



CountryOpinionSurveys

FY 2024 Brazil

Country Opinion Survey Report

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Acknowledgements

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Objectives

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

- 1. Overall Context:** 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 regarding its effectiveness, relevance, alignment with Brazil'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 on the Ground:** How is the WBG perceived as a development partner in Brazil? Are opinions improving or declining?
- 5. Financial Instruments and Knowledge Work:** What do key stakeholders value the most regarding the WBG's work in Brazil? What opinion do key stakeholders have of WBG financial instruments and knowledge products? Are opinions improving or declining? What are stakeholders' suggestions for improving WBG's effectiveness?
- 6. Communication and Outreach:** What are the preferred communication channels? 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 February – May 2024

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

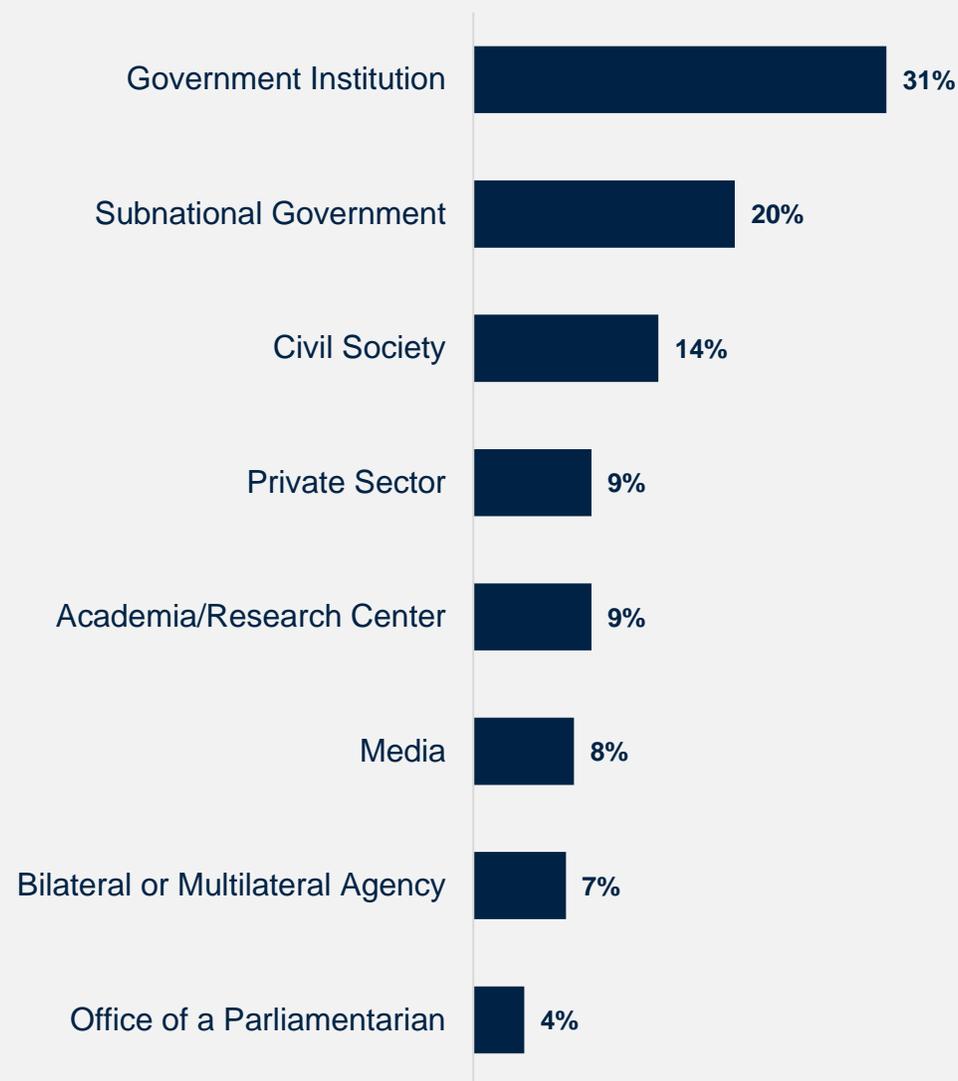
■ 159 participants (19% response rate)

- 36% from Southeast; 31% from Center-West
- 45% currently collaborate with the WBG

■ Compared to FY19 Country Survey

- 300 participants (32% response rate)
- 32% from Southeast; 31% from Center-West
- 32% collaborated with the WBG

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



What is your primary professional affiliation? (Select only 1 response)
(Percentage of Respondents, N=159)

Overall Context

“Prioritize the reduction of inequalities in all its initiatives. Promote intersectoral coalitions that bring together governments, the private sector, academia, and civil society organizations to tackle complex challenges, boosting dialogue, understanding, and collaboration. Listen to and work more closely with representatives of the users of public policies, such as communities and civil society organizations. Better publicize studies, opportunities, and funding lines.” (Civil Society Respondent)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Brazil? (N=81)

Increased Familiarity with the World Bank Group

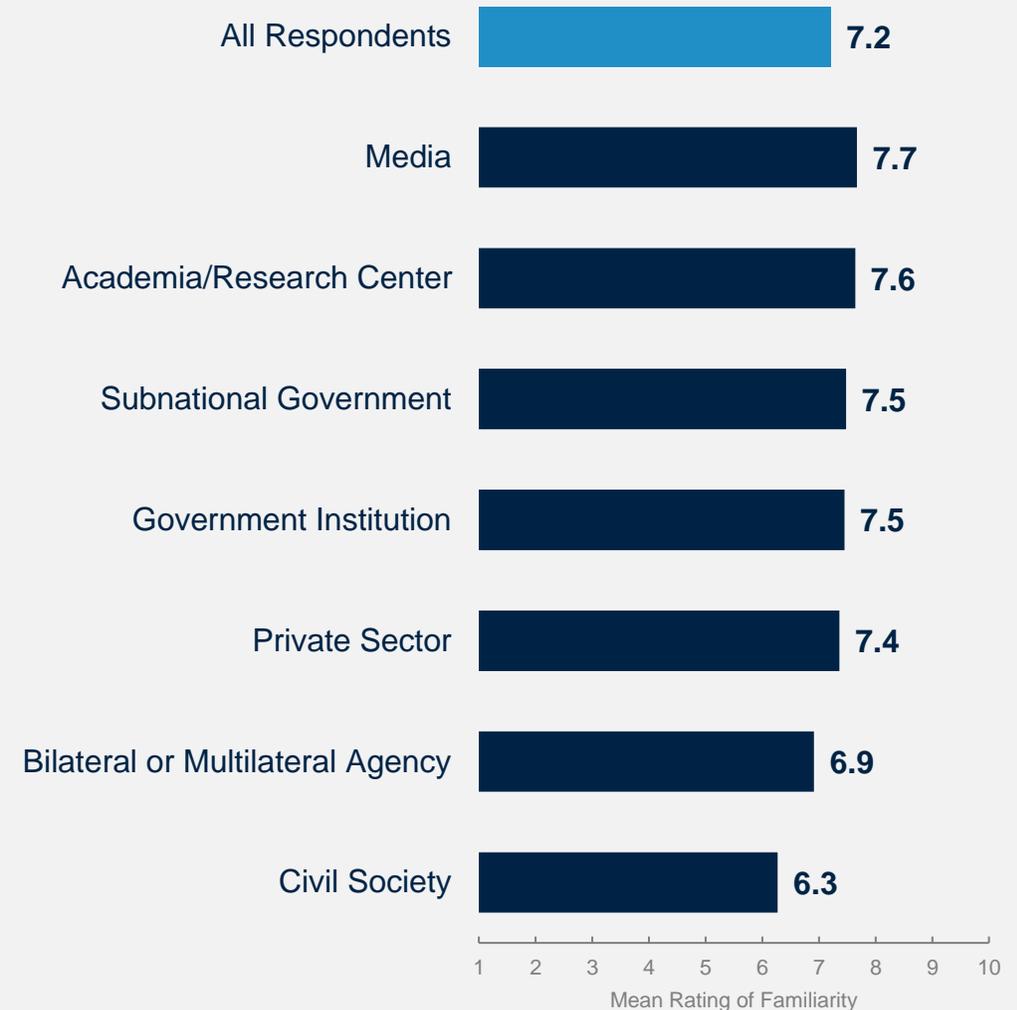
- Comparison of FY19 and FY24:** Respondents in this year's Country Survey reported higher levels of familiarity with the WBG compared to respondents in the FY19 Survey:

Mean familiarity: **FY24 = 7.2**
 FY19 = 6.6

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

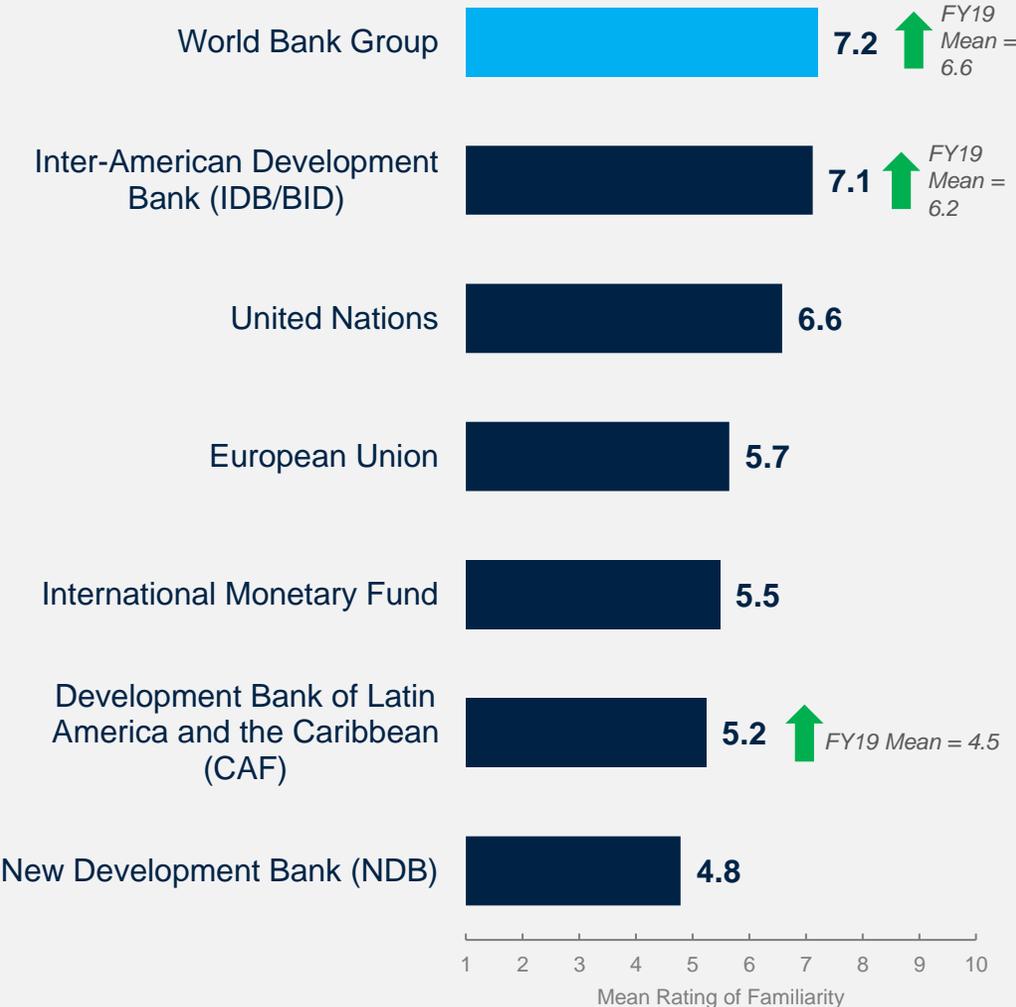
Mean familiarity: **Collaborate with WBG = 7.7**
 Do not collaborate = 6.8

- Stakeholders:** Although respondents from bilateral or multilateral agencies and civil society indicated low familiarity with the WBG compared to respondents from other stakeholder groups, this difference did not reach statistical significance.



Stakeholders Most Familiar with the WBG and IDB

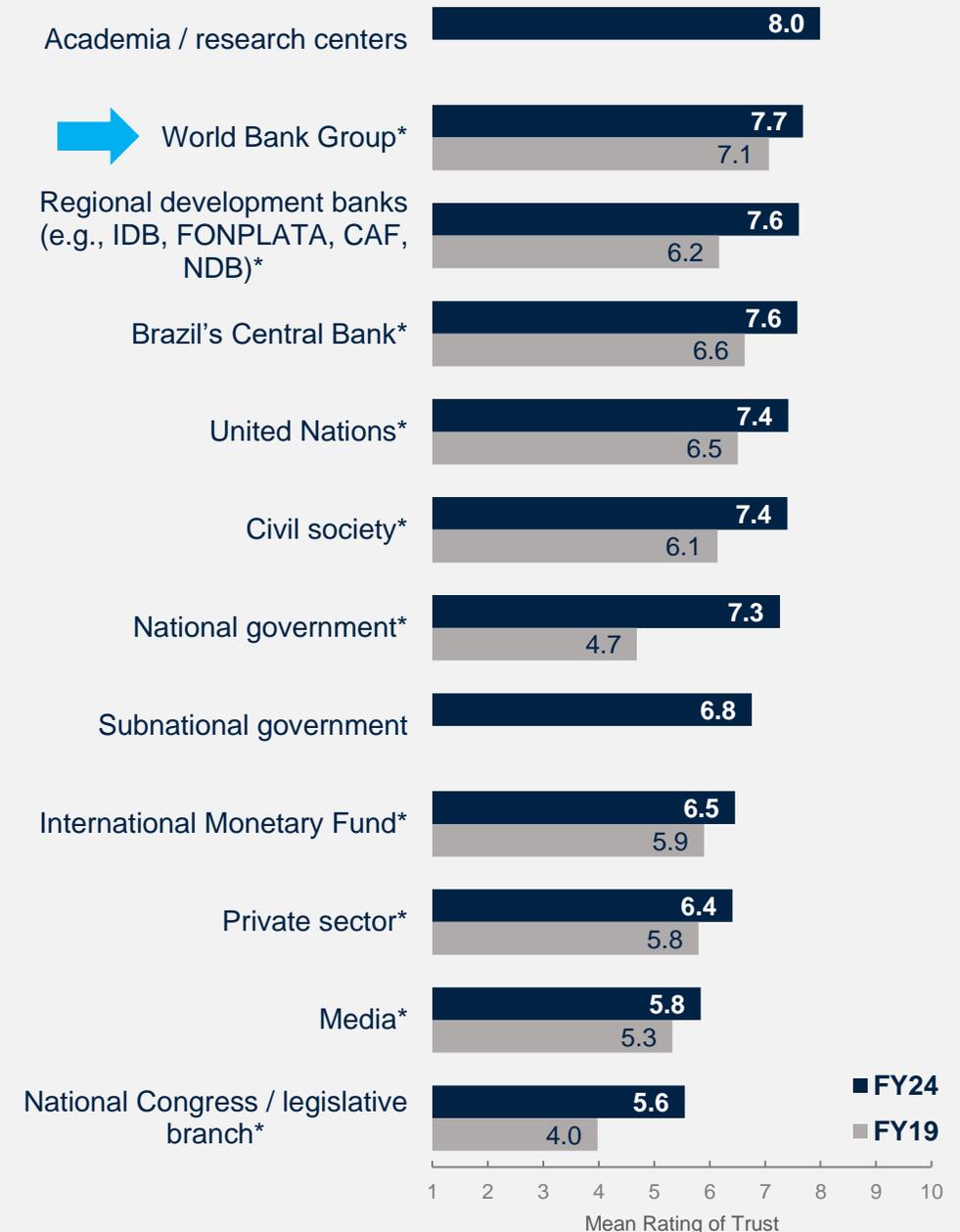
- Respondents in this year’s Country Survey were asked to indicate their familiarity with the work of several international organizations and the World Bank Group. Of these organizations, respondents in Brazil indicated the highest levels of familiarity with the work of the WBG and Inter-American Development Bank, followed by the UN. Respondents were least familiar with the work of the New Development Bank in Brazil.
- **Year comparison:** It should be noted that respondents in this year’s Country Survey reported significantly higher levels of familiarity with the Inter-American Development Bank (IDB/BID) and the Development Bank of Latin America and the Caribbean (CAF) compared to respondents in FY19.



How familiar are you with the work of these organizations in Brazil? Scale: 1 Not familiar at all – 10 Very familiar
 Ratings for the IDB and WBG were statistically similar, otherwise WBG ratings are significantly higher than all other organizations.

The WBG is One of the Most Trusted Institutions in Brazil

Respondents in Brazil gave the **highest ratings of trust for academia** and the **World Bank Group**. Of note, trust ratings for all institutions significantly improved in FY24 compared to the FY19 Survey. Despite this improvement, the **media** and **National Congress** were the **least trusted** institutions studied.



Overall Attitudes toward the World Bank Group

“The World Bank has added a lot to the country. In my opinion, it depends much more on Brazil's contribution.” (Academia Respondent)

“Get out of São Paulo and travel more around Brazil.” (Private Sector Respondent)



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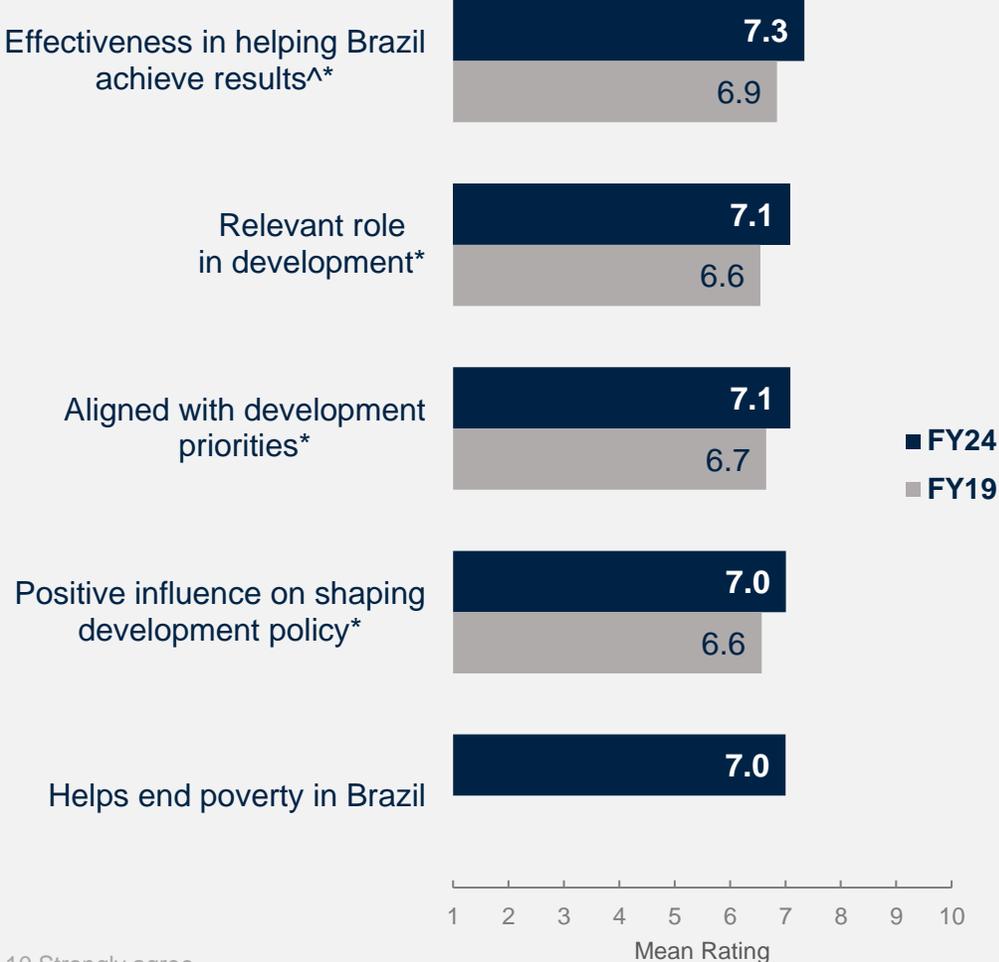


In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Brazil? (N=81)

Key Performance Indicators Increasingly Positive

In FY24, respondents gave significantly higher ratings for the WBG’s **effectiveness** in helping Brazil achieve development results, its **relevance** to development in Brazil, **alignment** with their development priorities, and its **positive influence** on shaping development policy. Stakeholder group differences of note:

- Respondents from the subnational government gave the highest ratings for the WBG’s relevance (mean = 8.0), whereas respondents from civil society and academia gave significantly lower ratings (means = 6.1 and 6.4, respectively).
- Respondents from subnational government and private sector gave the highest ratings for the WBG’s positive influence (means = 7.9 and 7.8, respectively). In contrast, respondents from civil society and academia gave significantly lower ratings (means = 5.9 and 6.1, respectively).
- Respondents from subnational governments and bilateral or multilateral agencies gave the highest ratings for the WBG’s work to help end poverty in Brazil (means = 7.7 and 7.5, respectively). In contrast, respondents from civil society gave significantly lower ratings (mean = 5.7).



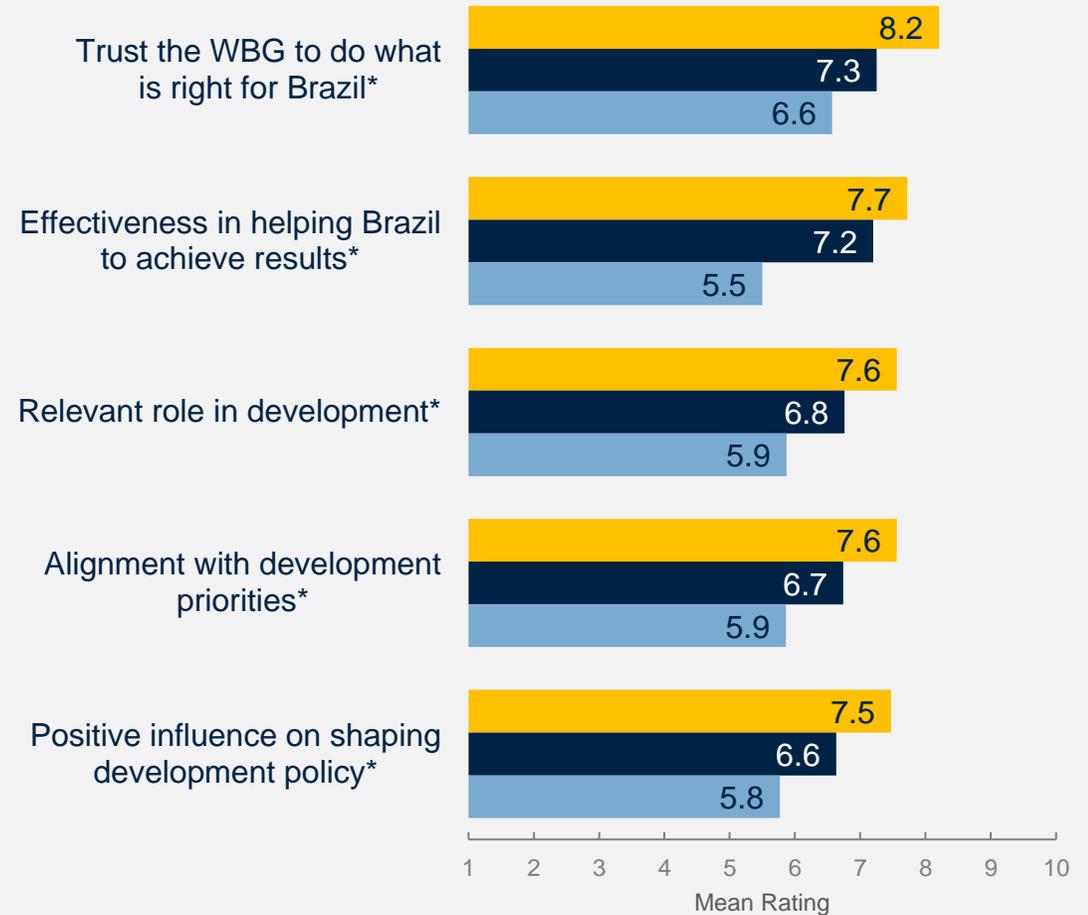
The WBG currently plays a relevant role in development in Brazil. Scale: 1 Strongly disagree – 10 Strongly agree
 The WBG has a positive influence on shaping the development policy in Brazil. Scale: 1 Strongly disagree – 10 Strongly agree
 The WBG’s work is aligned with what I consider the development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

*Significant difference between years

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 Brazil?

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

*Significant difference between levels of familiarity



How much do you trust the WBG to do what is right for Brazil? Scale: 1 Not at all – 10 Very much

The WBG has a positive influence on shaping the development policy in Brazil. Scale: 1 Strongly disagree – 10 Strongly agree

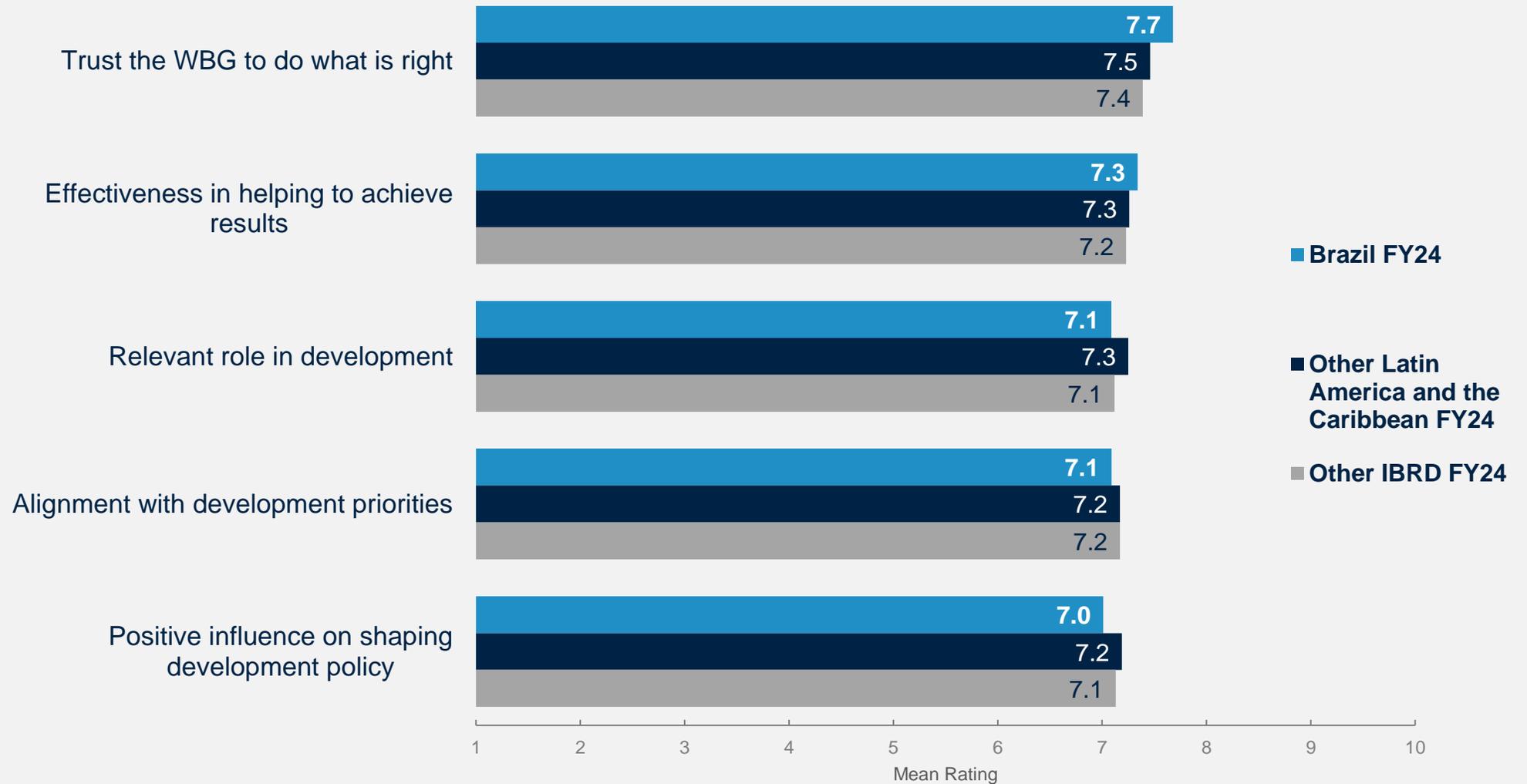
The WBG currently plays a relevant role in development in Brazil. Scale: 1 Strongly disagree – 10 Strongly agree

The WBG's work is aligned with what I consider the development priorities for Brazil. Scale: 1 Strongly disagree – 10 Strongly agree

How effective is the WBG in helping Brazil achieve development results? Scale: 1 Not effective at all – 10 Very effective



Brazil On Par with Other Latin America and the Caribbean and IBRD Countries on KPIs

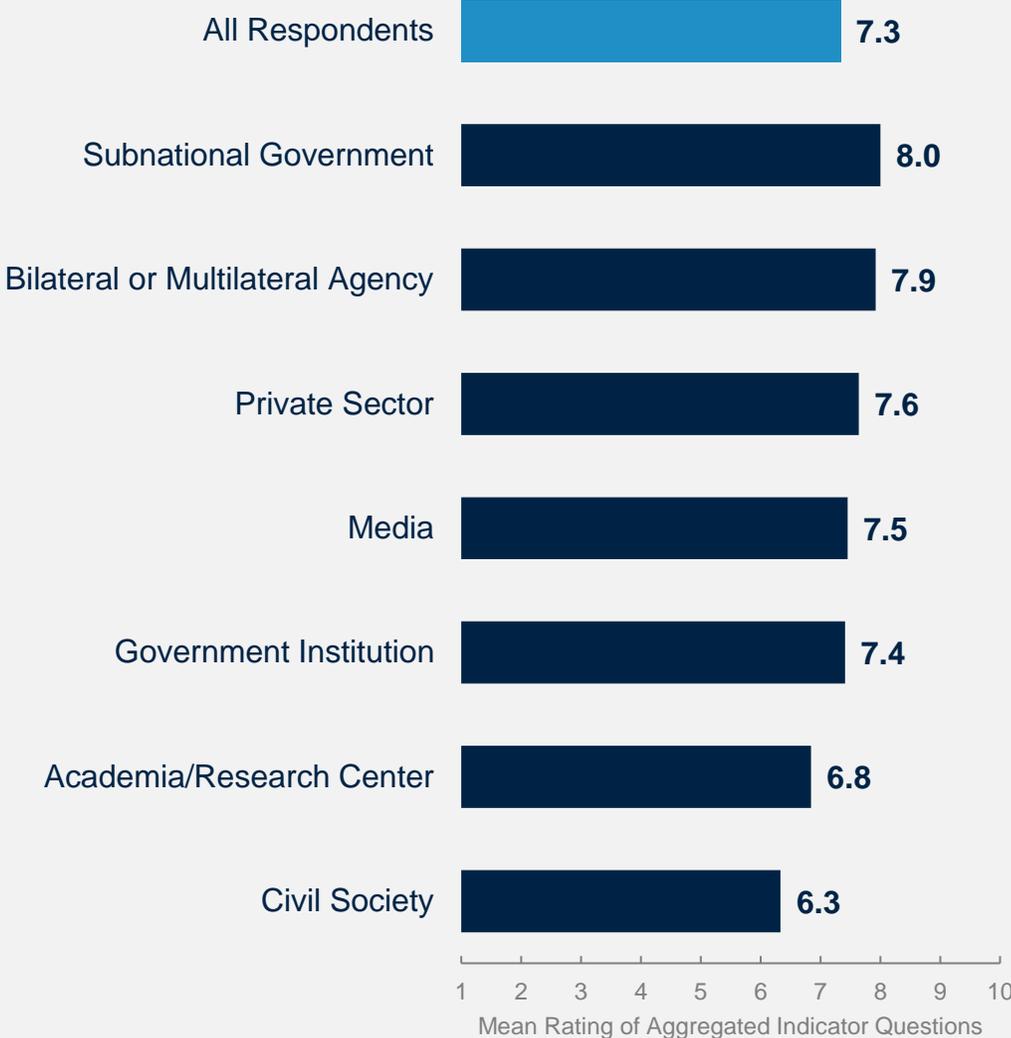


Stakeholder Trends across Performance Indicators

Respondents from subnational governments and bilateral or multilateral agencies had the highest mean ratings across the aggregated responses to the eighteen COS indicator questions. In contrast, respondents from academia and civil society had significantly lower ratings.

- 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 did not collaborate with the WBG:

Mean rating: **Collaborate with WBG = 7.9**
 Do not collaborate = 6.9



World Bank Group's Support for Development Areas

“Support public and private institutions with financial resources:

- In the development of knowledge production, innovation, and scientific research in the area of health and technology;*
- Support the expansion of comprehensive education in the country, considering that Brazil has the shortest classroom time;*
- Investing in basic sanitation in Brazil.”*

(Civil Society Respondent)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Brazil? (N=81)

Development Areas for WBG Focus

As in FY19, **education** was the top area where stakeholders would like the WBG to focus its resources in FY24.

Social protection/inclusion was a much greater priority in FY24, identified by more than ten times as many respondents compared to FY19, and became the #2 development priority in Brazil.

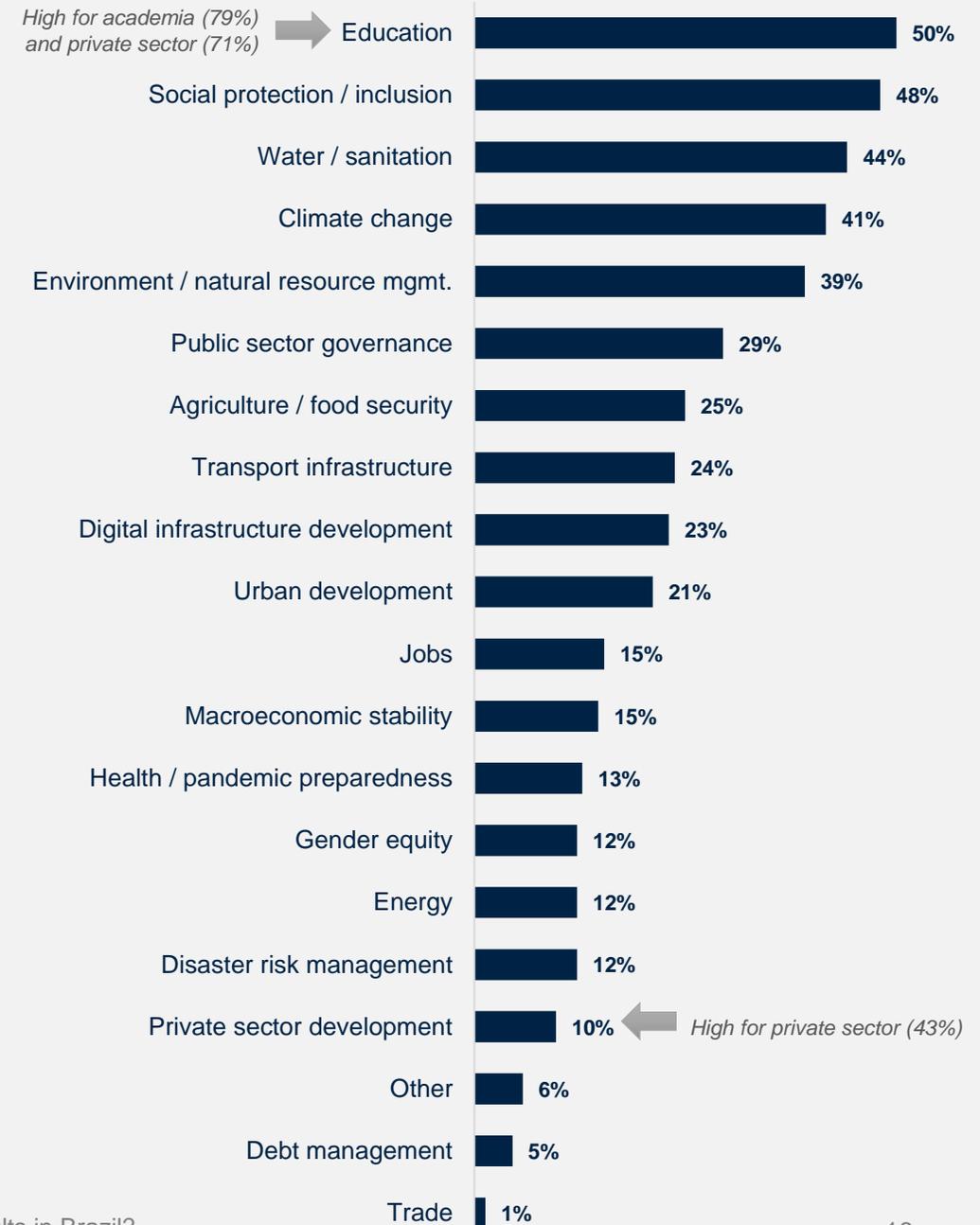
Similarly, **climate change** was identified by more than five times as many respondents compared to FY19, becoming the #4 development priority in Brazil in FY24.

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

“Prioritize investments in key areas such as education, housing, income generation, urban development and the prison system.” (Subnational Government Respondent)

“Studies and projects focused on urban infrastructure and environmental goals are important for contributing to development in Brazil.” (Bilateral or Multilateral Respondent)

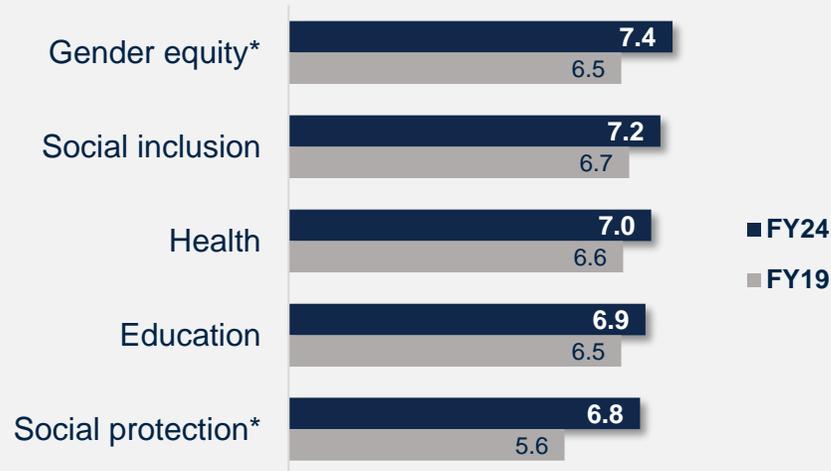
“Supporting projects that are smaller financially but have a significant impact on society. For example, with traditional and indigenous communities.” (Government Institution Respondent)



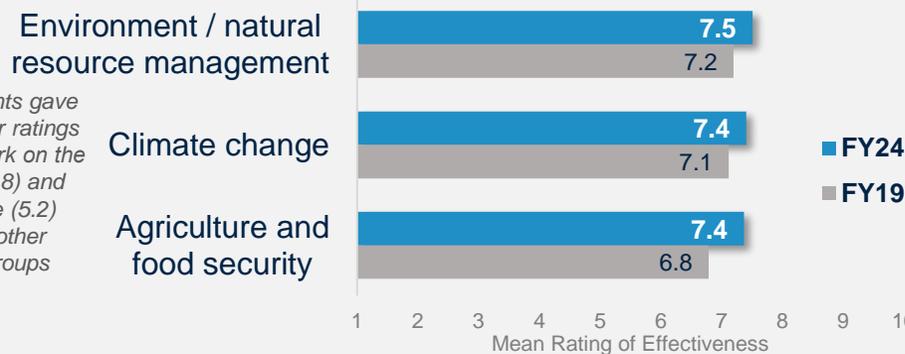
Effectiveness of WBG's Sectoral Support

The WBG's work in **environment/natural resource management** and **water supply/sanitation** received the highest effectiveness ratings. Of note, this year's survey respondents rated the WBG's work in gender equity, social protection, governance, and transport significantly higher than in FY19.

Human Development



Environmental Sustainability



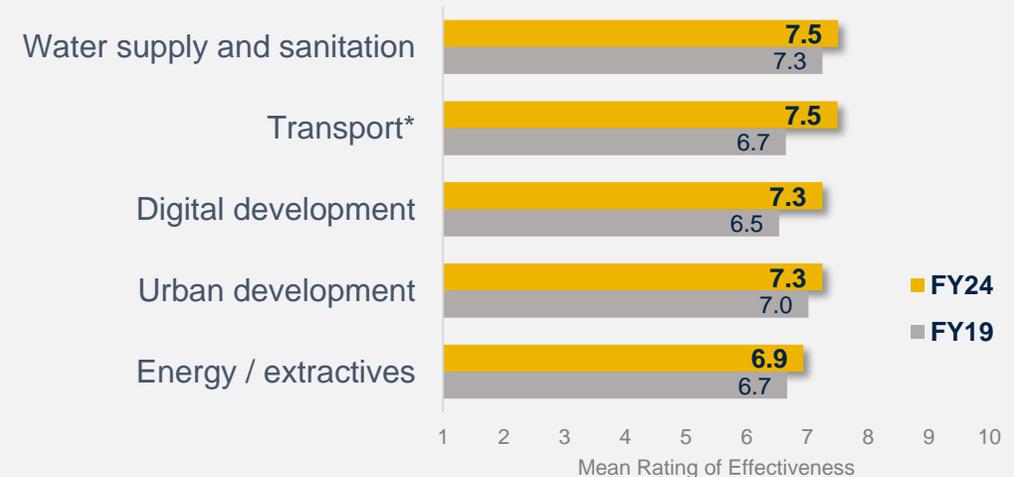
Media respondents gave significantly lower ratings for the WBG's work on the environment (4.8) and climate change (5.2) compared to other stakeholder groups

*Significant difference between years

Finance / Institutions / Economic Growth



Infrastructure



How **effective** has the WBG been at achieving development results in each of these areas in Brazil? 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")

World Bank Group's Engagement on the Ground in Brazil

"Bring the WB closer to academia, civil society organizations, and the private sector."
(Academia Respondent)

"More work with sub-national units." (Government Institution Respondent)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Brazil? (N=81)

The WBG Increasingly Seen as an Effective Partner

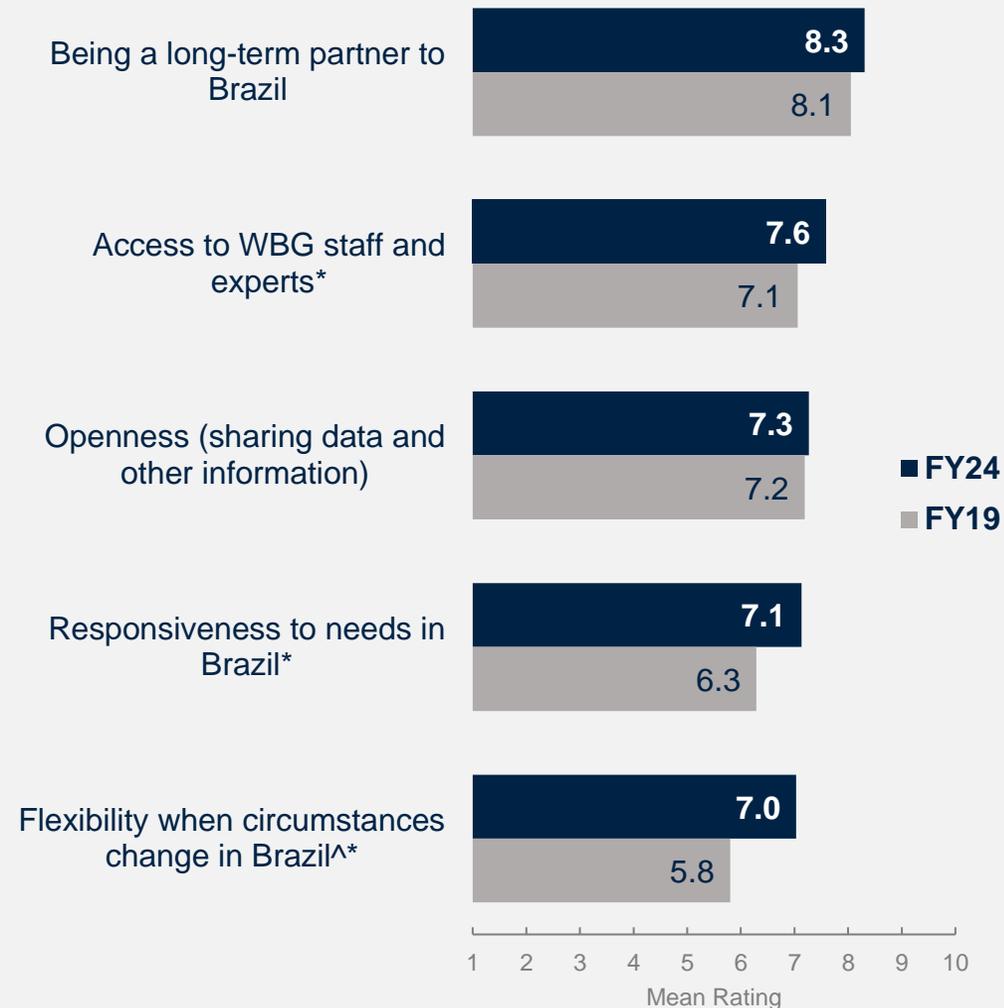
In FY24, respondents gave the WBG the highest ratings for being a long-term partner to Brazil. In addition, respondents perceived the WBG as significantly more **accessible**, **responsive**, and **flexible** than in FY19. Stakeholder group differences of note:

- Respondents from subnational government and private sector gave the highest ratings for the WBG's responsiveness (both means = 7.9), whereas respondents from civil society gave significantly lower ratings (mean = 5.8).
- Respondents from subnational government and private sector gave the highest ratings for the WBG's accessibility (means = 8.8 and 8.1, respectively). In contrast, respondents from civil society and media gave significantly lower ratings (means = 6.7 and 6.3, respectively).

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

“Improving the communication process and greater participation with the private sector.” (Subnational Government Respondent)

“Expand partnerships with international organizations, think tanks, and other development agents to gain scale and broaden impact.” (Bilateral or Multilateral Respondent)



To what extent is the WBG an effective development partner in terms 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 the country context asked in FY19. *Significant difference between years



The WBG Increasingly Seen as Effectively Collaborating with Stakeholders

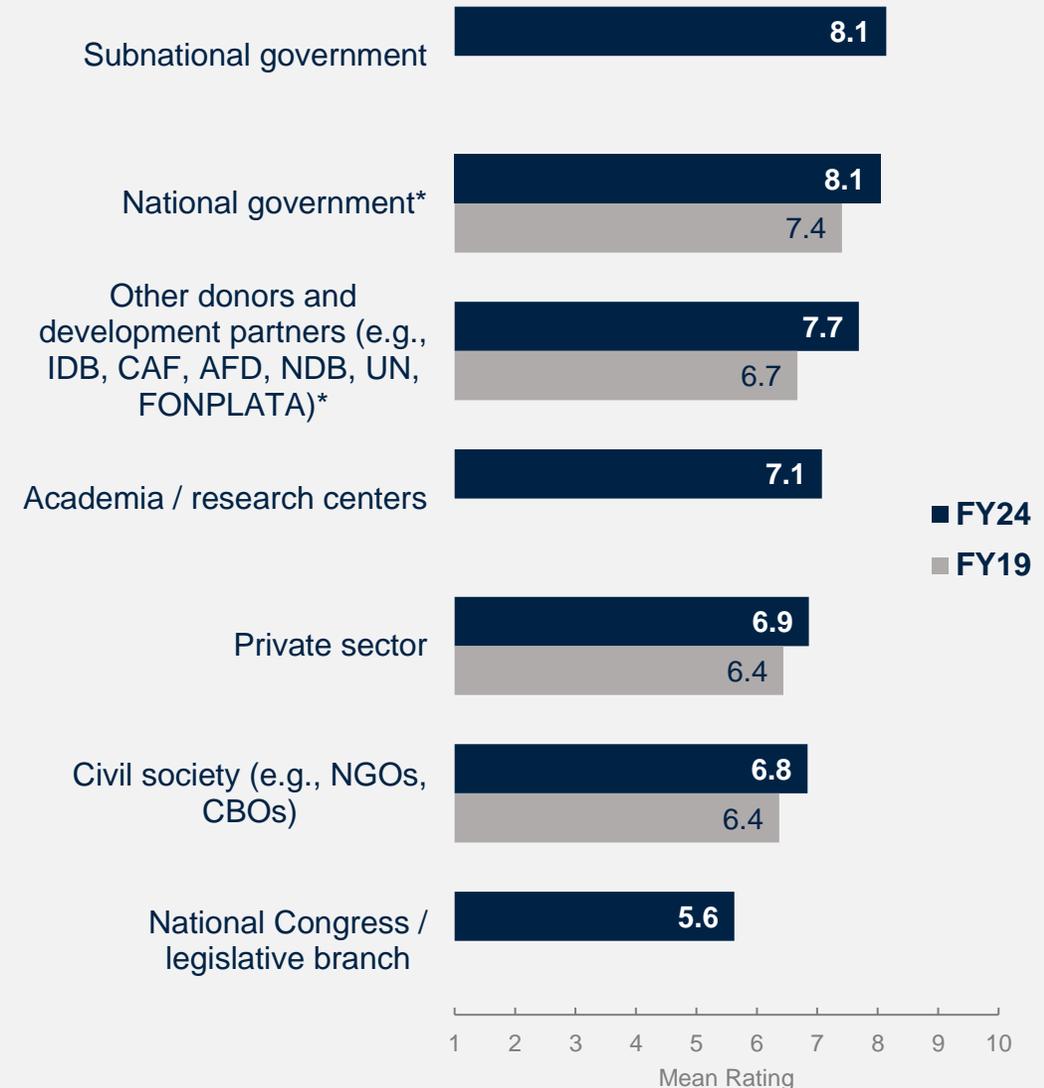
In FY24, respondents perceived the WBG as collaborating significantly more effectively with the **National government** and **other donors and development partners**. The WBG's collaboration with the **private sector** and **civil society** improved compared to FY19, but this difference did not reach statistical significance. Stakeholder group differences of note:

- Respondents from the private sector and the media gave the highest ratings for the WBG's collaboration with the private sector (means = 8.3 and 9.1, respectively), whereas respondents from government institutions and the subnational government gave significantly lower ratings (both means = 5.8).
- Respondents from the private sector gave the highest ratings for the WBG's collaboration with academia (mean = 8.8), whereas respondents from academia, civil society, and government institutions gave significantly lower ratings (means = 6.3, 6.5, and 6.4, respectively).

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

“Communicate with civil society in accessible language. Include traditionally marginalized groups in this dialogue. Stimulating multisectoral debate is also important.”

(Civil Society Respondent)



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

Stakeholders want the Bank to Collaborate More with Subnational Government, Civil Society, and Academia

Although the WBG received the highest rating for its collaboration with the subnational government, a majority of respondents in this year's survey indicated that, in addition to its partnership with the National government, the WBG should collaborate more with the **subnational government**. Four in ten respondents wanted to see the WBG collaborate more with **civil society** and **academia**.

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

"Getting closer to grassroots civil society organizations to learn their realities, understand their problems, and propose community solutions."
(Civil Society Respondent)

"Strengthen the relationship with municipalities; strengthen support for the governance of sub-national spheres." (Subnational Government Respondent)

Top for subnational government (75%) and government institutions (67%)

Subnational government

52%

Top for civil society (86%)

Civil society

44%

Academia / research centers

40%

Private sector

27%

Top for private sector (92%)

Other donors and development partners

14%

National Congress / legislative branch

8%

Other

2%



In addition to its partnership with the National government, which of the following should the WBG collaborate with more to have greater impact in Brazil? (Select up to 2) (Percentage of Respondents, N=140)

World Bank Group's Financial Instruments and Knowledge Work

“Acting more strongly in partnership with regional development banks, whether in credit programs (for the public or private sectors) or through technical cooperation to disseminate good practices and training for the banks themselves and for specific target audiences (such as sub-national entities and small entrepreneurs).”

(Government Institution Respondent)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Brazil? (N=81)

Financial Resources considered the Bank's Greatest Value

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

"More funding for social impact. Expand lines of financing for medium and small financial institutions."

(Private Sector Respondent)

"Financing for the private sector."

(Parliamentarian Respondent)

"Together with the financial support for the projects, they should offer operational advice that maximizes the expected end result by maximizing the most efficient use of financial resources."

(Subnational Government Respondent)

"Supporting, on a larger scale, through technical assistance, the design of projects at the sub-national level."

(Civil Society Respondent)

"Provide ongoing training for the technical staff of public servants who will manage the projects and/or programs requested."

(Subnational Government Respondent)

Of more value to subnational government (81%), but of less value to media (17%)



Financial resources



Technical assistance and implementation support



Knowledge and analytical products



Of more value to media (92%)

Mobilizing third party financial resources



Convening / bringing together different groups of stakeholders



Capacity development and training



Of more value to subnational government (29%)

Development partner coordination



Other 2%



WBG Financial Instruments Seen as Increasingly Meeting Brazil's Needs

Regarding the WBG's financial instruments, respondents had the highest levels of agreement that the WBG **insists on accountability through its lending**. It should also be noted that respondents had significantly higher levels of agreement that **the WBG's financial instruments meet Brazil's needs** this year compared to the FY19 survey. Stakeholder group differences of note:

- Respondents from the subnational government had the highest levels of agreement that the WBG's financial instruments meet Brazil's needs (mean = 7.9). In contrast, respondents from academia and media had significantly lower levels of agreement (means = 6.3 and 4.8, respectively).
- Respondents from the subnational government had the highest levels of agreement that the WBG provides timely financial support (mean = 7.5), whereas respondents from civil society and the private sector had significantly lower levels of agreement (means = 5.6 and 4.8, respectively).
- Respondents from the subnational government, bilateral or multilateral agencies, and the private sector had the highest levels of agreement that the WBG effectively monitors and evaluates the projects it supports (means = 8.3, 8.3, and 8.4, respectively). In contrast, respondents from civil society and media had significantly lower levels of agreement (means = 5.9 and 6.2, respectively).

The WBG insists on accountability through its lending (e.g., performance-based financing, resources tied to results)



The conditions of the WBG's financing are competitive compared to markets



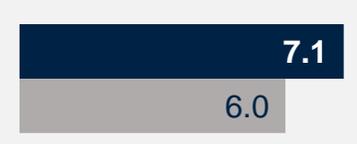
The WBG effectively monitors and evaluates the projects it supports in Brazil



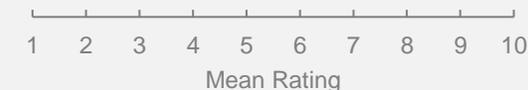
The WBG's Environmental and Social Framework requirements are reasonable



The WBG's financial instruments (i.e., budget support, loans, grants, trust funds) meet the needs of Brazil*



The WBG provides financial support in a timely manner^

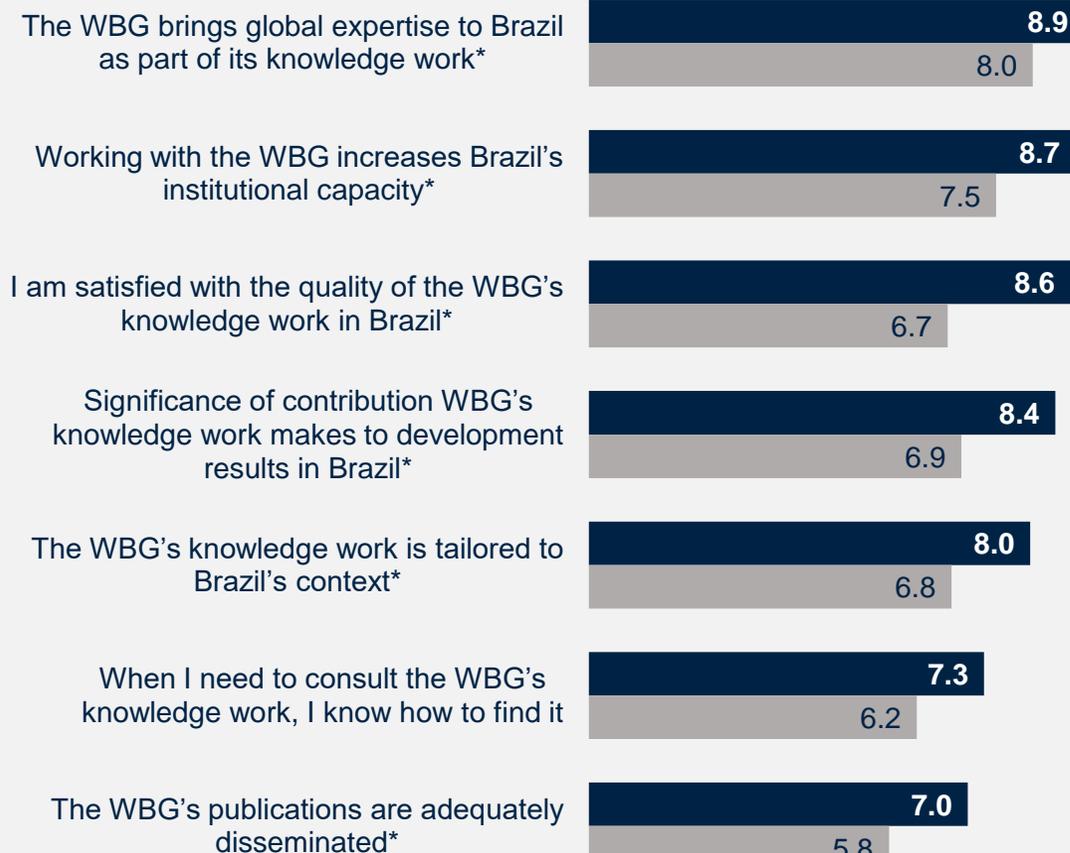
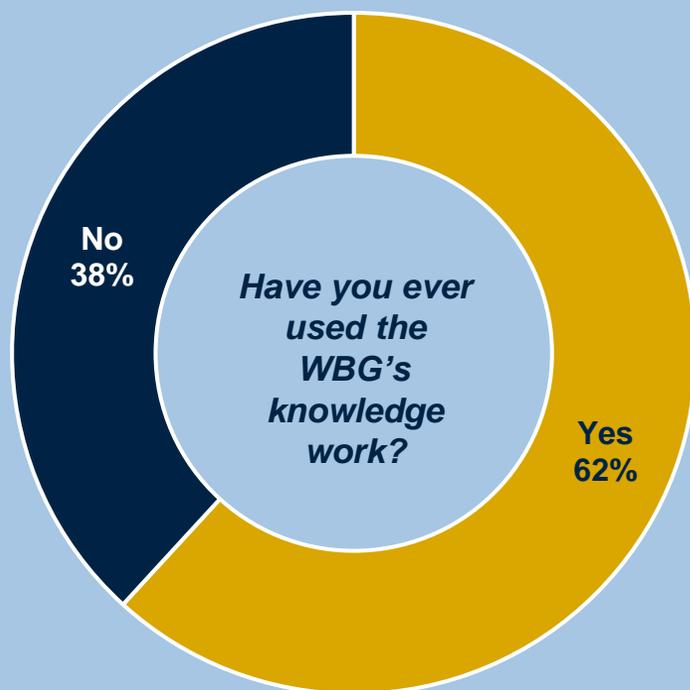


■ FY24
■ FY19



62% of Respondents Have Used the WBG's Knowledge Work and Reported Much More Positive Perceptions of It

More than 6 in 10 respondents reported having used the WBG's knowledge work in the past.



*Significant difference between usage

1 2 3 4 5 6 7 8 9 10
Mean Rating

Have you ever used the WBG's knowledge work?

■ Yes
■ No



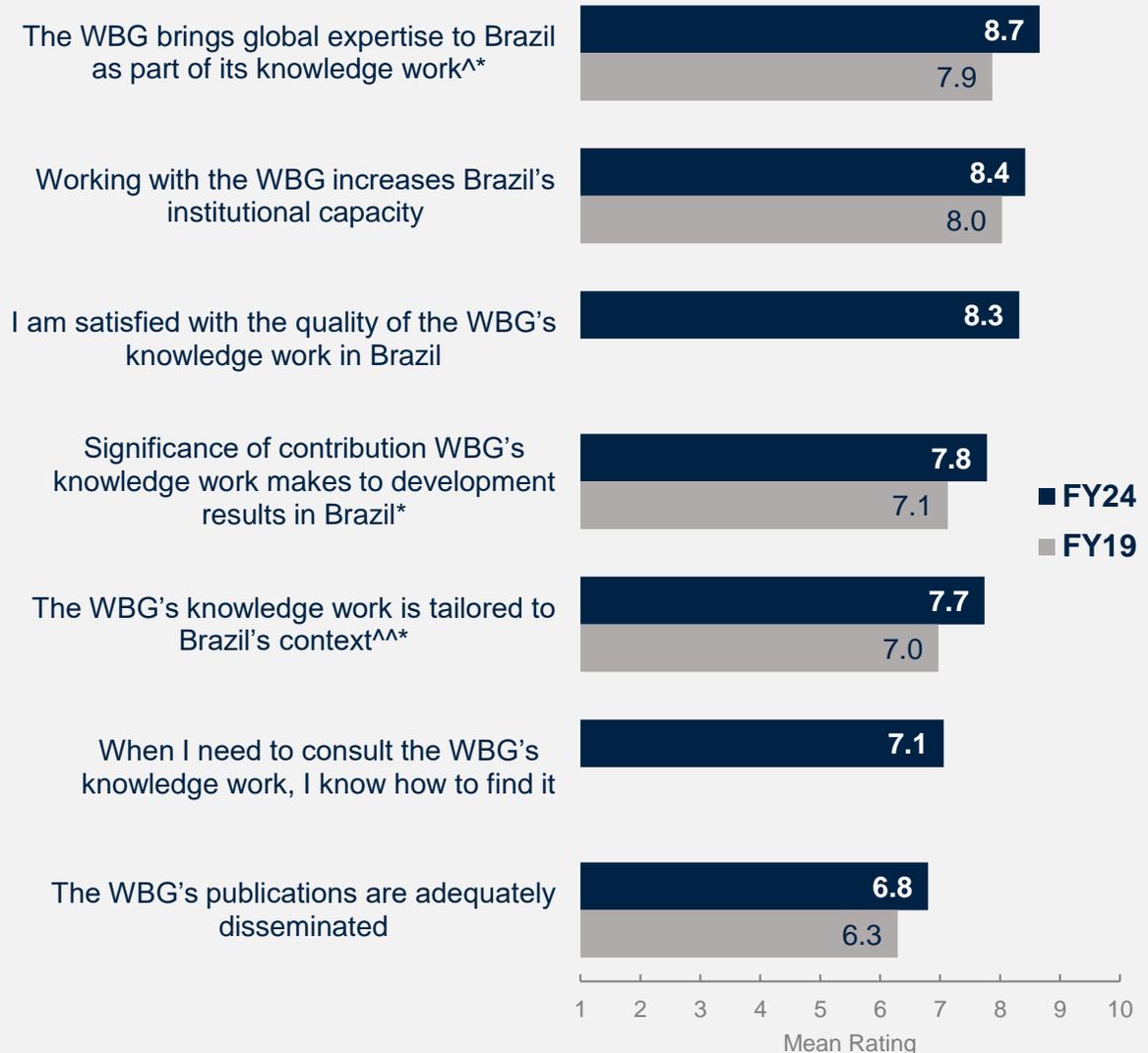
WBG Knowledge Work Perceived More Positively

Respondents had the highest levels of agreement that the WBG **brings global expertise** to Brazil, significantly improved compared to respondents in FY19. In addition, respondents this year had significantly higher levels of agreement that the WBG’s knowledge work is **tailored** to Brazil’s context and significantly higher ratings for the **contribution it makes to development results** in Brazil compared to respondents in FY19. Stakeholder group differences of note:

- Respondents from the subnational government and private sector had the highest levels of agreement that working with the WBG increases Brazil’s institutional capacity (both means = 9.0). In contrast, respondents from academia and civil society had significantly lower levels (both means = 7.7).
- Respondents from the private sector had the highest levels of agreement that the WBG’s knowledge work is tailored to Brazil’s context (mean = 8.8). In contrast, respondents from civil society had significantly lower levels (mean = 6.5).

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

“Greater dissemination and training on the Bank’s policies, especially in tendering, environmental, and social issues.”
(Subnational Government Respondent)



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

How significant a contribution do you believe the WBG’s knowledge work makes to development results in Brazil?

Scale: 1 Not significant at all – 10 Very significant [^]Compared to “Source of relevant information on global good practices” asked in FY19.

^{^^}Compared to “Adaptable to Brazil’s specific development challenges and country circumstances” in FY19 ^{*}Significant difference between years



The Future Role of the World Bank Group in Brazil

“The WBG could emphasize project financing, structuring, and preparation of infrastructure projects, and work more strongly with regional and sub-national development finance institutions in Brazil.” (Private Sector Respondent)

“Use cutting-edge research to analyze economic and social aspects of Brazil... Propose solutions based on this research.” (Academia Respondent)

“Capacity building for sub-national governments.” (Government Institution Respondent)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Brazil? (N=81)

How can the Bank increase its effectiveness? Open-Ended Responses

Engage with more non-government stakeholders, build capacity, and better align with Brazil's needs, context, and capacity.

Engagement 26%

- More engagement and collaboration with civil society, private sector, academia, and the media
- More collaboration with subnational government and municipalities
- Engage with other development partners

Knowledge 16%

- More training/capacity building
- More dissemination of project results and knowledge products
- More tailored analysis of Brazil's economy and development needs

Focus Area 15%

- Projects that touch on multiple layers of governance
- Education
- Sanitation
- Environmental sustainability



Communication 13%

- Greater partnership with the media
- More promotion/awareness of the WBG's work
- Broader dissemination of results

Operational Effectiveness 12%

- Better understand the local context, capacity, etc.
- More flexibility to adapt to local circumstances

Financial Support 10%

- Private sector funding
- Smaller projects with large impact
- Partner with regional development banks

Results 8%

- Less bureaucracy
- More transparency



In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Brazil? (N=81)

How can the Bank increase its effectiveness? Open-Ended Responses

Engage with more non-government stakeholders, build capacity, and better align with Brazil's needs, context, and capacity.

Engagement

"To widely and educationally disseminate its initiatives to civil society and social participation bodies." (Government Institution Respondent)

"Partnerships with sub-national entities." (Parliamentarian Respondent)

"Greater priority [should be] given to supporting initiatives by civil society and sub-national governments." (Government Institution Respondent)

"Broaden the dialogue with Brazilian civil society organizations, highlighting the correlation between Brazilian experiences and the WBG." (Civil Society Respondent)

"Partnerships with Brazilian academic institutions." (Academia Respondent)

Focus Area

"In your financing and analytical work, consider multi-level governance, such as integrating actions between levels of government. Numerous public policies require this integration, and the WBG can make this possible and achieve results, so it could induce results for society." (Government Institution Respondent)

"Invest much more in basic sanitation." (Government Institution Respondent)

"Continue to identify educational, social, and economic deficits in order to mitigate the problems related to these issues." (Subnational Government Respondent)

"Actions and projects aimed at reducing greenhouse gases and adapting gray infrastructure to green infrastructure, given that this is the most effective action for adapting to climate change." (Government Institution Respondent)

"Investing in social inclusion." (Parliamentarian Respondent)

Knowledge

"Although I read and follow all the GBM reports on Brazil and other Latin American countries, many do not. Perhaps it would be useful to distill the main conclusions/arguments in a more agile way to reach more people." (Academia Respondent)

"Present analytical reports on pressing issues in Brazil, such as political polarization and the impact of disinformation on society, for example." (Private Sector Respondent)

"Expand its training to subnational entities on loan modalities and public debt management, with a focus on subnational rather than the Union." (Subnational Government Respondent)

"Having regional offices with the infrastructure and technical capacity to provide closer support to projects financed by the Bank." (Government Institution Respondent)



In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Brazil? (N=81)

How can the Bank increase its effectiveness? Open-Ended Responses

Engage with more non-government stakeholders, build capacity, and better align with Brazil's needs, context, and capacity.

Operation Effectiveness

"Recognize, in a more realistic way, the technical limitations of sub-national governments." (Subnational Government Respondent)

"Improving mechanisms so that resources reach grassroots communities and their organizations." (Civil Society Respondent)

"Create a network of project executors to share good practices." (Subnational Government Respondent)

"Make it easier for smaller municipalities to access WBG resources by working on smaller projects in poorer regions, balancing the current strategy of larger projects." (Government Institution Respondent)

"Better adaptation of its instruments to the local reality." (Government Institution Respondent)

"Expanding the Bank's team of specialists and regionalizing its operations. Brazil is a vast country with many projects running in parallel." (Government Institution Respondent)

"1) Use national legal and regulatory frameworks; 2) Adapt policies, processes, and procedures for indirect operations (through financial institutions); 3) Offer the option of operating without a sovereign guarantee." (Subnational Government Respondent)

"Increase its capacity to address development issues in the country based on the knowledge it possesses." (Private Sector Respondent)

Communication

"Expanding the dissemination of its studies on Brazil's socio-economic, environmental and climate realities by promoting events, seminars, courses, and debates, in partnership with federal and state governments, public banks, academia, and productive agents." (Government Institution Respondent)

"Better promotion of the WBG's work in the press." (Media Respondent)

Results

"Having a greater understanding of local conditions to enable financing structures that don't require such an inefficient degree of monitoring." (Private Sector Respondent)

"Improving the procurement process, which is complex and bureaucratic, discouraging institutions and staff." (Government Institution Respondent)

"Be less bureaucratic." (Subnational Government Respondent)

Financial Support

"Flexibility in the use of funding resources, since the problems faced by federal, state, and municipal governments are dynamic." (Subnational Government Respondent)

"Financing small projects." (Government Institution Respondent)

"Increase the volume of resources." (Subnational Government Respondent)



Communication and Outreach

“Improve communication and dissemination of the programs and results of the conducted studies.”
(Parliamentarian Respondent)

“To be known. To make it easier and more transparent for you to operate in Brazil.”
(Private Sector Respondent)

“Public studies could be more widely disseminated through social networks, debates, and thematic agendas. Given the Bank's capacity for articulation and influence, experts could provide more access to thematic partners.”
(Civil Society Respondent)

“It needs to appear more on social media as a way of disseminating information about Brazil.”
(Bilateral or Multilateral Respondent)



Events, e-Newsletters, and Direct Contact were Most Preferred for Receiving WBG Communication

Respondents most preferred to receive Bank communications through **events/conferences/seminars/workshops** (in person or online), **e-newsletters**, and **direct contact** with staff.

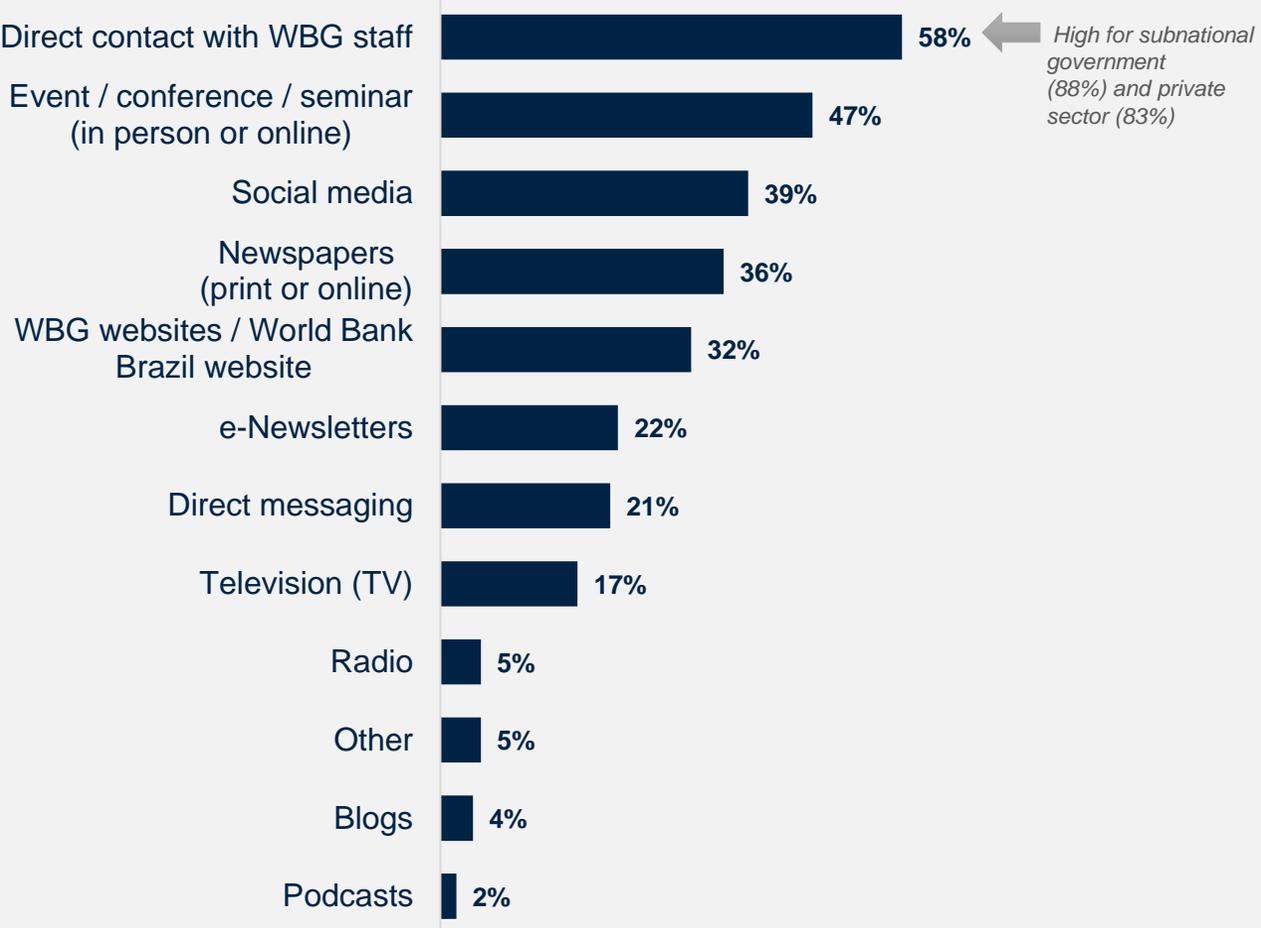
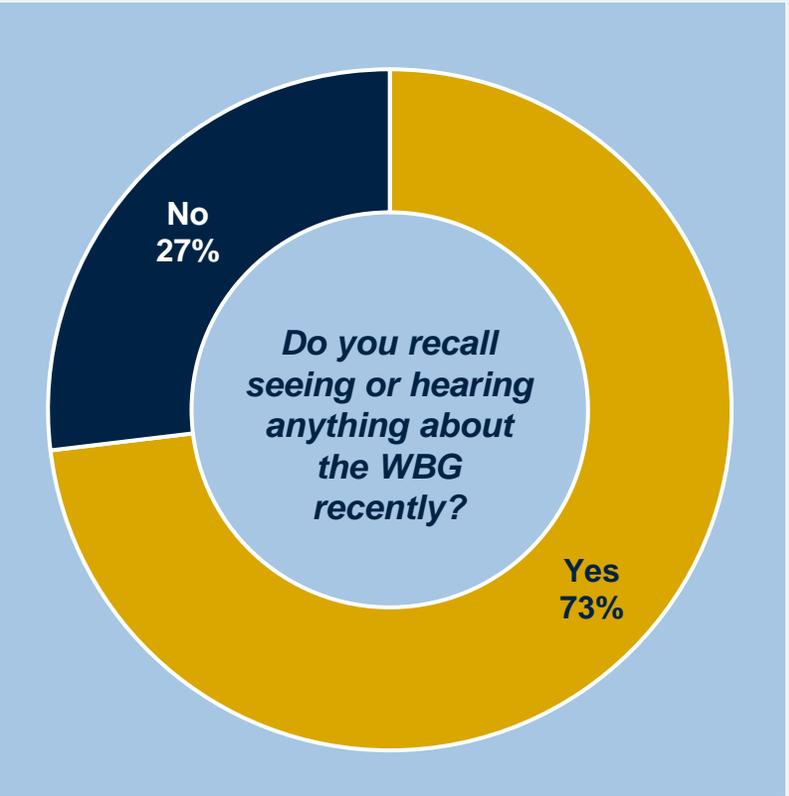
	Preferred WBG Channel							
	All Respondents	Government Institution	Subnational Government	Bilateral or Multilateral Agency	Civil Society	Private Sector	Academia / Research Center	Media
Event / conference / seminar / workshop <i>(in person or online)</i>	49%	51%	57%	67%	30%	55%	60%	18%
e-Newsletters	45%	44%	39%	44%	50%	91%	30%	36%
Direct contact with staff <i>(e.g., in person, virtually, phone, email)</i>	43%	36%	54%	44%	35%	18%	60%	73%
Direct messaging <i>(e.g., WhatsApp)</i>	29%	36%	25%	11%	35%	9%	10%	55%
Social media* <i>(e.g., Facebook, Twitter)</i>	15%	8%	4%	33%	30%	9%	30%	9%



How would you prefer to receive communication from the WBG? (Select up to 2)
 (Percentage of Respondents, N=133) *Significant difference between stakeholder groups

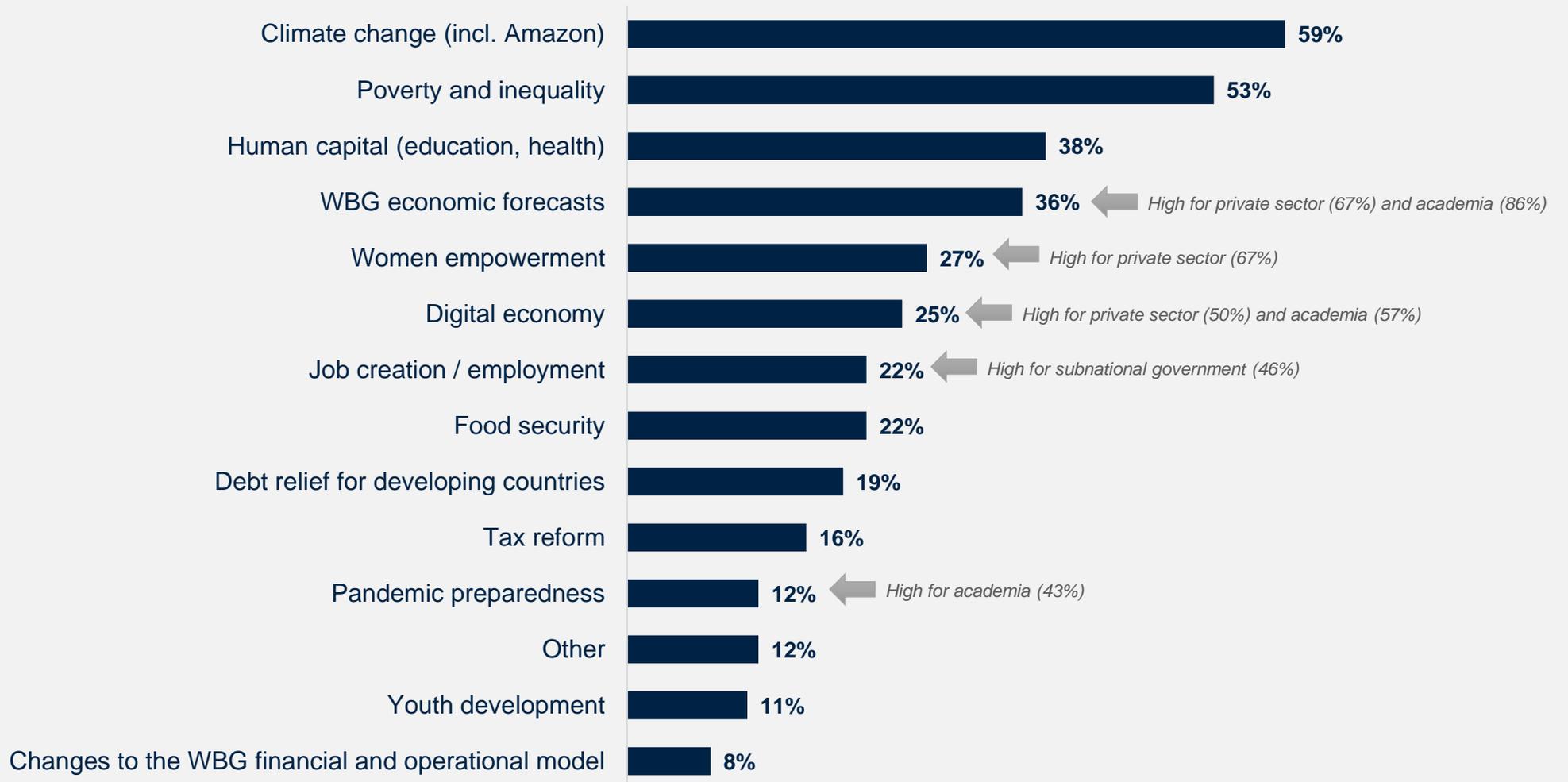
Nearly Three-Quarters Engaged with the WBG Recently, most often through Direct Contact or Events

73% of respondents recalled hearing or seeing something about the WBG recently. Respondents often reported seeing/hearing about the WBG through **direct contact** with staff and **events/conferences/seminars** (in person or online).



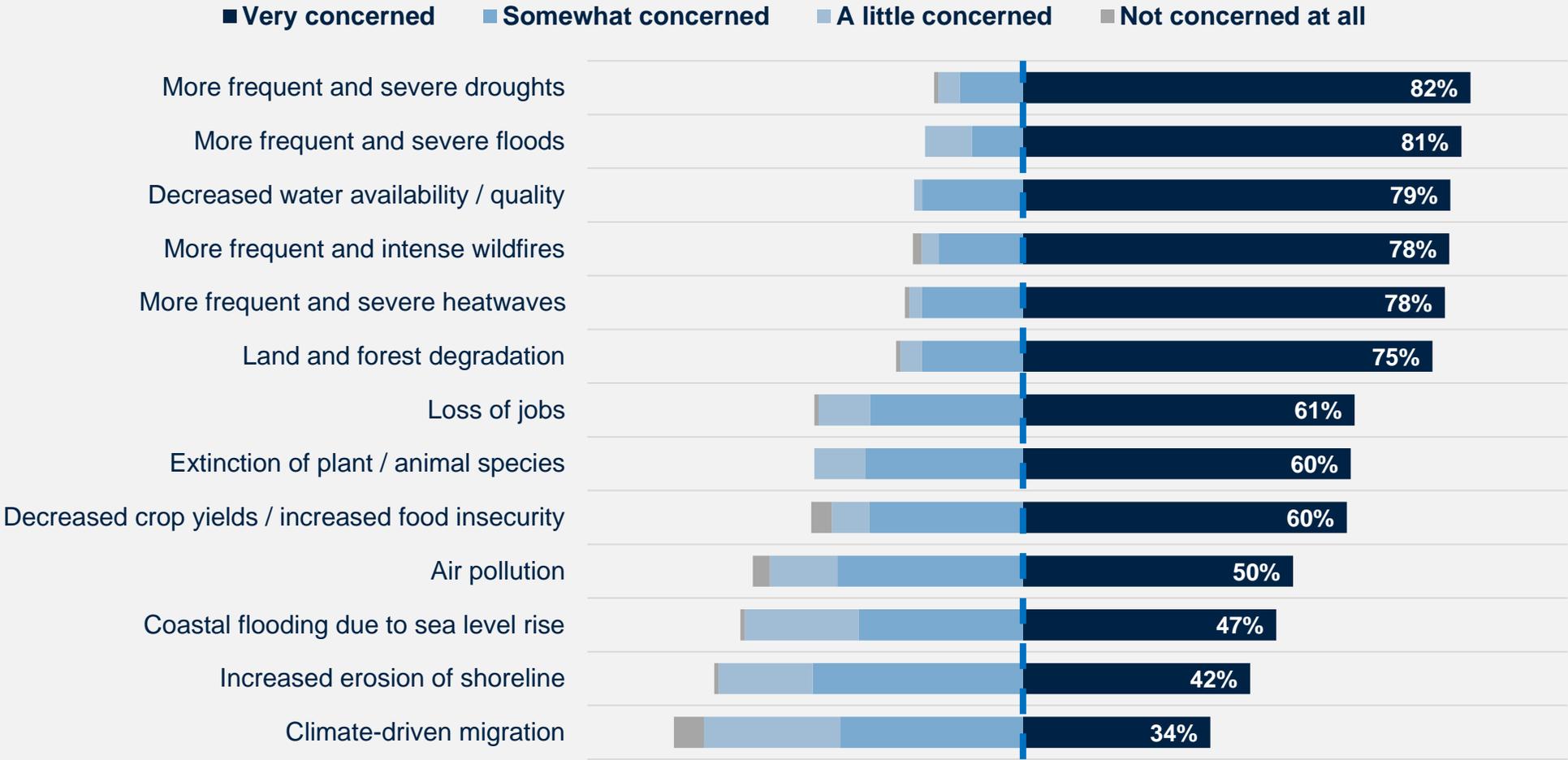
WBG Work on Climate Change and Poverty and Inequality were the Most Commonly Recalled Topics

Respondents most frequently recalled WBG work or research on **climate change** and **poverty and inequality**.

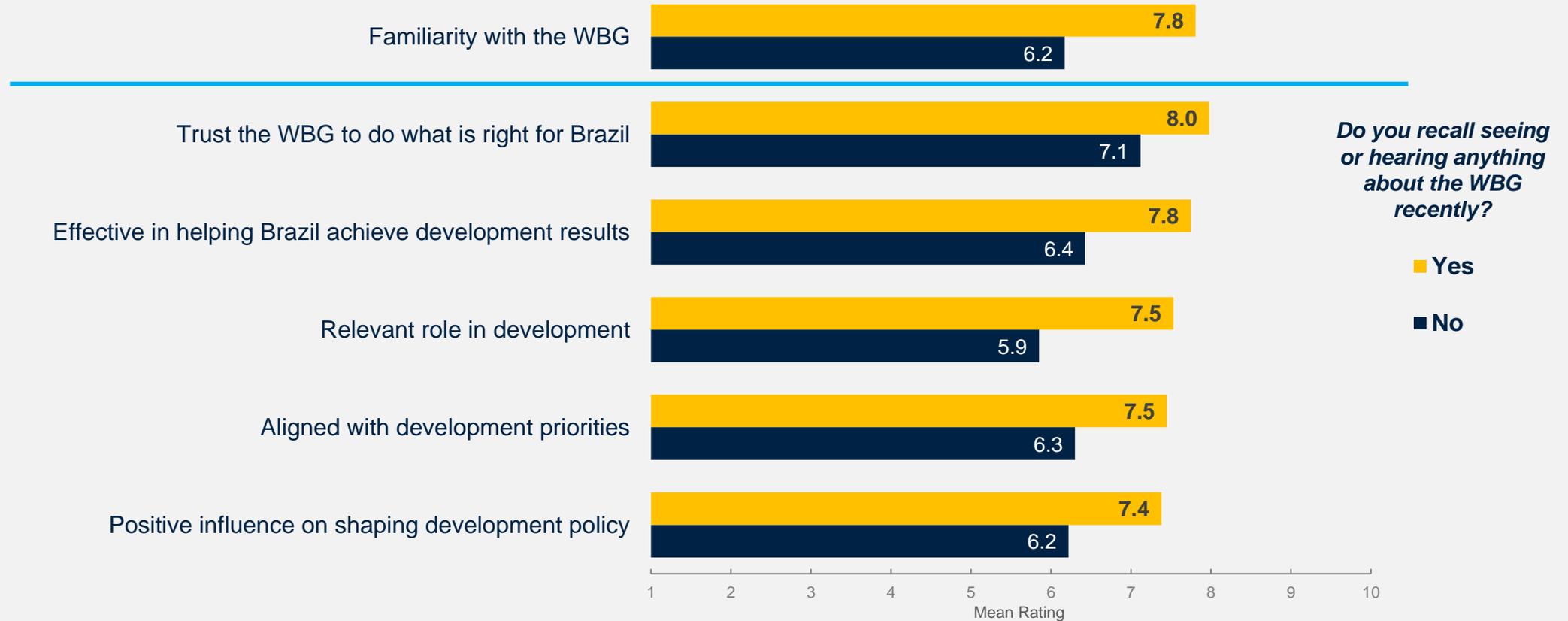


Climate Change Communications can be More Impactful when Related to Stakeholders' Top Concerns: Drought and Floods

More than 8 in 10 respondents were **very concerned** about **more frequent/severe droughts** and **more frequent/severe floods** regarding the potential impacts of climate change in Brazil. **Decreased water availability/quality, more frequent/intense wildfires, more frequent/severe heatwaves, and land/forest degradation** were also of great concern to respondents. These key areas of concern should be considered to make communications about climate change more impactful.



Message Recall Increases Familiarity and Leads to More Positive Perceptions of the WBG and its Work



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.

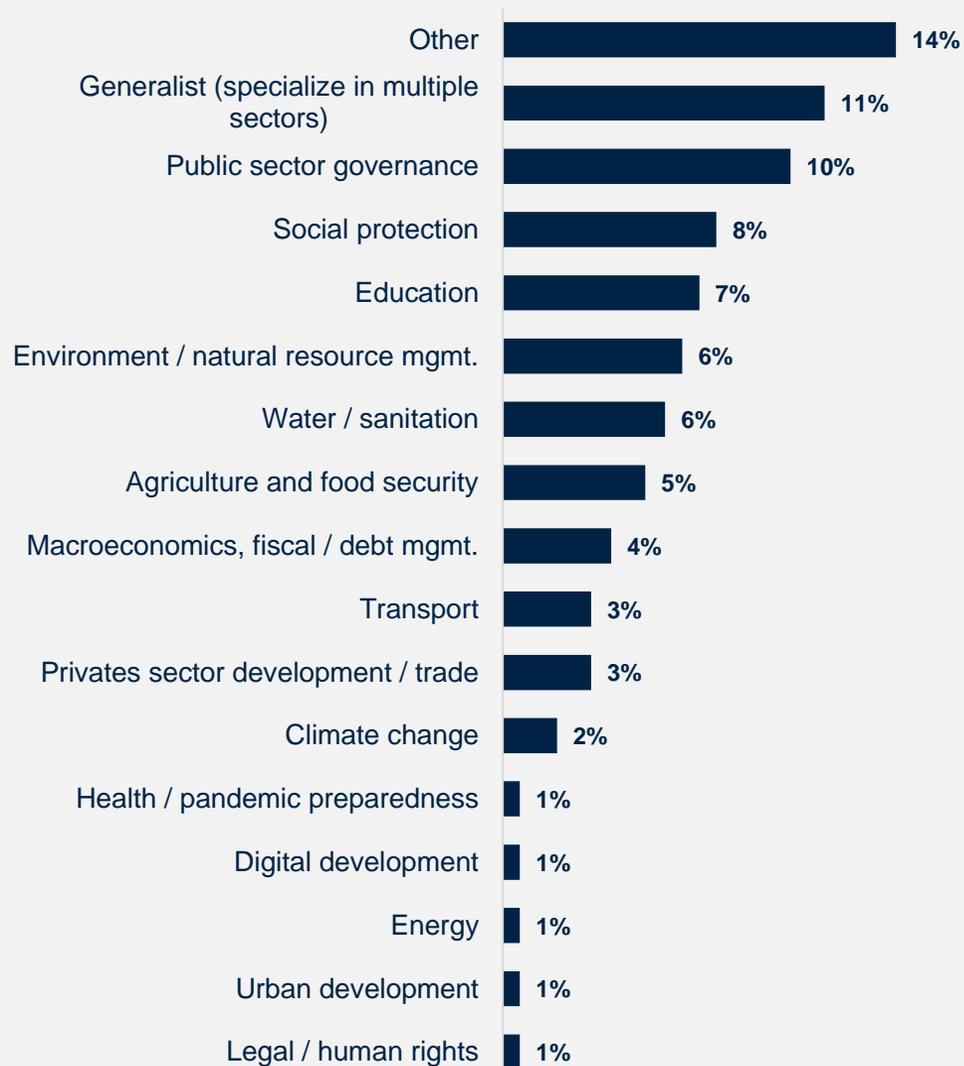
How familiar are you with the work of the World Bank Group in Brazil? Scale: 1 Not familiar at all – 10 Extremely familiar
 How much do you trust the WBG to do what is right for Brazil? Scale: 1 Not at all – 10 Very much
 Scale: 1 Strongly disagree – 10 Strongly agree: The WBG currently plays a relevant role in development in Brazil. The WBG has a positive influence on shaping the development policy in Brazil. The WBG’s work is aligned with what I consider the development priorities for Brazil.
 How effective is the WBG in helping Brazil achieve development results? Scale: 1 Not effective at all – 10 Very effective.

Sample Demographics and Detailed Methodology

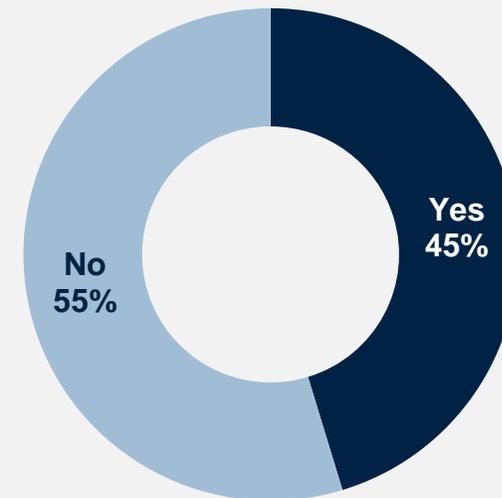


Sample Demographics

What is the primary specialization of your work? (N=130)

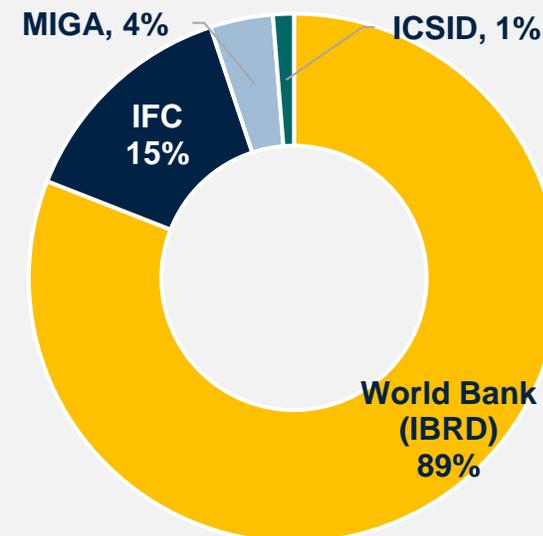


Do you collaborate/work with the World Bank Group (WBG) in Brazil? (N=159)



Respondents from subnational government were significantly more likely to indicate that they collaborate with the WBG (81%) whereas respondents from civil society, academia, and the media were significantly less likely to collaborate with the WBG (23%, 14%, and 0%, respectively).

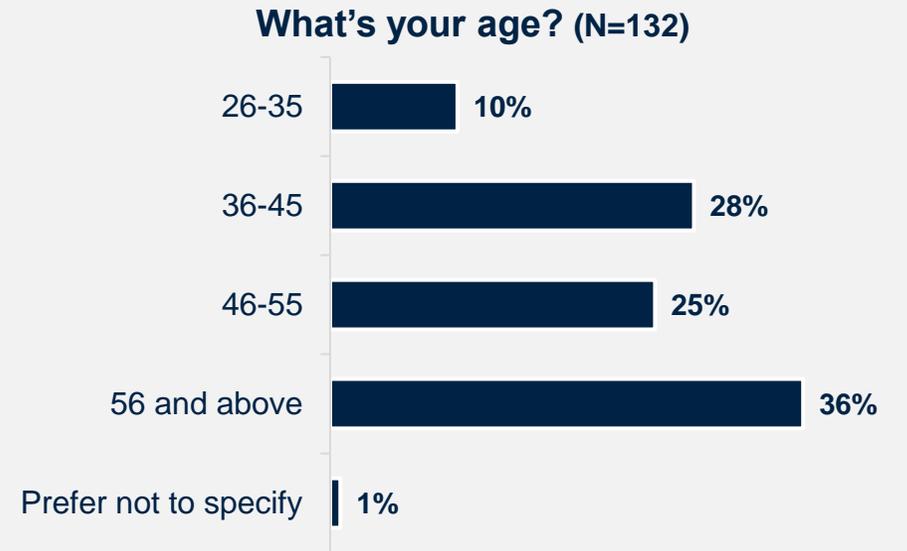
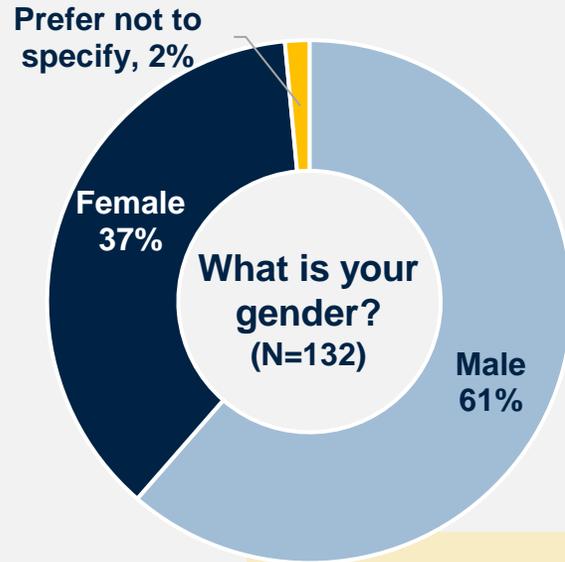
Which of the following WBG agencies do you collaborate/work with in Brazil? (N=72)



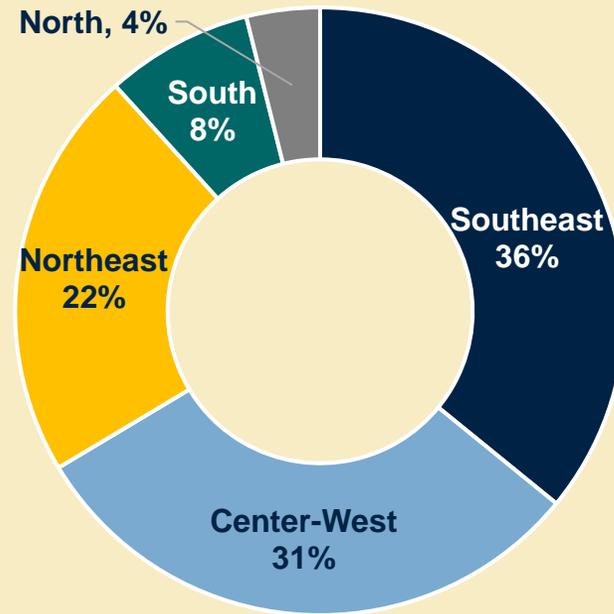
Percentages equal more than 100% because respondents could choose multiple agencies within the WBG.



Sample Demographics (continued)



Which best represents your geographic location? (N=128)



Detailed Methodology

From **February to May 2024**, a total of 858 stakeholders in Brazil were invited to provide their opinions on the WBG’s work by participating in a Country Opinion Survey (COS). A list of potential participants was compiled by the WBG country team and the field agency. Participants were drawn from the Offices of the President, Vice President, Minister, and Parliament/National Congress, government institutions, subnational governments, bilateral or multilateral agencies, the private sector, civil society, academia, and the media.

Of these stakeholders, **159 participated in the survey (19% response rate)**. Respondents completed the questionnaire via an online platform.

The results of this year’s survey were compared to the FY19 Survey with a response rate of 32% (N=300).

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 had a similar distribution of respondents across stakeholder groups with a slight outreach to and/or response from subnational governments. Any differences in stakeholder composition between the two years should be considered 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 “Brazil COS FY24 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 2024
Government Principals: Office of the President, Vice President, Minister, Parliamentarian/National Congress	7%	4%
Government Institutions: Employee of a Ministry, Department, Project Implementation Unit, Independent Government Institution, Judiciary, State-Owned Enterprise	29%	31%
Subnational Government	15%	20%
Bilateral/Multilateral Agency: Embassy, Development Organization, Development Bank, UN Agency	4%	7%
Civil Society Organization: Local and regional NGOs, Community-Based Organization, Private Foundation, Professional/Trade Association, Faith-Based Group, Youth Group	15%	14%
Private Sector: Private Company, Financial Sector Organization, Private Bank	13%	9%
Academia / Research Center	10%	9%
Media	5%	8%
Total Number of Respondents	294	159

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.

A1_5. How much do you trust the World Bank Group to do what is right for Brazil? Scale: 1 Not at all – 10 Very much

A2. How effective is the World Bank Group in helping Brazil achieve development results? Scale: 1 Not effective at all – 10 Very effective

A3. How significant a contribution do you believe the WBG's knowledge work make to development results in Brazil?
Scale: 1 Not significant at all – 10 Very significant

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

A4. The WBG currently plays a relevant role in development in Brazil.

A5. The WBG's work is aligned with what I consider the development priorities for Brazil.

A6. The WBG has a positive influence on shaping development policy in Brazil.

A7. The WBG's work helps end poverty in Brazil

To what extent is the WBG an effective development partner in terms of each of the following? Scale: 1 To no degree at all – 10 To a very significant degree

C1_1. Responsiveness to needs in Brazil

C1_2. Access to WBG staff and experts

C1_3. Flexibility when circumstances change in Brazil

C1_5. Being a long-term partner to Brazil

To what extent is the WBG an effective development partner in Brazil, in terms of collaborating with the following groups?

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

C2_1. National government

C2_4. Private sector

C2_5. Civil society

C2_6. Other development partners

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

C4_1. The WBG's financial instruments (i.e., budget support, loans, grants, trust funds) meet the needs of Brazil.

C6_1. I am satisfied with the quality of the WBG's knowledge work in Brazil.

C6_4. The WBG's knowledge work is tailored to Brazil's context.





CountryOpinionSurveys

Thank you

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

countrysurveys@worldbankgroup.org

