



CountryOpinionSurveys

FY 2024 Bhutan

Country Opinion Survey Report

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Acknowledgements

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

BI acknowledges the significant contribution of the Bhutan Country Team and independent consultant Dr. Tshering Cigay. In particular, BI is grateful for the support from Mehrin Mahbub (Senior External Affairs Officer) who coordinated the survey-related activities from Dhaka, Bangladesh.



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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 Bhutan 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 Bhutan'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 five 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 regarding the WBG's work in Bhutan? How is the WBG perceived as a development partner? Are opinions improving or declining?
- 5. 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?
- 6. Message Recall:** What key topics that the WBG communicates do stakeholders recall?



Methodology Overview

■ Fielded November 2023 – January 2024

- 310 potential participants were asked to complete a mostly quantitative survey
- Respondents completed the questionnaire online
- List of names provided by the WBG country team, cleaned and updated by an independent fielding consultant
- Process managed on the ground by the COS team and the fielding consultant

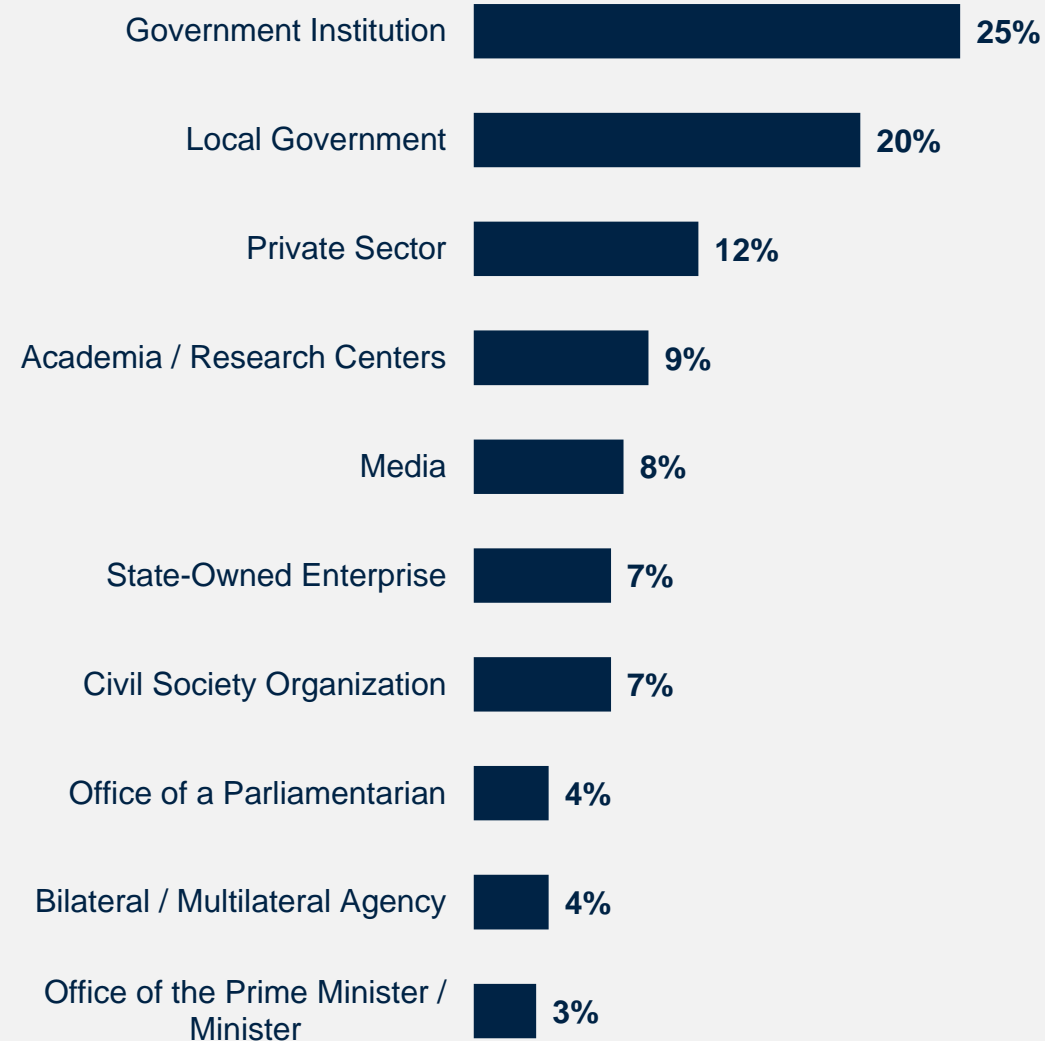
■ 155 participants (51% response rate)

- 99% from Bhutan, 1% from outside of Bhutan
- 30% currently collaborate with the WBG

■ Compared to FY19 Country Survey

- 122 participants (53% response rate)
- Majority of respondents completed surveys online, and some received the questionnaire via post and returned it accordingly
- 34% 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=155)

Overall Context

“Bhutan is one of the smallest economies in the world and opportunities for businesses in Bhutan are limited due to small GDP. The only way Bhutan can catch up with other countries is through multi-economic activities and increased exports. Lack of finances and high-interest borrowing rates are making it hard for Bhutanese business sectors to establish high-production capacity house[s], thus losing market edge. Stricter rule from the Central Bank has hampered private sector growth in Bhutan, and [the] World Bank can intervene by issuing soft loans or low-interest loans to private sectors directly bypassing the Central Bank, which imposes higher lending rates through its local banks. It will make a big difference to the private sector, and business growth will be accelerated. Further, if the World Bank can help interconnect international businesses by organizing business tours or taking Bhutanese to international expos.”

(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 Bhutan? (N=114)

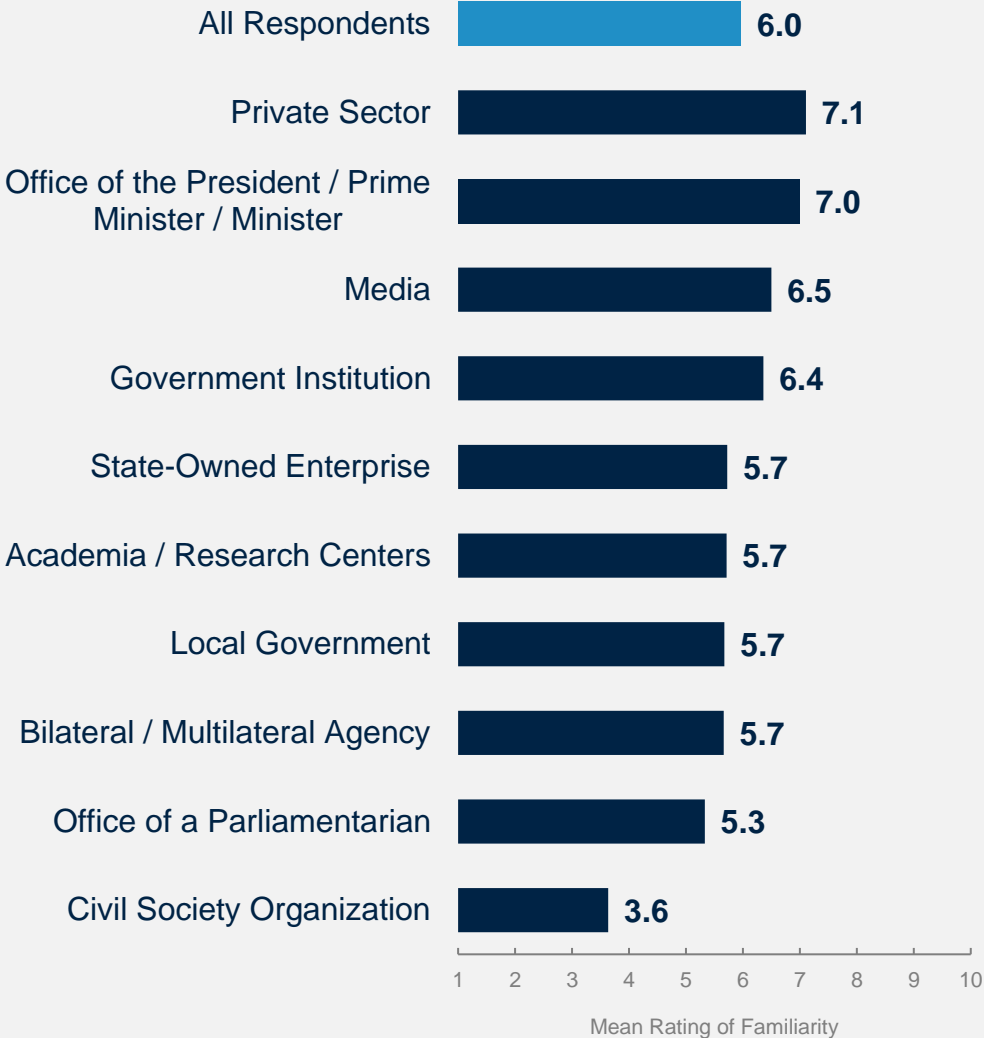
Familiarity with the World Bank Group

- FY24 compared to FY19:** Respondents in this year's Country Survey reported similar levels of familiarity with the WBG as in FY19:

Mean familiarity: **FY24 = 6.0**
FY19 = 6.0

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

Mean familiarity: **Collaborate with WBG = 7.8**
Do not collaborate = 6.8

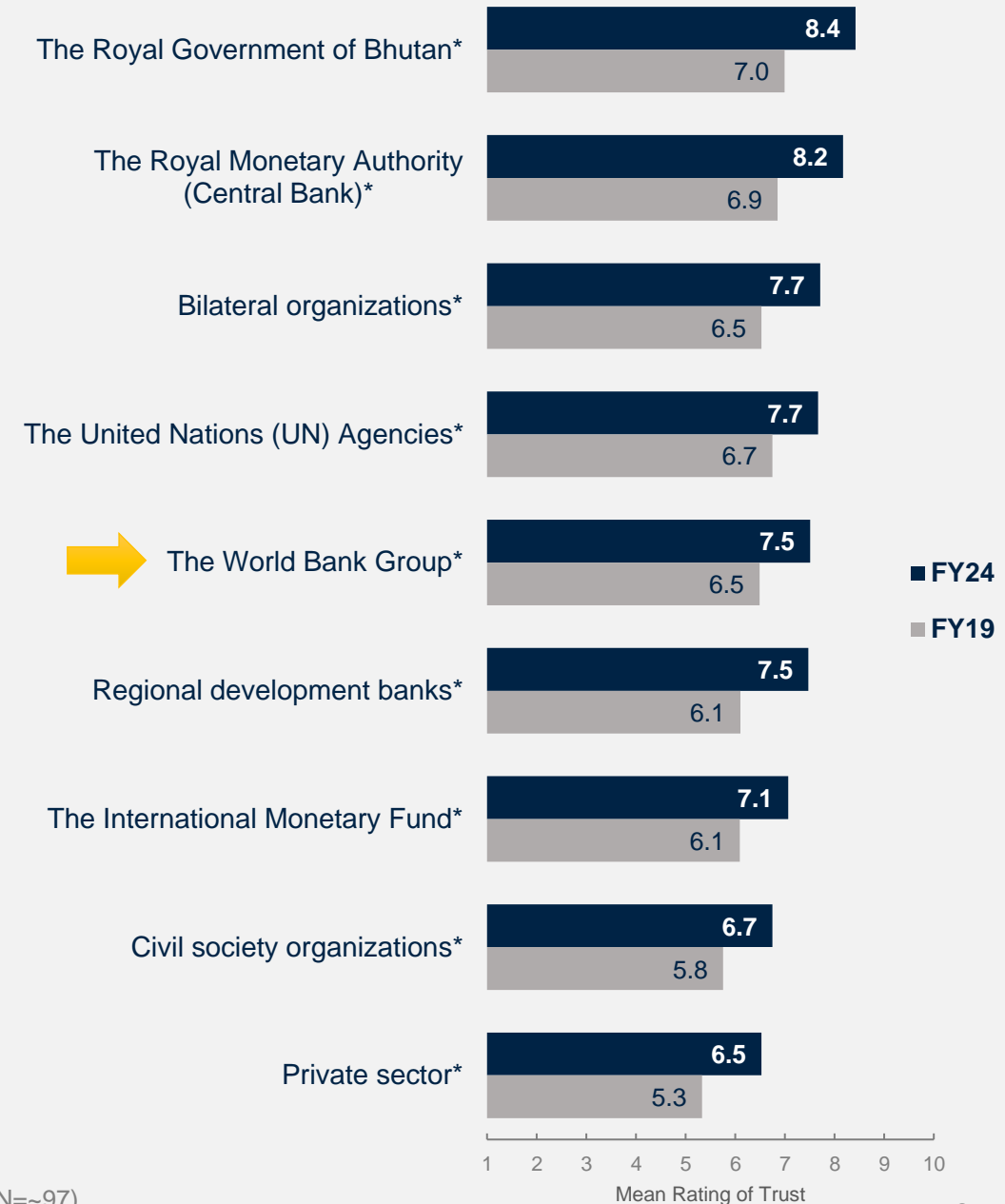


Respondents Trust the WBG, on par with Regional Development Banks

Respondents gave the highest trust ratings for the **Royal Government of Bhutan** and the **Royal Monetary Authority (Central Bank)** in Bhutan. Respondents also gave relatively high trust ratings to the UN, the WBG, and regional development banks.

At the same time, **civil society organizations** and the **private sector** remain the least trusted among the institutions studied in Bhutan. Notably, levels of trust in all institutions were significantly higher in FY24 than in the FY19 survey, which may reflect a more positive outlook of the respondents in FY24 compared to FY19.

- In FY24, respondents from the **private sector** gave the highest ratings of trust for the WBG (mean=8.4), whereas respondents from **civil society** organizations gave significantly lower ratings (mean = 6.7).



Overall Attitudes toward the World Bank Group

“Strengthen collaboration with Bhutanese stakeholders: foster closer collaboration with the Bhutanese government, civil society organisations, and private sector entities to ensure that WBG-supported projects align with national development priorities and address local needs effectively.

Promote private sector engagement: encourage and facilitate private sector participation in Bhutan's development initiatives. Support creating a conducive environment for private sector investment and growth, fostering economic diversification and job creation.

Data-driven decision-making: emphasize[s] using data and evidence to inform project design, implementation, and monitoring. Utilize data analytics and evaluation frameworks to assess the effectiveness of WBG-supported projects and identify areas for improvement.

Long-term partnership and strategic vision: maintain a long-term partnership with Bhutan, aligning WBG support with Bhutan's long-term development vision and strategies. Foster mutual understanding and collaboration to achieve shared development goals.”

(State-Owned Enterprise Respondent)



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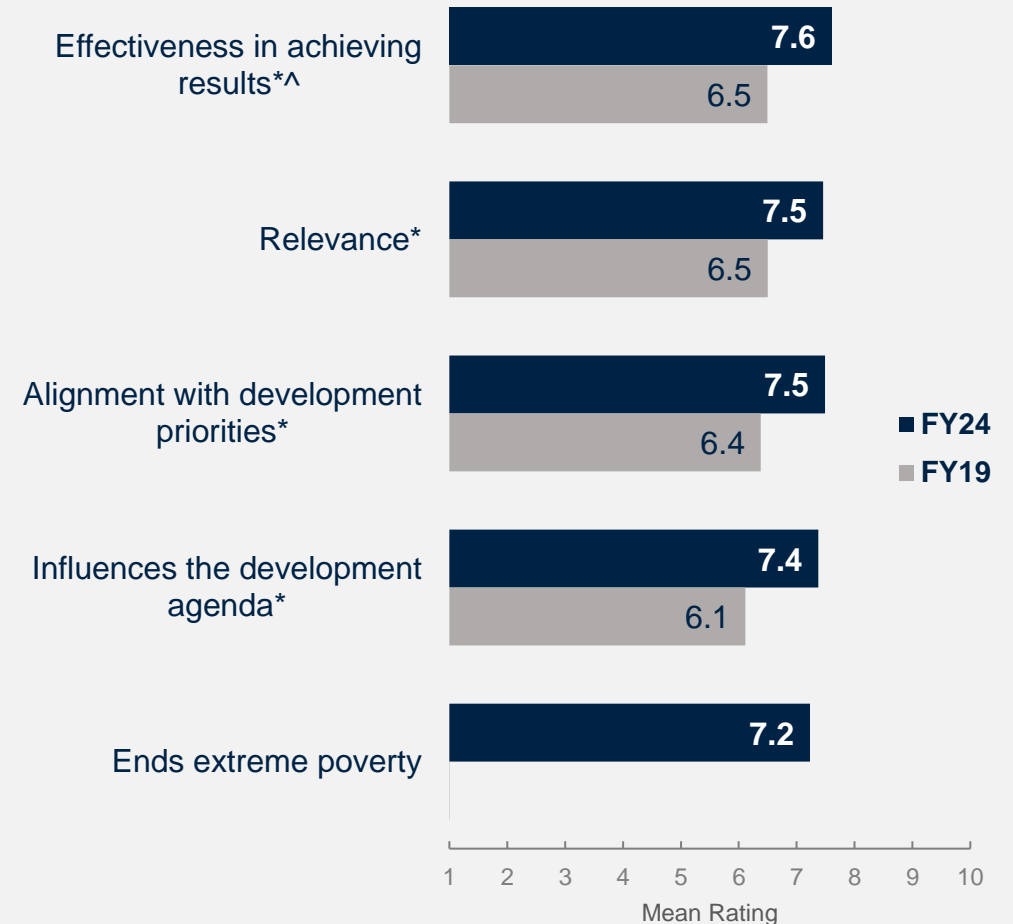


In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Bhutan? (N=114)

Improvement Across Key Performance Indicators

In FY24, rankings across all key indicators have improved significantly. The WBG's work is increasingly perceived as **effective, relevant, aligned** with Bhutan's development priorities, and **influential**.

- Of note, respondents from the **private sector** gave significantly higher ratings for the WBG's relevance (mean = 8.3), while respondents from civil society organizations gave significantly lower ratings (mean = 6.8).



How effective has the WBG been in achieving development results in Bhutan? Scale: 1 Not effective at all – 10 Very effective

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

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

To what extent does the WBG influence the development agenda in Bhutan? Scale: 1 To no degree at all – 10 To a very significant degree

The WBG's work helps end poverty in Bhutan. 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 Bhutan.

Scale: 1 Not effective at all – 10 Very effective; To what extent does the WBG's work help to achieve development results in Bhutan?

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

*Significant difference between years

Respondents from the Private Sector and Government Organizations Have More Positive Views of the WBG

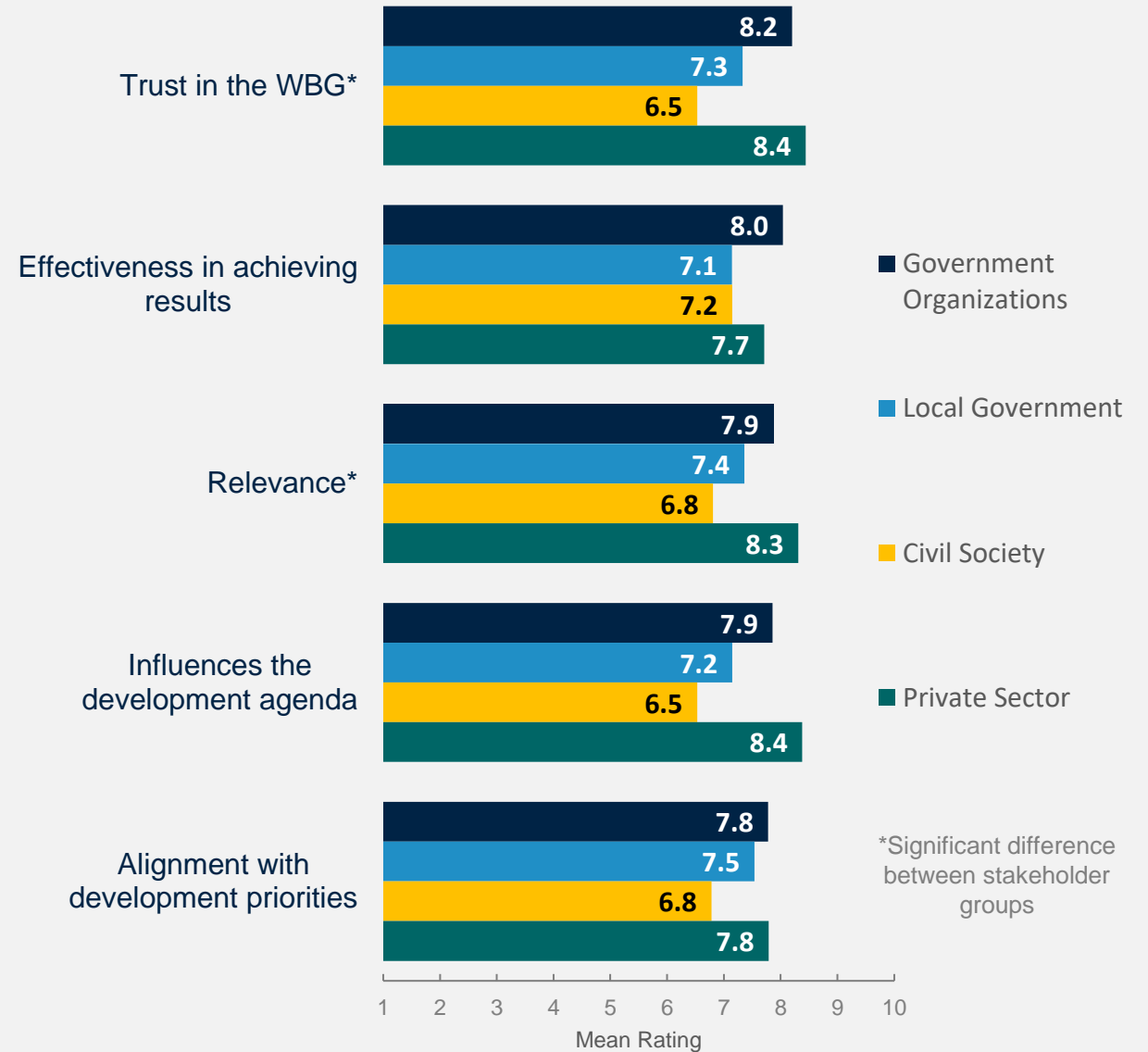
At the same time, respondents from civil society gave significantly lower ratings to key performance indicators.

Government organizations included respondents from the office of the Prime Minister or minister, government institutions, and state-owned enterprises.

Civil society organizations included respondents from civil society organizations, the academia/research centers, and the media.



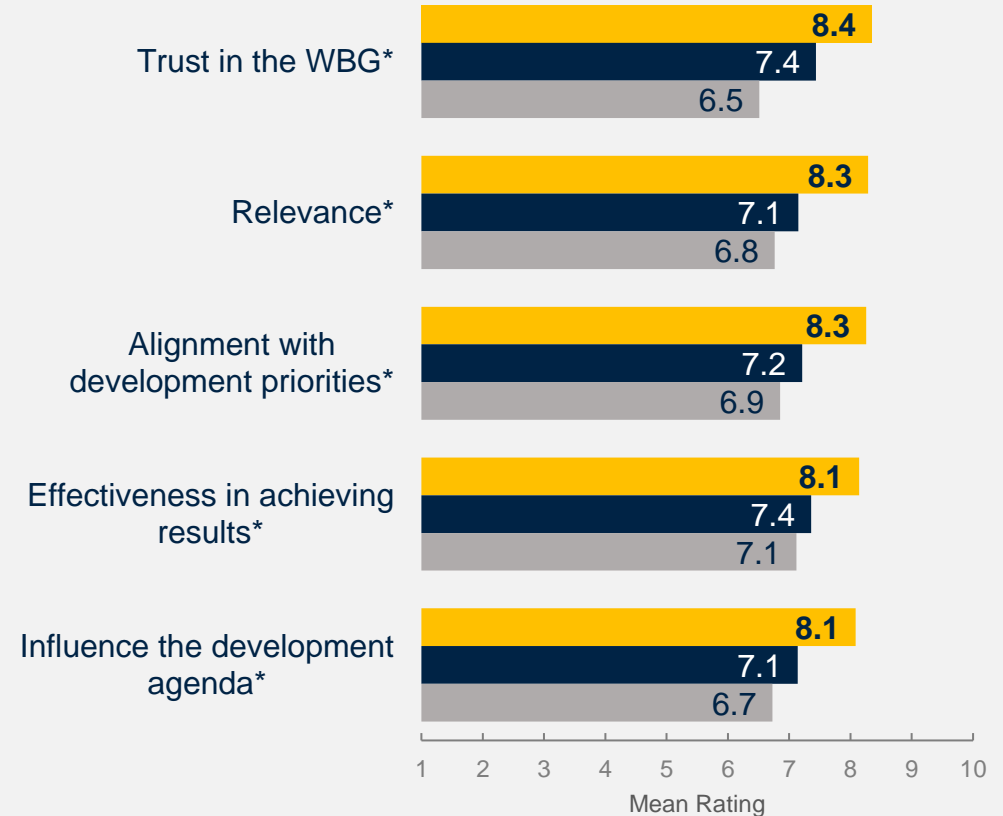
To what extent do you trust the WBG to do what is right? Scale: 1 To no degree at all – 10 To a very significant degree
 How effective has the WBG been in achieving development results in Bhutan? Scale: 1 Not effective at all – 10 Very effective
 The WBG currently plays a relevant role in development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



Familiarity Leads to More Positive Perceptions

Comparing ratings of key performance indicators among respondents who are 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 their perceptions of the institution and its work are.

Meaningful engagement and outreach can continue to increase positive perceptions.



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

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

*Significant difference between levels of familiarity



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

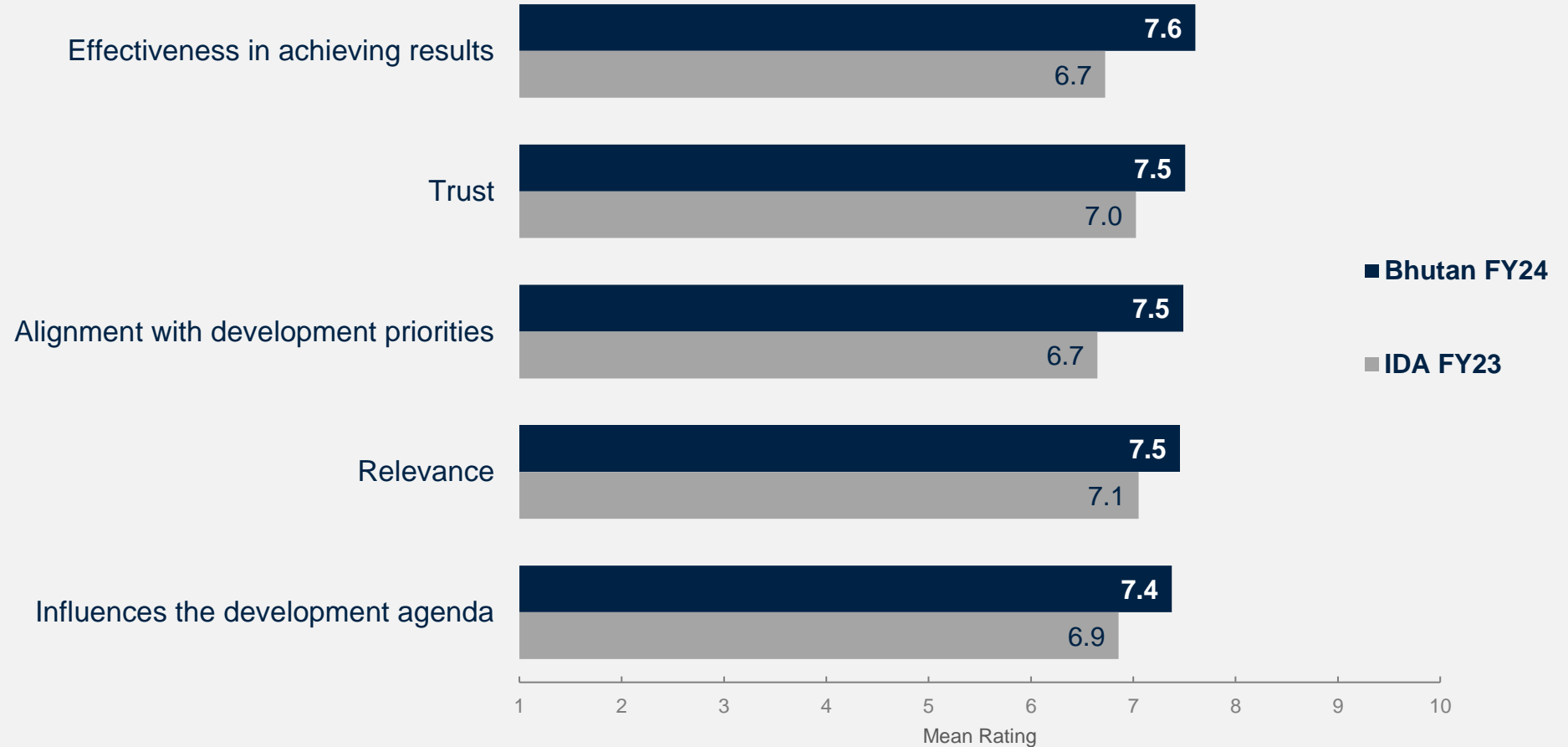
The WBG currently plays a relevant role in development in Bhutan. Scale: 1 Strongly disagree – 10 Strongly agree

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

How effective has the WBG been in achieving development results in Bhutan? Scale: 1 Not effective at all – 10 Very effective

To what extent does the WBG influence the development agenda in Bhutan? Scale: 1 To no degree at all – 10 To a very significant degree

Bhutan Outperforms FY23 IDA Countries on Key Performance Indicators

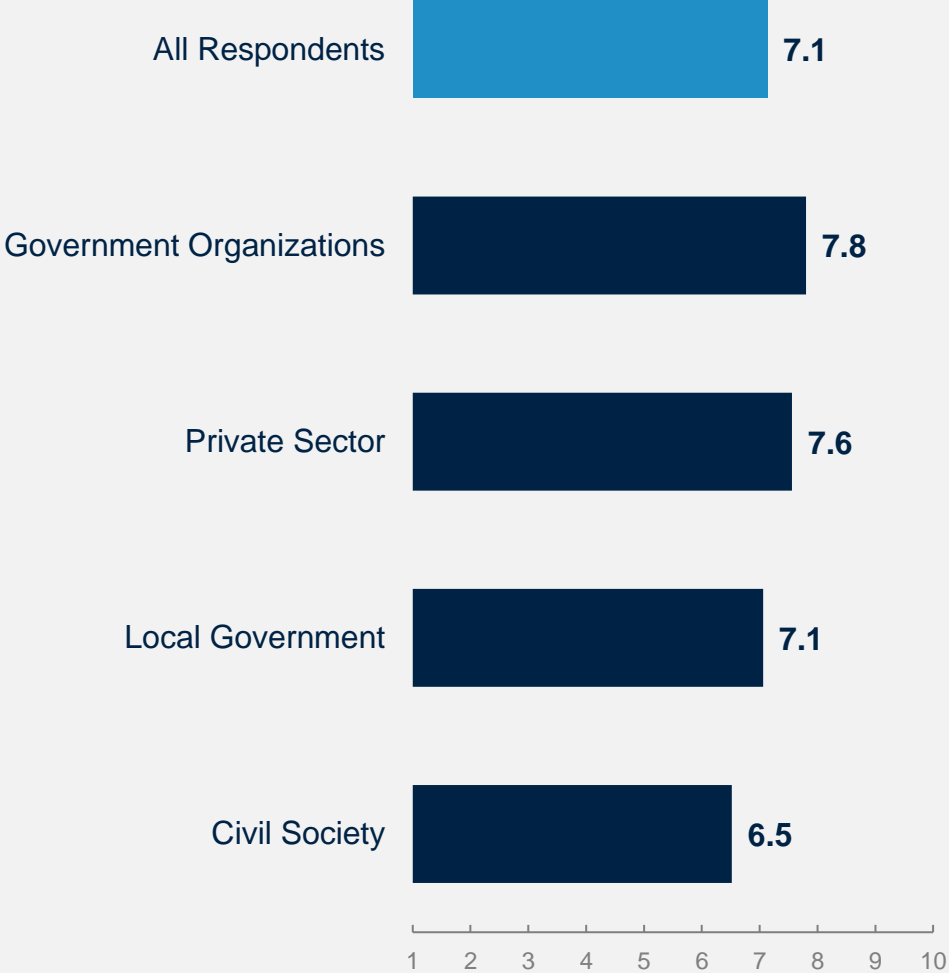


Stakeholder Trends Across Performance Indicators

Respondents from **government organizations** had the highest mean ratings across the aggregated responses to the fifteen COS indicator questions, whereas respondents from **civil society** organizations had significantly lower ratings. Notably, civil society respondents also reported a lower familiarity with the WBG.

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

Mean rating: **Collaborate with WBG = 7.8**
 Do not collaborate = 6.8



Mean Rating of Aggregated Indicator Questions
*Significant difference between stakeholder groups



World Bank Group's Support for Development Areas

“The WBG should really penetrate into rural Bhutan and support farmers to have better skill on modern farm mechanization, trained on climate resilient crop production and climate change awareness.”

(Local Government Respondent)

“WBG should also work to strengthen the private sector. Look into how WBG can help create opportunities to grow their business in line with the country's social and economic development. “

(Private Sector Respondent)

“Given Bhutan's commitment to environmental conservation and sustainability, the WBG could focus on projects that promote green and sustainable development. This may include investments in renewable energy, conservation efforts, and sustainable agriculture. ...”

(State-Owned Enterprise Respondent)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Bhutan? (N=114)

WBG: Focal Development Areas

Digital development and **private sector development** were the top areas in FY24 where stakeholders would like the WBG to focus its resources. While private sector development continues to be a priority (35% in FY19), respondents in this year’s survey considered digital development of much greater priority (only 6% in FY19[^]).

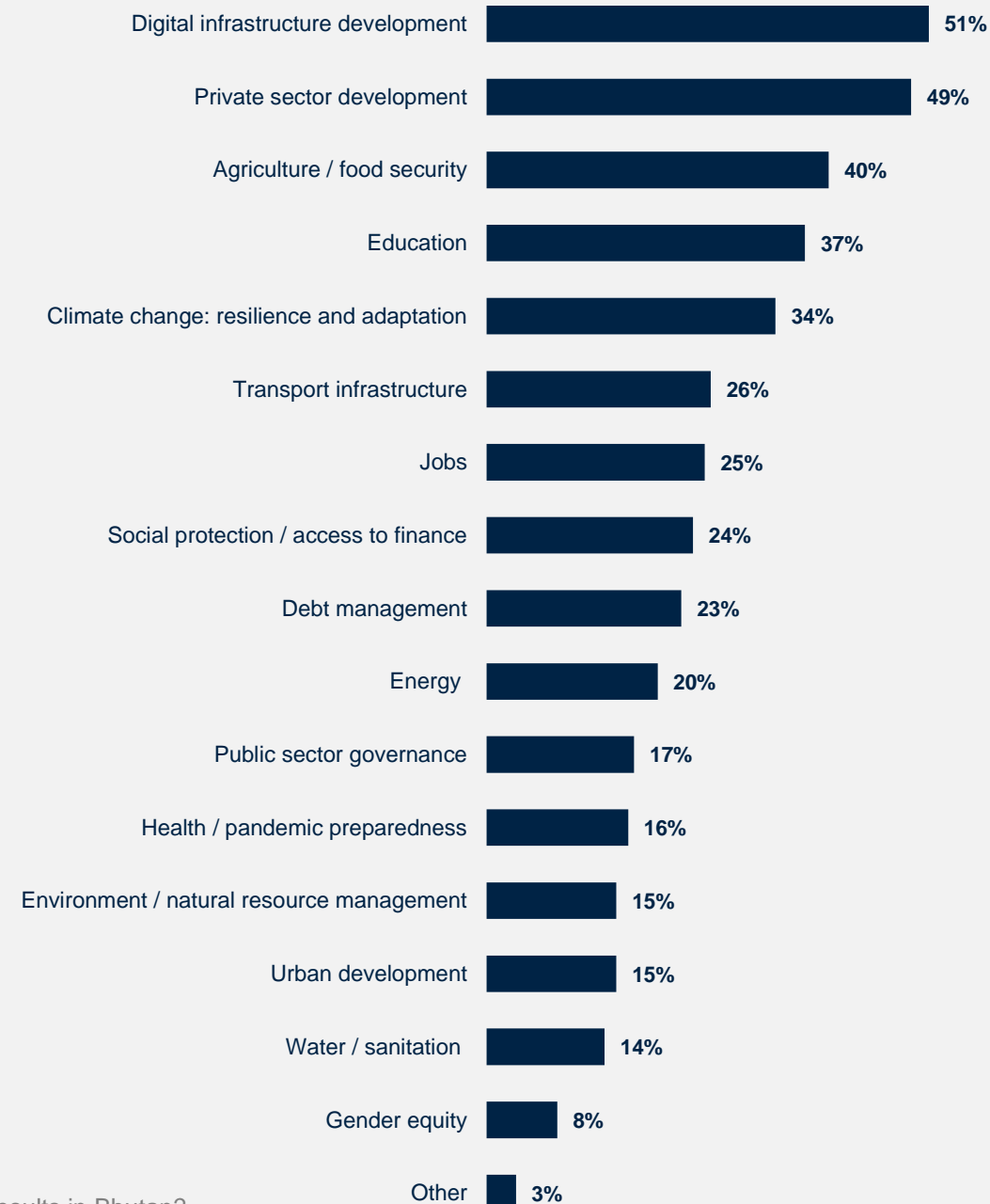
Agriculture / food security, education, and climate change were also top areas for over one-third of the respondents. Climate change has notably increased in priority in FY24, from just 7% in FY19.

- It should be noted that Agriculture / food security (#3) was a top priority for respondents from local governments (65%).

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

“Increasing transparency of governance / decision making and institutional accountability; making public services more efficient through digital transformation, interoperability, and unified government cloud migration. Reforming the education system through policies and funding based on performance indicators and linking them to appropriate inclusion measures.”

(Government Institution Respondent)



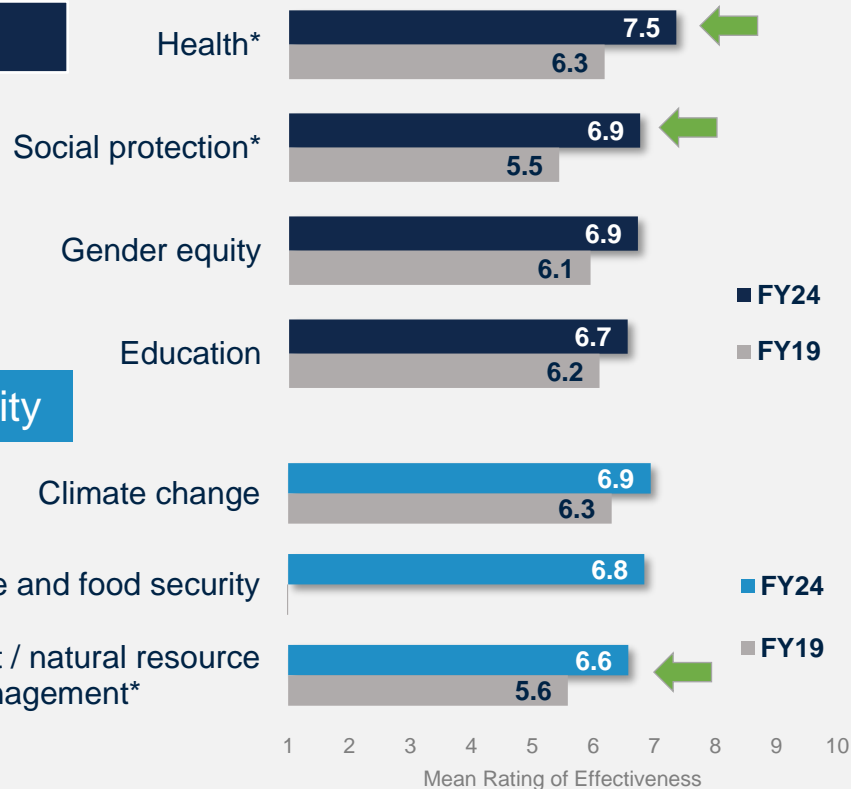
Which areas should the WBG prioritize to have the most impact on development results in Bhutan? (Choose no more than 5) (Percentage of Respondents, N=146)

[^] “Information and communication technology” in FY19

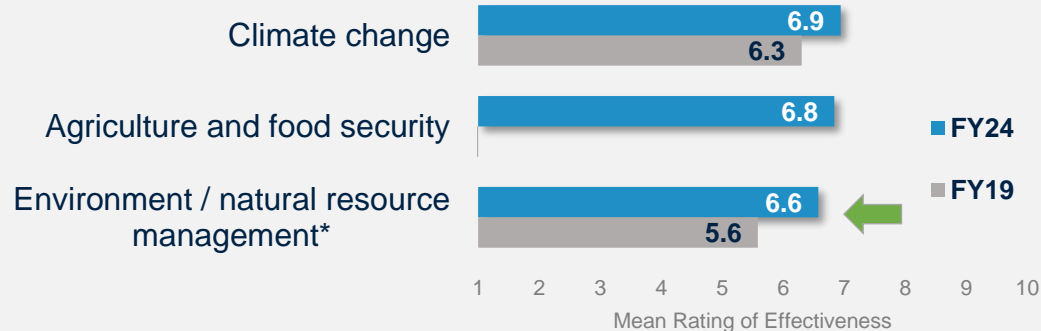
Effectiveness of WBG's Sectoral Support

The WBG's work in **health (support during the COVID-19 pandemic)** received the highest effectiveness ratings in Bhutan. The work in public sector governance and macroeconomic stability was also highly ranked. The ratings for the top two priority areas—**digital development** and **private sector development** — were relatively lower, although the ratings for digital development have somewhat increased (not significantly).

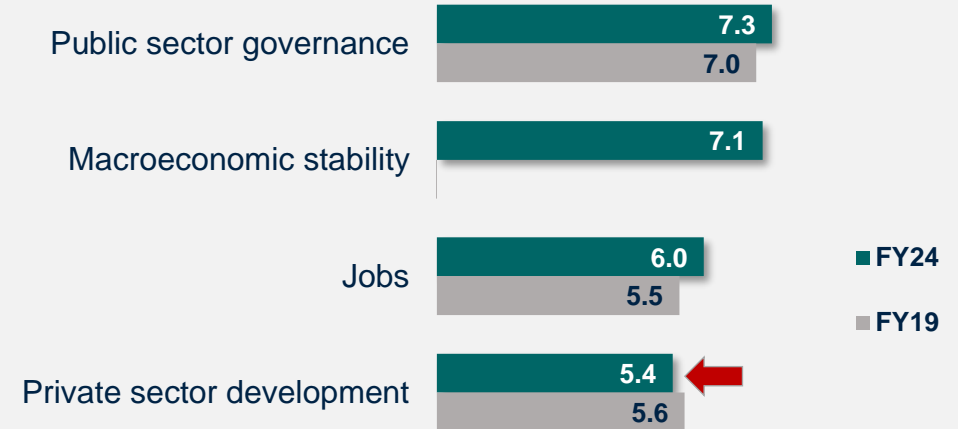
Human Development



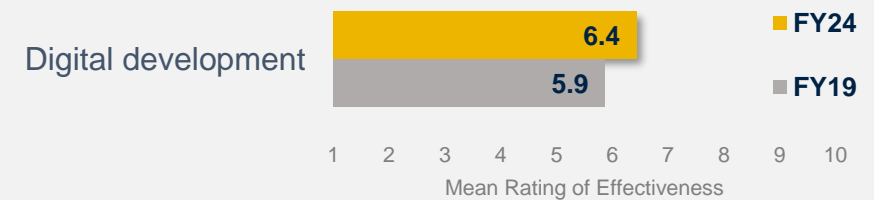
Environmental Sustainability



Finance / Institutions / Economic Growth



Infrastructure



*Significant difference between years

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

“Support to ensure that the projects are implemented and executed as planned. Making sure that the projects and activities are not dropped mid way with a lame report submitted to WBG. Support in project monitoring and evaluation to ensure that we know how to improve in the later projects.

Knowledge documentation and knowledge transfer should happen - knowledge should be transferred to the locals (get the locals fully involved in the project instead to being a dummy member). Make sure that the locals are fully participating in the activity or projects. Currently, the locals just engage in the projects and activities without even understanding what, how and why of the projects.”

(Academia Respondent)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Bhutan? (N=114)

WBG's Financial Resources are Considered the WBG's Greatest Value

Financial resources are considered the Bank's greatest value in Bhutan, even more so in FY24 than in FY19 (56%). **Technical assistance** also continues to be highly valued.

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

"Data-Driven Decision Making: Emphasize using data and evidence to inform project design, implementation, and monitoring. Utilize data analytics and evaluation frameworks to assess the effectiveness of WBG-supported projects and identify areas for improvement."

(State-Owned Enterprise Respondent)

"Give more financial support (grants/TAs) to build professional capacity through short-term training/long-term studies to shoulder 21st Century Economic development mandates"

(Government Institution Respondent)

"Enhancement of the training and budget for the local government officials and block administrations as they are closest to the people."

(Local Government Respondent)

"WBG could invest in the field of academia and research where research could collect data, [which can] then be used for policy-making as well as for future reference."

(Academia Respondent)

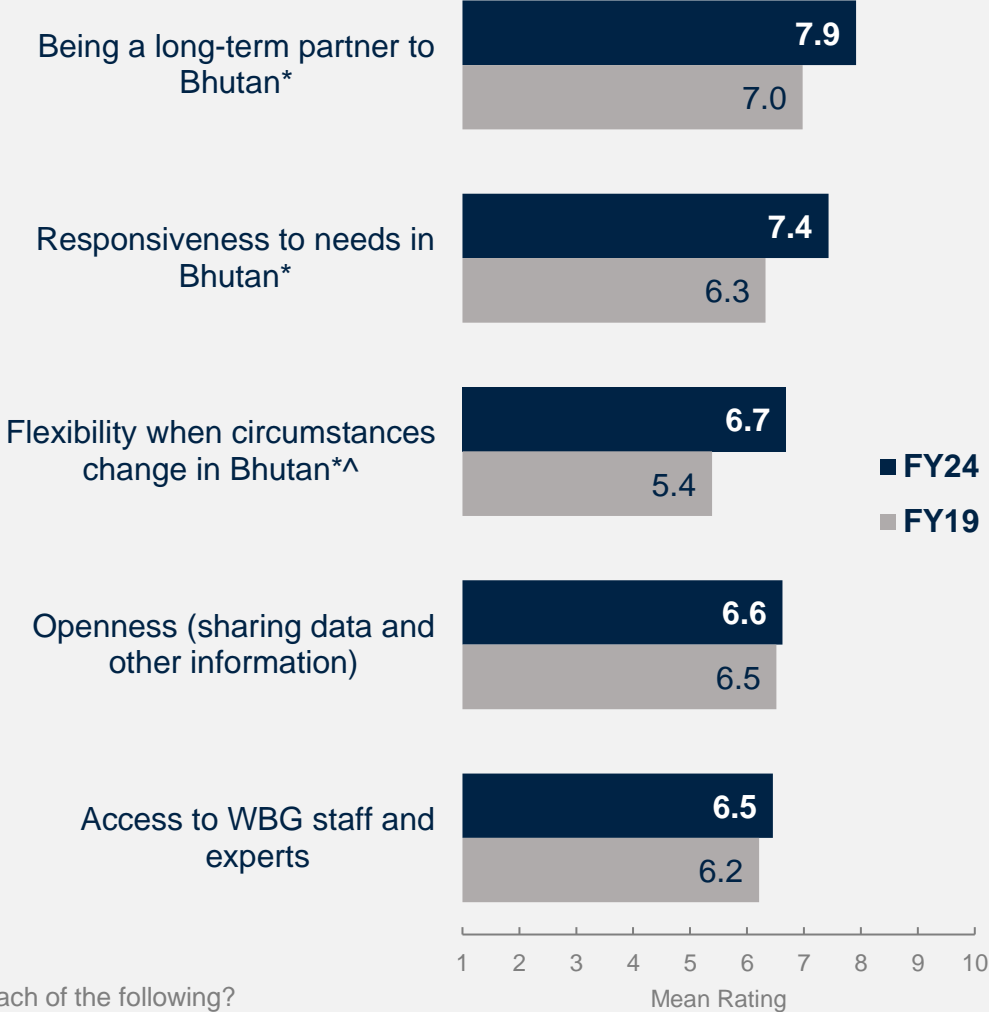


Which WBG instruments do you VALUE the most in Bhutan? (Select up to 2)
(Percentage of Respondents, N=147)

Perceptions of The WBG as a Development Partner Have Significantly Improved

In FY24, respondents perceived the WBG as a significantly more **responsive** and **flexible long-term partner** than in FY19. However, perceptions of **staff openness and access** were somewhat lower and remained unchanged since FY19.

- Respondents from government organizations and the private sector gave significantly higher ratings across these questions. In contrast, respondents from local governments and civil society tended to be significantly more critical.



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

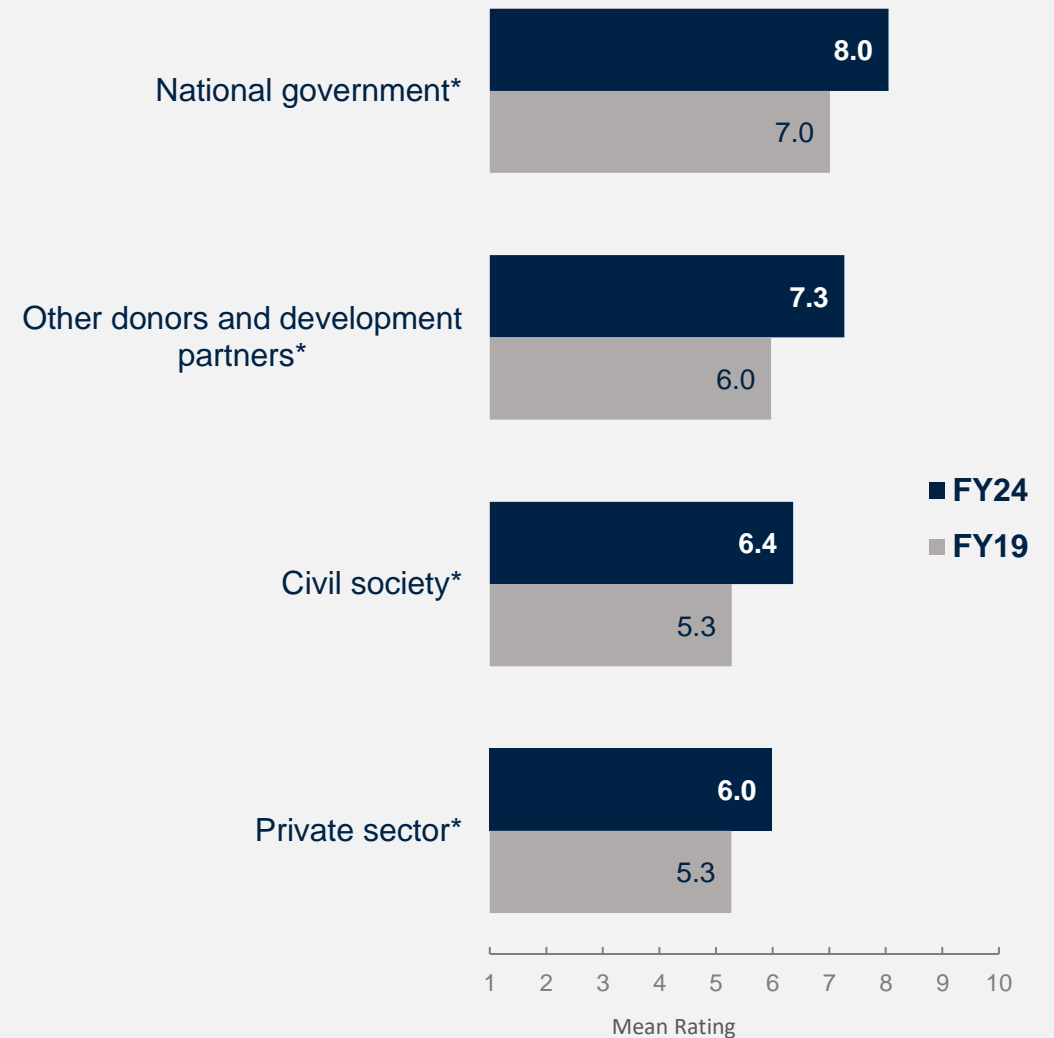
*Significant difference between years

^Compared to a mean score of the two questions asked in FY19: Flexibility (in terms of the institution’s products and services) and Flexibility (in terms of changing country circumstances)



The WBG Increasingly Seen as Effectively Collaborating with Various Stakeholder Groups

In FY24, respondents perceived the WBG as collaborating significantly more effectively with the **national government**, **other donors / development partners**, **civil society**, and **the private sector**. However, ratings for collaboration with the **private sector** and **civil society** were somewhat lower. Notably, these were the two groups with which respondents would like to see more collaboration.



Stakeholders want the Bank to Collaborate More with the Private Sector

Respondents in this year’s survey indicated that the WBG should collaborate more with the **private sector** and **civil society**, consistent with the FY19 findings.

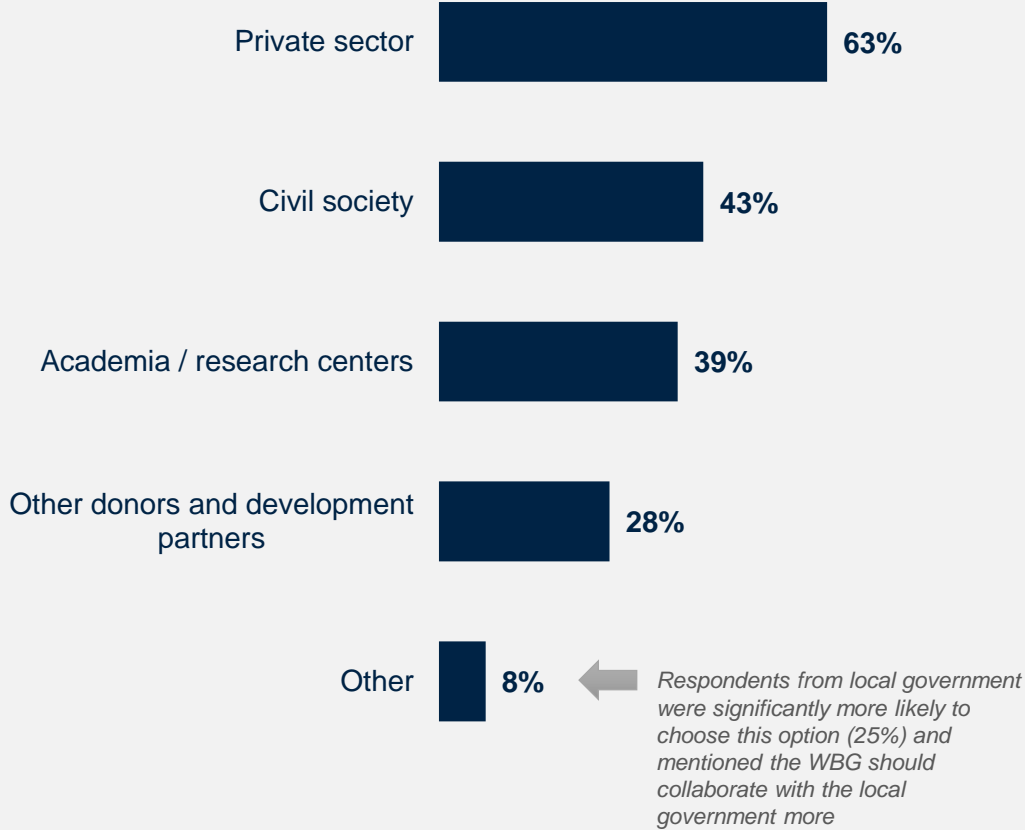
In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Bhutan?

“Strengthen relationships between government, private sector, and public sector (NGO/CSO engagement)”
(Civil Society Respondent)

“Bring the government, private sector, and civil society together.”
(Media Respondent)

“The WBG should collaborate [with] other developments such as the UN agencies, share expertise and resources to reduce duplication and strengthen synergies, which have a greater impact.”
(Bilateral / Multilateral Respondent)

“Enabling and conducive environment for the citizen to participate in the decision-making process”
(Government Institution Respondent)



The Future Role of the World Bank Group in Bhutan

“Bring in experts that can transmit the knowledge and build institutional capacity in the country to ensure that both financial and technical support goes a long way in the socio-economic development progress.”

(Government Institution Respondent)

“The most important thing that WBG could help Bhutan with better job at diversifying its economy by improving its physical and human capital by using resource from hydropower and on other hand by helping in digital marketing.”

(Local Government Respondent)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Bhutan? (N=114)

How can the Bank increase its effectiveness? Open Ended Responses

Engage with various stakeholders, provide more technical and financial support, and focus on the digital infrastructure.

Results
3%
Effectively monitor and evaluate the WBG's projects

Communication
4%
Create greater awareness of the WBG's work and engagement opportunities

Operational Effectiveness
8%
Speedy approval of projects
Be more flexible
Local context matters – adapt solutions and best practices

Financial Support
12%
More financial support for infrastructure development and capacity building
Enhance access to International concessional loans



Focus Areas
40%
Digital Infrastructure
Private Sector Development
Sustainable Development
Jobs for the Youth
Education and Health

Knowledge
16%
Consider the local context when developing policy/program recommendations
Build local capacity

Engagement
16%
Collaborate with various partners to achieve synergies
Work with local experts to tailored the projects
Maintain a long-term partnership with Bhutan and achieve shared development goals

How can the Bank increase its effectiveness? Open Ended Responses

Engage w/ various stakeholders, provide more technical and financial support, and focus on the digital infrastructure.

Focus Area

“The WBG could strengthen its support to entrepreneurship promotion and development and private sector development , especially in terms of startup acceleration programs, ease of doing business, and building product and market value chains. Enhancing digital infrastructure and capacities. ...” (Government Institution Respondent)

“WBG can support the private sector to create more job opportunities so that migration can be controlled.” (Private Sector Respondent)

“To help Bhutan to rebuild its economy and create more job opportunities in rural places of Bhutan.” (Bilateral or Multilateral Agency Respondent)

“The WBG should really penetrate into rural Bhutan and support farmers to have better skill on modern farm mechanization, trained on climate resilient crop production and climate change awareness.” (Local Government Respondent)

Results

“Carrying out M&E for projects and programs, establishing feedback mechanism after implementation.” (Private Sector Respondent)

“After financing the particular project, proper follow-up of its outcomes and its benefits.” (Academia / Research Centers Respondent)

Engagement

“Engage with all levels of stakeholders, public, government, CSOs, private and corporate.” (Civil Society Organization Respondent)

“Collaborate with the other donor’s partner so that the projects can be efficiently implemented and co-financed.” (Bilateral or Multilateral Agency Respondent)

“In addition to what World bank has been helping Bhutan, World Bank in coordination with other development partners/Donor agencies should focus assisting achieving the priorities area of Bhutan’s FYP which have direct impact to the country and the people.” (Respondent from the Office of the Prime Minister or Minister)

Knowledge

“Knowledge documentation and knowledge transfer should happen - knowledge should be transferred to the locals (get the locals fully involved in the project instead of being a dummy member). make sure that the locals are fully participating in the activity or projects.” (Academia / Research Centers Respondent)

“Need technical backstopping, expertise, and aid in the field of agri, livestock, infrastructure developments, and also required capacity development training for local leaders and farmers by expertise in building climate-smart farming, etc.” (Local Government Respondent)

How can the Bank increase its effectiveness? Open Ended Responses

Engage w/ various stakeholders, provide more technical and financial support, and focus on the digital infrastructure.

Financial Support

“Enhancing access to International concessional loans for the local private sectors and exploring new financing windows for Bhutan (Grants/concessional loans).”

(Respondent from the Office of the Prime Minister or Minister)

“Provide financial assistance(Grants) and technical assistance in building human resource skills and spend in relevant sectors which will enhance the economic growth of Bhutan.”

(Government Institution Respondent)

“As Bhutan graduated from the least developed country, WBG should invest more and finance Bhutan, which can enhance the development of Bhutan and the creation of job opportunities. It's crucial to support Bhutan in its efforts to grow and prosper, and I believe that WBG's support can go a long way in helping Bhutan achieve its goals.”

(Media Respondent)

“Access to financial resources for the entrepreneurs.”

(Local Government Respondent)

Operation Effectiveness

“Funding projects that have a long-term impact on the economy, such as helping the Department of Tourism in coming up with a strategy plan to implement MICE tourism in the country.”

(Civil Society Organization Respondent)

“Speedy approval of projects.”

(Government Institution Respondent)

“Minimize unnecessary processes and make them more swift and practical in the context of the local environment.”

(Local Government Respondent)

“Should have a strategic support plan aligned to the needs / development plan of the country.”

(Government Institution Respondent)

“Be more flexible and improve the project turnaround time.”

(Private Sector Respondent)

Communication

“Create awareness of their role(s) in the Country (dissemination and social media presence).”

(Academia / Research Center Respondent)

“Will appreciate [it] if WBG could create awareness [among] CSOs about its purpose and potential partnership and collaborations towards achieving its goals.”

(Civil Society Organization Respondent)



In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Bhutan? (N=114)

Communication and Outreach

“WBG's engagement of the private sector in consultations should not be just to tick the box. It should be more open to sharing vital information with the private sector institutions for informed investment decisions.”

(Civil Society Respondent)

“More awareness must be created amongst private players in order for them to come forward to access the fund. Without awareness and collaborative efforts, our private sector is not confident in taking WBG on their board of investment.”

(State-Owned Enterprise Respondent)



WORLD BANK GROUP



In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Bhutan? (N=114)

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

Events, direct contact, and e-newsletters were the most preferred channels to obtain information from the WBG. Respondents from the private sector expressed an equal preference for e-newsletters and events, whereas respondents from local governments also preferred direct messaging. Additionally, a quarter of the respondents indicated social media as their preferred communication channel.

Preferred WBG Source

	All Respondents	Government Organizations	Local Government	Civil Society	Private Sector
Event / conference / seminar / workshop (in person or online)	57.6%	59.6%	48.3%	66.7%	50.0%
Direct contact with staff	44.4%	38.5%	34.5%	50.0%	42.9%
e-Newsletters	31.9%	32.7%	31.0%	36.1%	50.0%
Social media	25.0%	30.8%	27.6%	16.7%	21.4%
Direct messaging*	21.5%	25.0%	34.5%	8.3%	21.4%
Other	0.7%	1.9%	0.0%	0.0%	0.0%

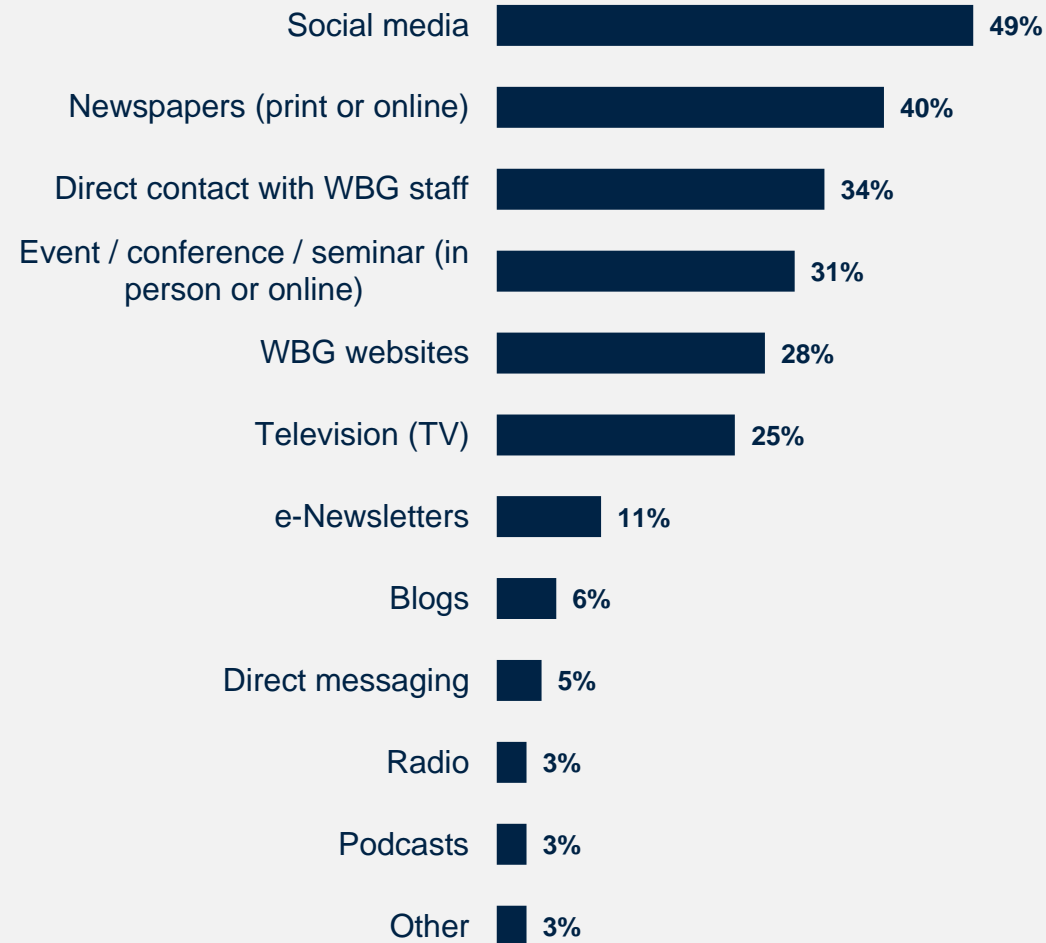


How would you prefer to receive communication from the WBG? (Select up to 2)
(Percentage of Respondents, N=144)

*Significant difference between stakeholder groups

45% of Respondents Recalled Information About the WBG

45% of respondents recalled hearing or seeing something about the WBG recently. Respondents reported seeing that information most often on **social media** and in **newspapers**.



WBG's Work on Climate Change was the Most Commonly Recalled Topic

Respondents in Bhutan most frequently recalled seeing messages about the WBG's work on **climate change**. The **digital economy** emerged as the second most frequently recalled topic, which aligns well with it being a top priority area on which the WBG should focus its resources in Bhutan, according to the respondents.

- Respondents from civil society organizations and the private sector were more likely to recall WBG's work on **macro-fiscal and financial stability** (55% and 57%, respectively) than government respondents.

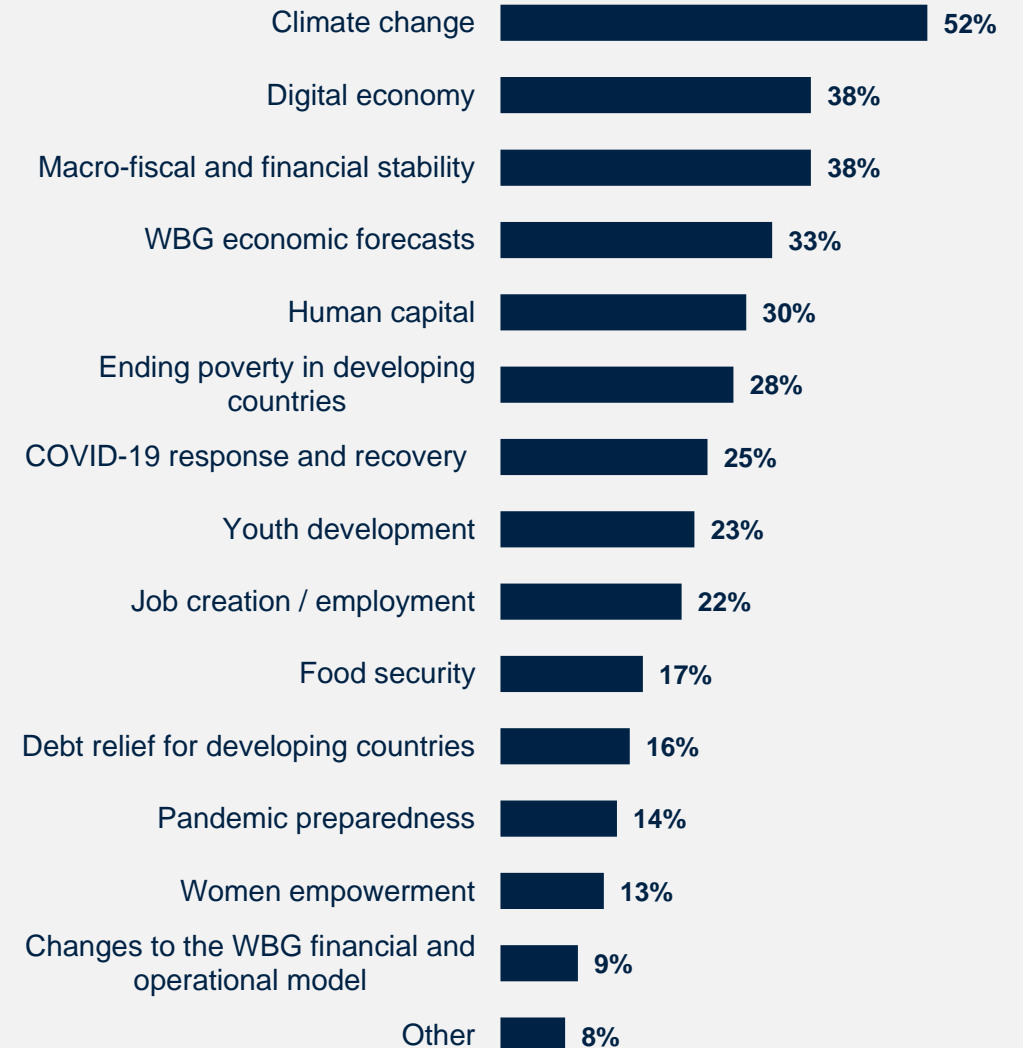
In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Bhutan?

"The WBG should focus on funding productive investments in Bhutan like in energy, IT, private sector development when it comes to financing with low interest rate loans."

(Media Respondent)

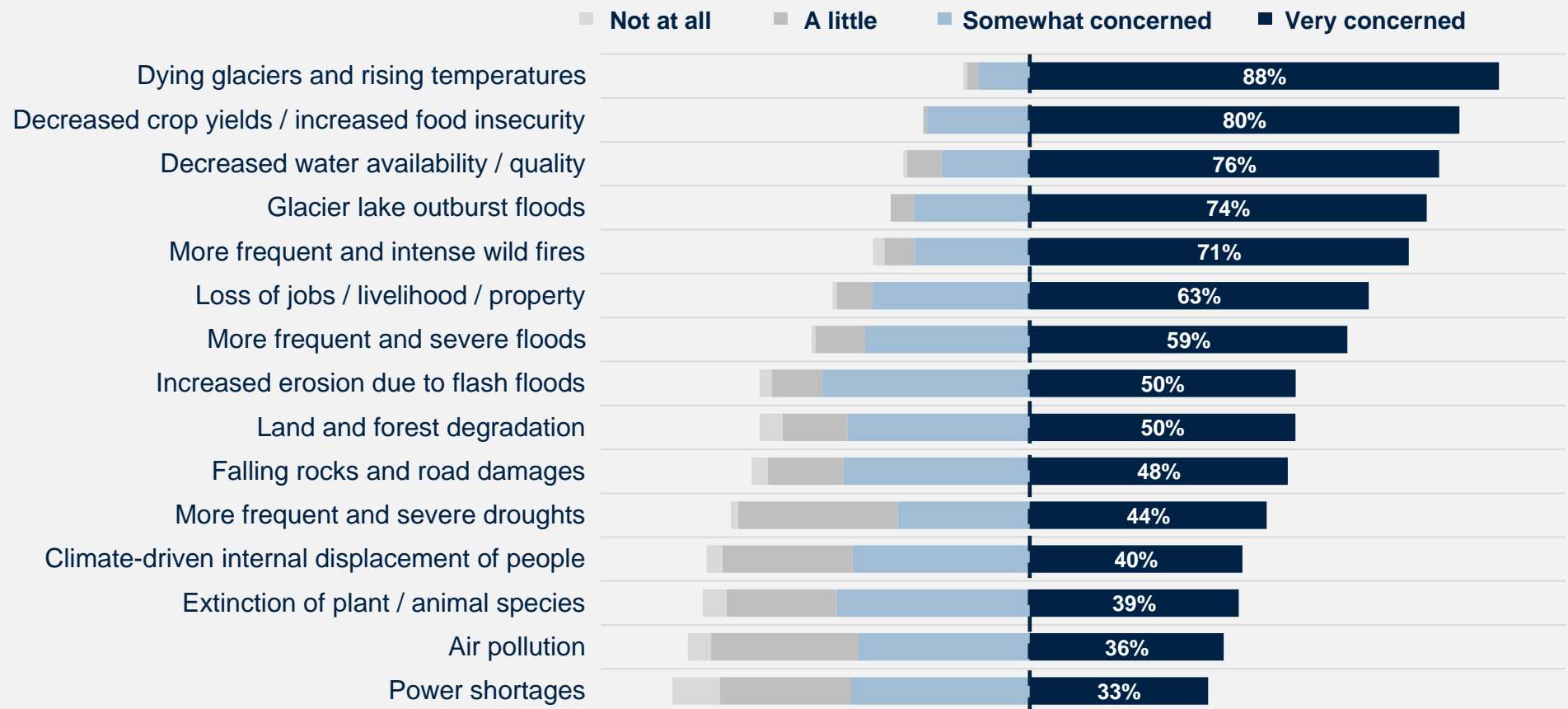
- 1. WBG could support sustainable economic diversification and*
- 2. Invest in Education and Skills Management*
- 3. Invest in infrastructure for remote areas in Bhutan*
- 4. Supporting Bhutan in preparing for Climate challenges"*

(Office of the Prime Minister / Minister Respondent)



Climate Change Communications can be More Impactful when Related to Stakeholders' Top Concerns: Dying Glaciers, Rising Temperatures, and Decreased Crop Yields

Respondents expressed high levels of concern about the potential impacts of climate change in Bhutan. The majority of the respondents were very concerned about **dying glaciers and rising temperatures** and **decreased crop yield / increased food insecurity**. These key areas of concern should be considered to make communications about climate change more impactful in Bhutan.



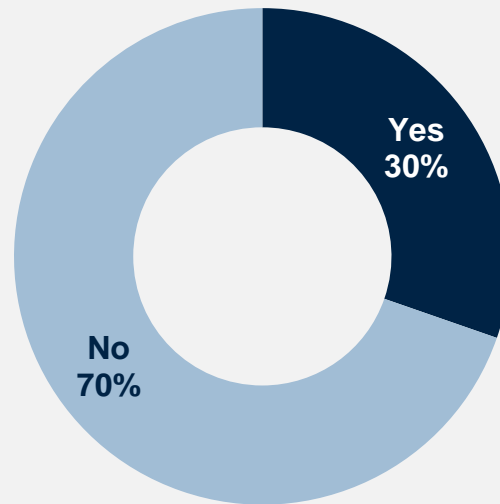
Sample Demographics and Detailed Methodology



Sample Demographics

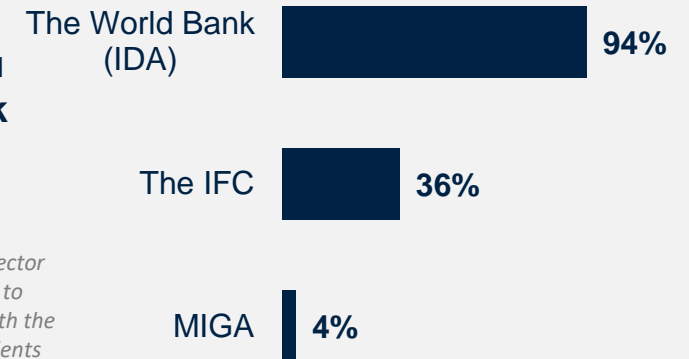
Do you collaborate/work with the World Bank Group (WBG) in Bhutan? (N=155)

Respondents from the private sector were significantly more likely to indicate that they collaborate with the WBG (61%) compared to respondents from other stakeholder groups.

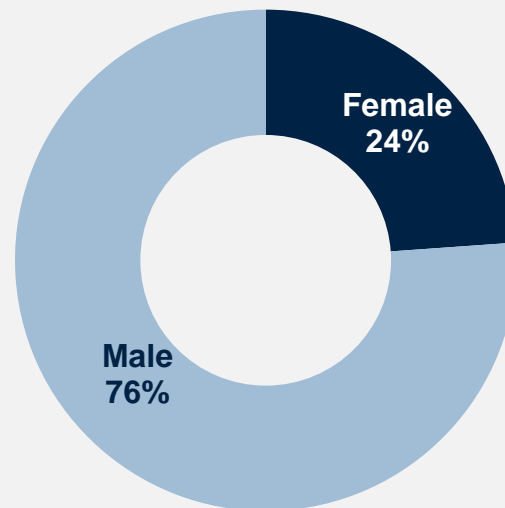


Which of the following WBG agencies do you collaborate/work with in Bhutan? (N=47)

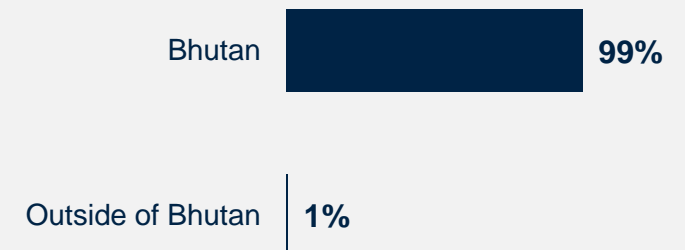
Respondents from the private sector were significantly more likely to indicate that they collaborate with the IFC (82%) compared to respondents from other stakeholder groups.



What's your gender? (N=155)



Which best represents your geographic location? (N=155)



Detailed Methodology

From **November 2023** to **January 2024**, a total of **310** stakeholders of the WBG in Bhutan were invited to provide their opinions about the WBG’s work in the country by participating in a Country Opinion Survey (COS). A list of potential participants was compiled by the WBG country team and the fielding agency. Participants were drawn from the Office of the Prime Minister or minister; the office of a parliamentarian, government institutions, state-owned enterprises, local governments, bilateral/multilateral agencies, the private sector, civil society organizations, academia / research centers, and the media.

A total of **155 stakeholders participated in the survey (51% 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 53% (N=122).

Comparing responses across Country Surveys reflects changes in attitudes over time, as well as changes in respondent samples, methodology, and the survey instrument itself. To reduce the influence of the latter factor, only those questions with similar response scales/options were analyzed. Additionally, this year, the COS project utilized a Pulse survey format, a shorter survey version conducted online by the BI team at the WBG. The differences in stakeholder composition between the two years—for example, a higher response from local government stakeholders — 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 “Bhutan 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 Prime Minister, Minister, Parliamentarian	9%	7%
Government Institutions: Employee of a Ministry, Department, Project Implementation Unit, Independent Government Institution, Judiciary, State-Owned Enterprise	40%	32%
Local Government	3%	20%
Bilateral/Multilateral Agency: Embassy, Development Organization, Development Bank, UN Agency	7%	4%
Civil Society Organization: NGOs, Community-Based Organization, Private Foundation, Professional /Trade Association, Faith-Based Group, Youth Group	14%	7%
Private Sector: Private Company, Financial Sector Organization, Private Bank	17%	12%
Academia/Research Institute/Think Tank	5%	9%
Media	4%	8%
Other	1%	1%
Total Number of Respondents	122	155

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_3. To what extent do you trust the World Bank Group to do what is right? Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

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

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

A4. The WBG currently plays a relevant role in development in Bhutan, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

A5. The WBG's work is aligned with what I consider the development priorities for Bhutan, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

A6. To what extent does the World Bank influence the development agenda in Bhutan? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

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

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

B1_1. Responsiveness to needs in Bhutan

B1_2. Access to WBG staff and experts

B1_3. Flexibility when circumstances change in Bhutan

B1_5 Being a long-term partner to Bhutan

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

B2_1. National government

B2_2. Private sector

B2_3. Civil society

B2_4. Other donors and development partners

Note: Corporate Score questions are highlighted in **RED**





CountryOpinionSurveys

Thank you

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

countrysurveys@worldbankgroup.org

