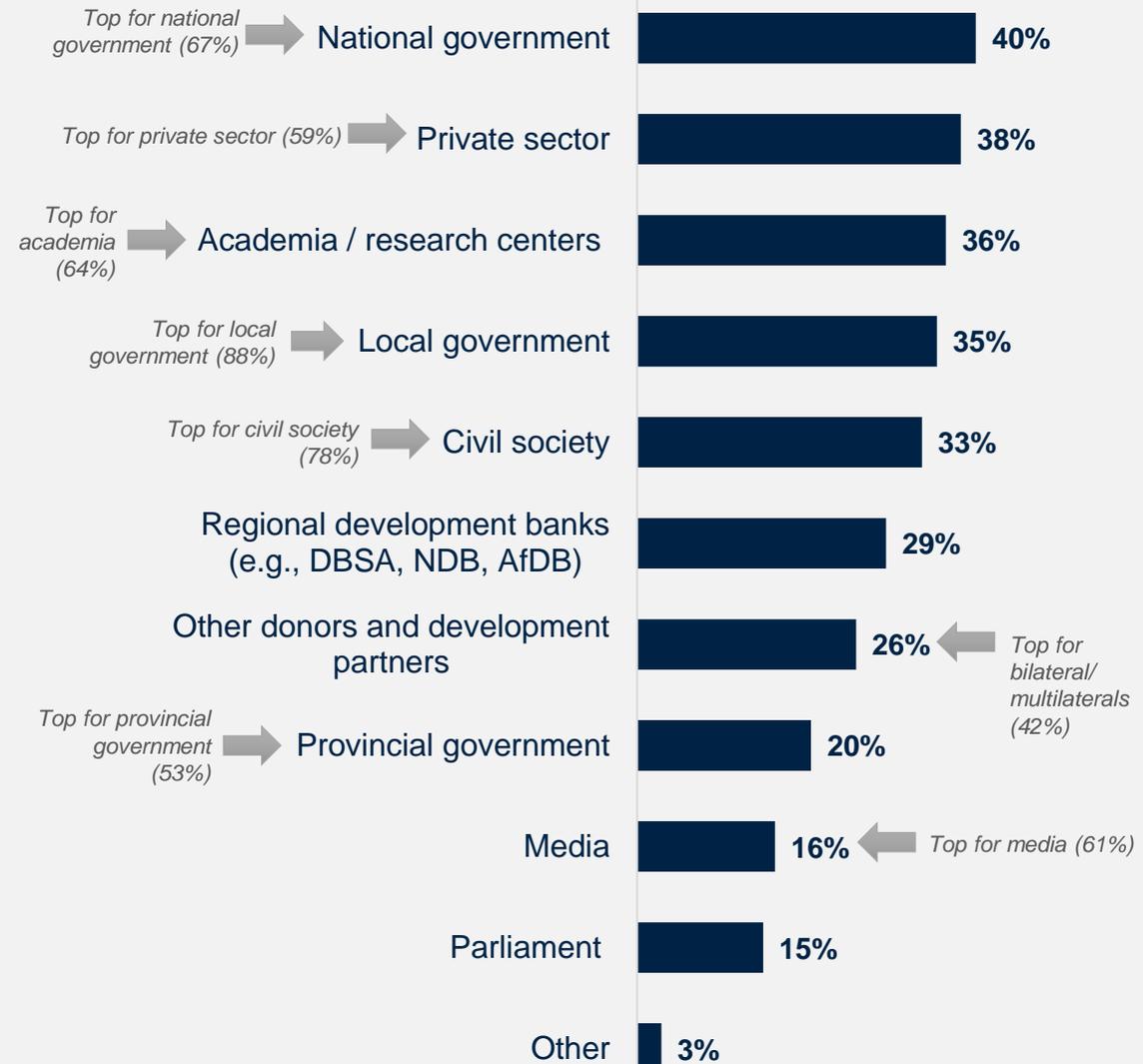
(Government Institution Respondent)

“They should liaise with the right people in terms of developing the country, such as youth and academics from different sectors.”

(Private Sector Respondent)

“Provide support at the local level, in terms of strengthening governance and accountability. Second, there is an urgent need to re-engage civil society to build skills to hold local government/national government to account. So, investing in improving governance indirectly via local NGOs and businesses.”

(Civil Society Respondent)



Which THREE of the following groups should the WBG collaborate with more in South Africa? (Choose no more than 3)
(Percentage of Respondents, N=285)

Financial Instruments and Knowledge Work

“Facilitate the transfer of innovative technologies and best practices from other countries can help South Africa address specific development challenges more effectively.” (Civil Society Respondent)

“Ensuring strict governance rules before extending any funds for projects or loans. Being fair in the assessment of and extension of loans to developing nations and ensuring a fair interest rate across nations. Doing due diligence to assess the bodies and projects responsible for funds dispersed to ensure they flow into the correct hands and/or beneficiaries.” (Private Sector Respondent)

“Strengthen processes and support to reduce growing social and economic inequality.” (Government Principal Respondent)



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In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in South Africa? (N=249)

WBG Lending Seen as Increasingly Timely and Meeting South Africa's Needs

In terms of the WBG's financial instruments, respondents gave the highest ratings for the **timeliness of the Bank's financial support**, closely followed by the **WBG insisting on accountability through its lending** and the **WBG's financial instruments meeting South Africa's needs**. In addition, respondents perceived the Bank's timeliness and its financial instruments meeting South Africa's needs significantly higher than in FY19.

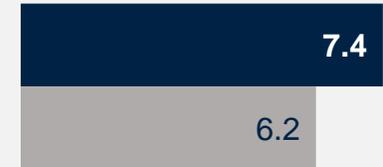
In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in South Africa?

"...Adding in the alleviation of corruption and stealing of monies would help. The situation in South Africa would be 10 times better if resources and finances were actually used for what they were intended for." (Private Sector Respondent)

"Attaching greater governance standards to terms of assistance and funding and financing packages; and having a robust enforcement framework for project-specific outcomes." (Media Respondent)

"To reduce the rates paid to service loan debts. Must charge same interest rates as other European countries." (Media Respondent)

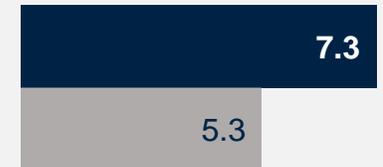
The World Bank Group provides financial support in a timely manner^{^*}



The World Bank Group insists on accountability through its lending



The World Bank Group's financial instruments meet the needs of South Africa*



The conditions of the World Bank Group's financing are competitive compared to markets

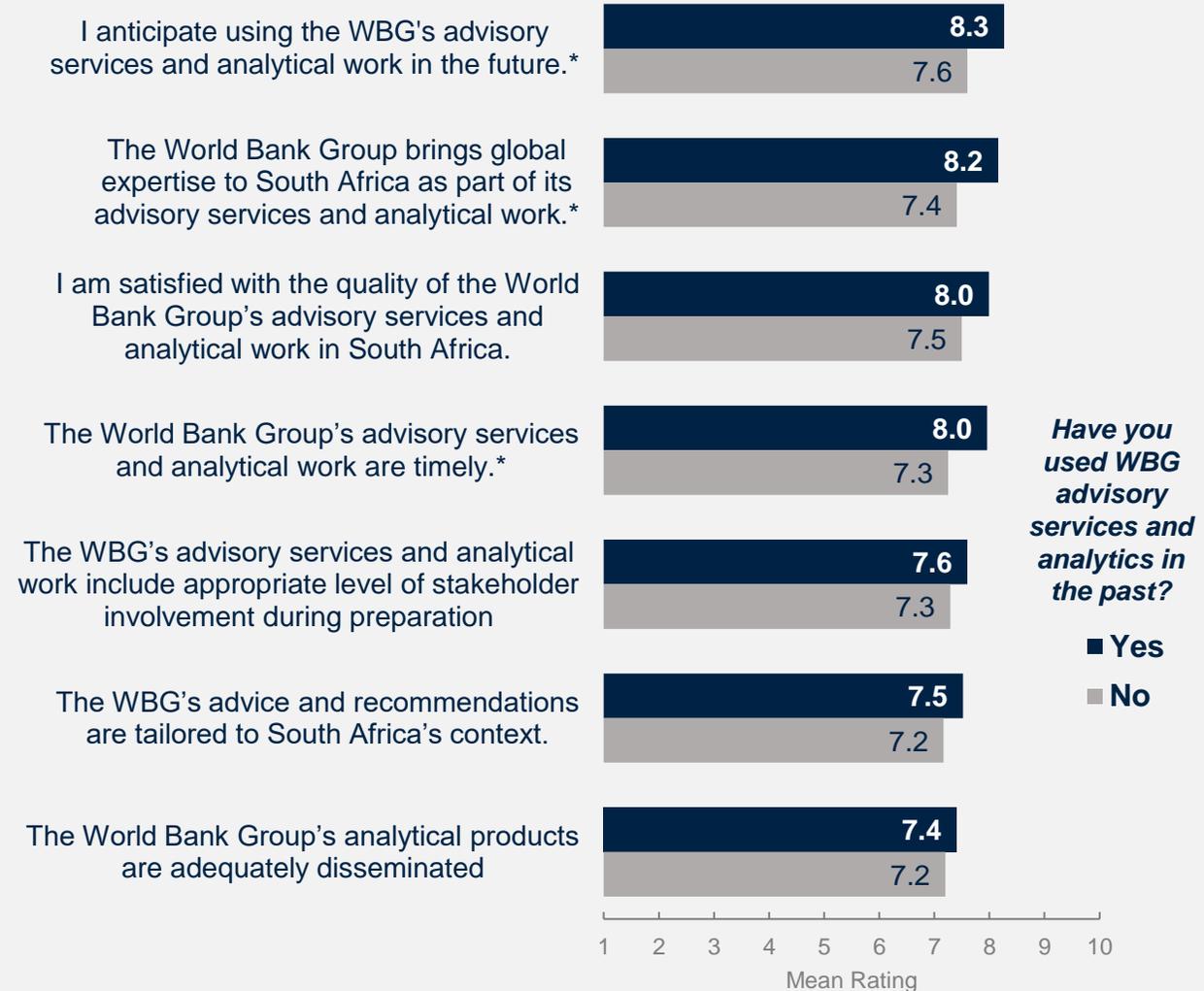
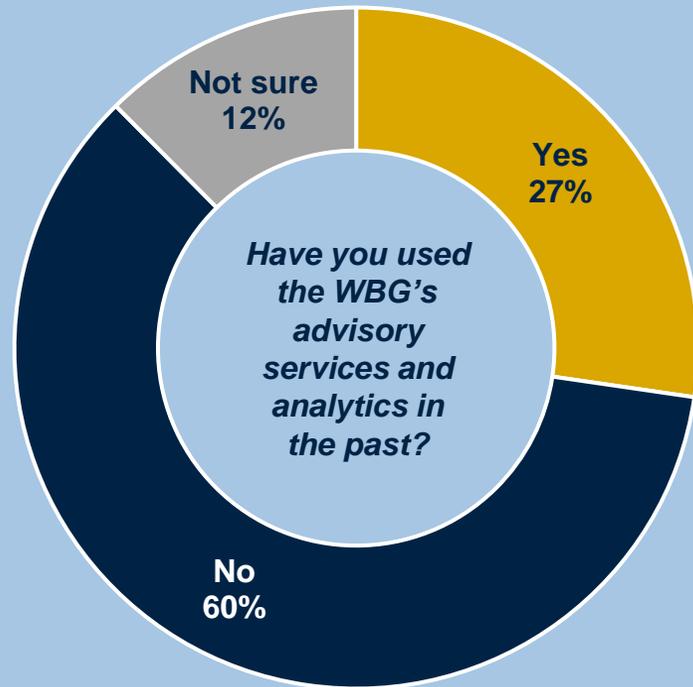


■ FY23
■ FY19



60% of Respondents Have Not Used the WBG's Knowledge Work; Those Who Have, Considered it Timely Global Expertise and Plan to Use It in the Future

Six in ten respondents reported that they had not used the WBG's knowledge work in the past.



WBG Knowledge Work Increasingly Perceived as bringing Timely Global Expertise, Tailored to South Africa, Adequately Disseminated, and Contributing to Development Results

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, closely followed by the WBG **bringing global expertise** to South Africa through its knowledge work and **satisfaction with the quality** of the work.

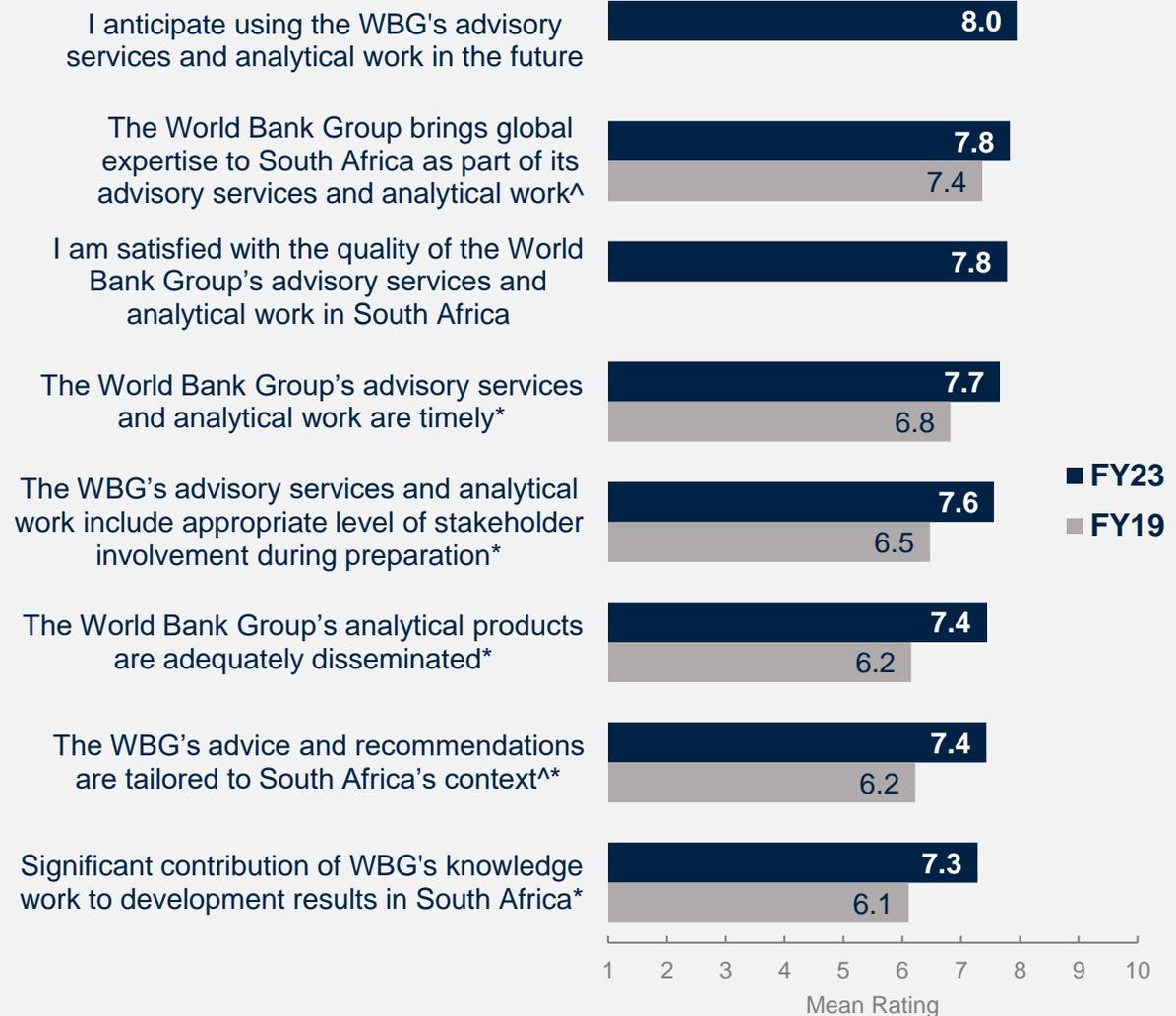
In addition, respondents had significantly higher levels of agreement that the WBG **brings global expertise**, that its knowledge work is **timely, includes stakeholders during preparation, is adequately disseminated, tailored to South Africa’s context**, and provides a **significant contribution to development results** in South Africa compared to respondents in FY19.

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

“The WB should be more transparent about its role as a largely technical advisory service. The quality of consultants is variable: some [are] poor in performance and inappropriate for the context. ...

The WB has a (strong) tendency to advance its own institutional and political agendas, rather than supporting and enhancing local plans, development processes, and policies.”

(Civil Society Respondent)



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 South Africa?

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 South Africa's specific development challenges and country circumstances", respectively, asked in FY19. *Significantly different between years



The Future Role of the World Bank in South Africa

“They can improve the country's energy and logistical constraints, reducing barriers to private sector investment, addressing structural rigidities in the labor market, and tackling crime and corruption.”
(Government Principal Respondent)

“Provide tailored solutions by customising solutions to address the unique challenges and needs of South Africa. Recognise that the country faces a complex set of issues, including high levels of inequality, unemployment, and poverty, as well as structural economic challenges.”
(Government Institution Respondent)



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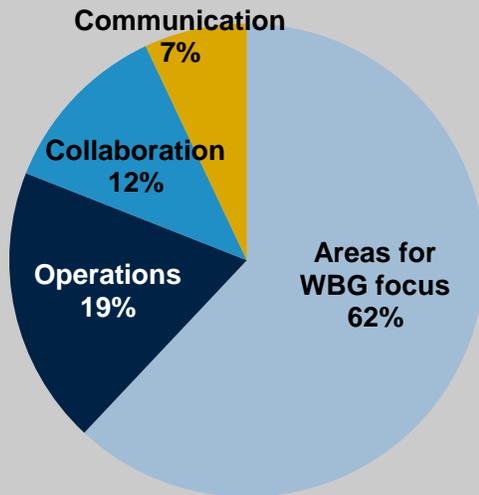


In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in South Africa? (N=249)

What the WBG could do to Increase its Effectiveness in South Africa

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

Categories of responses



Operations: Respondents across stakeholder groups highlighted the need for the WBG to **incorporate more accountability and transparency** in how WBG funds are used to ensure their appropriate disbursement and effective results.

“Promote anti-corruption and change a few laws on governances. This will help create accountability and support to all sectors, including large to small business, increase professionalism and efficiency in the environment.”

(Private Sector Respondent)

“The World Bank could have more scrutiny when it comes to spending and results in South Africa.”

(Bilateral/Multilateral Respondent)

“Consult with National Government on measures to root out and address economic sabotage, including construction and transport mafia in addition to large scale government-led corruption. We can’t develop if we’re being held ransom by ‘big’ players in our own environment.”

(Local Government Respondent)

There were also some concerns specific to **building capacity** and supporting **implementation** – the **timing**, the **focus areas**, and the extent to which the WBG is **empowering** South Africa.

“Support to build state capacity to deliver on development objectives. Enhance state working relations with the private sector. Prudent utilisation of government money for public goods and services to release private sector investment.”

(Provincial Government Respondent)

“It could focus more on empowering South African citizens and resources.”

(Bilateral/Multilateral Respondent)

“Be hands-on in implementing and driving projects it funds.”

(Private Sector Respondent)

“Focus on areas that have political support and government backing and where the need may be technical skills or project management. Providing technical skills to areas before having full government support is a waste of resources and instills a negative behavior by [the] government that others will do their work for them.”

(Government Institution Respondent)



In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in South Africa? (N=249)

What the WBG could do to Increase its Effectiveness in South Africa

Focus: Respondents consistently mentioned **job creation** as a focus area for the WBG, prioritizing the funding of Eskom to **end load shedding**, public sector **governance**, **health**, and **infrastructure** needs along with empowerment and development of the **youth in South Africa**.

“Help with achieving developmental goals and objectives around the following issues: 1. Fighting crime and corruption. 2. Provision of water and sanitation. 3. Climate change and environment protection / enhancement. 4. Elimination of unemployment, poverty and inequality. 5. Review the current strategic direction of the country. 6. Infrastructural improvements and protection.” (Local Government Respondent)

“Fund the Eskom project to fight the load shedding.” (Bilateral/Multilateral Respondent)

“Provide financial support to sanitation projects. Health is one of the major issues in South Africa. If we could have projects that will teach people about sanitation, it would make a big difference. Also, finance rural areas so they could also have clean water and toilets.” (Government Institution Respondent)

“They could help with the public sector governance. I feel that should we have a better governed public sector, everything else such as economy stability, poverty, inequality, and job creation would be better handled.” (Private Sector Respondent)

“Investing more in developing skills and techniques for young people and increase investing in energy and power.” (Media Respondent)

“Emphasis should be placed on good governance initiatives to improve development processes.” (Civil Society Respondent)

Collaboration and Communication: Respondents mainly focused on the need for **more effective collaboration and communication with various stakeholder groups outside of the Government** to ensure the WBG is meeting the needs of South Africa’s people, as well as providing transparency and accountability. These responses are mostly covered in the respective sections of this report.

“World Bank must involve youth, NGOs, and NPOs as they always serve the interests of the public, unlike Government.” (Civil Society Respondent)

“Prioritize youth-based projects and uplift them because for South Africa to have a better future, it rests on the youth to take it to greater heights. Making the youth a point of priority will make it easier for the World Bank Group to increase its effectiveness.” (Academia Respondent)

“They need to make people aware of everything they do.” (Private Sector Respondent)



Communication and Outreach

“There might be a lot that the World Bank is doing but that I am not aware of. The organization needs to improve their communication channels.” (Government Institution Respondent)

“Greater on-the-ground engagement to better understand the formal role that the World Bank has in South Africa and its long-term objectives.” (Academia Respondent)

“More communication to people, make them trust you, have a positive image.” (Bilateral/Multilateral Respondent)



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In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in South Africa? (N=249)

TV was Most Common Information Source

Respondents most relied on **television**, **social media**, and **research papers** 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 Institution	Provincial Government	Local Government	Bilateral / Multilateral Agency	Civil Society	Private Sector	Academia	Media
Television	55%	40%	53%	64%	53%	56%	65%	61%	47%
Social media	47%	55%	27%	36%	50%	39%	49%	56%	42%
Research papers / Official statistics*	44%	55%	40%	28%	32%	56%	33%	78%	53%
Newspapers (print or online)	38%	38%	33%	52%	32%	39%	37%	28%	42%
Radio	35%	26%	27%	60%	34%	33%	31%	33%	45%
e-Newsletters	20%	21%	27%	16%	24%	11%	18%	11%	24%
Direct Messages	14%	14%	20%	4%	21%	22%	14%	6%	11%
Podcasts	11%	7%	7%	12%	13%	6%	19%	0%	8%
Blogs	10%	7%	13%	4%	13%	11%	8%	6%	18%
Other	2%	0%	7%	0%	3%	6%	1%	0%	3%



How do you get most of your information about economic and social development issues in South Africa? (Choose no more than 3) (Percentage of Respondents, N=278)

*Significantly different between stakeholder groups

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

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

**Preferred
WBG Source**

	All Respondents	Government Institution	Provincial Government	Local Government	Bilateral / Multilateral Agency	Civil Society	Private Sector	Academia	Media
Social media	41%	31%	40%	42%	41%	33%	42%	45%	45%
Event/conference/seminar (in person or online)	39%	38%	33%	46%	32%	33%	42%	65%	29%
Website	37%	54%	33%	46%	22%	33%	42%	35%	29%
Broadcast media (radio & TV)	35%	36%	47%	42%	38%	17%	33%	20%	42%
Direct contact with staff	31%	36%	27%	33%	41%	44%	23%	25%	32%
e-Newsletters	27%	26%	40%	13%	22%	44%	24%	40%	26%
Interviews and press conferences*	23%	10%	0%	17%	24%	22%	29%	15%	37%
Direct messaging	20%	23%	47%	4%	19%	22%	24%	15%	13%
Podcasts	12%	10%	0%	17%	14%	6%	14%	5%	18%
Blogs	6%	8%	7%	4%	19%	0%	8%	0%	11%
Other	1%	3%	7%	0%	0%	0%	0%	0%	0%



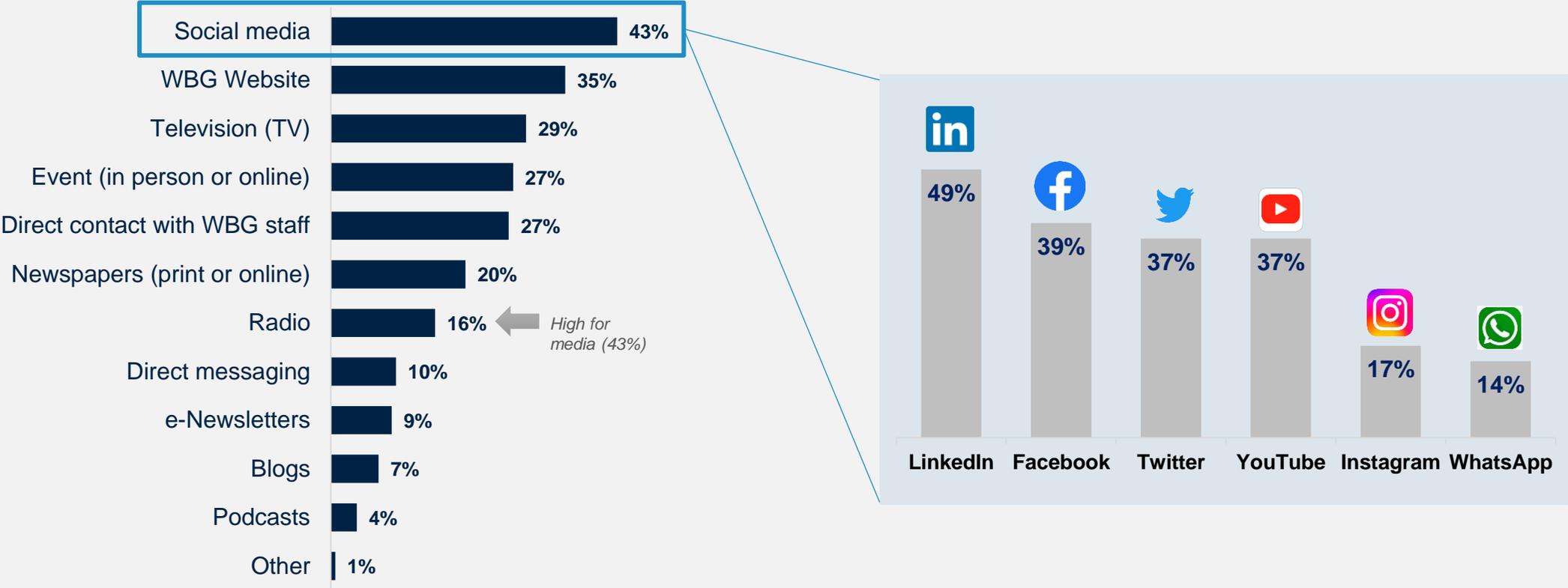
How would you prefer to obtain information about the World Bank Group and its work? (Choose no more than 3) (Percentage of Respondents, N=275)

*Significantly different between stakeholder groups

More than Half Engaged with the WBG in the Last 30 Days

54% of respondents recalled hearing or seeing something about the WBG in the last 30 days. Although respondents from government institutions, provincial government, and the media were the most likely to recall something (63%, 67%, and 61%, respectively), and respondents from local government were significantly less likely to do so (44%), this difference did not reach statistical significance.

Respondents reported seeing this information most often on **social media** and the **WBG website**. Among those who selected “Social media”, respondents most commonly reported seeing something on **LinkedIn, Facebook, Twitter, or YouTube**.



Do you recall seeing or hearing anything about the WBG in the last 30 days? (N=280)
 Where do you recall seeing or hearing this information? (Check all that apply) (Percentage of Respondents, N=153)
 What social media platforms do you recall seeing this information on? (Check all that apply) (Percentage of Respondents, N=71)

WBG Work on Climate Change, Energy, Food Insecurity, the Environment, and Economic Forecasts were the Most Commonly Recalled Topics

Respondents most frequently recalled WBG work or research on **climate change**, **energy**, **food insecurity**, the **environment**, and **global economic forecasts**.

- Respondents from the media were significantly more likely to recall WBG’s work on human capital and the environment (52% and 57%, 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 South Africa?

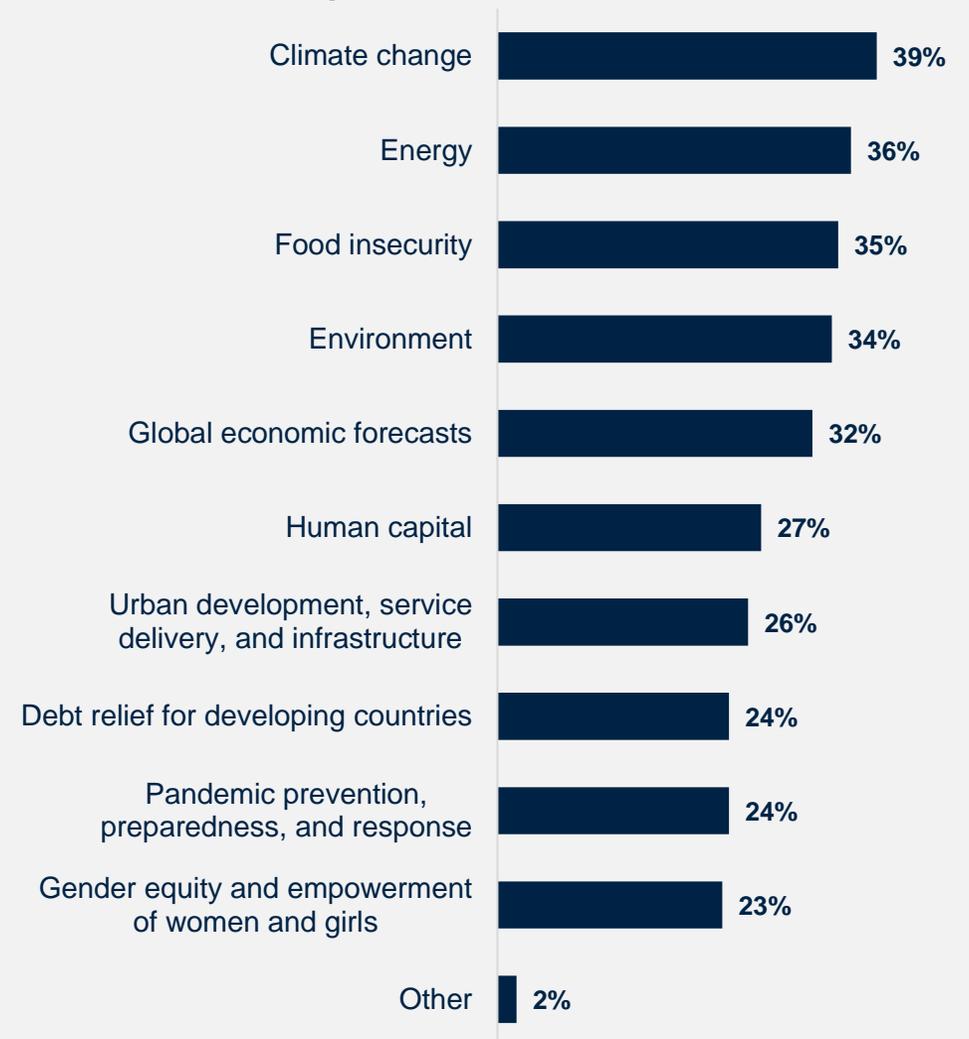
“More marketing. Brand awareness in community-based organizations, SEDA, youth groups, and civil society organizations.” (Government Principal Respondent)

“The World Bank needs to be transparent about the work they are doing. We only know that they have a country office, and its work remains unknown.” (Local Government Respondent)

“Release the work it does to the public and newspaper and media platforms.” (Civil Society Respondent)

“Show South Africa how they go about assisting the companies in South Africa.” (Private Sector Respondent)

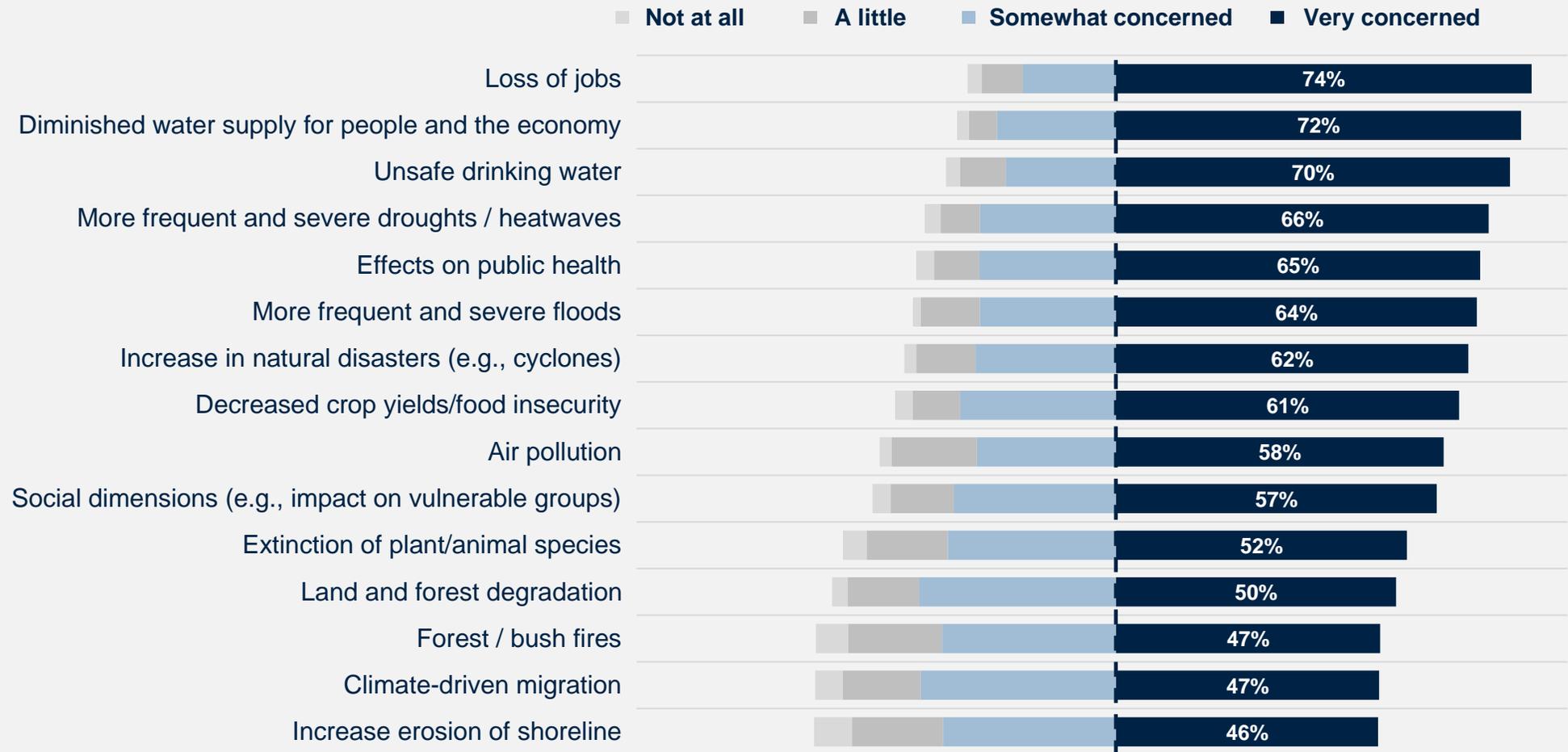
World Bank Group work or research on...



What topics were included in what you saw or heard? (Check all that apply) (Percentage of Respondents, N=152)

Climate Change Communications can be More Impactful when Related to Stakeholders' Top Concern: Jobs

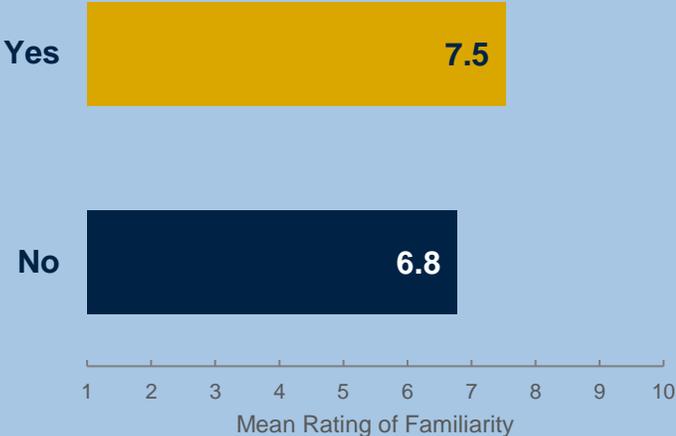
Nearly three-quarters of respondents were very concerned about the **loss of jobs** when it comes to the potential impacts of climate change in South Africa. Diminished water supply and unsafe drinking water were also of great concern to respondents. These key areas of concern should be taken into consideration to make communications about climate change more impactful.



Message Recall Increases Familiarity, Leading to More Agreement with WBG Messages

Respondents who recalled seeing or hearing something about the WBG recently reported significantly higher levels of familiarity with the WBG

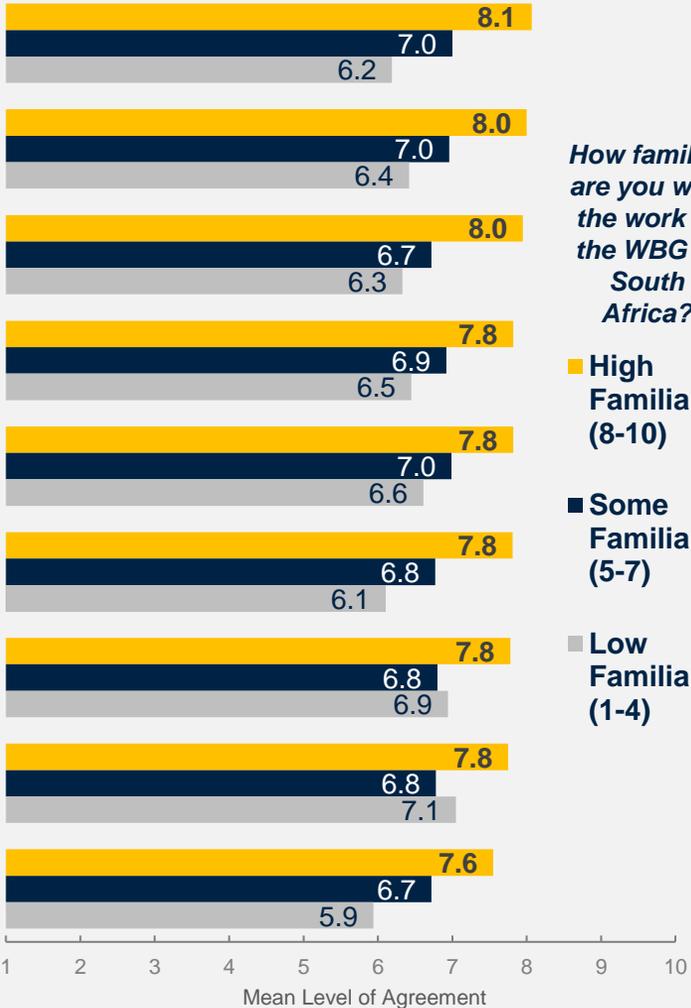
Do you recall seeing or hearing anything about the WBG in the last 30 days?



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...

- supports South Africa to address the health impacts of the COVID-19 pandemic and increase vaccination rates*
- supports countries to ensure transition to more diversified and cleaner sources of energy*
- helps improve the natural environment through support for conservation, biodiversity, and recycling projects*
- helps countries boost climate resilience and mitigate the effects of climate challenge*
- is improving gender equity and inclusion for women and girls*
- supports countries to strengthen their human capital through improving health care, nutrition, education, jobs, and skills*
- helps address the current food crisis and enables greater preparedness to future food security crises*
- is committed to comprehensive debt solutions that bring significant benefits to people in poor countries*
- supports South Africa to improve urban management, infrastructure, and service delivery*



How familiar are you with the work of the WBG in South Africa?

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



To what extent do you agree with the following statements:
Scale: 1 To no degree at all – 10 To a very significant degree
*Significantly different between levels of familiarity

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

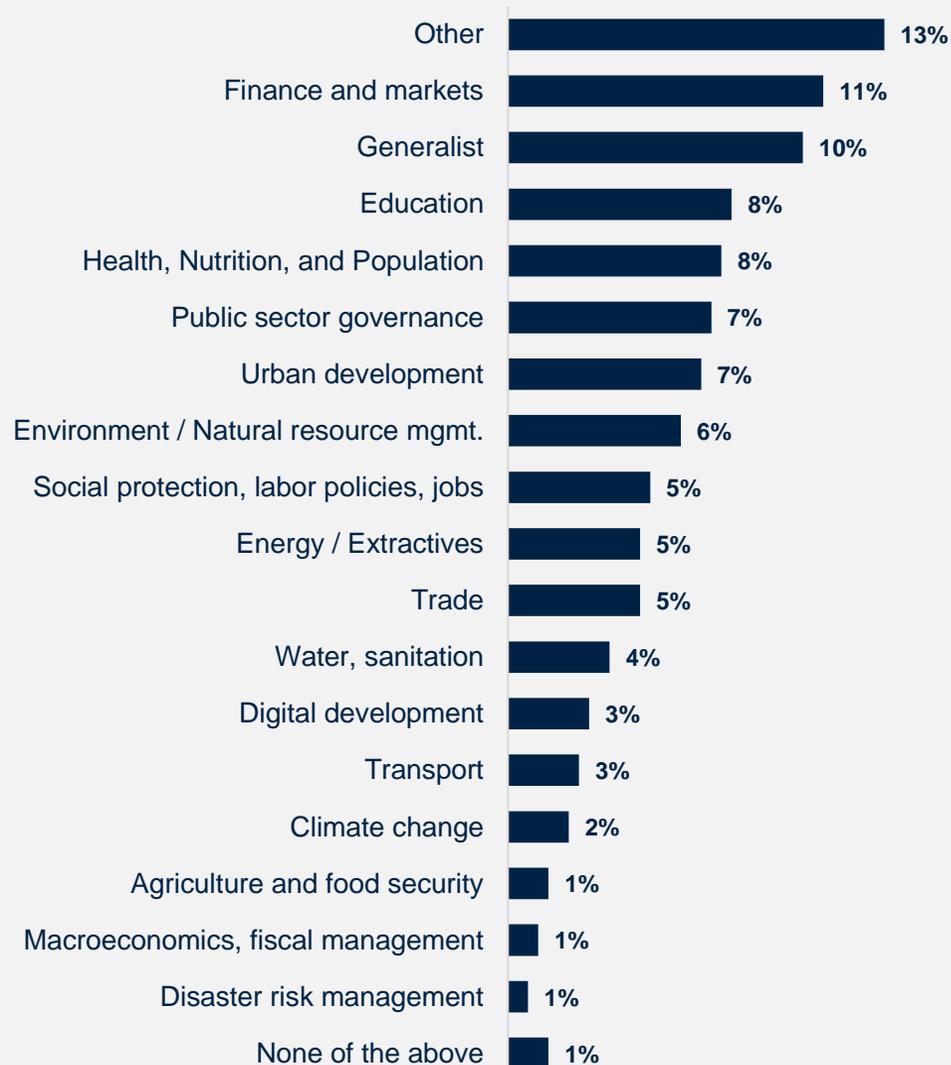


Demographics of the Sample and Detailed Methodology

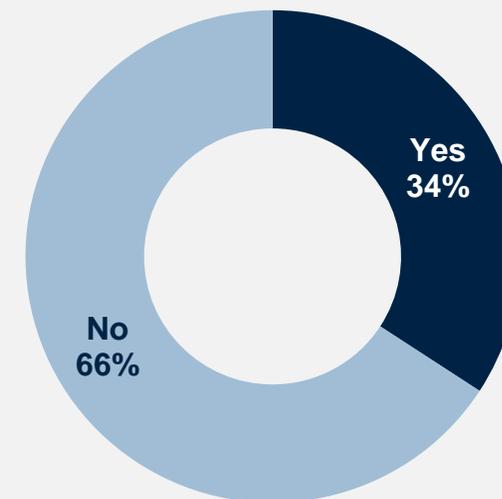


Demographics of the Sample

Which, if any, of the following is the primary specialization of your work? (N=280)

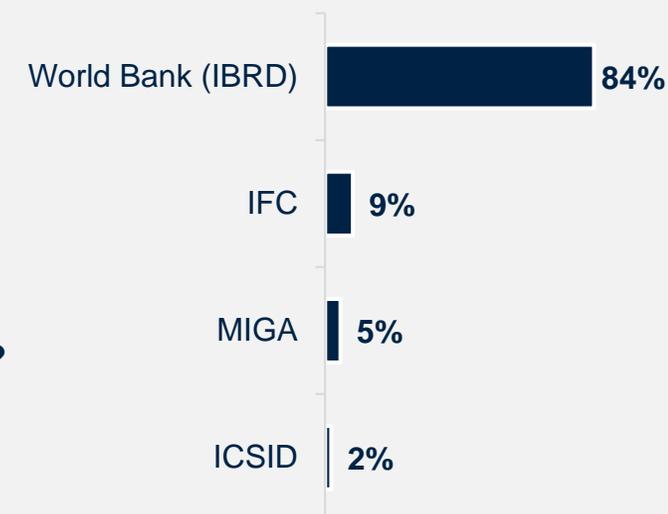


Currently, do you professionally collaborate/work with the WBG in South Africa? (N=310)



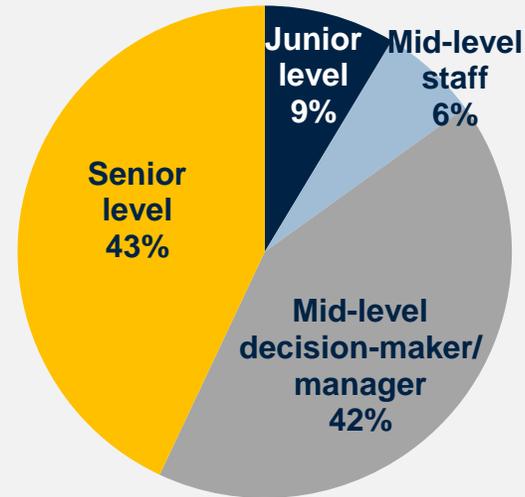
Respondents from government institutions and bilateral/multilateral agencies were significantly more likely to indicate that they collaborate with the WBG (48% and 55%, respectively) compared to respondents from other stakeholder groups.

Which of the following agencies of the WBG do you primarily collaborate/work with in South Africa? (N=103)

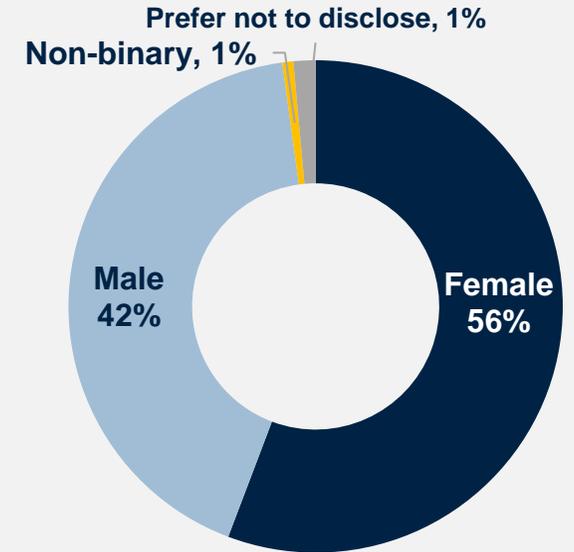


Demographics of the Sample

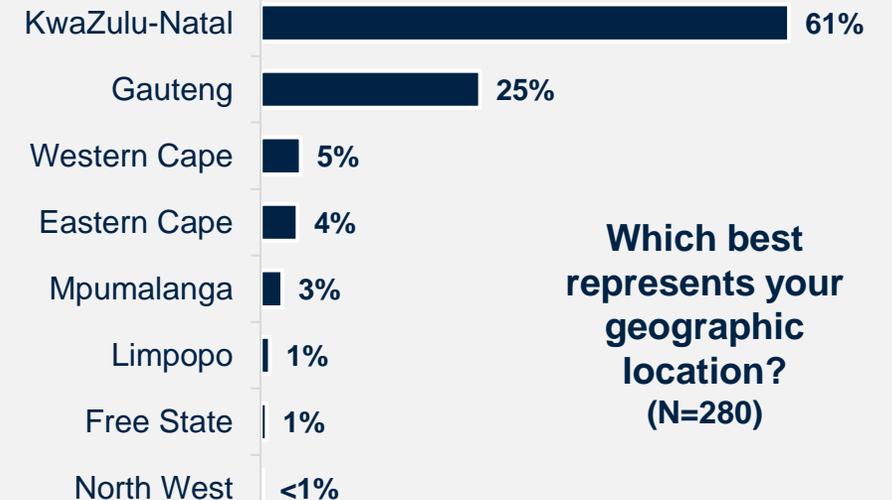
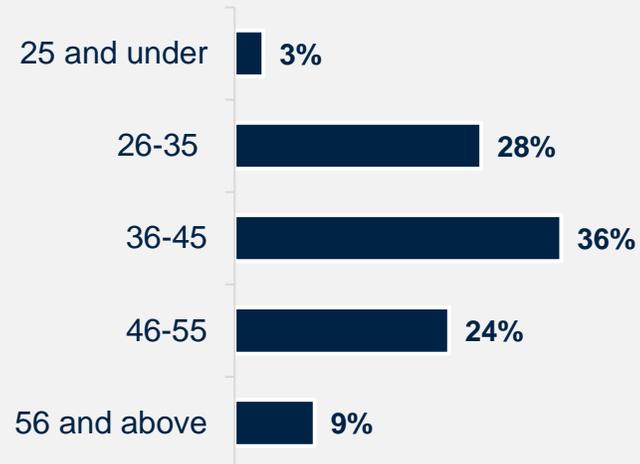
Within your organization, would you describe yourself as... ?
(N=279)



What's your gender?
(N=278)



What's your age?
(N=280)



Which best represents your geographic location?
(N=280)



Detailed Methodology

A total of 1,313 stakeholders in South Africa were invited to provide their opinions on the WBG’s work by participating in a Country Opinion Survey from **July 2023 to October 2023**. 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, Deputy President, Minister, Parliament, government institutions, provincial governments, local governments, bilateral/multilateral agencies, the private sector, civil society, academia, and the media.

Of these stakeholders, **310 participated in the survey (24% response rate)**. Respondents completed the questionnaires online or in person.

The results of this year’s survey were compared to the FY19 Survey with a response rate of 20% (N=96).

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. To reduce the influence of the latter factor, only those questions with similar response scales/options were analyzed. This year’s survey saw an increased outreach to and/or response from provincial governments, local governments, and the private sector but a decrease from government institutions and academia. 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 “South Africa 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, Deputy President, Minister, Parliamentarian	6%	2%
Government Institutions: Employee of a Ministry, Department, Project Implementation Unit, Independent Government Institution, Judiciary, State-Owned Enterprise	34%	17%
Provincial Government	0%	5%
Local Government	1%	9%
Bilateral/Multilateral Agency: Embassy, Development Organization, Development Bank, UN Agency	9%	12%
Civil Society Organization: Local and regional NGOs, Community-Based Organization, Private Foundation, Professional/Trade Association, Faith-Based Group, Youth Group	11%	8%
Private Sector: Private Company, Financial Sector Organization, Private Bank, Small, Micro & Medium Enterprise	15%	27%
Academia/Research Institute/Think Tank	14%	7%
Media	9%	13%
Other	2%	0%
Total Number of Respondents	94	310

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 and are highlighted in red below.

A2_6. 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 South Africa? 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 South Africa? Scale: 1 Strongly disagree – 10 Strongly agree

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

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

A7. To what extent does the World Bank Group influence the development agenda in South Africa? 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 South Africa, 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

C5. Flexibility when circumstances change

C6. Being a long-term partner

To what extent is the WBG an effective development partner in South Africa, in terms of collaborating with the following groups:

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

C8_1. Collaboration with the national government

C8_6. Collaboration with the private sector

C8_7. Collaboration with civil society

C8_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

C9_1. The WBG's financial instruments meet the needs of South Africa (i.e., investment lending, Development Policy Loan, Trust Funds, Program-for-Results).

C11_1. I am satisfied with the quality of the WBG's advisory services and analytical work in South Africa.

C11_6. The WBG's advice and recommendations are tailored to South Africa's context.





CountryOpinionSurveys

Thank you

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