

October 2022



Country Opinion Surveys

FY 2022 **Kosovo** Country Opinion Survey Report

ECR Business Intelligence Team



WORLD BANK GROUP

Acknowledgements

The Kosovo 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). Yulia Danilina, Jessica Cameron, Nan Lin, and Sofya Gubaydullina oversaw design, reporting, and analysis. Dania Mendoza, Noreen Wambui, and Irina Popova provided data support.

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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 Kosovo perceive the WBG. The survey explored the following questions:

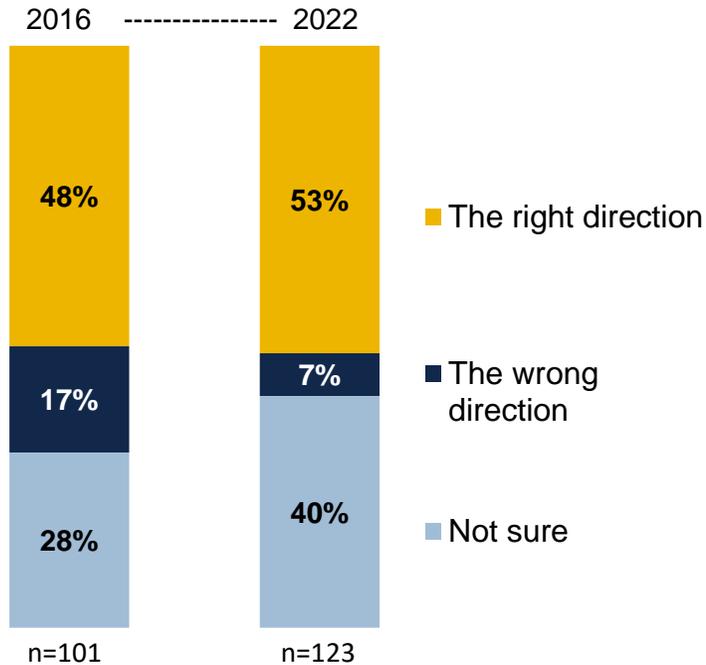
1. What opinion do key stakeholders have of the WBG when it comes to its effectiveness, relevance, alignment with Kosovo's development priorities, and other key indicators? Are opinions improving or declining?
2. What areas of development are perceived to be the most important? Have the priorities changed over the past three years?
3. How the WBG is perceived as a development partner? Are opinions improving or declining?
4. What do key stakeholder value the most, and the least when it comes to the WBGs work at the country level? What are the priorities looking forward?
5. What opinion do key stakeholders have of the WBG knowledge products and their quality? Are opinions improving or declining?
6. What are the preferred communication channels and which channels are reported to be used the most? Are there differences among stakeholder groups in terms of preferred channels?

Overall Context

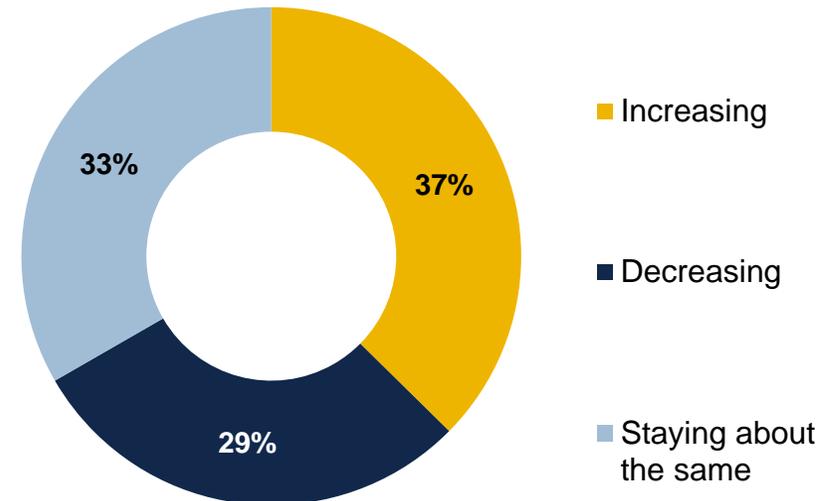
Country direction and economic opportunity

In FY' 22, stakeholders are slightly more, however not significantly, optimistic about their country's direction, while they are split over whether economic opportunity is increasing

Country direction



Perceptions of economic opportunity



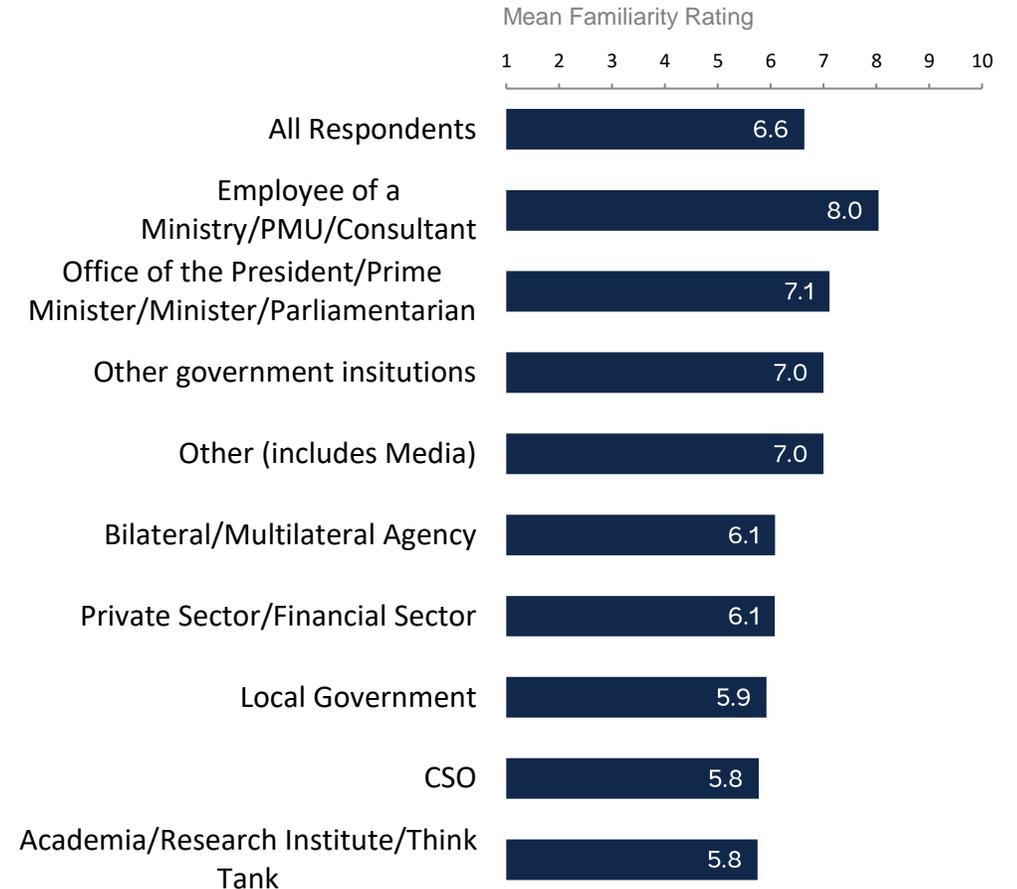
A1. In general, would you say that Kosovo is headed in ... ?
 A2. Do you think that economic opportunity for citizens in Kosovo is ... ?

Familiarity with the World Bank Group

Year comparison: Respondents in this year’s Country Survey had statistically similar levels of familiarity with the World Bank compared to FY’ 16 (FY’ 22 mean = 6.6; FY’ 16 mean = 6.7)

Collaboration: Respondents who collaborate with the WBG also reported significantly higher levels of familiarity with the work of the World Bank compared to respondents who do not collaborate:

mean familiarity, WB collaborators = **7.4**;
non-collaborators = **5.5**).



Development Priorities

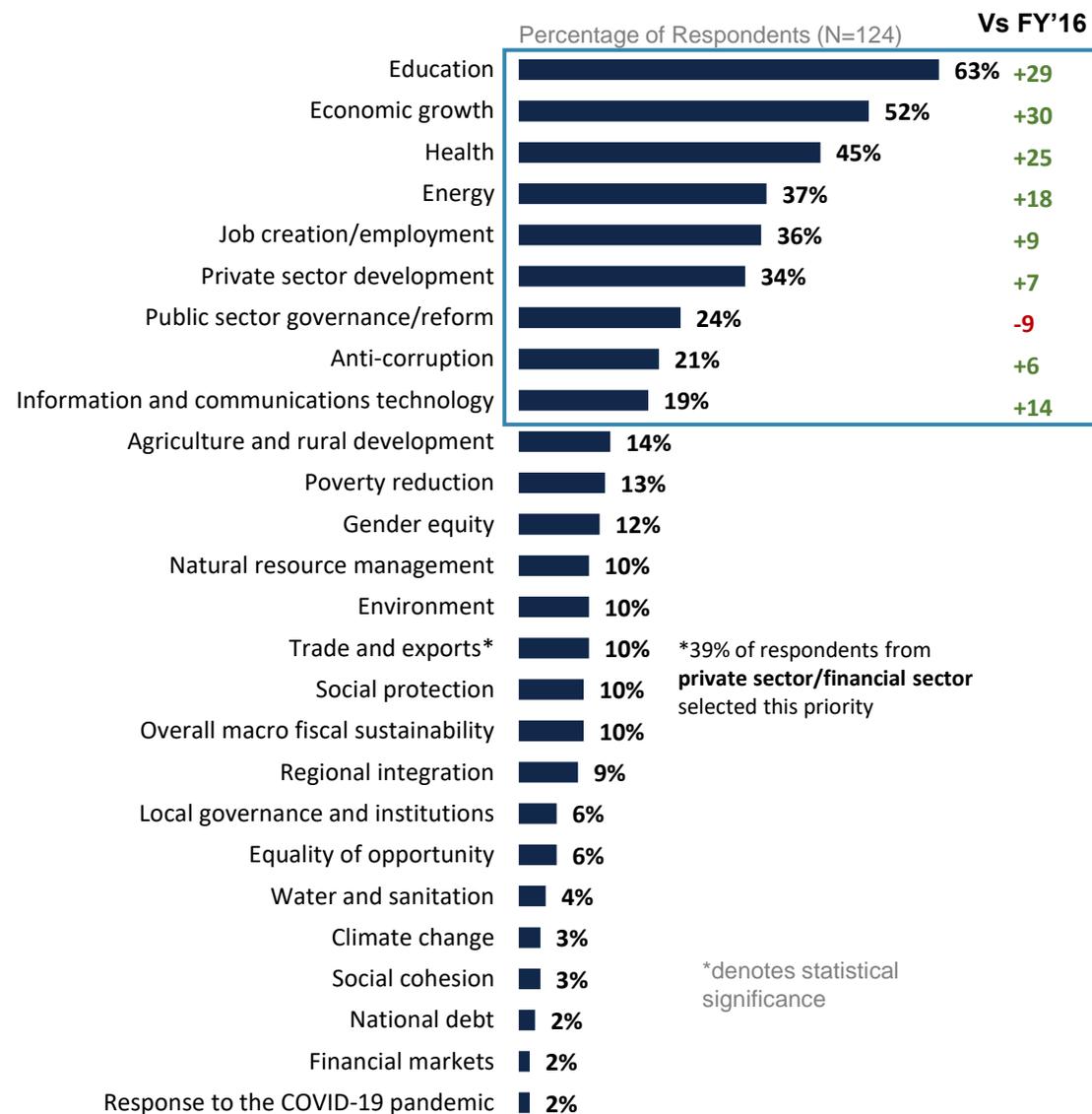
Education remains top of mind for respondents – it was also a top development priority in FY’ 16

Economic growth, Health, and Energy grew in prominence in FY’ 22, with twice as many respondents selecting them among the top development priorities in Kosovo

Public sector governance/reform, a second most important priority in FY’ 16, has waned significantly by FY’ 22, although it is still among the top for one-fourth of the respondents

Of note is the increased importance of **information and communication technology** to the respondents in FY’ 22

IMPORTANT: The overall increase in percentages in the chart is partially attributable to the change in the methodology: In FY’ 16, respondents were offered to select up to three priorities, while in FY’ 22 – up to five.



A3. Please identify which of the following development priorities you consider the most important in Kosovo. (Choose no more than 5)

Trust in Institutions

WBG, along with the IMF, are the most trusted international organizations in Kosovo among those studied. It should be noted that even top-trusted institutions get only moderate ratings of trust from the respondents, the highest mean being 6.8 on a 10-point scale.

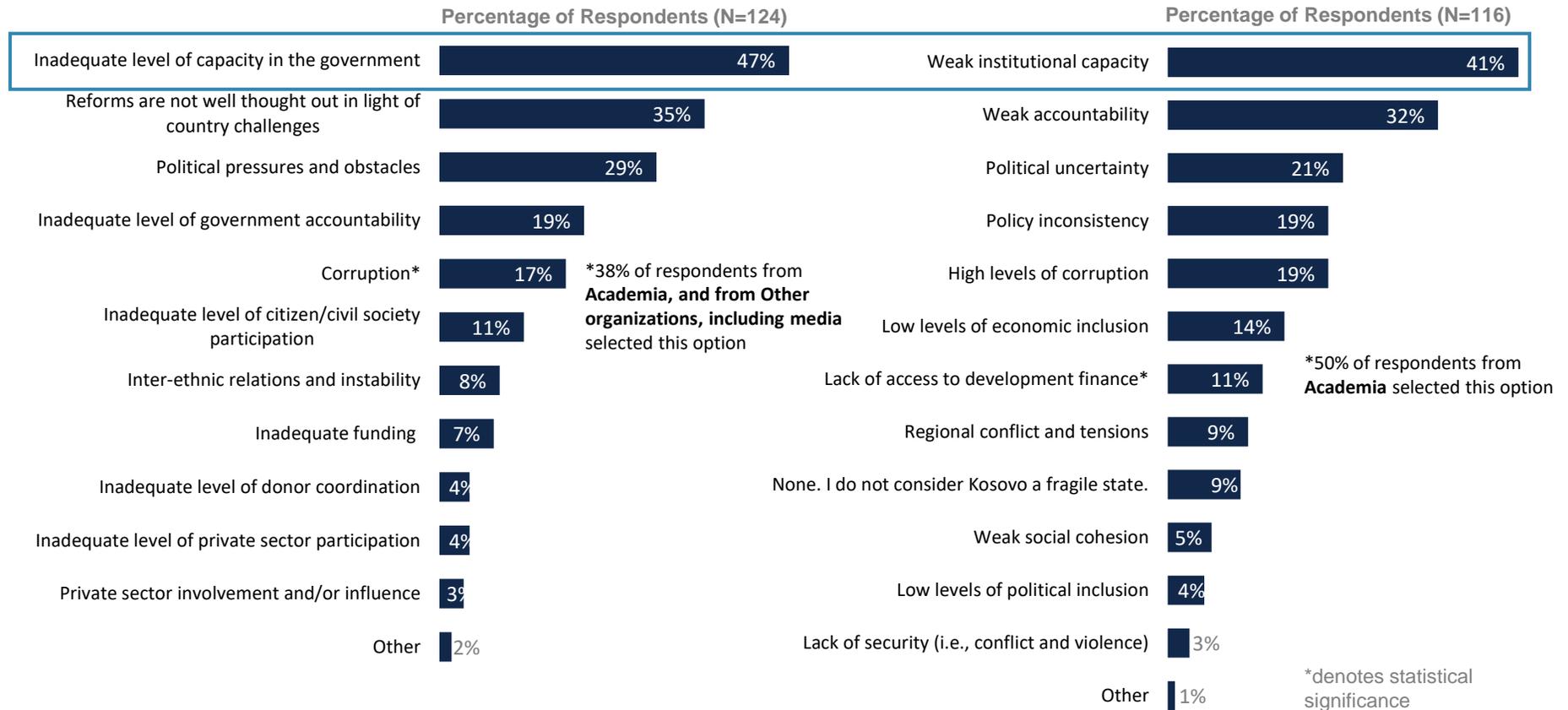
Notably, respondents report rather lower trust in the UN as a whole.



A5. To what extent do you trust each of the following groups to do what is right?
Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

Attribution of Failure and sources of Fragility

Inadequate capacity in the government (47%) is the main reason for failed reforms in Kosovo and **weak institutional capacity** (41%) is the main source of fragility in the country, according to the respondents.



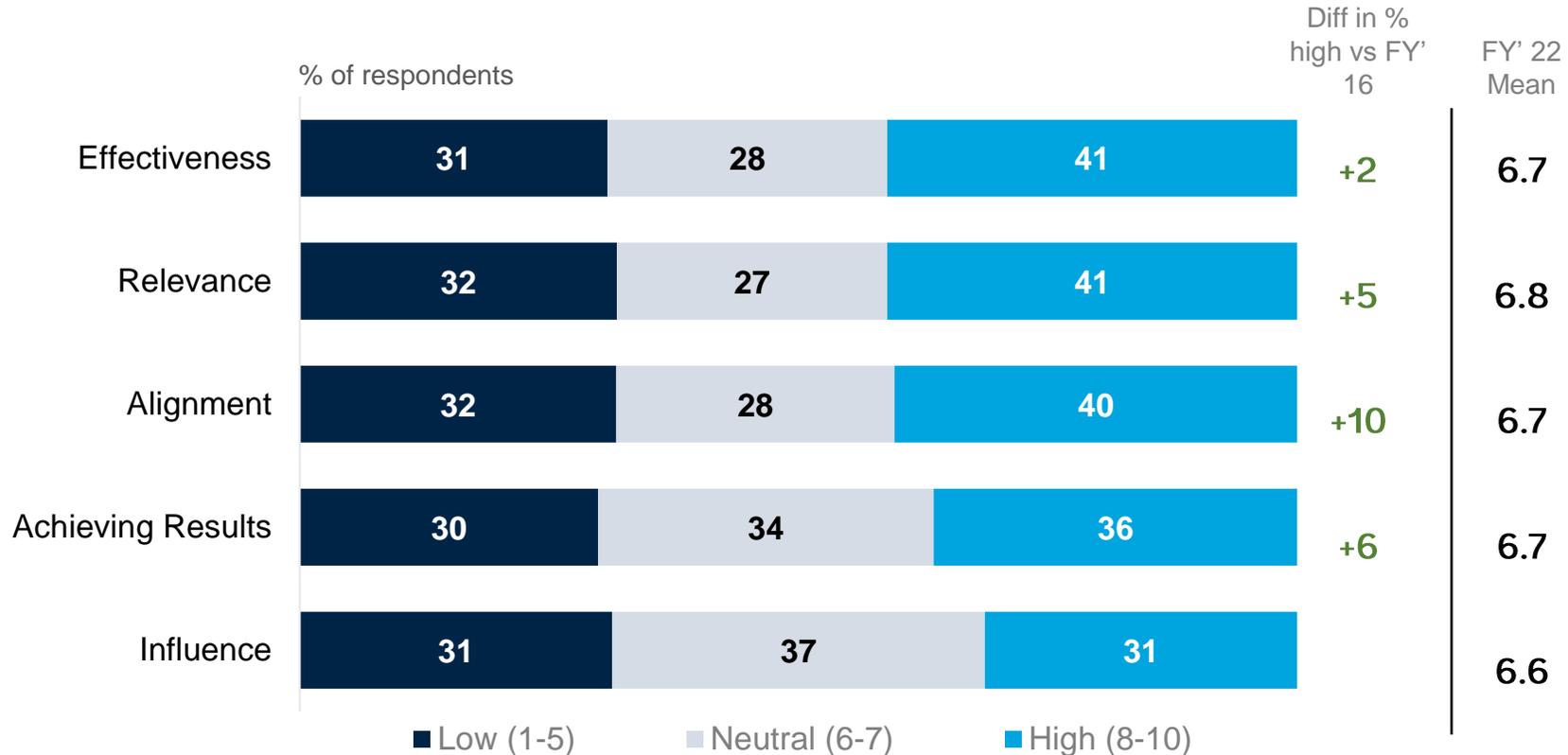
A4. When economic and/or social reform efforts fail or are slow to take place in Kosovo, which of the following would you attribute this to? (Choose no more than 2)

A6. When considering the characteristics of a fragile state, please identify which of the following best illustrate fragility in Kosovo. (Choose no more than 2)

Overall Attitudes toward the World Bank Group

Key Performance Indicators

In FY' 22, responses to the key indicator questions were similar to FY' 16, with only slight non-significant increases in the percentages of respondents who gave high rankings (8, 9, or 10 on a 10-point scale).



- B4_1 Overall, please rate your impression of the effectiveness of these organizations in Kosovo. The World Bank (IDA), Scale: 1-10 (1: Not effective at all – 10: Very effective)
- B2 Overall, the World Bank Group currently plays a relevant role in development in Kosovo, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)
- B3 The World Bank Group’s work is aligned with what I consider the development priorities for Kosovo, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)
- B5 To what extent does the World Bank Group’s work help to achieve development results in Kosovo? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)
- B6 To what extent does the World Bank Group influence the development agenda in Kosovo? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

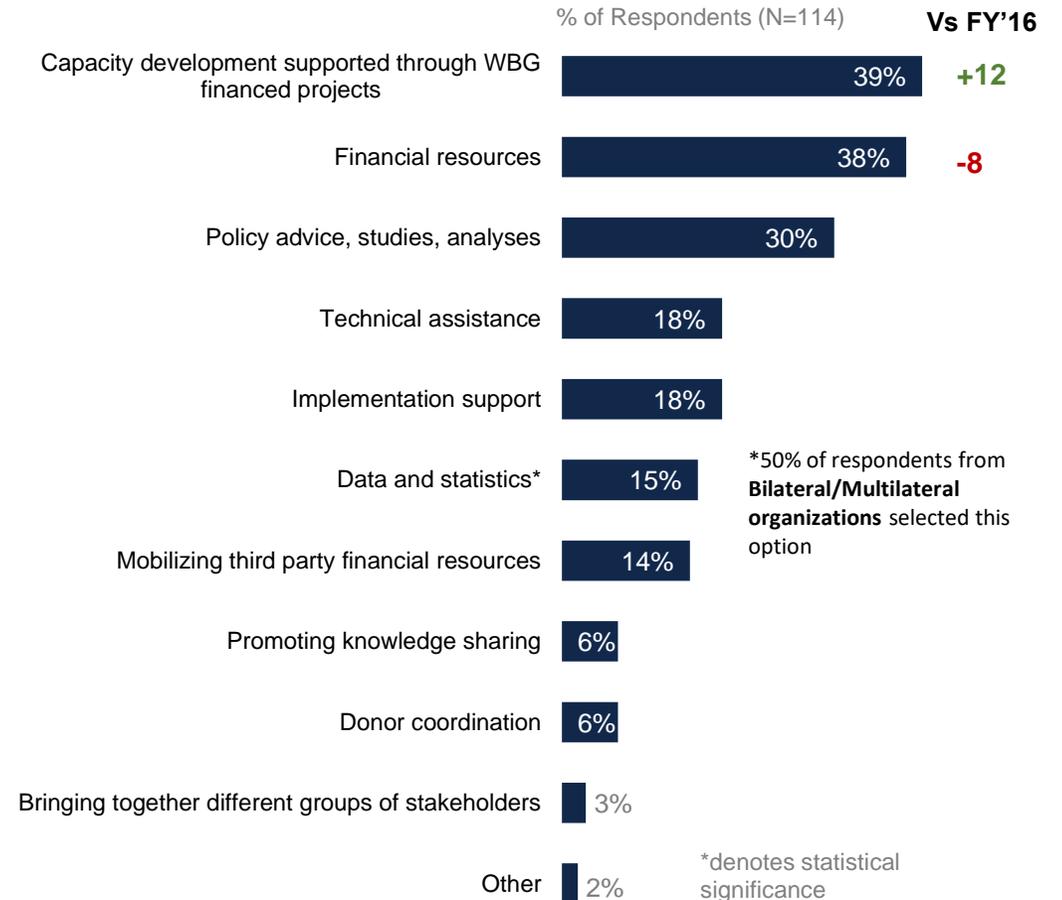


Greatest Value

Capacity development (39%) and **financial resources (38%)** are the most highly valued activities of the WBG in Kosovo, according to the respondents.

The importance of capacity development has increased by 12 percentage points (pp), compared to FY' 16; at the same time, financial resources, while still very valuable, are not so prominent this year (-8 pp compared to FY' 16).

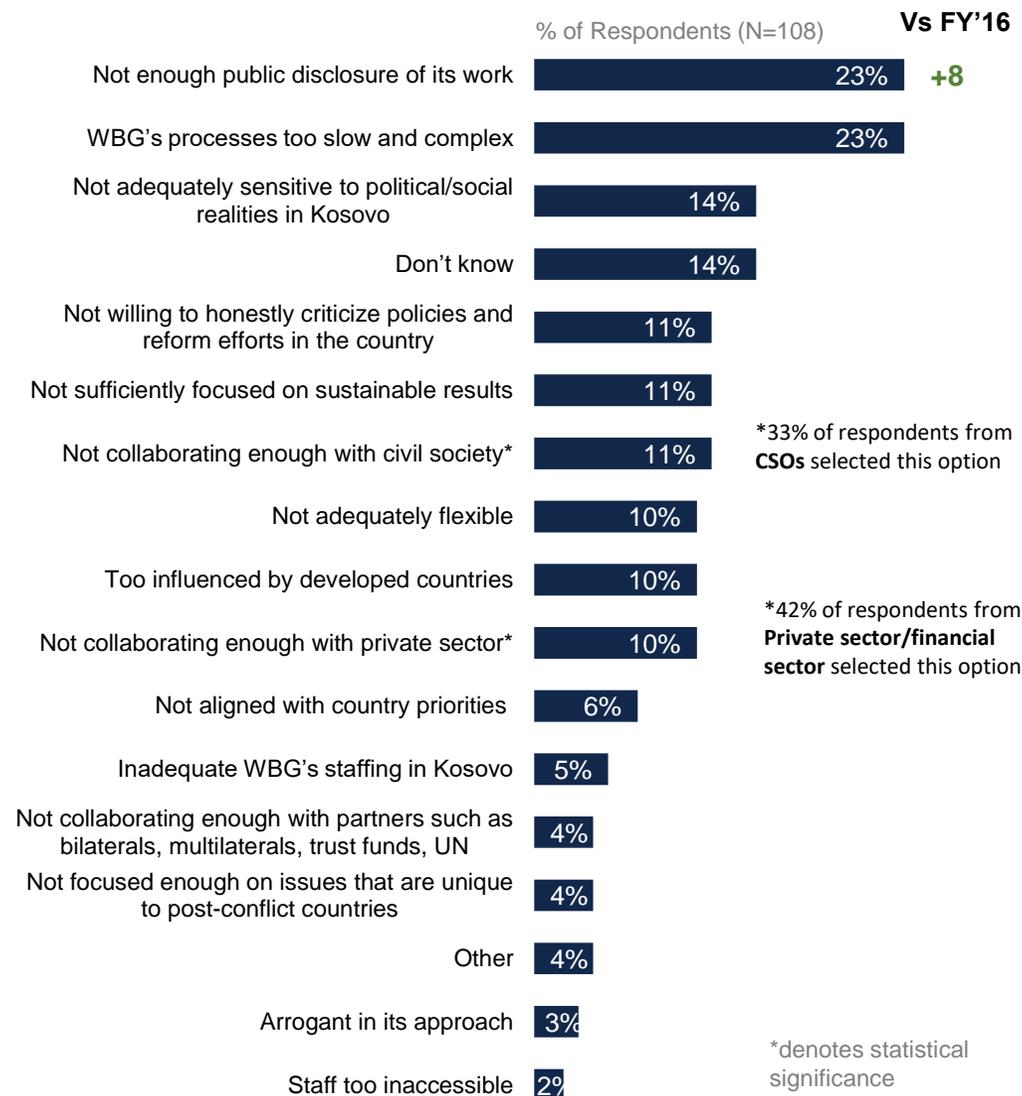
Notably, respondents say that low capacity in the government and in the institutions is the main reason for failed reforms in Kosovo and the top source of fragility in the country.



B8. When thinking about the World Bank Group's role in Kosovo, which activity do you VALUE the most? (Choose no more than 2)

Greatest Weakness

More respondents in FY' 22 say that “**Not enough public disclosure of its work**” (23%) is one of the WBG’s main weaknesses, along with its **processes being too slow and complex (23%)**.



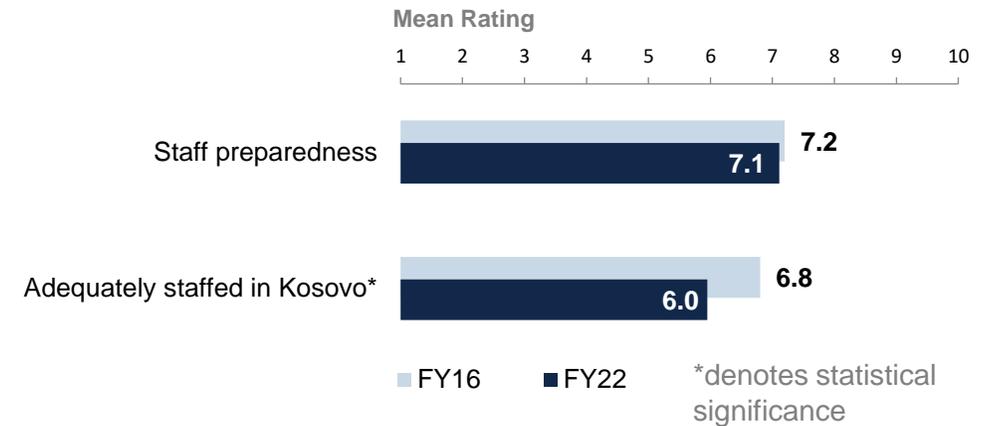
*denotes statistical significance



B9. Which of the following do you identify as the World Bank Group’s greatest WEAKNESSES in its work in Kosovo? (Choose no more than 2)

Staff preparedness and WBG staffing in Kosovo

In FY' 22, there is a significant gap (1.1 point) between the perceptions of staff preparedness in terms of skills and knowledge and the perceived adequacy of staffing in Kosovo, which has dropped significantly compared to FY' 16.



C1. To what extent do you believe the World Bank Group's staff is well prepared (e.g., skills mix and knowledge) to help Kosovo solve its most complicated development challenges?, Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

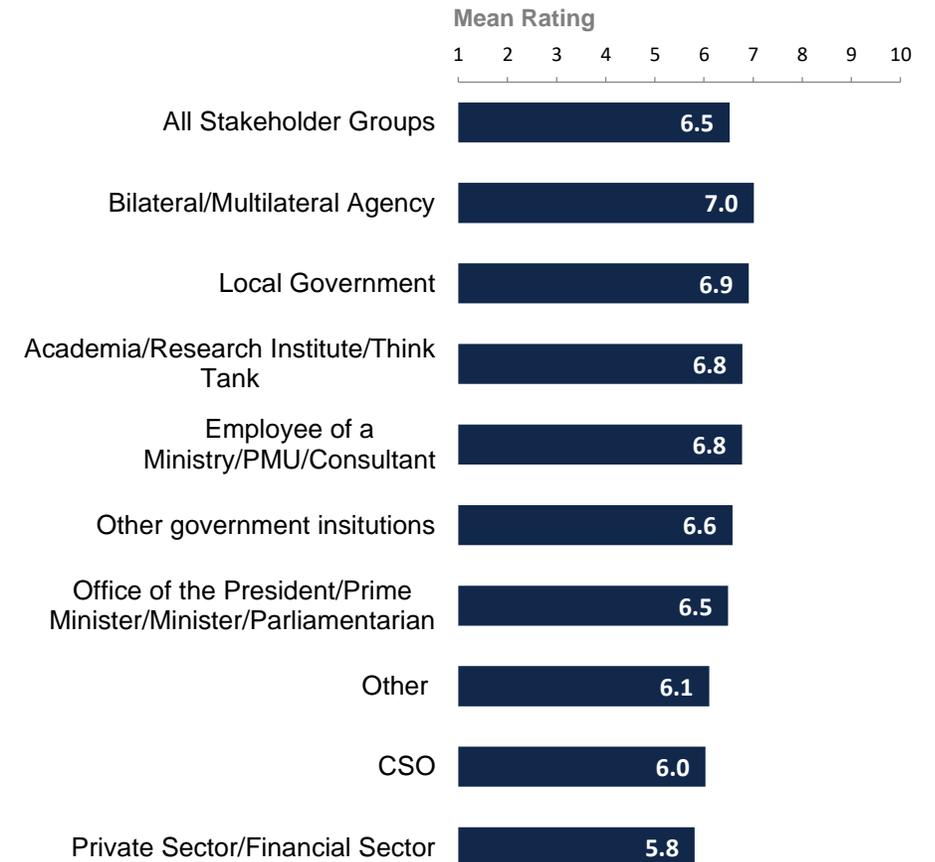
C2. To what extent do you believe the World Bank Group is adequately staffed in Kosovo?, Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

Overall Ratings for Indicator Questions by Stakeholder Groups

Respondents across **stakeholder groups** gave **statistically similar** rankings for the [twenty-five COS indicator questions](#) about the WBG's performance in Kosovo.

Collaboration: Respondents who collaborate with the WBG had significantly higher mean ratings for the aggregated responses to those same indicator questions (mean rating = 6.8*) compared to respondents who do not collaborate with the WBG (mean rating = 6.1*).

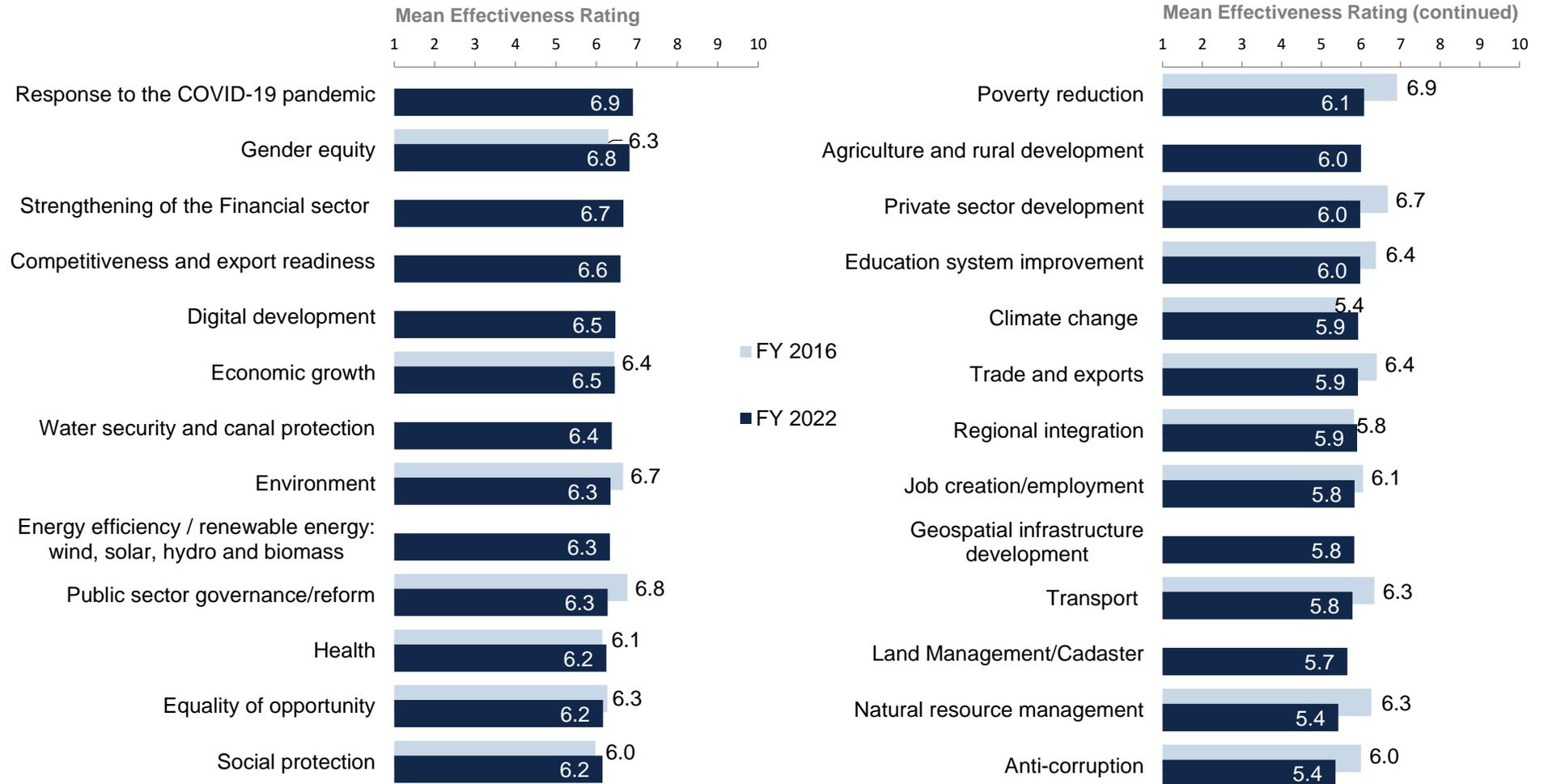
Mean Ratings for All Indicator Questions by Stakeholder Groups on a Scale from 1 to 10



World Bank Group's Support in Development Areas

Effectiveness of WBG's Support in Sectoral Areas

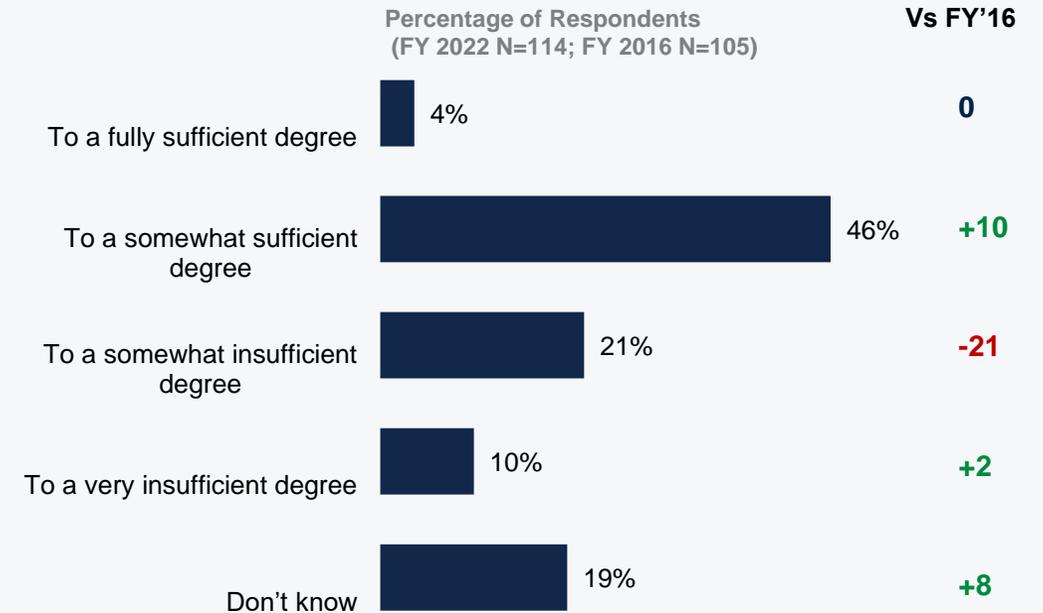
There were no statistically significant differences between FY' 22 and FY' 16 rankings for the WBG's effectiveness in comparable sectoral areas. WBG's response to COVID-19 pandemic received the highest rankings (mean = 6.9)



D1. How EFFECTIVE do you believe the World Bank Group is in terms of the work it does in the following areas of development in Kosovo? (If you have NO exposure to/experience in working in any of the sectors listed below, please respond "Don't know"), Scale: 1-10 (1: Not effective at all – 10: Very effective)

Perceived extent of help to the poorest people

Stakeholders are split over whether the WBG supports enough the poorest people in Kosovo, with just under half (46%) thinking it does so to a sufficient degree, a 10 pp increase compared to FY' 16.



Support for Systems:



B7. To what extent do you believe that the World Bank Group's work and support help the poorest in Kosovo? (Select only 1 response)
 D2. How effectively does the World Bank Group support Kosovo's efforts ... ? Scale: 1-10 (1: Not effectively at all – 10: Very effectively)



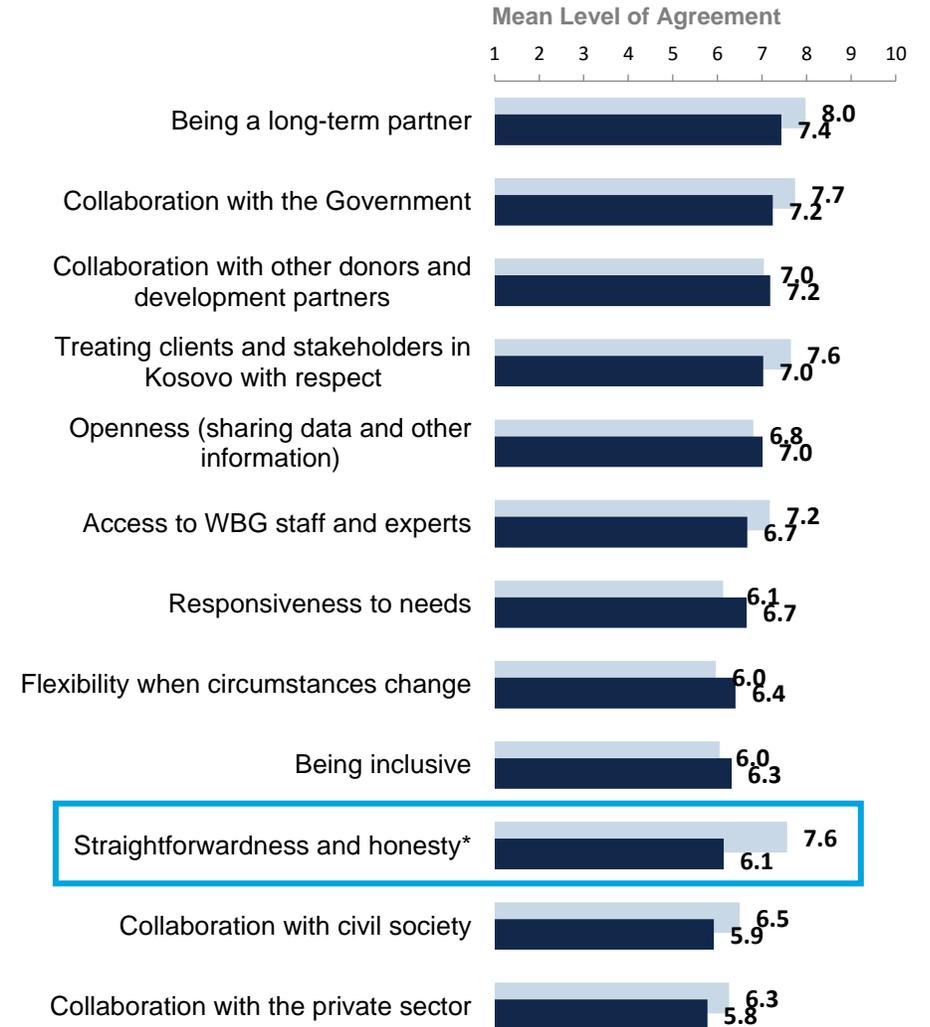
World Bank Group's Work and Engagement on the Ground

The WBG as a Development Partner

The WBG is seen as a long-term partner in Kosovo that collaborates well with the government and other donors and development partners. While the ratings for these aspects have somewhat decreased in FY' 22, the change was not significant.

In FY' 22, the institution received the lowest rating for its collaboration with the private sector. Notably, six in ten respondents say the WBG should collaborate more with the private sector in Kosovo.

There was a significant decline in the perceptions of the WBG's straightforwardness and honesty (-1.5 points compared to FY' 16)



■ FY 2016 ■ FY 2022 *denotes statistical significance



C3:C14. To what extent is the World Bank Group an effective development partner in Kosovo, in terms of each of the following?, Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

The WBG as a Development Partner

Respondents tend to give higher rankings of the WBG's contribution to increasing Kosovo's **institutional capacity** (mean = 7.5), for its effective **measurement of results**, and for its insistence on **accountability** (mean = 7.4).

In FY' 22, there was a significant drop in the rankings for the **timeliness of approvals and reviews** (-1.4 points) and for the **speed of decision making** (-0.8 points).

The WBG receives consistently lower rankings (less than 6 out of 10) for its **financial instruments'** meeting the needs of Kosovo.

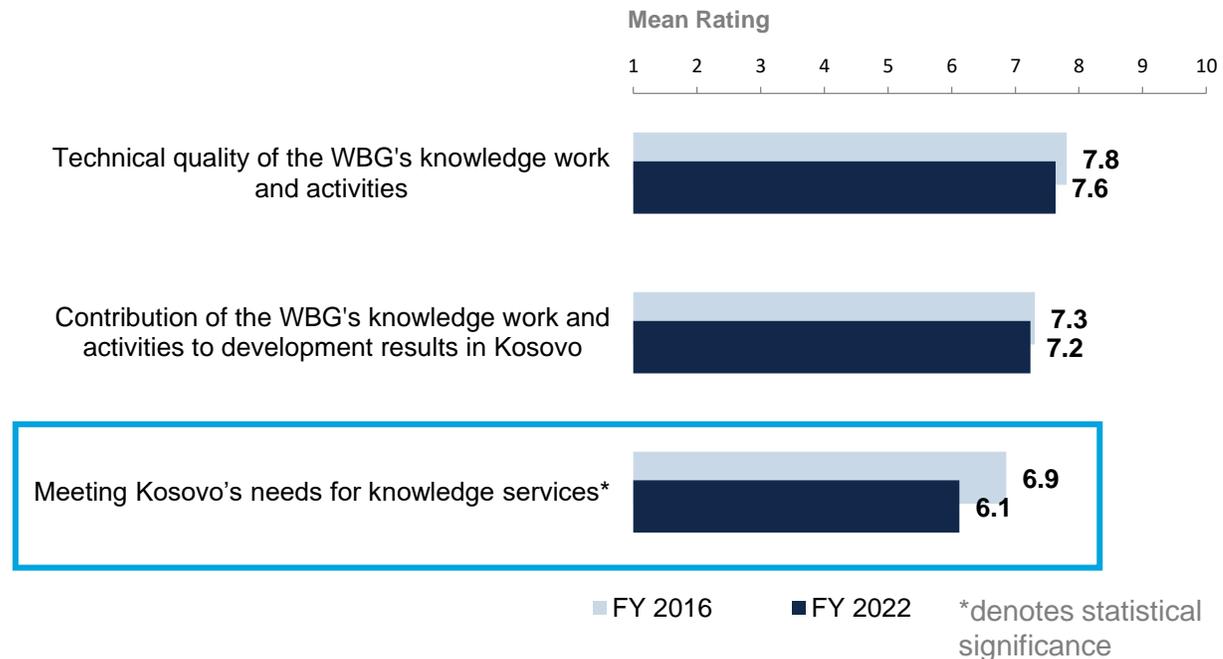


C15:C22. To what extent do you agree/disagree with the following statements?, Scale: 1-10 (1: Strongly disagree– 10: Strongly agree)
 C23. To what extent do you agree/disagree with the following statements about the World Bank Group in Kosovo?
 Scale: 1-10 (1: Strongly disagree– 10: Strongly agree)

World Bank Group's Knowledge work and Activities

WBG's knowledge work: key indicators

Respondents consistently give the highest rankings for the **technical quality** of the WBG's knowledge products and for their **contribution to development results** in the country, but significantly lower rankings when it comes to meeting the **knowledge needs**, which suggests that there is a demand for the WBG's knowledge work in the country.



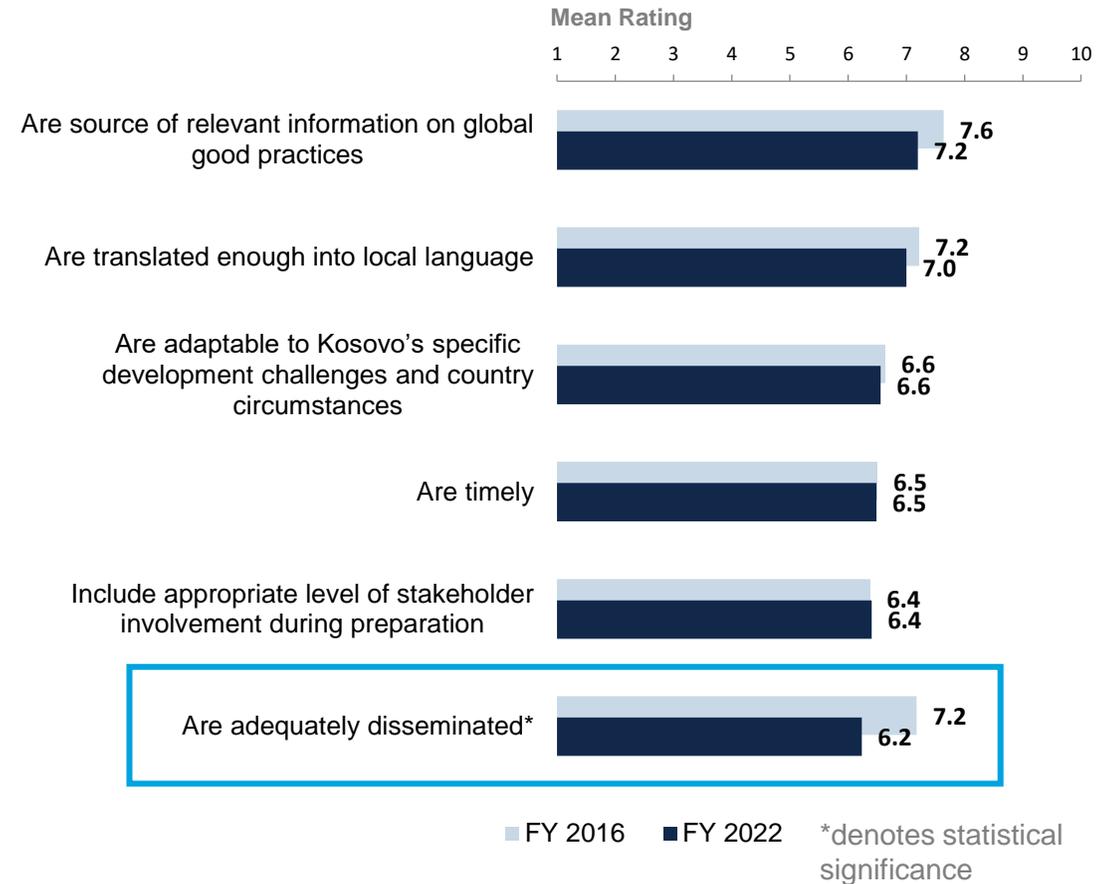
C24. To what extent do you agree/disagree with the following statements about the World Bank Group in Kosovo? The World Bank Group meets Kosovo's needs for knowledge services (e.g., research, analysis, data, technical assistance), Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

E8. Overall, how significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in your country?, Scale: 1-10 (1: Not significant at all– 10: Very significant)

E9. Overall, how would you rate the technical quality of the World Bank Group's knowledge work and activities?, Scale: 1-10 (1: Very low technical quality– 10: Very high technical quality)

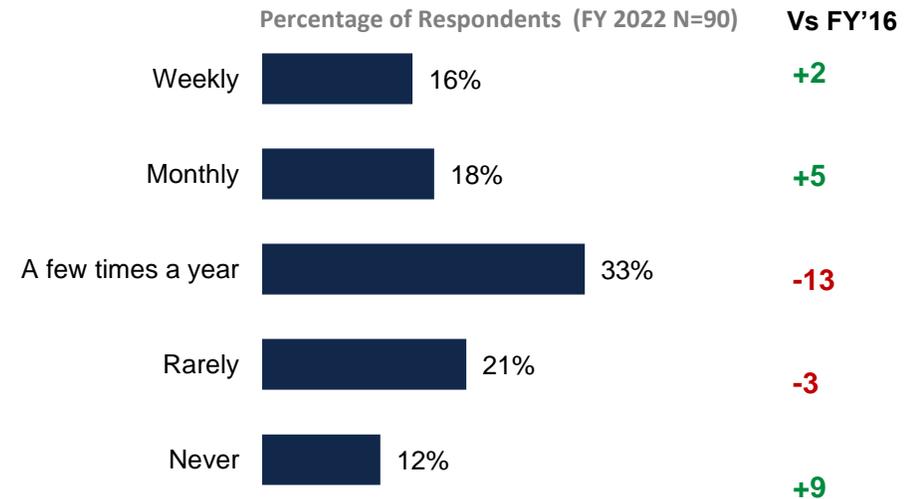
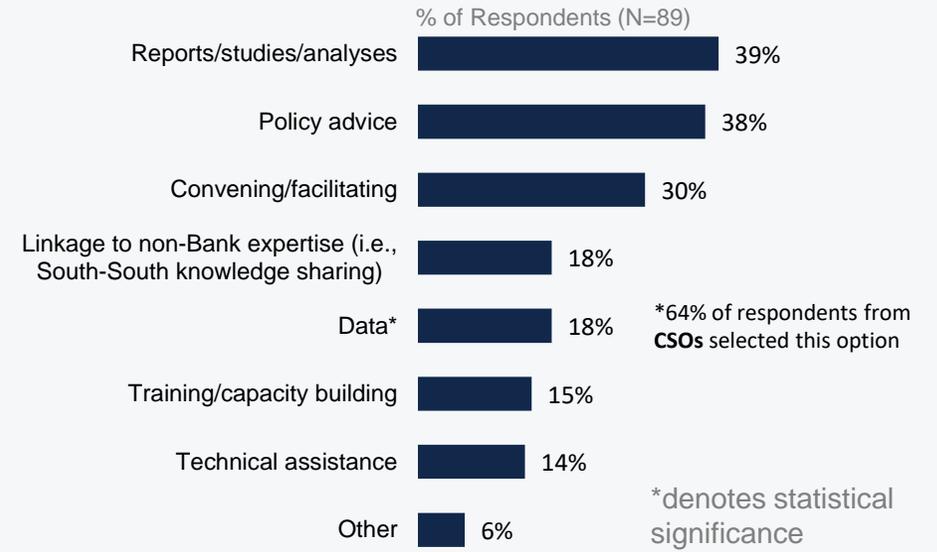
Attributes of the WBG's knowledge work

Similar to FY' 16, the WBG received the highest rating for its knowledge products being **a source of relevant information** on global good practices (mean=7.2), but somewhat lower ratings for its work being **adequately disseminated** (mean=6.2), with the latter one significantly decreasing compared to FY' 16. The rankings were statistically similar across all stakeholder groups.



Frequency of use and most useful types of knowledge work

Reports, studies and analyses (39%), along with the **policy advice** (38%) are the most useful types of the WBG's knowledge work and activities, according to the respondents. The WBG's convening and facilitating is also considered important by just under one-third of the respondents (30%).



E10. What type of World Bank Group's knowledge work and activities do you find most useful for your work? (Choose no more than 2)

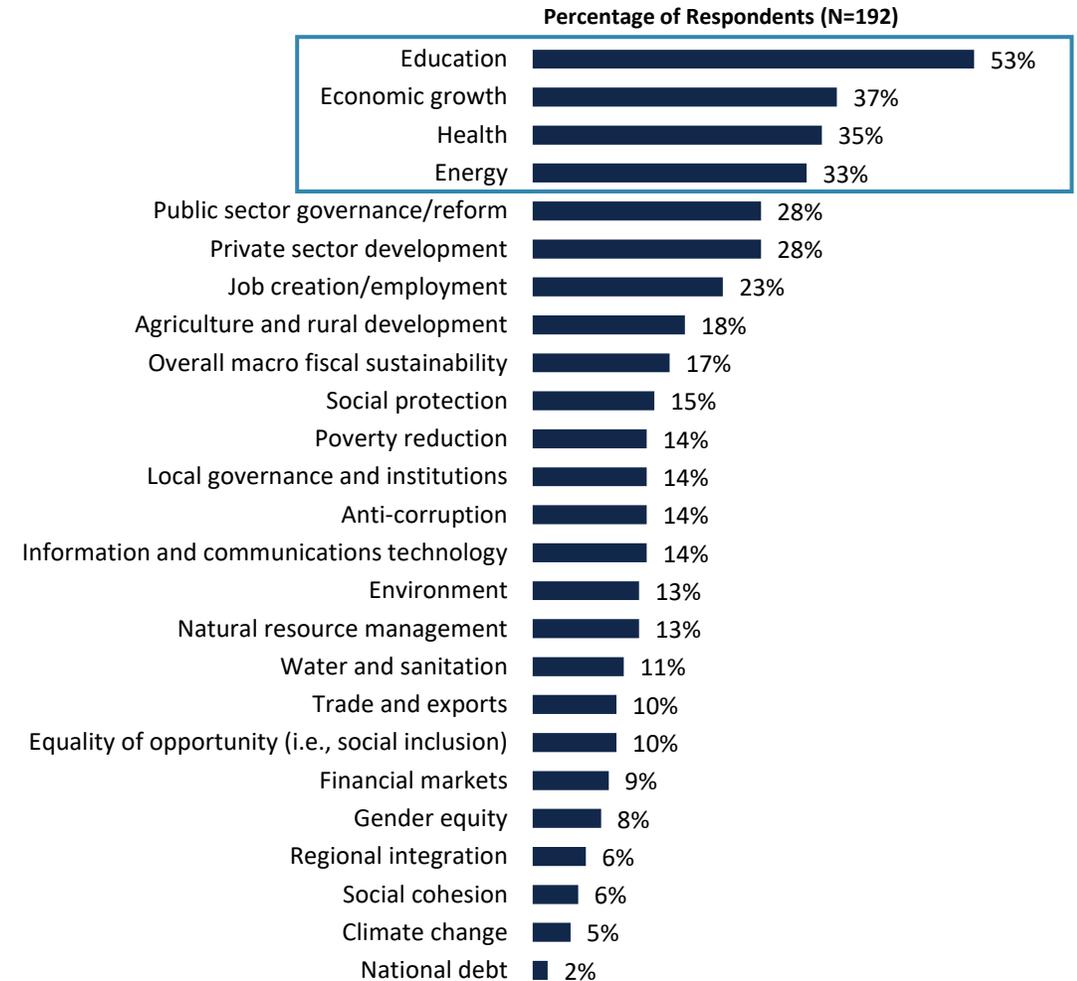
E1. How frequently do you consult World Bank Group's knowledge work and activities in the work you do?

The Future Role of the World Bank Group in Kosovo

Areas the WBG should prioritize with its resources

In FY' 22, over half of the respondents (53%) thought the WBG should prioritize **education** sector in Kosovo. Education was also a top development priority in the country, according to the respondents (63%).

Other top focus areas for the WBG -- **economic growth, health, and energy** -- were also in full alignment with the perceived top development priorities in the country.

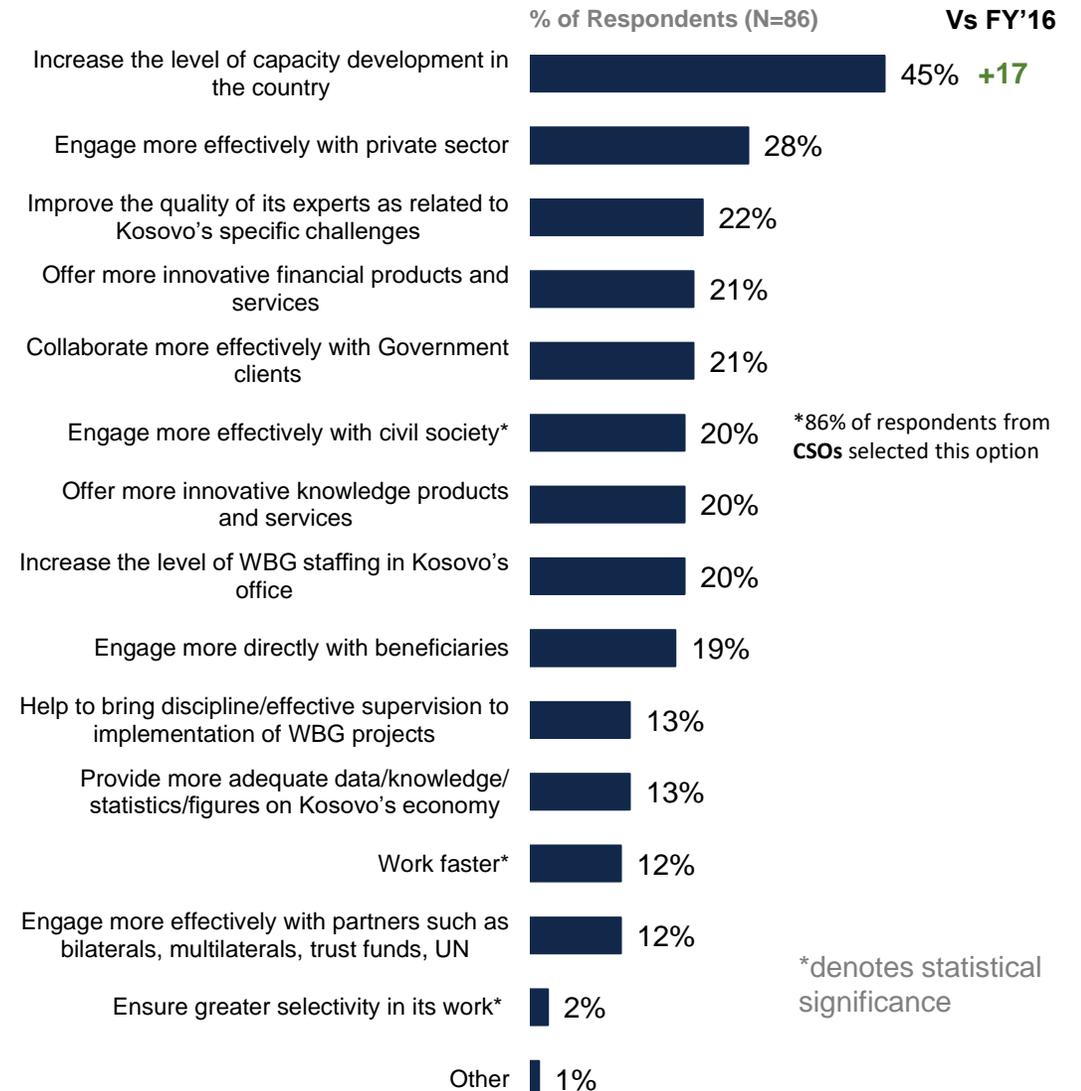


B10. When thinking about how the World Bank Group can have the most impact on development results in Kosovo, which sectors do you believe the World Bank Group should prioritize with its resources (financial and knowledge services) in Kosovo? (Choose no more than 5)

Making the WBG of Greater Value

A plurality of respondents (45%) say that, to make itself of greater value in Kosovo, the WBG should increase the level of **capacity development** in the country. Capacity development is also the area of the WBG's work that respondents value the most (39%), along with financial resources (38%).

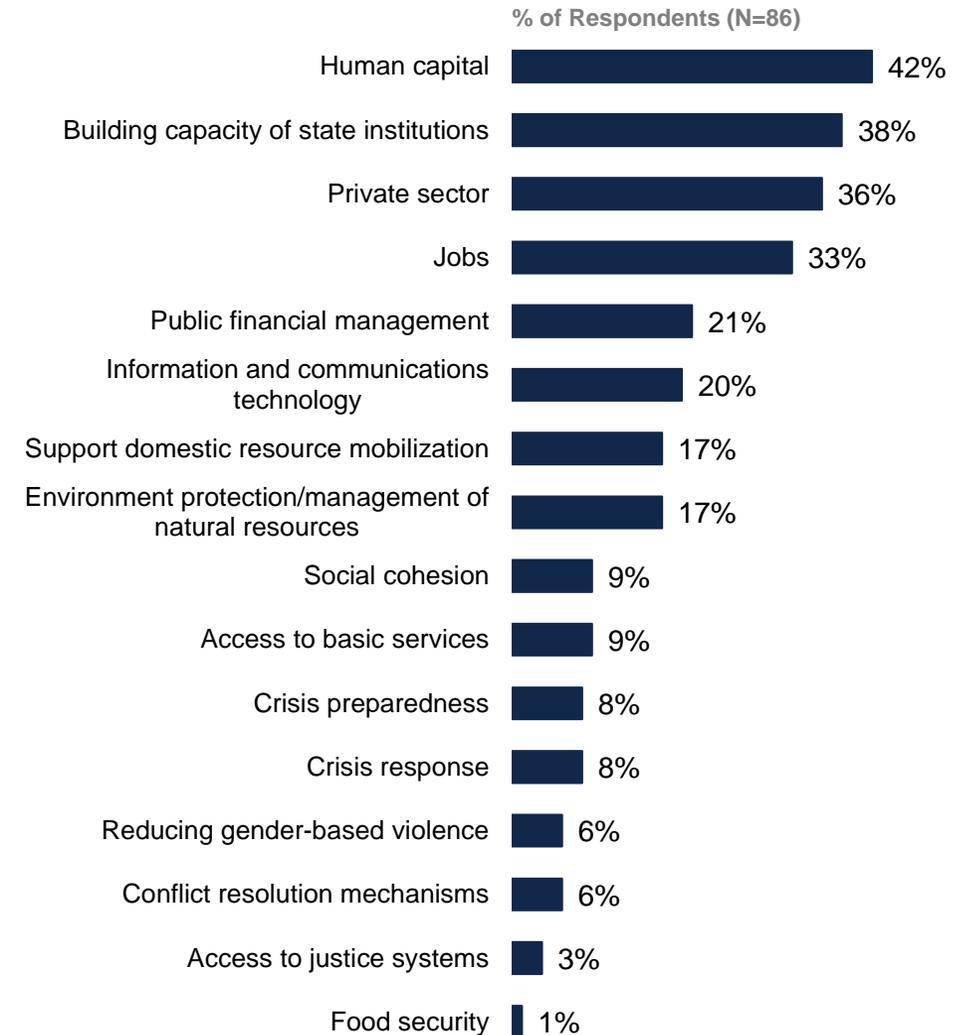
IMPORTANT: The reported increase in the percentage compared to FY' 16 is partially attributable to the change in the methodology: In FY' 16, respondents were offered to select up to two options, while in FY' 22 – up to three. However, in FY' 16, capacity development was also a top focus area (28%).



F1. Which of the following SHOULD the World Bank Group do to make itself of greater value in Kosovo? (Choose no more than 3)

Areas where the WBG should lead

Human capital (42%), followed by **building capacity of state institutions** (38%), **private sector** (36%), and **jobs** (33%) were the areas where, according to respondents, the WBG should be playing a leading role among international partners in Kosovo.

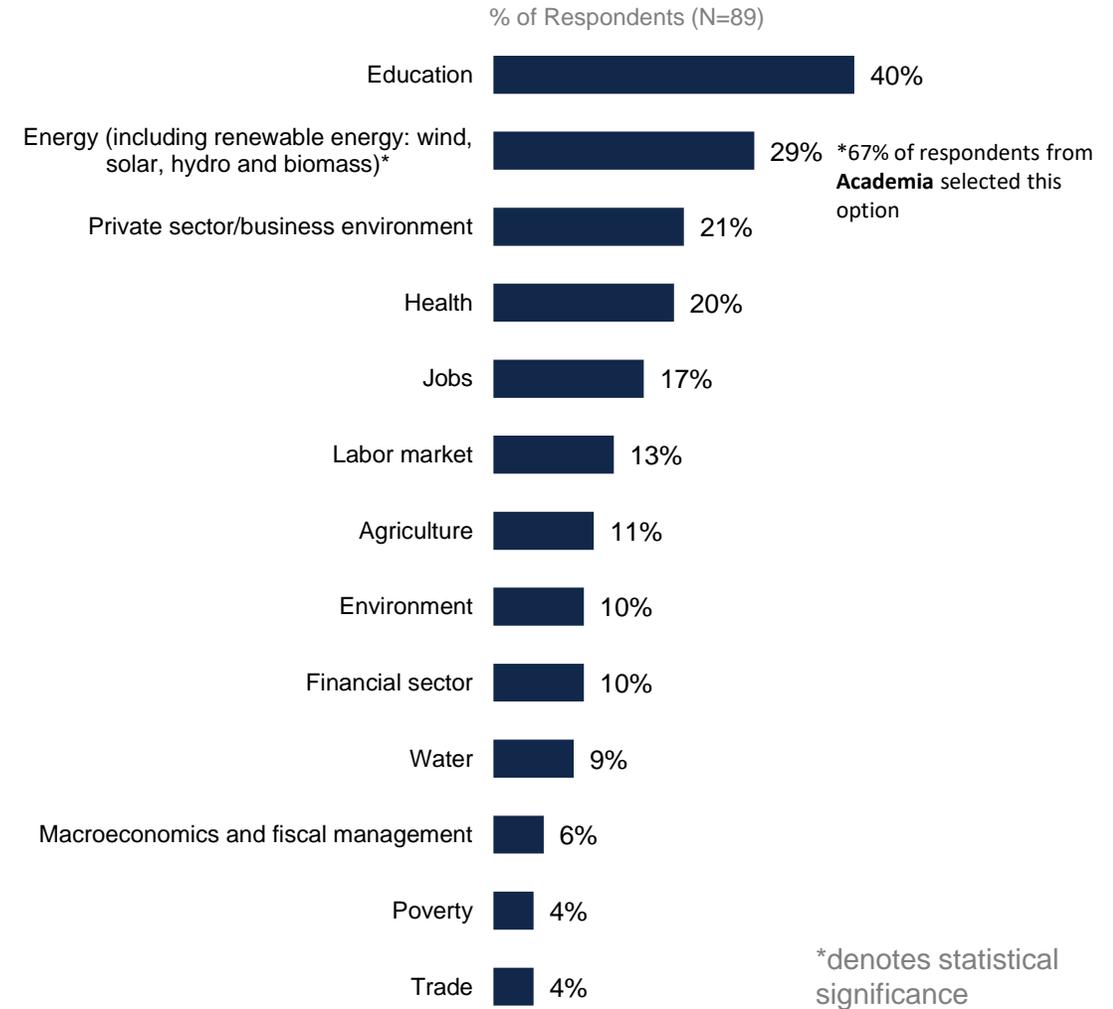


F3. Which THREE areas below would benefit most from the World Bank Group playing a leading role among international partners in Kosovo? (Choose no more than 3)

Focus of the WBG's knowledge work

Education (40%) and **energy** (29%) were the top areas where respondents would like the WBG to focus its knowledge work.

These areas were also top development priorities for respondents (education – 63%, energy – 37%) and sectors where they would like the WBG to focus its recourses (education – 53%, energy – 33%)

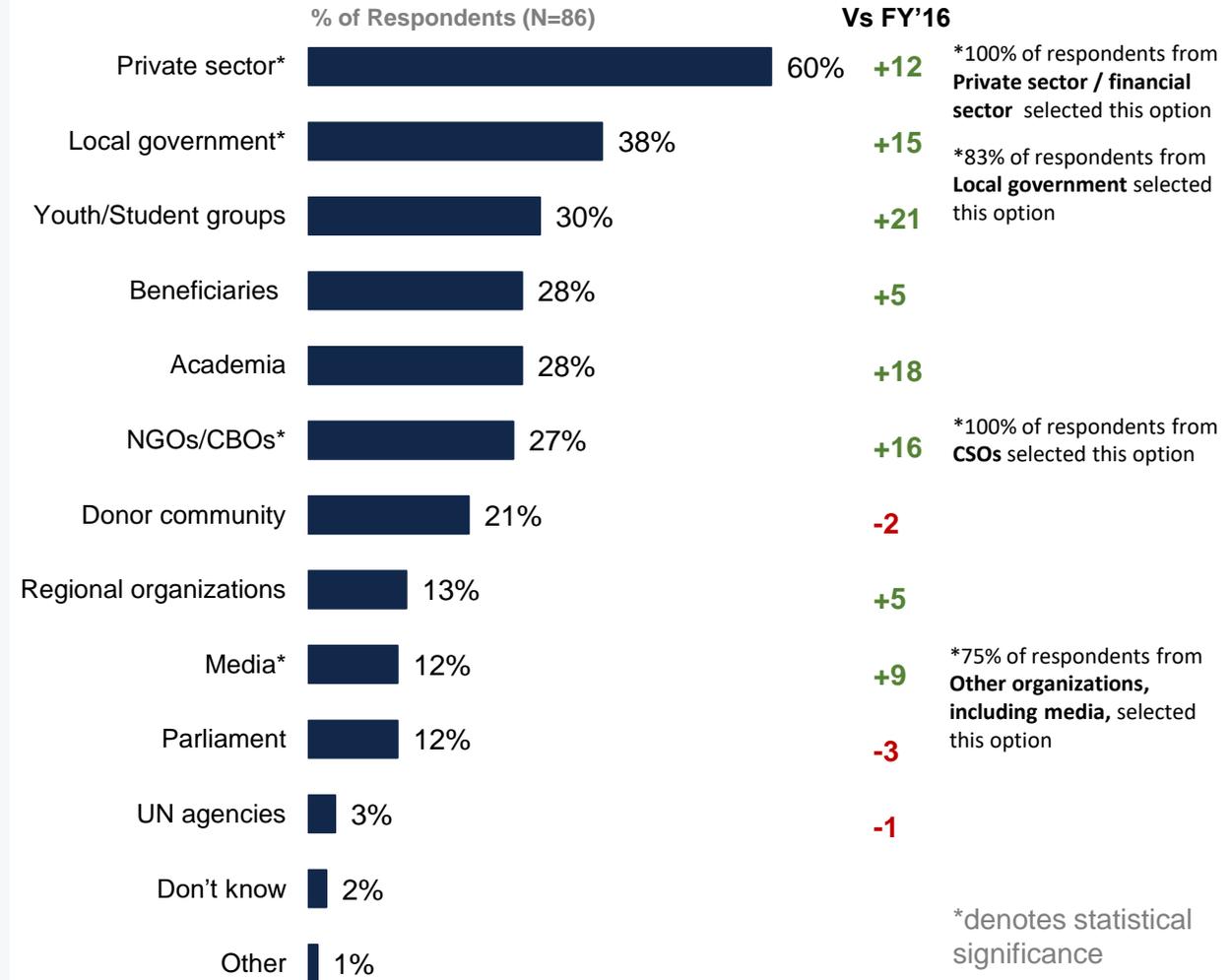


E11. When thinking about the development challenges in Kosovo, where do you believe it would be most valuable for the World Bank to focus its knowledge work and activities in the next few years? (Choose no more than 2)

The WBG Should Collaborate More with ...

Six in ten respondents say the WBG should collaborate more with the **private sector** in Kosovo.

IMPORTANT: The overall increase in the reported percentages compared to FY' 16 is partially attributable to the change in the methodology: in FY' 16, respondents were offered to select up to two groups, while in FY' 22 – up to three. However, in FY' 16 private sector(48%) was also the top group, which, according to respondents, the WBG should collaborate more with in Kosovo.



F2. In addition to the regular relations with the national government, which THREE of the following groups should the World Bank Group collaborate with more in your country? (Choose no more than 3)

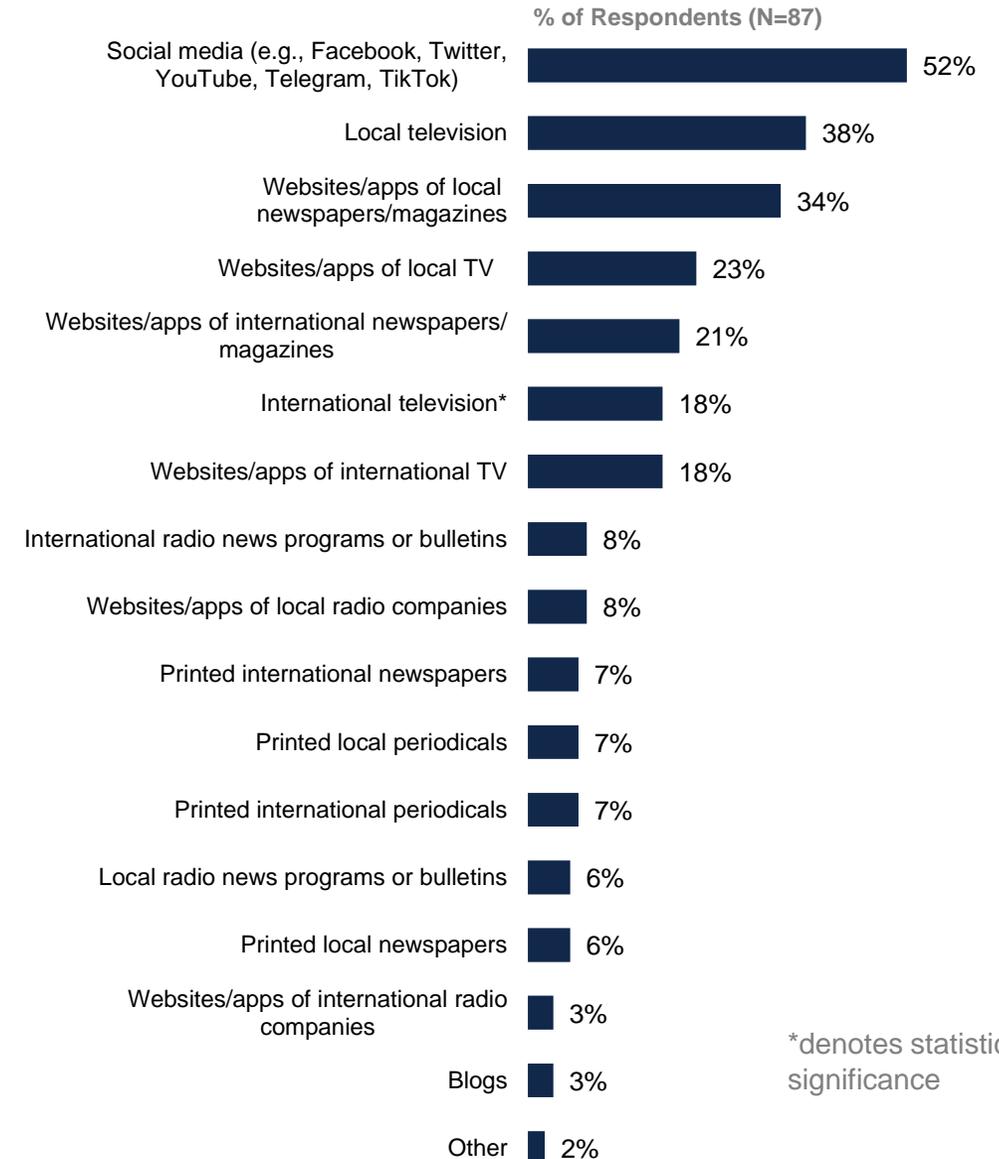
Communication and Outreach

General Information Sources

Respondents report using a variety of news sources, but a majority (52%) uses **social media**.

Local television (38%) and **websites/apps of local newspapers/magazines** (34%) are also used by over one-third of the respondents

There were no significant differences among stakeholder groups, with one exception of the respondents from the **media and other organizations** who were more likely to use international television as their main source of news (75%).



*denotes statistical significance

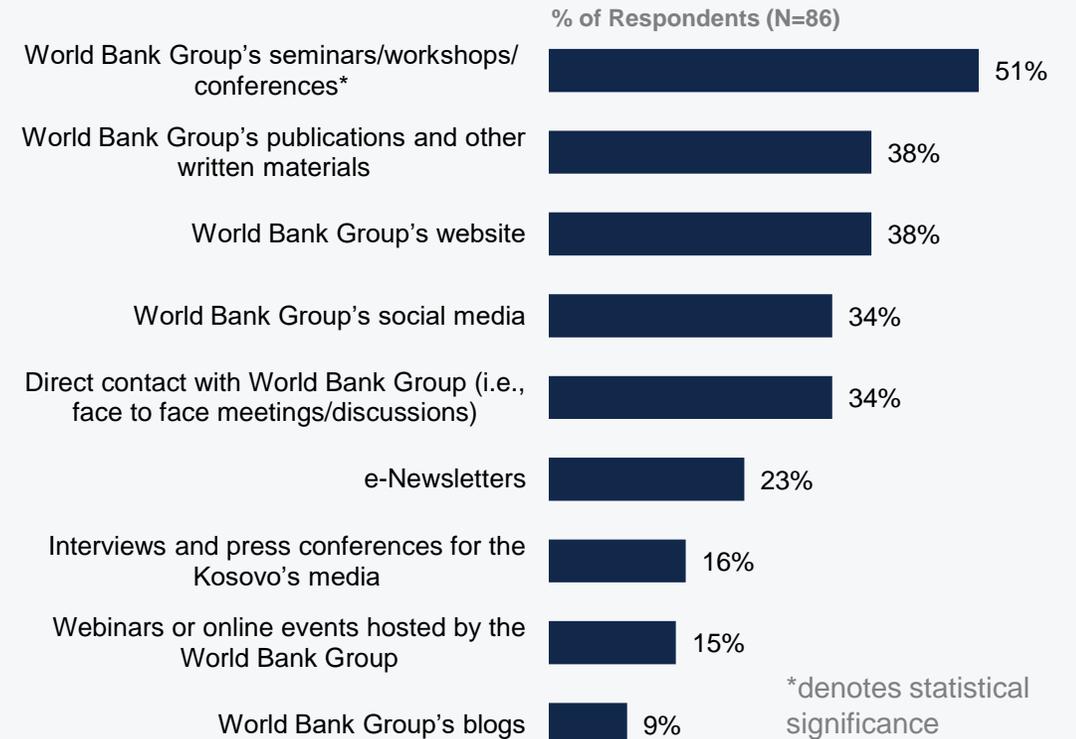


G1. Which would you say are your MAIN sources of news about economic and social development issues in Kosovo? (Choose no more than 3)

General Information Sources

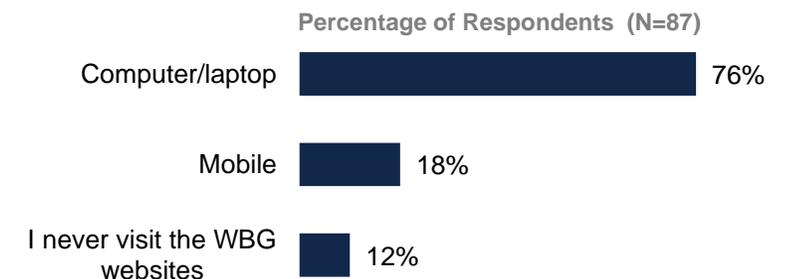
Respondents were split over the ways they prefer to receive information from the WBG, with just over half giving preference to the WBG's **seminars, workshops, and conferences (51%)**.

Respondents from **independent government institutions and state-owned enterprises (91%**, combined as "Other Government Institutions") were the most likely to say that they prefer WBG's seminars, workshops, and conferences. At the same time, no respondents from the office of the **President, Prime Minister, minister, or parliamentarian** have selected this option. Their preference was direct contact, as well as webinars.



While the majority (76%) uses a computer/laptop to access WBG's websites, 18 percent use mobile connection.

Respondents from the **local government** were the least likely to use computer (33%) and most likely to use either mobile connection (42%), or never visit the WBG's website (25%).

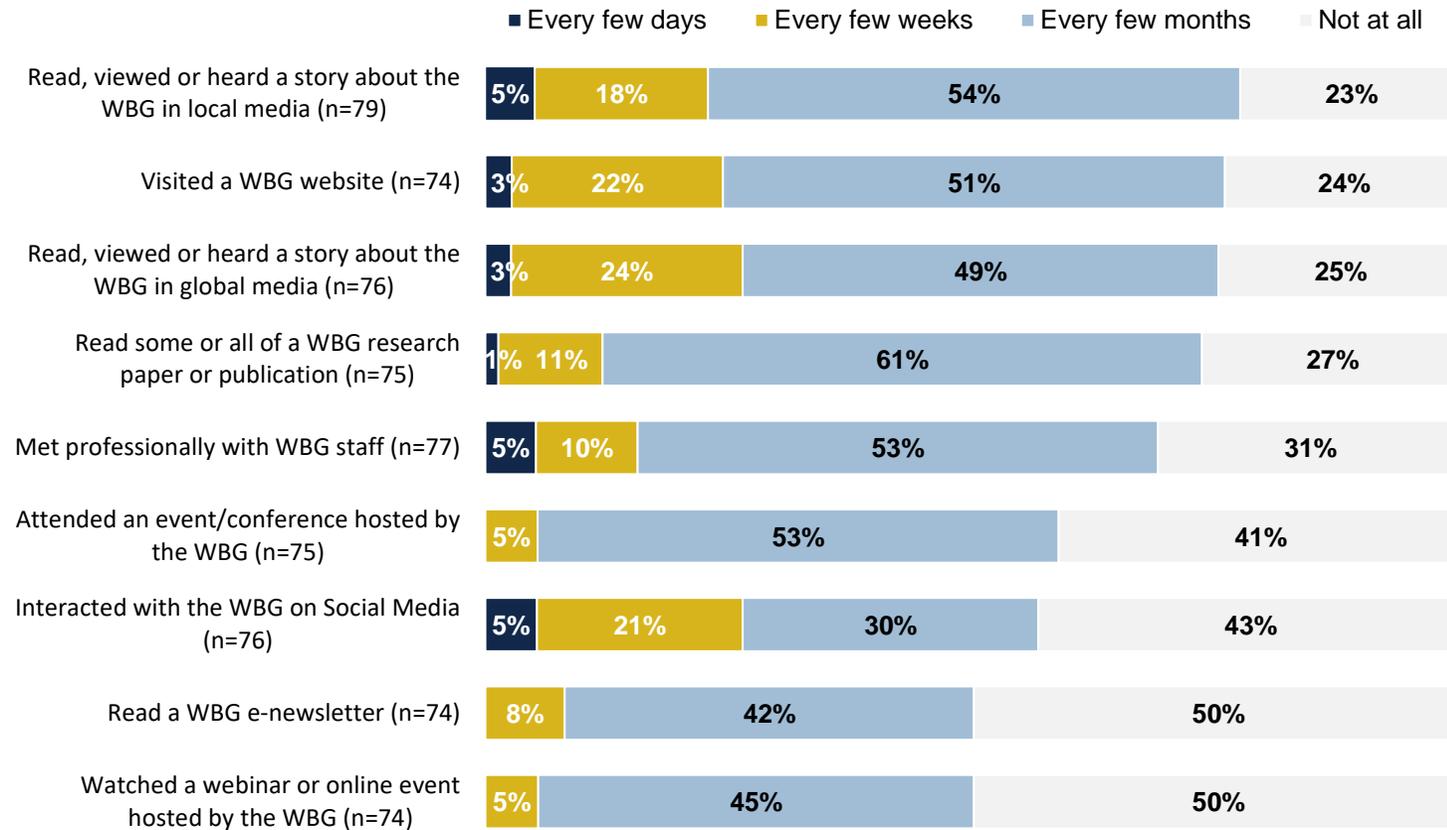


G2. How would you prefer to obtain information about the World Bank Group and its work? (Choose no more than 3)

G3. What do you use primarily when visiting a World Bank Group website? (Select only 1 response)

Frequency of Specific WBG Interactions

Press coverage in the local / global media and WBG’s research are the most frequent information sources on WBG.



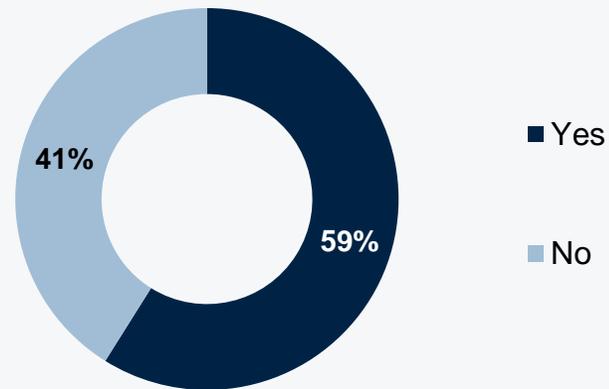
G4. Over the past SIX MONTHS, on average how often did you do any of the following related to the World Bank Group (WBG)?

Demographics of the Sample

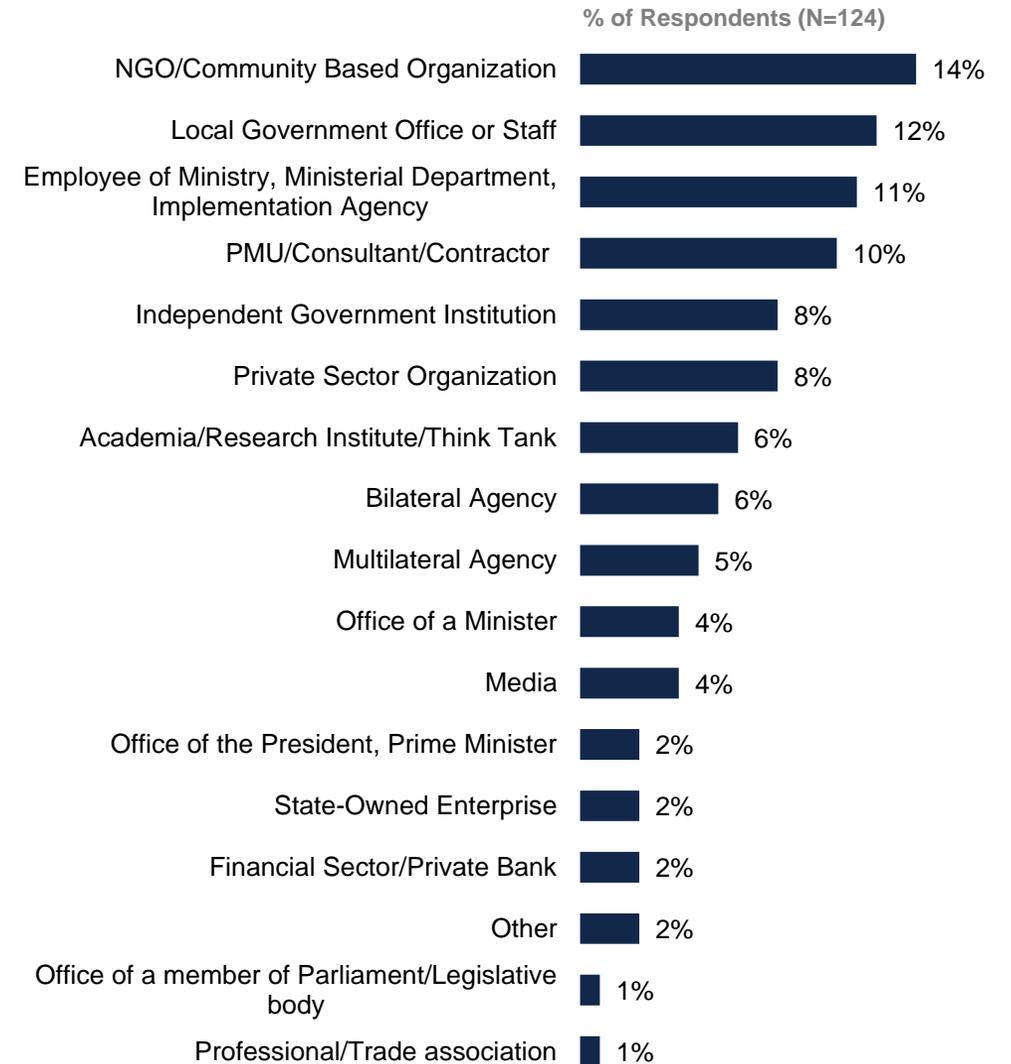
Respondent profile 1

Note that for further analyses, some respondent groups were combined (for details in the [Methodology section](#)).

Collaboration with the WBG n=124



Current affiliation

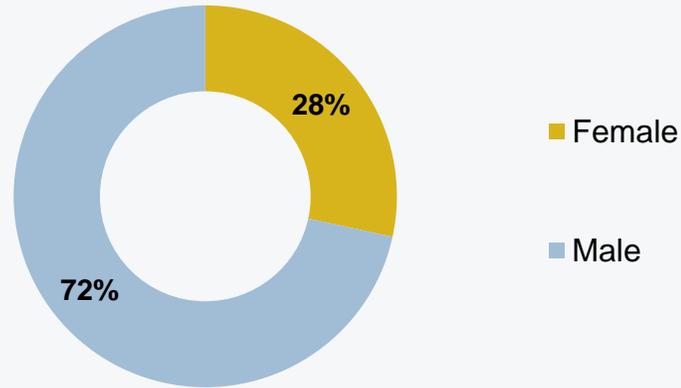


Q1. Which of the following best describes your current affiliation? (Select only 1 response)

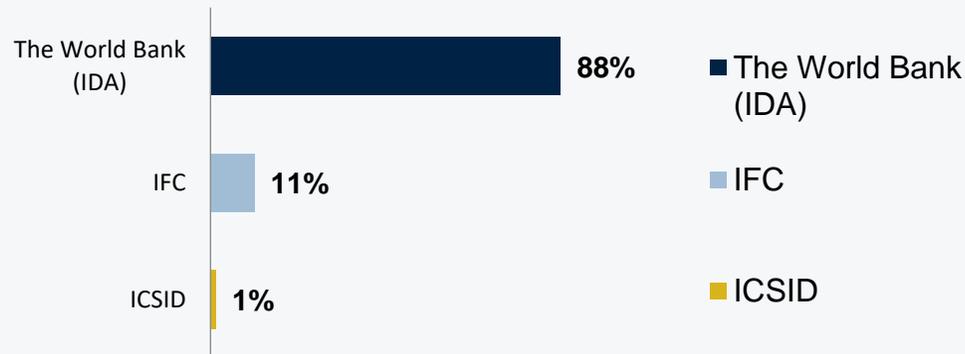
Q2. Currently, do you professionally collaborate/work with the World Bank Group (IDA, IFC, MIGA, ICSID) in your country?

Respondent profile 2

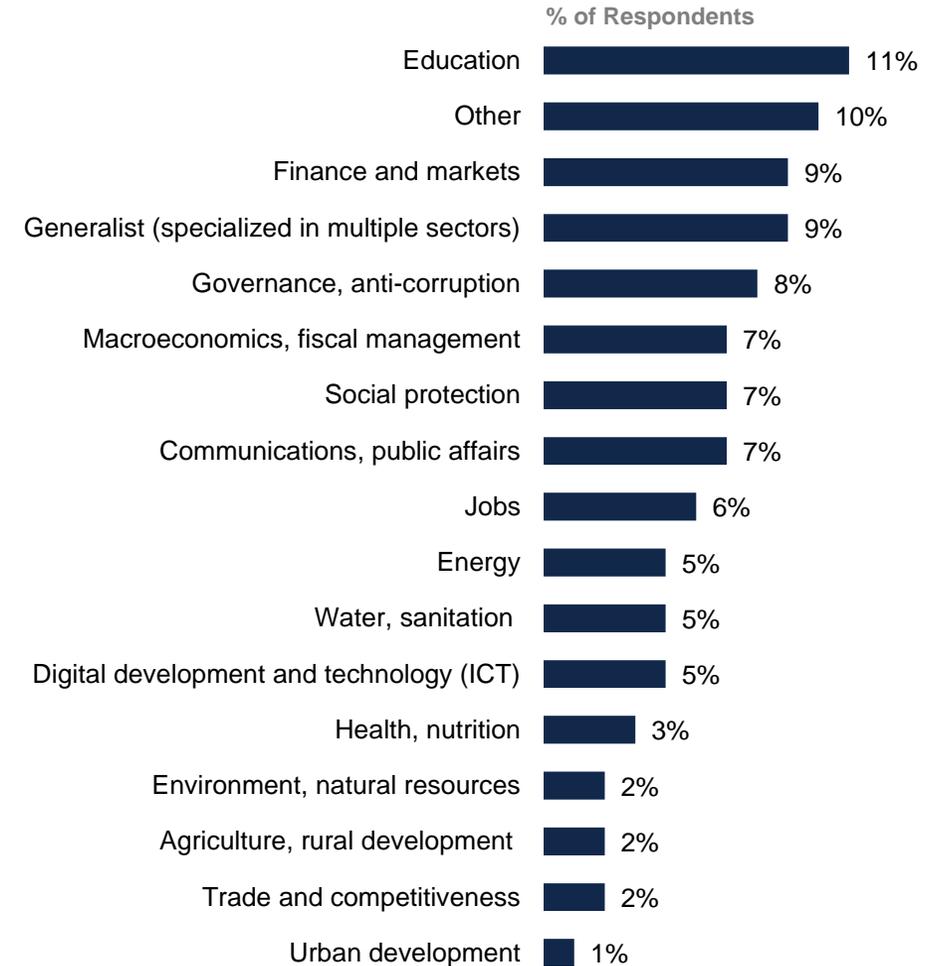
Gender n=88



Institutions n=73



Specialization n=87



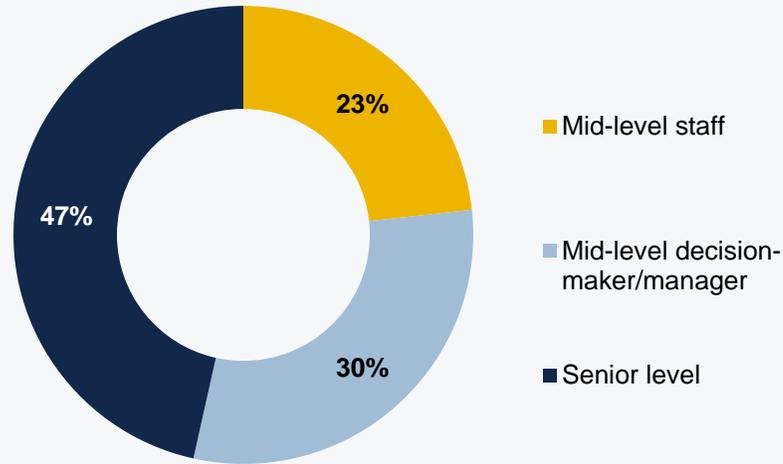
H2. What's your gender?

Q4. Which of the following agencies of the World Bank Group do you primarily collaborate/work with in Kosovo? (Select only ONE response)

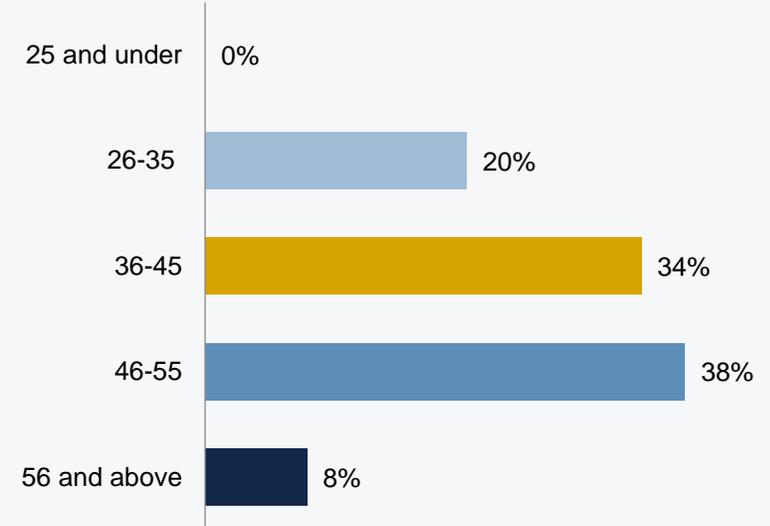
H1. Please identify the primary specialization of your work. (Select only 1 response)

Respondent profile 3

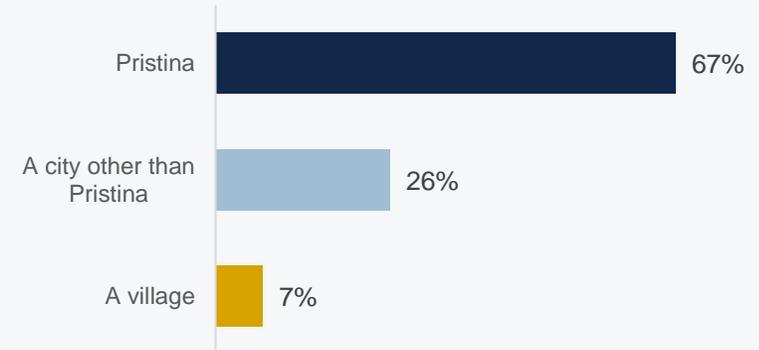
Seniority n=86



Age n=88



Location n=86



- H3. Within your organization, would you describe yourself as
- H4. What's your age?
- H5. Which best represents your geographic location?

Methodology



Methodology

From July to August 2022, 297 stakeholders of the WBG in Kosovo were invited to provide their opinions on the WBG's work in the country by participating in a Country Opinion Survey. Participants were drawn from the Office of the President, Prime Minister; office of a minister; office of a member of parliament/legislative body; ministries, ministerial departments, and implementation agencies; project management units (PMUs) overseeing implementation of WBG projects; consultants and contractors working on WBG-supported projects and programs; local governments; independent government institutions; the judicial system; state-owned enterprises; bilateral and multilateral agencies; private sector organizations; the financial sector and private banks; private foundations; NGOs and community based organizations; professional and trade associations; faith-based groups; youth groups; from the academia, research institutes, and think tanks; from the media and other organizations.

A total of 124 stakeholders participated in the survey (42% response rate). Respondents completed the questionnaire via an online platform.

Note that there were no responses from the judicial system, from private foundations, faith-based groups, and youth groups.

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

Year comparison

The results in this year’s Country Survey were compared to those in the Country Survey conducted in FY’ 16 (response rate was 44%, N=105).

Comparing responses across Country Surveys reflect changes in attitudes over time, but also changes in respondent samples and changes to the survey instrument itself. To reduce the influence of the latter factor, only those questions with similar response scales/options were analyzed.

The distribution of respondent samples from the FY’16 and FY’22 Country Surveys used in the year comparisons analyses are listed in the table on the right. This year’s survey saw an increased outreach to and response from local governments and bilateral/multilateral agencies, but a decrease in responding from high-level government offices. These differences in stakeholder composition among survey respondents need to be taken into account when interpreting the results of the past-year comparison analyses.

% of Respondents	FY 2016	FY2022
High-level government offices: Office of the President, Office of Prime Minister, Office of a Minister, Office of a member of Parliament / legislative body	20%	7%
Government Institutions: employees of ministries, project management units (PMUs)/consultants on WBG-supported projects, independent government institutions, the judiciary, and state-owned enterprises)	37%	32%
Local government	2%	12%
Bilateral/multilateral agency: embassy, diplomatic, military, UN, regional development bank	5%	10%
Civil Society Organizations (SCO): NGOs/community-based organizations, private foundations, faith-based groups, professional/trade associations, and youth groups	15%	15%
Private Sector: private sector organizations and financial sector/private banks	6%	10%
Academia/Research Institute/Think Tank	2%	6%
Media	2%	4%
Other	9%	2%
Total Number of Respondents	105	124

Statistical analysis

To analyze responses by stakeholder groups, responses to the question “[Which of the following best describes your current affiliation?](#)” were re-grouped and recoded into nine groups (please see the table to the right).

Scale bucketing:

When mentioning **Low**, **Neutral**, and **High** in scales throughout the report: 1-5 is low, 6-7 is neutral and 8-10 is high.

Statistical significance:

Significant differences between the FY’ 16 and FY’ 22 data, as well as among different stakeholder groups are marked with an asterisk.

Significance is measured at p-value of .05

Groups	n	%
Office of the President, Prime Minister/ Minister / Parliamentarian – Includes respondents from the three high-level government offices	9	7%
Employee of a Ministry / PMU / Consultant – includes employees of ministries and respondents from project management units (PMUs) / consultants on WBG-supported projects	27	22%
Local government	15	12%
Other government institutions: includes independent government institutions and state-owned enterprises	13	10%
Bilateral / Multilateral agency	13	10%
Private Sector: includes private sector organizations and financial sector/private banks	13	10%
CSO: NGOs/community-based organizations and professional/trade associations	18	15%
Academia/Research Institute/Think Tank	8	6%
Other: Includes respondents from the Media and Other organizations	8	6%
Total	124	100%

Indicator questions

- A5_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)
- B2.** Overall, the World Bank Group currently plays a relevant role in development in Kosovo, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)
- B3.** The World Bank Group's work is aligned with what I consider the development priorities for Kosovo, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)
- B4_1 and B4_2.** Overall, please rate your impression of the effectiveness of these organizations in Kosovo. The World Bank (IDA), The International Finance Corporation (IFC), the World Bank Group's private sector arm, Scale: 1-10 (1: Not effective at all – 10: Very effective)
- B5.** To what extent does the World Bank Group's work help to achieve development results in Kosovo? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)
- B6.** To what extent does the World Bank Group influence the development agenda in Kosovo? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)
- C3:C14.** To what extent is the World Bank Group an effective development partner in Kosovo, in terms of each of the following? – Collaboration with the private sector, Being inclusive, Straightforwardness and honesty, **Access to WBG staff and experts**, Being a long-term partner, **Responsiveness to needs**, Collaboration with the Government, Flexibility when circumstances change, Collaboration with civil society, Treating clients and stakeholders in Kosovo with respect, Openness (sharing data and other information), **Collaboration with other donors and development partners**, Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)
- C15.** To what extent do you agree/disagree with the following statement? – The World Bank Group takes decisions quickly in Kosovo, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)
- C23:C24.** To what extent do you agree/disagree with the following statements about the World Bank Group in Kosovo? – The World Bank Group's financial instruments (i.e., investment lending, Development Policy Loan, Trust Funds, etc.) meet the needs of Kosovo, The World Bank Group meets Kosovo's needs for knowledge services (e.g., research, analysis, data, technical assistance), Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)
- E7.** In Kosovo, to what extent do you believe that the World Bank Group's knowledge work and activities: Are adaptable to Kosovo's specific development challenges and country circumstances, Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)
- E8.** Overall, how significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in your country?, Scale: 1-10 (1: Not significant at all – 10: Very significant)
- E9.** Overall, how would you rate the technical quality of the World Bank Group's knowledge work and activities? Scale: 1-10 (1: Very low technical quality – 10: Very high technical quality)

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

Thank you.