



Country Opinion Surveys

FY 2023 Romania

Country Opinion Survey Report

Acknowledgements

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

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



Methodology Overview

■ Fielded May 2023 through July 2023

- 1,900 potential participants were asked to complete a mostly quantitative survey
- Respondents completed the questionnaires online
- List of names provided by the WBG country team and supplemented by the fielding agency
- Process managed on the ground by the fielding agency

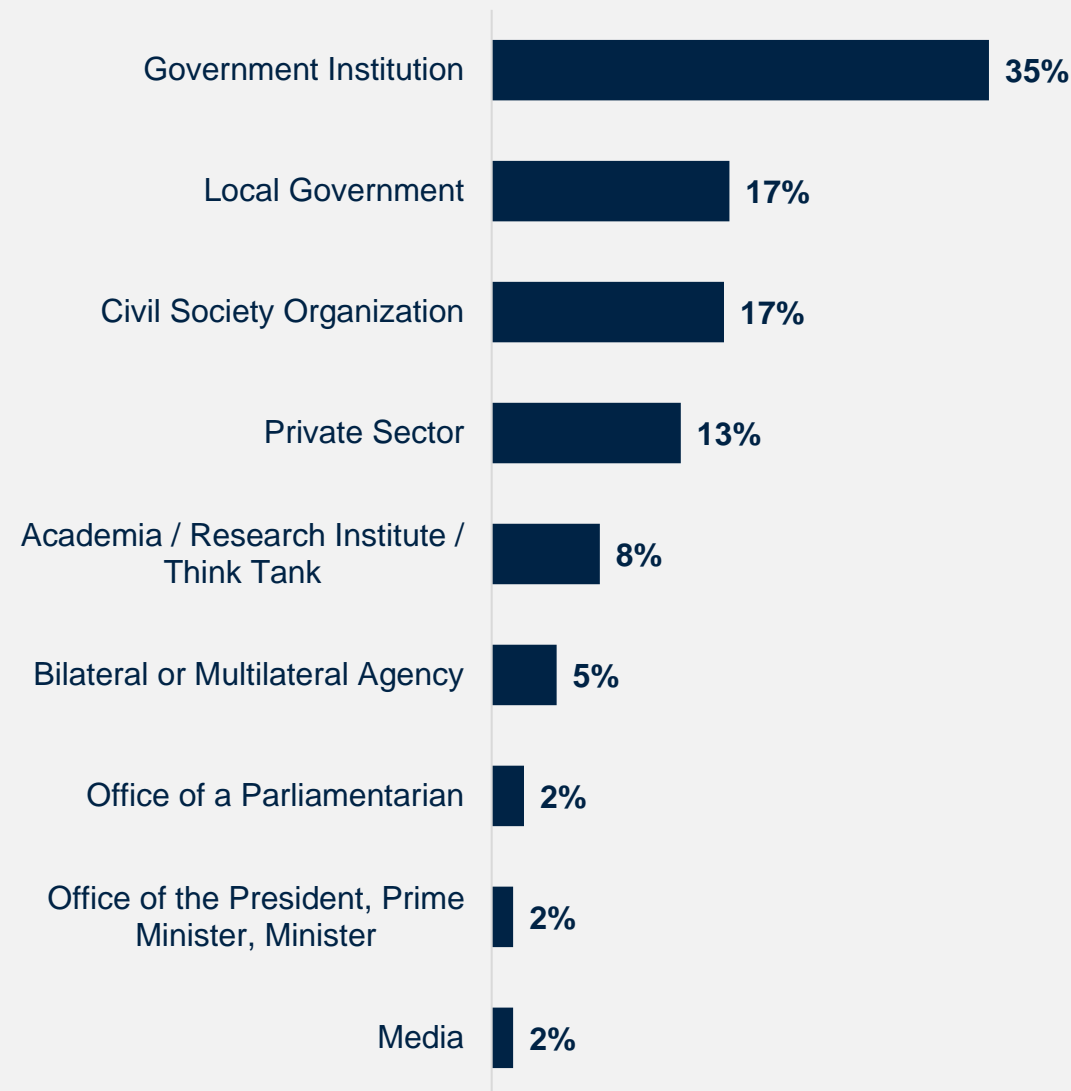
■ 260 participants (14% response rate)

- 57% from Bucharest, 27% from outside of Bucharest
- 51% currently collaborate with the WBG

■ Compared to FY20 Country Survey

- 391 participants (40% response rate)
- Surveys completed online or received via mail and returned accordingly
- 39% collaborated with the WBG

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



Which of the following best describes your current affiliation?
(Select only 1 response) (Percentage of Respondents, N=260)

Overall Context

"I think it is important for the WBG to reassess its ways of involvement in the development of Romanian society. Yes, WBG is a good partner, [and] a net contributor to Romania's development. Going forward, this partnership can be beneficial, but it should be revisited. Romania is no longer so "junior" in its relationship with WBG. We would be better served by a partnership of equals. ... Perhaps it's time for a more discreet, less "hands on" involvement from the WBG. For example, I would like WBG to work in partnership with local companies and expertise, not just hire those experts from local companies, thus stifling the development of the local consultancy market."

(Private Sector Respondent)

"Involve more actively the private sector and civil society when conducting analyses. Ensure that the involved stakeholders implement their recommendations."

(Government Institution Respondent)



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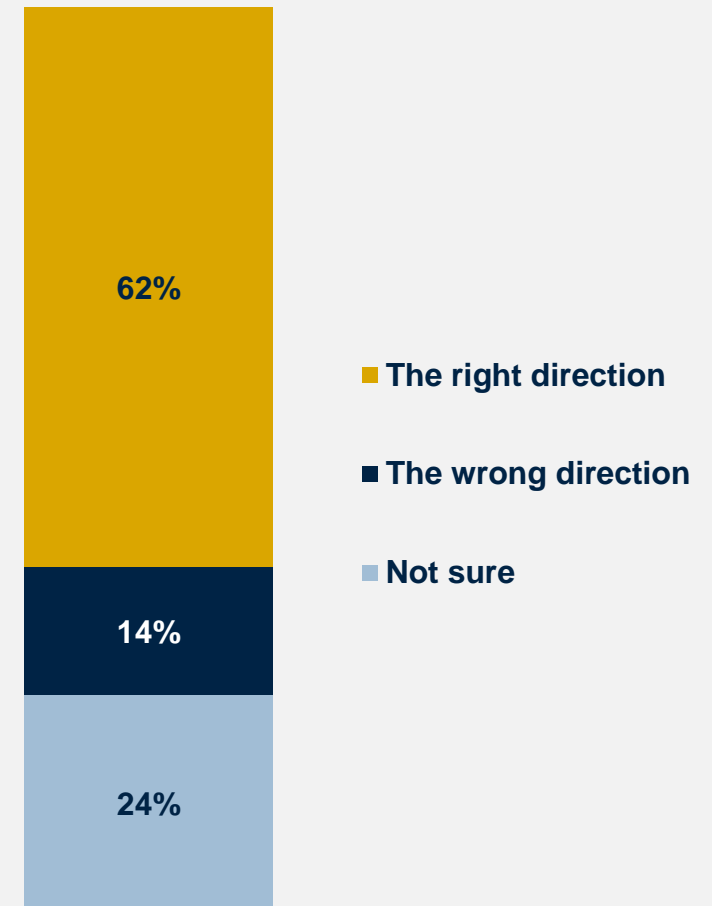


In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Romania? (N=78)

Respondents in Romania are Positive about the Country's Direction

In 2023, a majority of respondents in Romania (62%) indicated that the country was headed in the right direction.

- However, respondents from civil society were less optimistic – only a third of them agreed that the country was on the right track, while 46% were not sure.
- Overall, in this year's survey, respondents were more optimistic than in 2020, when only 44% said the country was on the right track, while a third thought the country was headed in the wrong direction. In 2020, the survey was conducted during the COVID-19 pandemic, which might have adversely affected respondents' outlook.



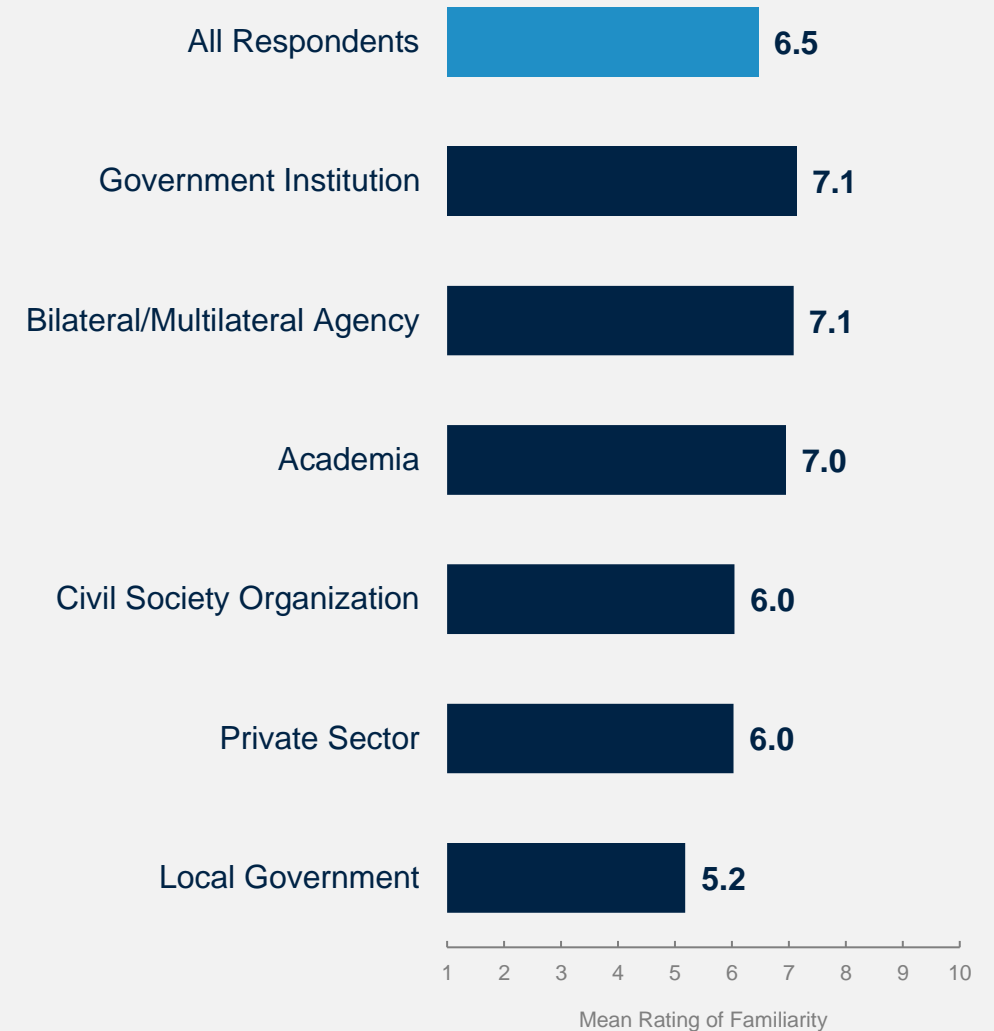
Familiarity with the World Bank Group has Improved

- **Year comparison:** Respondents in this year's Country Survey reported significantly higher levels of familiarity with the WBG compared to FY20:

Mean familiarity: **FY23 = 6.5**
 FY20 = 6.1

- **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 = 7.2**
 Do not collaborate = 5.8

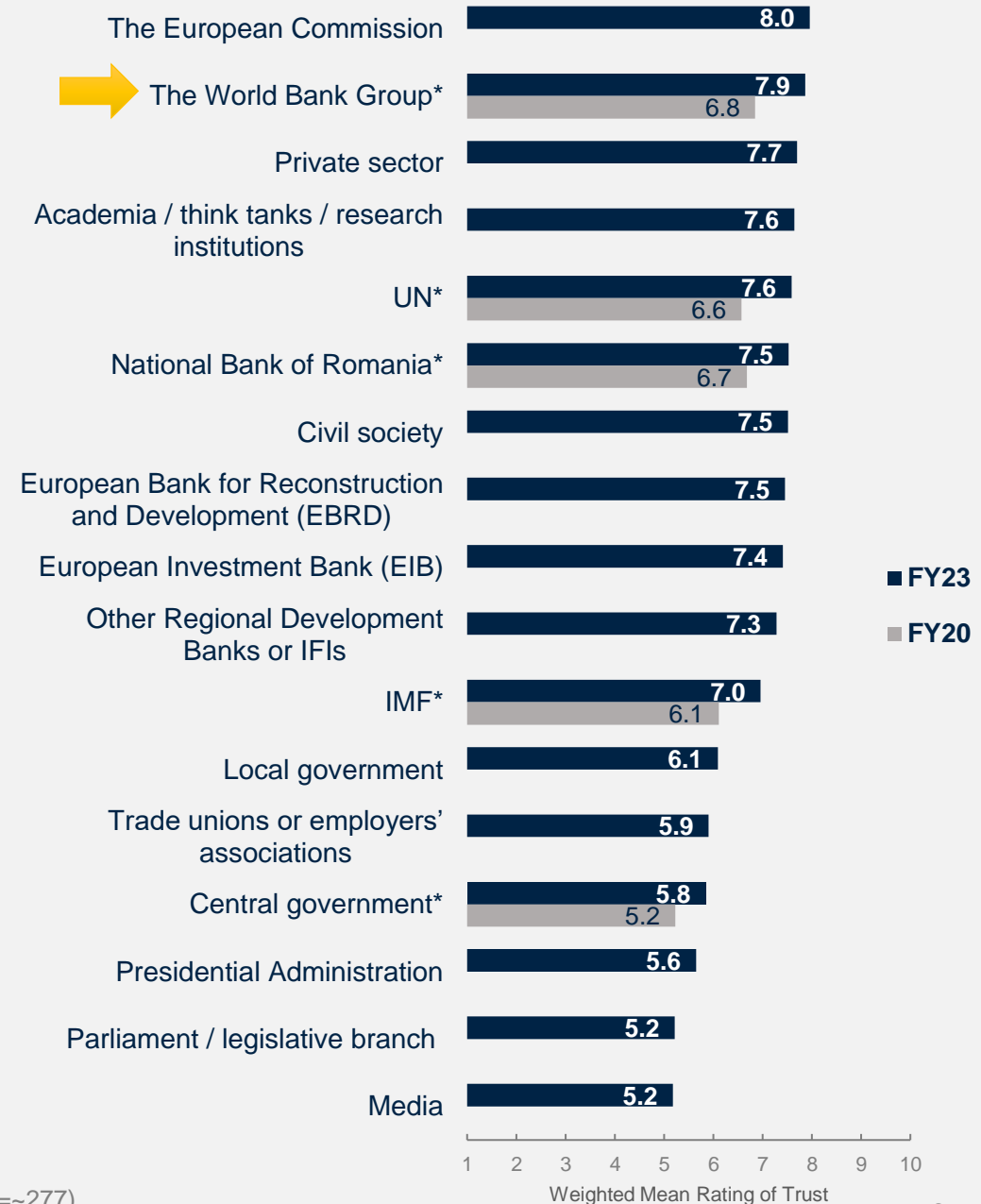


The WBG is among the Most Trusted Institution in Romania

Respondents gave the highest ratings of trust for the European Commission, the World Bank Group, academia, the UN, and the private sector in Romania. At the same time, media, parliament, and government institutions in Romania were the least trusted among the institutions studied.

Notably, levels of trust in the WBG, the UN, the National Bank of Romania, the IMF, and the Central Government were significantly higher in FY23 than in FY20 survey, which may reflect a more positive outlook of the respondents in FY23 compared to FY20, at the outset of the COVID-19 pandemic.

- In FY23, respondents from government institutions gave the highest ratings of trust for the WBG (mean=8.4) whereas respondents from civil society gave significantly lower, although, still rather positive ratings (mean = 7.0).



Overall Attitudes toward the World Bank Group

"I think it is important for the WBG to keep on the agenda issues such as the quality of the decision-making process and budgeting with a focus on increasing the transparency and effectiveness of public interventions. These are quite technical and, sometimes, difficult subjects that rarely make it onto the public agenda."

(Government Institution Respondent)

"Over the next 4-5 years, interventions in digitisation and environmental protection will remain a priority."

(Government Institution Respondent)

"Focus consulting on sector strategies and investment programmes, tracking the external funds [to make sure they] are used efficiently; post-implementation, avoiding investments in sophisticated and expensive equipment that are little or inefficiently used."

(Local Government Respondent)



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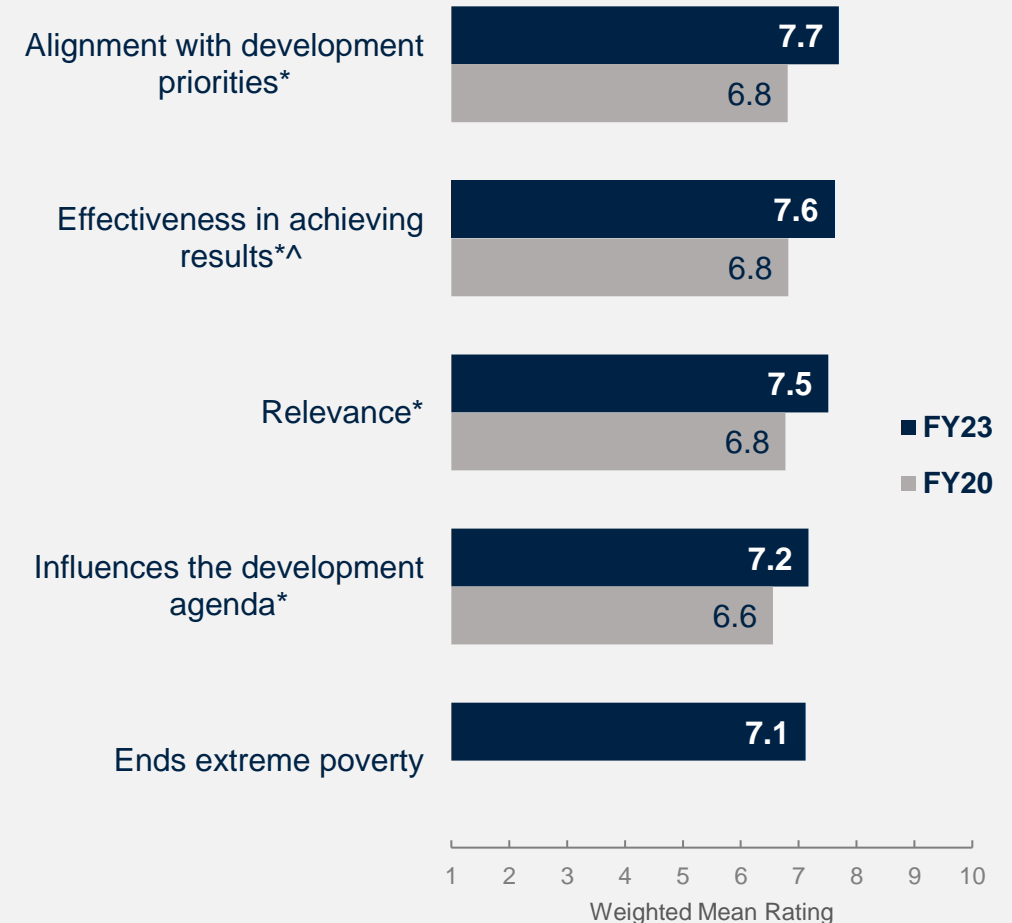


In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Romania? (N=78)

Improvement in Two Key Performance Indicators

In FY23, rankings across all key indicators have improved significantly. The WBG's work is increasingly perceived as being **aligned** with Romania's development priorities, **effective**, **relevant**, and **influential**.

- Of note, respondents from government institutions gave the highest ratings while those from civil society gave significantly lower ratings across all of these KPIs.



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

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

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

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

The WBG's work helps end extreme poverty in Romania. Scale: 1 Strongly disagree – 10 Strongly agree

^Compared to a mean score of the two questions asked in FY20: "Overall, please rate your impression of the WBG's effectiveness in Romania.

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

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

*Significantly different between years

Government Stakeholders, Respondents from Bilateral / Multilateral Institutions Have More Positive Perceptions of the WBG in Romania

Comparing ratings of key performance indicators between stakeholder groups, clear patterns emerge in their perceptions of the WBG and its work. Respondents from government institutions and bilateral and multilateral agencies have the most positive perceptions while respondents from civil society consistently have significantly lower ratings of the WBG and its work.



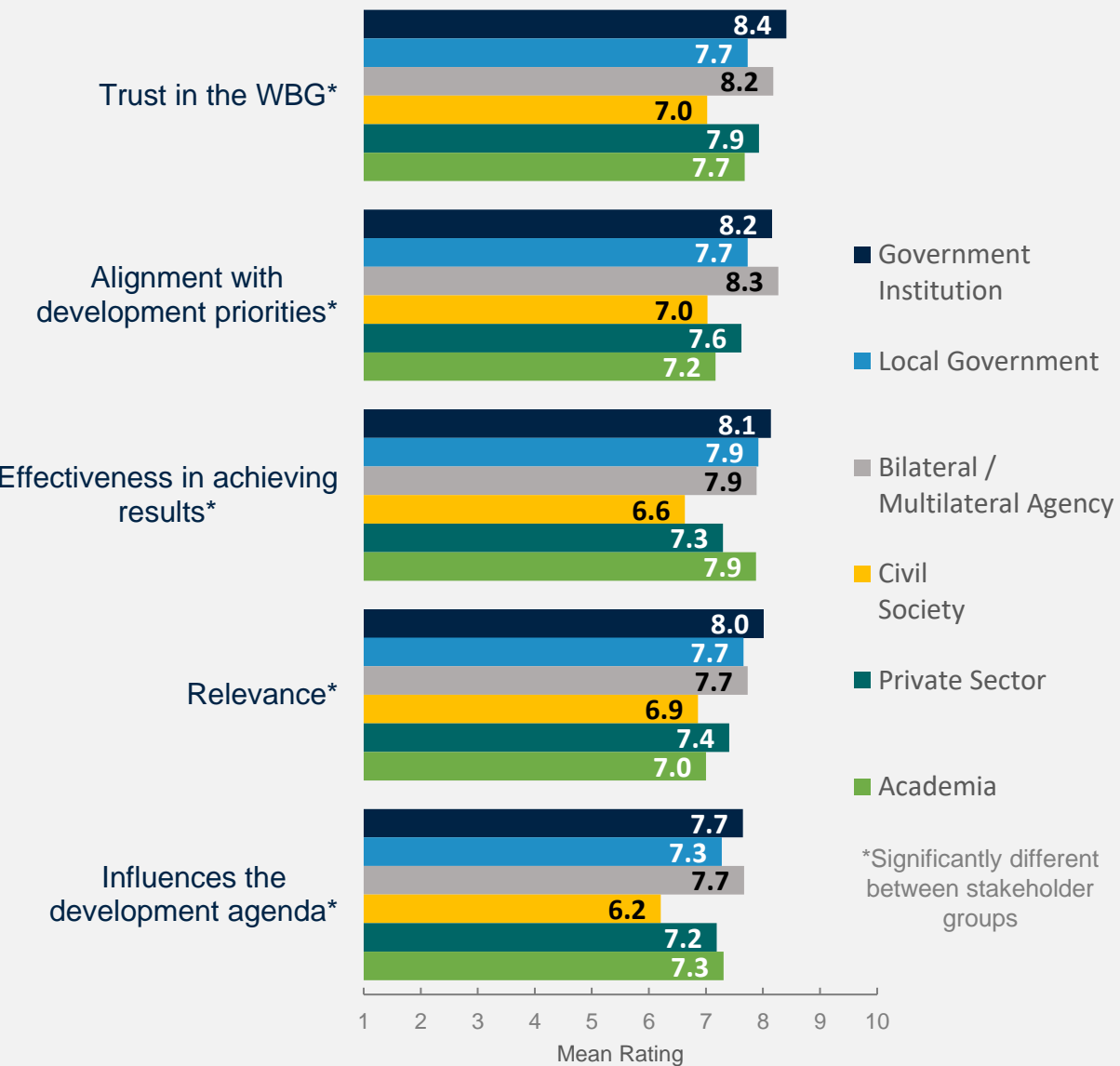
To what extent do you trust the WBG to do what is right? Scale: 1 To no degree at all – 10 To a very significant degree

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

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

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

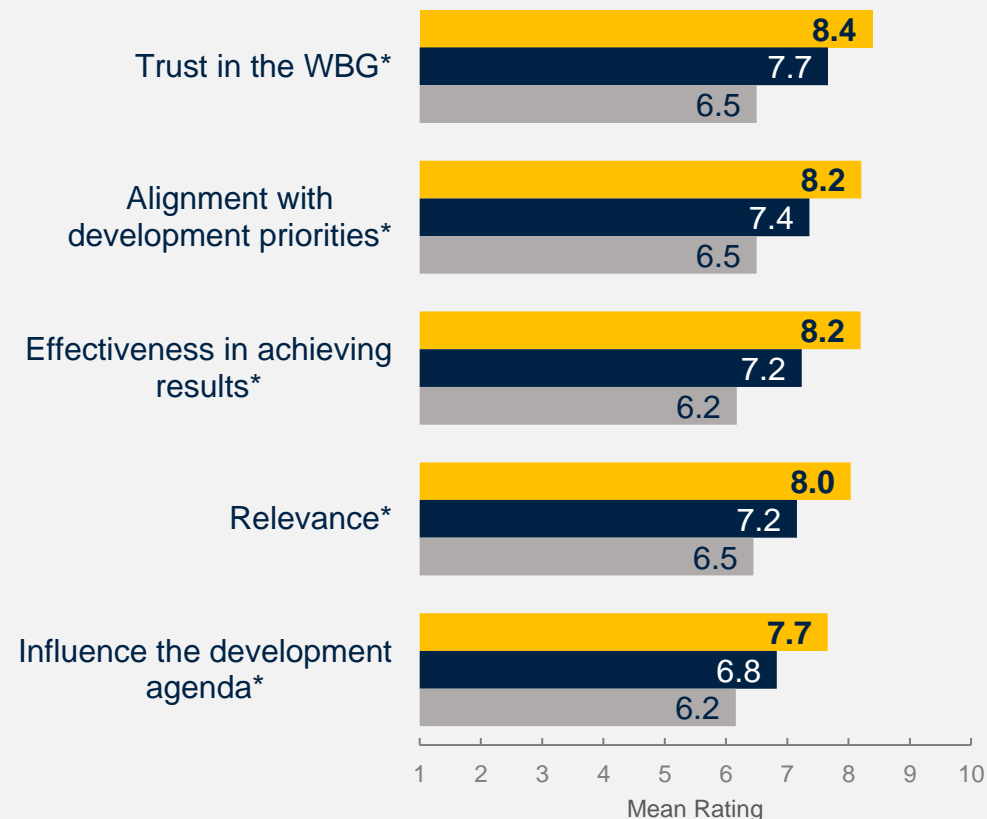
To what extent does the WBG influence the development agenda in Romania? Scale: 1 To no degree at all – 10 To a very significant degree



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 perceptions they have of the institution and its work.

Meaningful engagement and outreach can continue to increase positive perceptions.



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

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

*Significantly different between levels of familiarity



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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

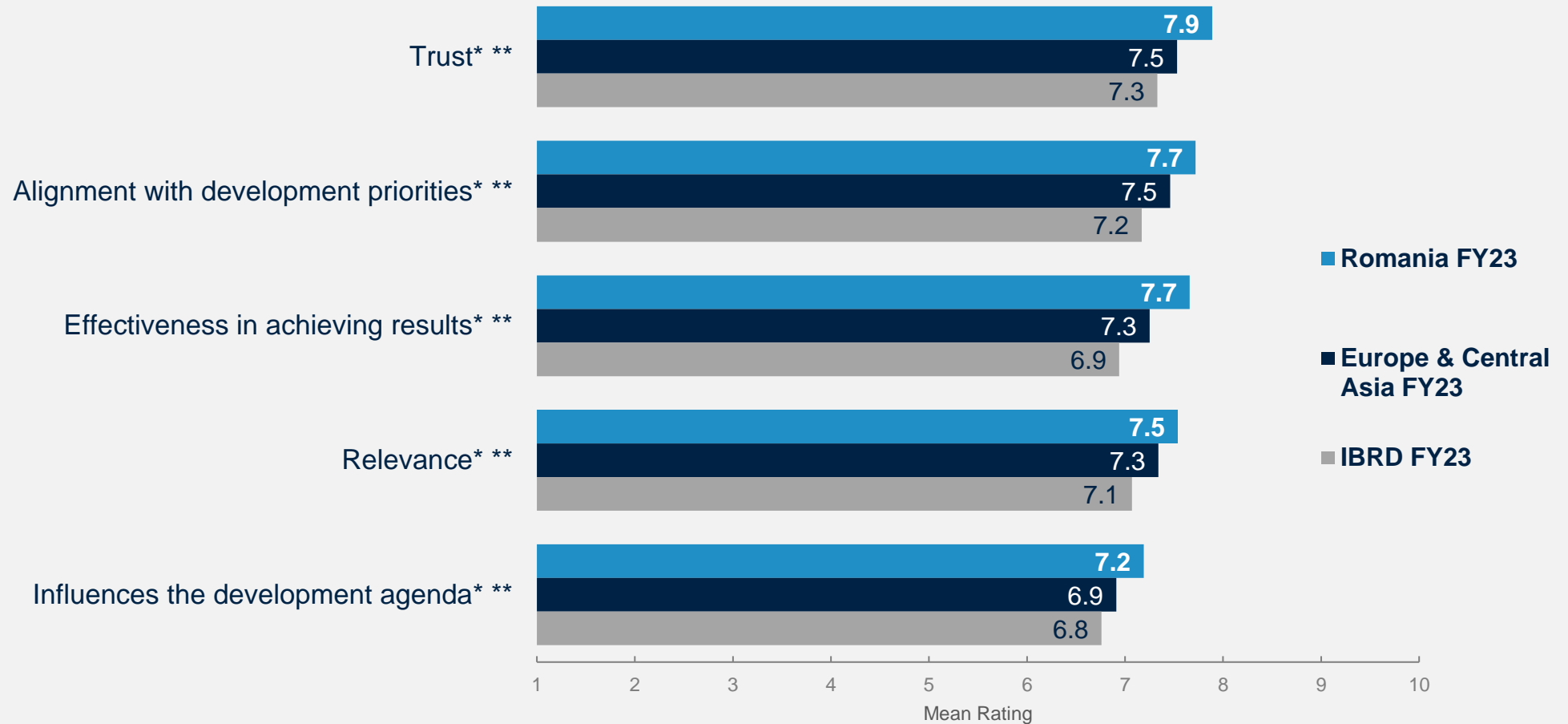
The WBG's work is aligned with what I consider the development priorities for Romania. Scale: 1 Strongly disagree – 10 Strongly agree

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

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

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

Romania Rated Higher than other European & Central Asian and IBRD Countries in FY23 on Key Performance Indicators



*Significantly different between Romania FY23 and Europe & Central Asia FY23

**Significantly different between Romania FY23 and IBRD FY23



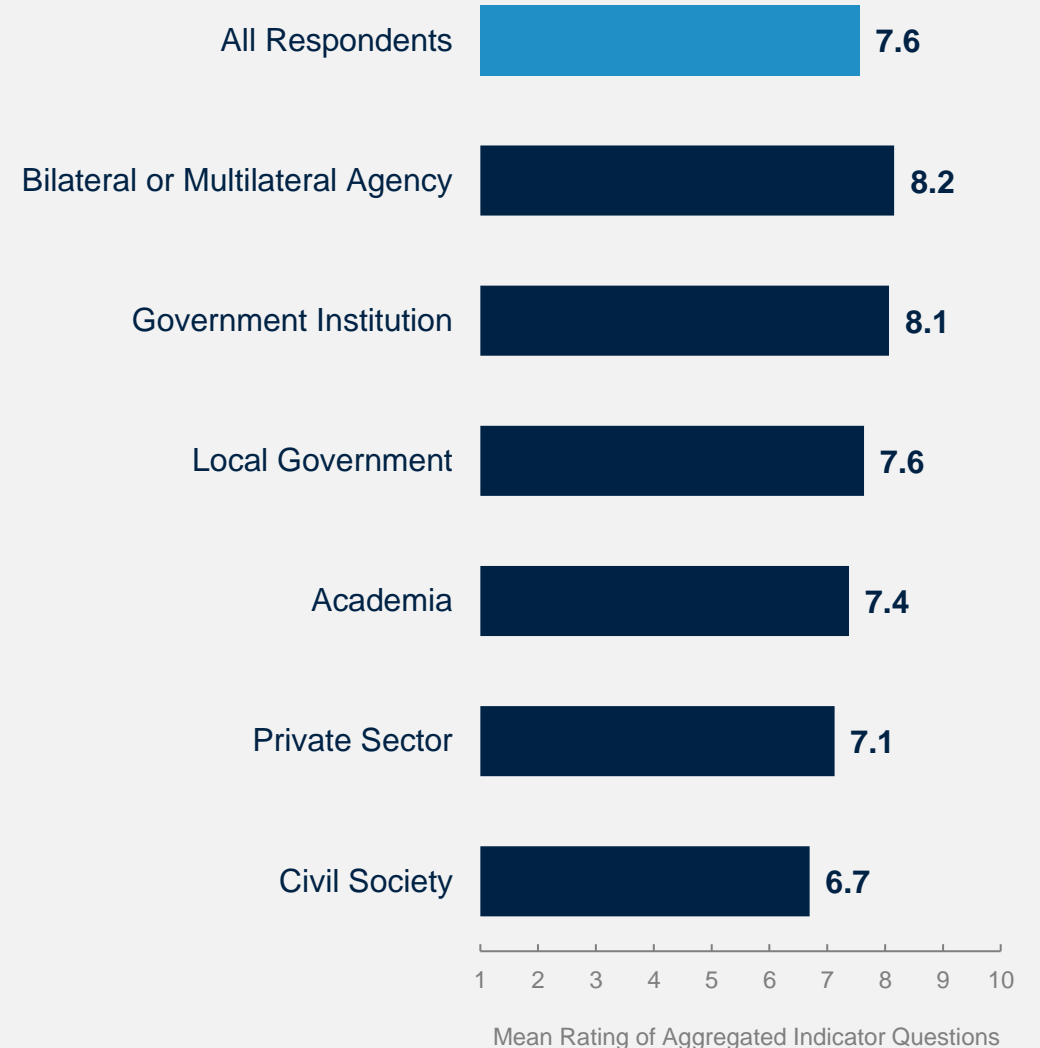
Stakeholder Trends Across Performance Indicators

Respondents from bilateral and multilateral agencies and from government institutions had the highest mean ratings across the aggregated responses to the eighteen COS indicator questions whereas respondents from civil society had significantly lower ratings (respondents from civil society also had lower ratings of familiarity with the WBG, along with the private sector and local government).

- **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 = 8.2**

Do not collaborate = 6.9



World Bank's Support in Development Areas

“Priority must be given to areas that help Romania's European convergence, to increasing the quality of the job offer, to the careers of young people. Supporting Romania's entry into the euro area through actions aimed at achieving the convergence criteria.”

(Respondent from the Office of a Parliamentarian)

“It would help a lot if, from an economic development perspective, the WBG paid more attention to the issues of social inclusion and equity....”

(Civil Society Respondent)

“Development of basic infrastructures and regional interconnectivity: energy, logistics, financial. Capital market development, modernisation of Financial Supervisory Authority regulations. Agricultural development based on efficiency and sustainability.”

(Private Sector Respondent)



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In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Romania? (N=78)

Development Areas for WBG Focus

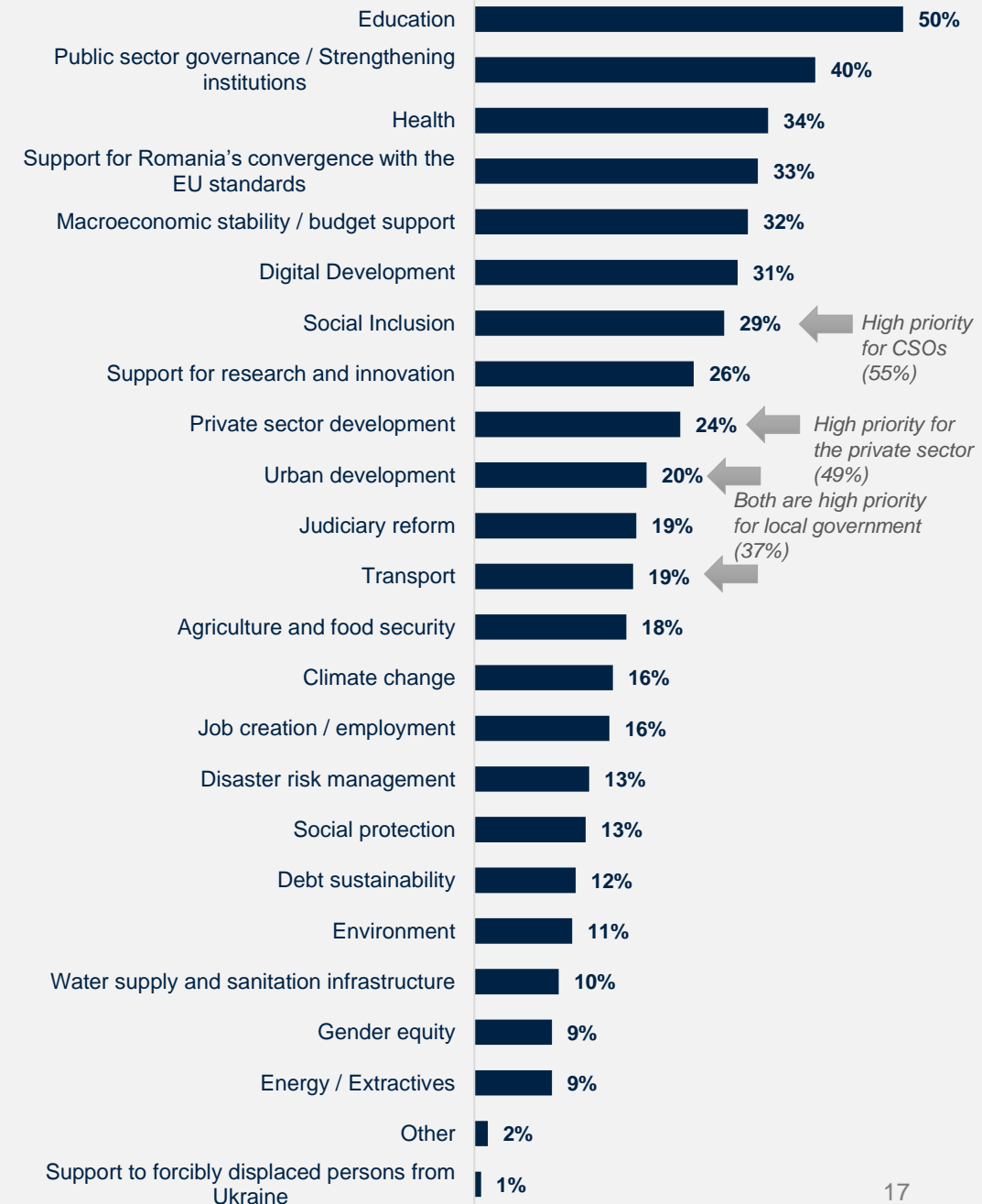
Education, public sector governance, health, convergence with the EU standards, macroeconomic stability, and digital development were the top areas in FY23 where stakeholders would like the WBG to focus its resources.

- Although education, governance, and health were among the top priorities for the WBG identified in the FY20 survey, respondents in this year's survey considered digital development of much greater priority—it was identified as a priority by one third of the respondents, as opposed to just 7% in 2020.

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

“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)

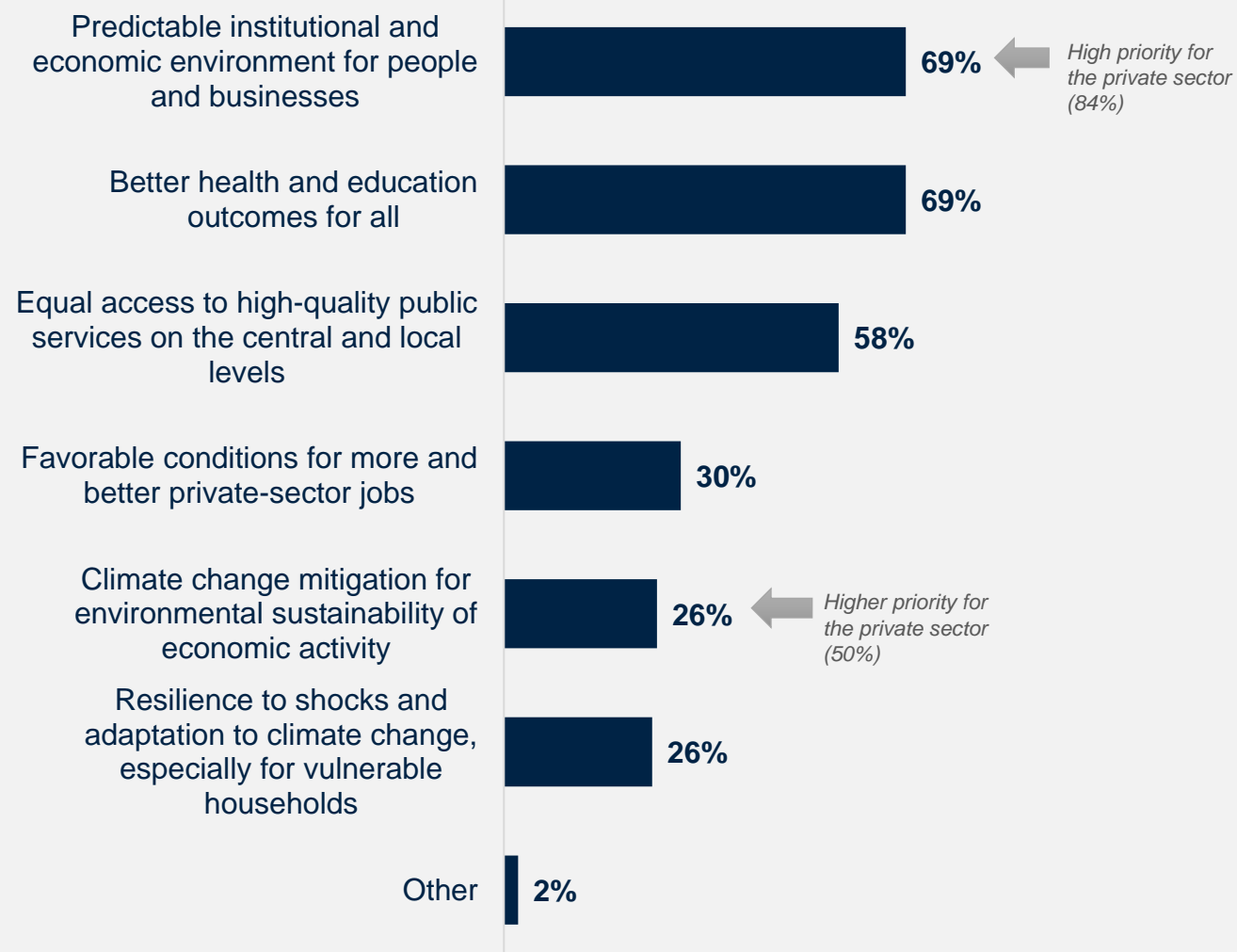


Which areas should the WBG prioritize in its work in Romania to have the most impact on development results in the country? (Choose no more than 5) (Percentage of Respondents, N=254)

Development Areas for WBG Focus

When asked about the focus areas for the new Country Partnership Framework (CPF), respondents identified a **predictable institutional and economic environment** (69%), **better health and education outcomes** (69%), and **equal access to high-quality public services** (58%) as top priorities.

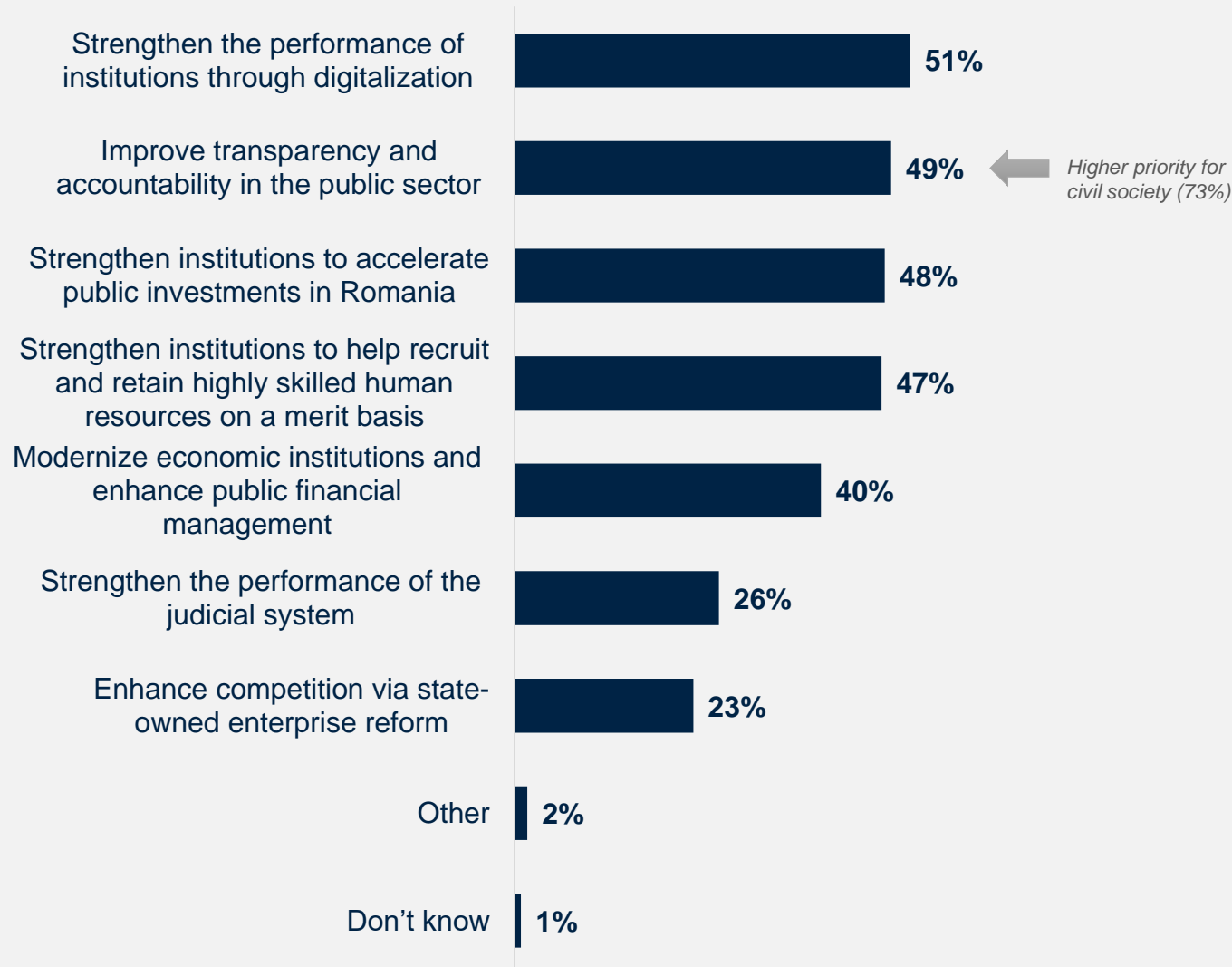
Respondents from the private sector also **identified climate change mitigation for environmental sustainability of economic activity** among their top priorities (50%).



WBG Focus to Strengthen Governance

When asked about the areas where the WBG could contribute the most to help strengthen governance based on reformed institutions, respondents identified **digitalization** as a top priority (51%), followed by **improved transparency and accountability in the public sector** (49%), **strengthening institutions to accelerate public investments in Romania** (48%) and **strengthening institutions to help recruit and retain highly skilled human resources on a merit basis** (47%).

For civil society respondents, **improving transparency and accountability** was the most important area for the WBG to focus on to strengthen governance in Romania (73%).



In your view, in which areas can the WBG contribute the most to help strengthen governance based on reformed institutions? (Choose no more than 3) (Percentage of Respondents, N=243)

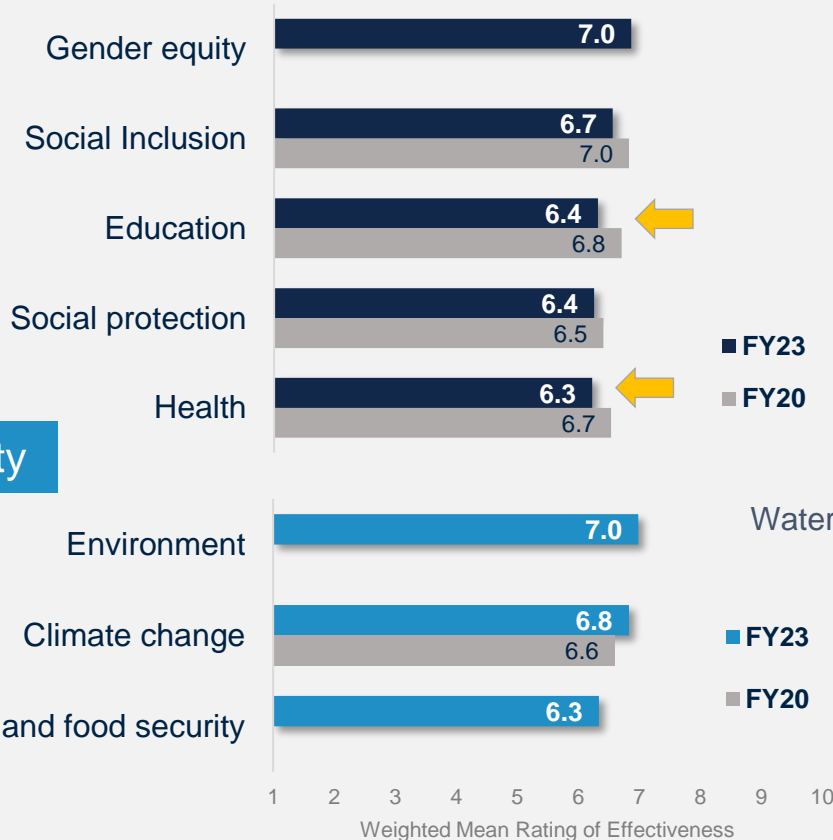


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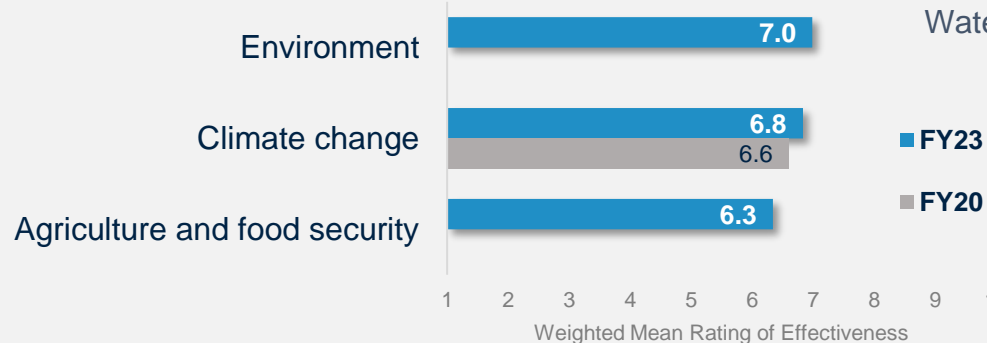
Effectiveness of WBG's Support in Sectoral Areas

The WBG's work in supporting Romania's convergence with the EU standards received the highest ratings of effectiveness in Romania. The work in macroeconomic stability and governance was also highly ranked. In contrast, ratings for education and health have declined, and they declined significantly in digital development and energy.

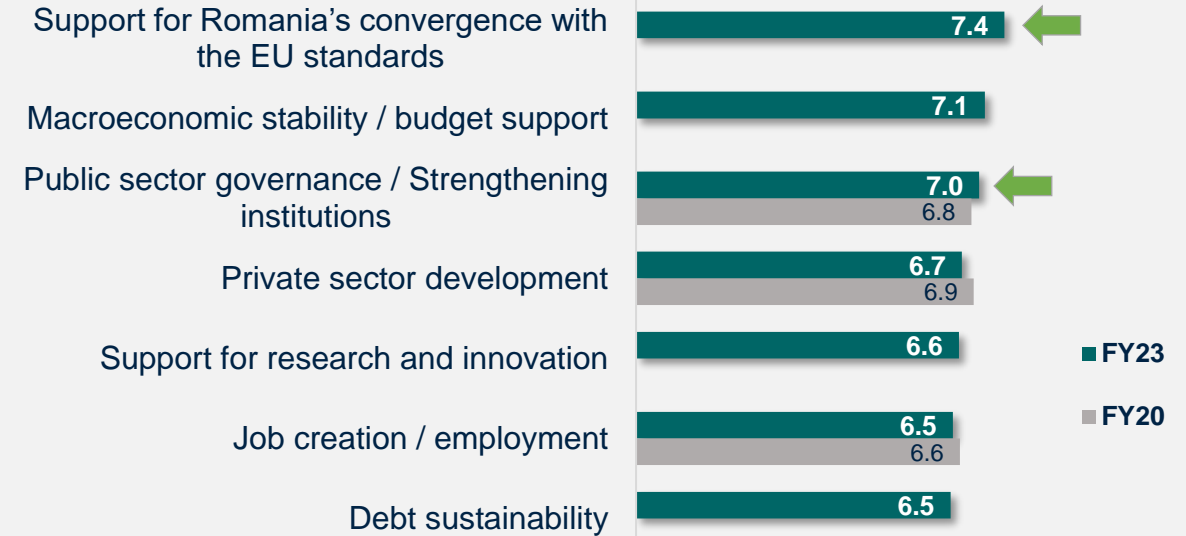
Human Development



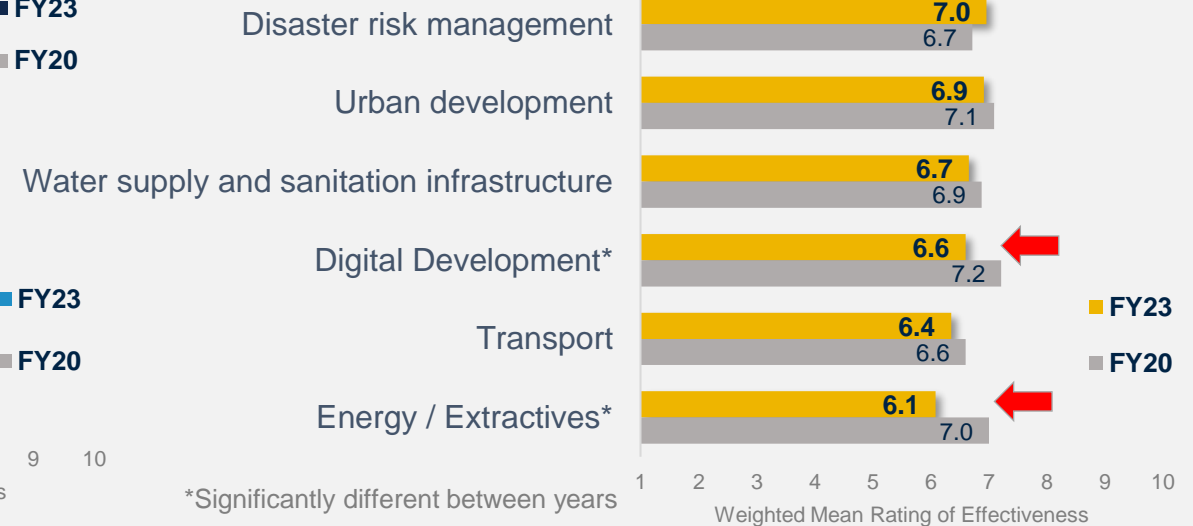
Environmental Sustainability



Finance / Institutions / Economic Growth



Infrastructure



*Significantly different between years

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

“Focus on capacity development in the management of the social inclusion sector for vulnerable people, including the labor market and social services; Increasing public administration capacity to manage local and national infrastructure investments”

(Government Institution Respondent)

“The WBG should keep monitoring closely the activities in which it is a partner/consultant, for efficiency, sustainability and countering corruption.”

(Government Institution Respondent)



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In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Romania? (N=78)

WBG's Advisory Services & Analytics are considered the WBG's Greatest Value

More than twice as many respondents in this year's survey considered WBG's **advisory services and analytics** of the greatest value to Romania, followed by financial resources (#1 most valued instrument in FY20).

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

"Providing consultations to local authorities, which generate 70-80% of Romania's GDP." (Civil Society Respondent)

*"The WBG can provide support on two levels:
- equity and inclusion in access to quality public services
- and support for evidence-based governance development and impact studies, including through technical assistance and independent reports."* (Government Institution Respondent)

*"- Promote structures and mechanisms to improve administrative capacity at central and regional level
- Continue training of public administration staff
- Piloting governance models
- Support for fiscal reforms
- Support for pension reform
- Analyses, summaries on budget, insurance, capital market etc."* (Government Institution Respondent)

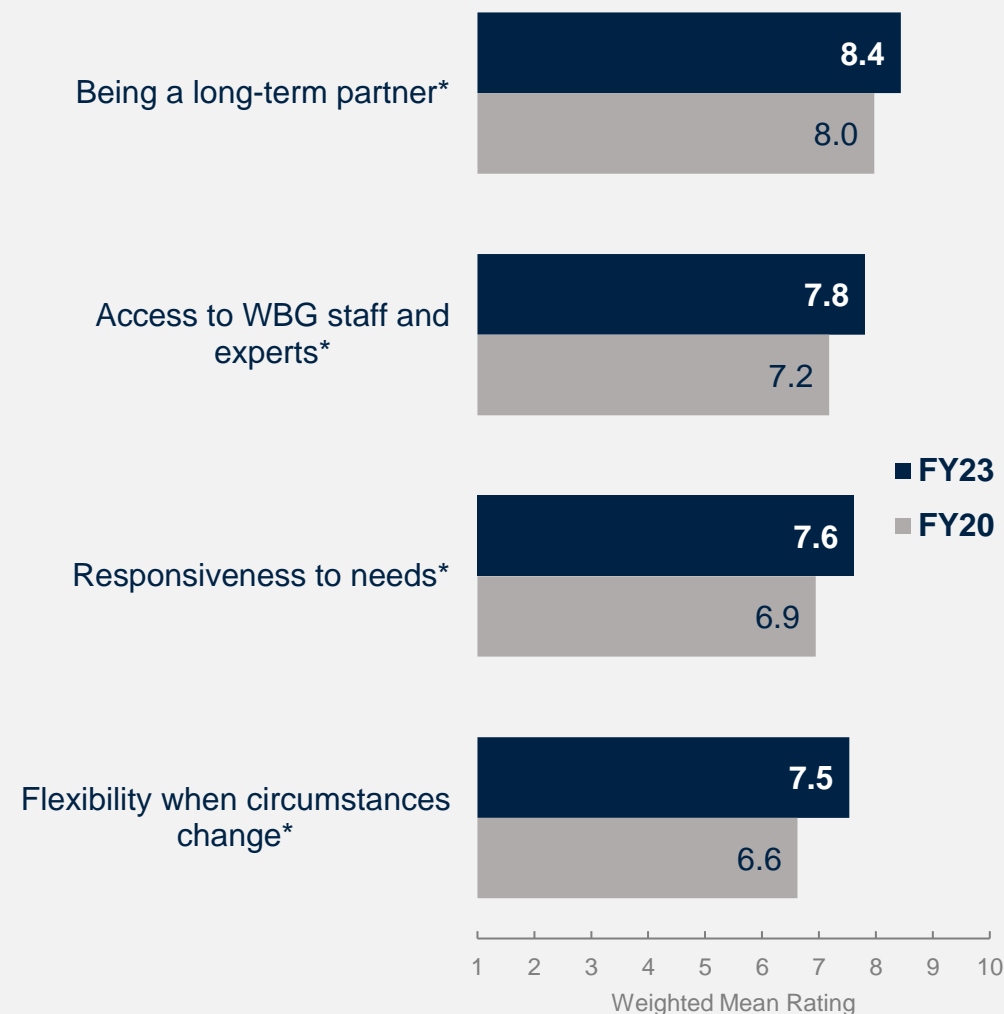


When thinking about the WBG's role in Romania, which activity do you VALUE the most? (Choose no more than 2)
(Percentage of Respondents, N=225)

Perceptions of The WBG as a Development Partner Have Significantly Improved

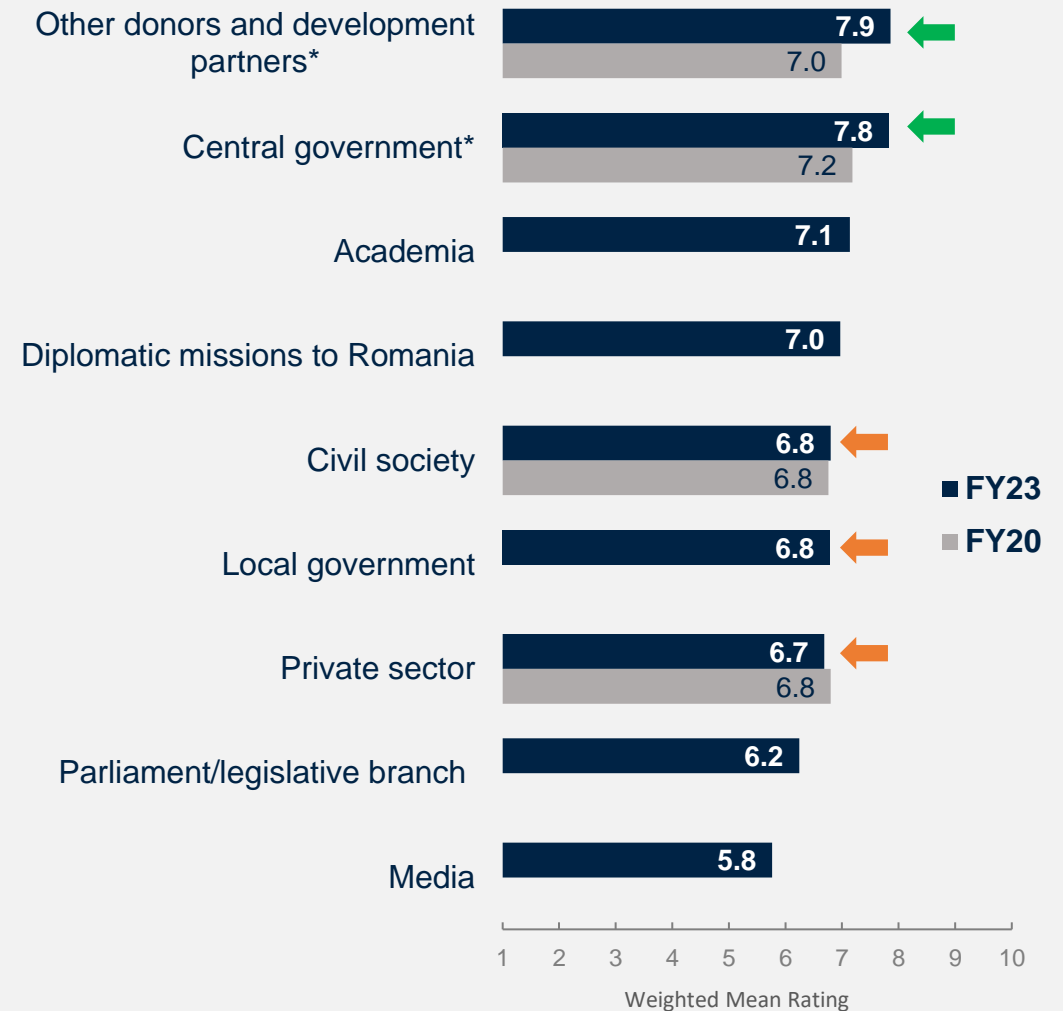
In FY23, respondents perceived the WBG as a significantly more **responsive, accessible, and flexible long-term partner** than in FY20.

- Respondents from government institutions and bilateral and multilateral agencies gave the highest ratings and those from civil society gave significantly lower ratings across most of these aspects, except for the WBG being a long-term partner in Romania, where ratings were high across all stakeholder groups.



The WBG Increasingly Seen as Effectively Collaborating with Central Government, Other Donors

In FY23, respondents perceived the WBG as collaborating significantly more effectively with **other donors/development partners** and with the **central government**. However, ratings for collaboration with **local government**, **civil society**, and the **private sector** were somewhat lower, and the latter two haven't changed since FY20. Notably, in addition to the central government, these were the groups with which respondents believe the WBG should collaborate more.



Stakeholders want the Bank to Collaborate More with Central and Local Government, Private Sector

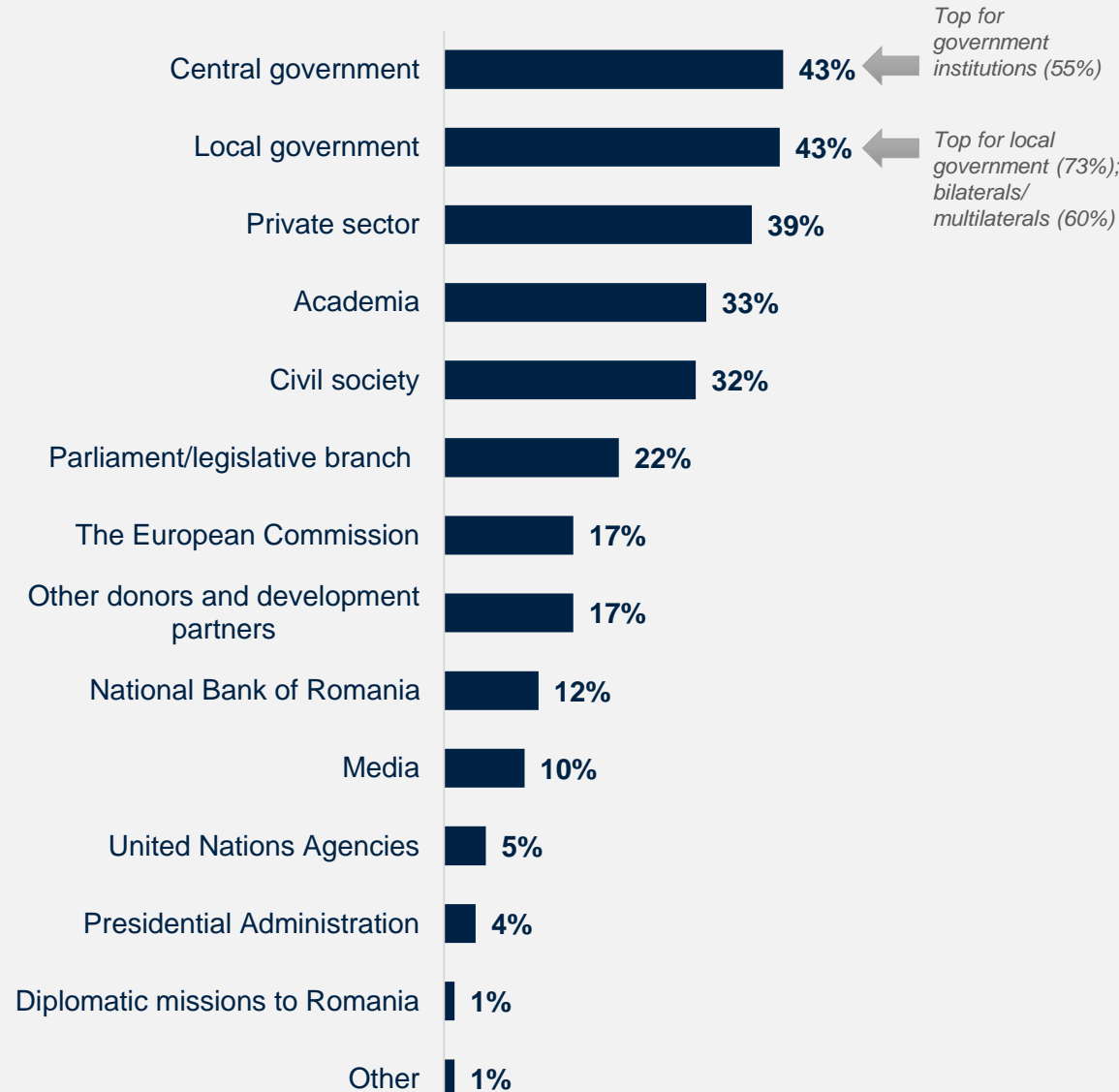
Respondents in this year's survey indicated that the WBG should collaborate more with the **central government, local government, and private sector**, which is consistent with the FY20 findings.

Respondents also indicated that the WBG should collaborate more with **academia** and **civil society**.

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

"- Improved communication with civil society, in particular, with grassroots organisations working in development regions. The vast majority of national and international institutions collect data and organise debates mainly in Bucharest without ensuring that the organisations interviewed are represented or that their point of view represents the territorial diversity of Romania and the specificity of the situations in the regions...."
(Civil Society Respondent)

"Collaboration with non-partisan, non-political professional institutions/organisations should be encouraged so that the information and analysis they produce is not influenced by politics."
(Private Sector Respondent)



Which THREE of the following groups should the WBG collaborate with more in Romania? (Choose no more than 3)
(Percentage of Respondents, N=224)

World Bank Group's Financial Instruments and Knowledge Work

"I think the most important aspect of support is the mechanism for implementing the recommendations. There are a number of excellent WBG reports that have not been implemented. Although implementation is not the responsibility of the WBG, more attention to implementation, monitoring, and reporting mechanisms needs to be emphasised in WBG reports and recommendations."

(Local Government Respondent)



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In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Romania? (N=78)

Respondents Believe the WBG Insists on Accountability and its Lending is Timely

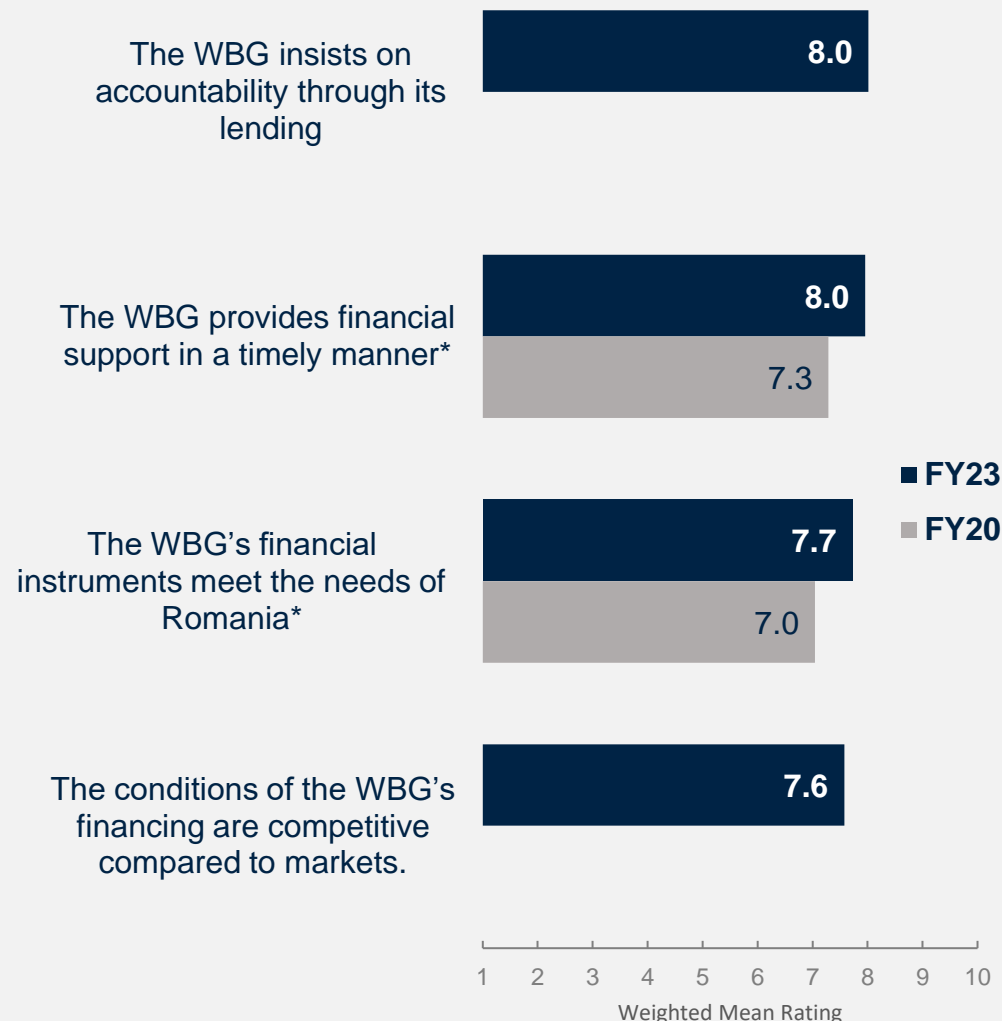
Respondents gave the highest ratings for the WBG **insisting on accountability through its lending** and for the **timeliness of the Bank's financial support**. Rankings for the **timeliness of the WBG's lending** and for its **instruments meeting Romania's needs** were significantly higher in FY23 than in FY20.

- As in other questions, respondents from Civil Society tended to give somewhat lower rankings for the WBG's financial instruments, particularly for their competitiveness (mean = 5.9) and for their meeting the country's needs (mean = 6.3).

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

"The most important thing is to give access to external funding (EU funds, World Bank, IMF, etc.) to the public sector. That will allow the country's economic potential to grow. Funds from the various sources should complement each other and the efficiency of their use should be demonstrated (through targets and milestones such as the NPRR), otherwise spending these funds only means increasing indebtedness without increasing repayment capacity."

(Private Sector Respondent)



Most Respondents Have Not Used the WBG's Knowledge Work

Only about **44%** of all respondents report using the WBG's advisory services and analytical work (knowledge work).

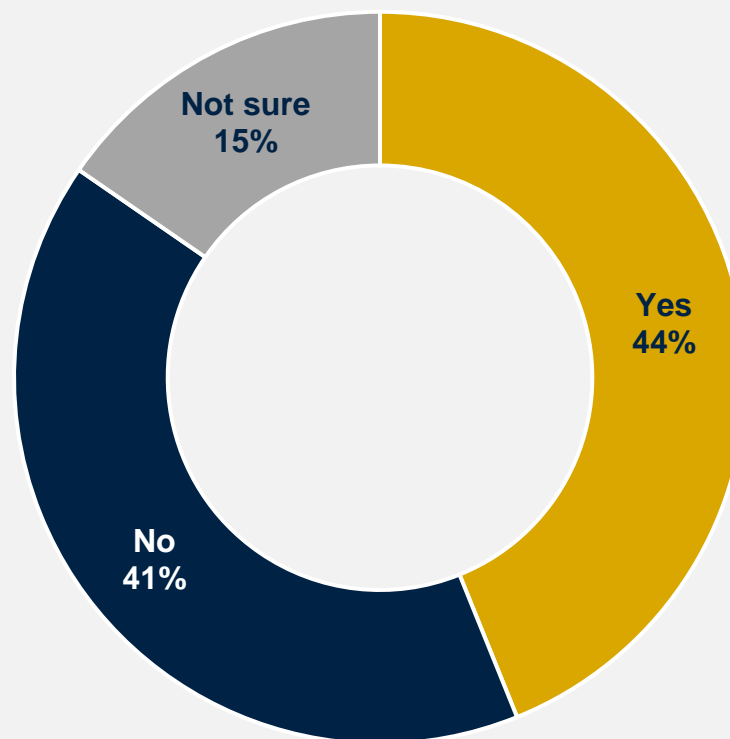
- Respondents from **government institutions** were significantly more likely to have used WBG's knowledge work (72%) compared to respondents from other stakeholder groups. Respondents from **Civil Society** were the least likely to use WBG's knowledge work (11%).

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

"Better promotion of the results of the analyses that WBG does."

(Civil Society Respondent)

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



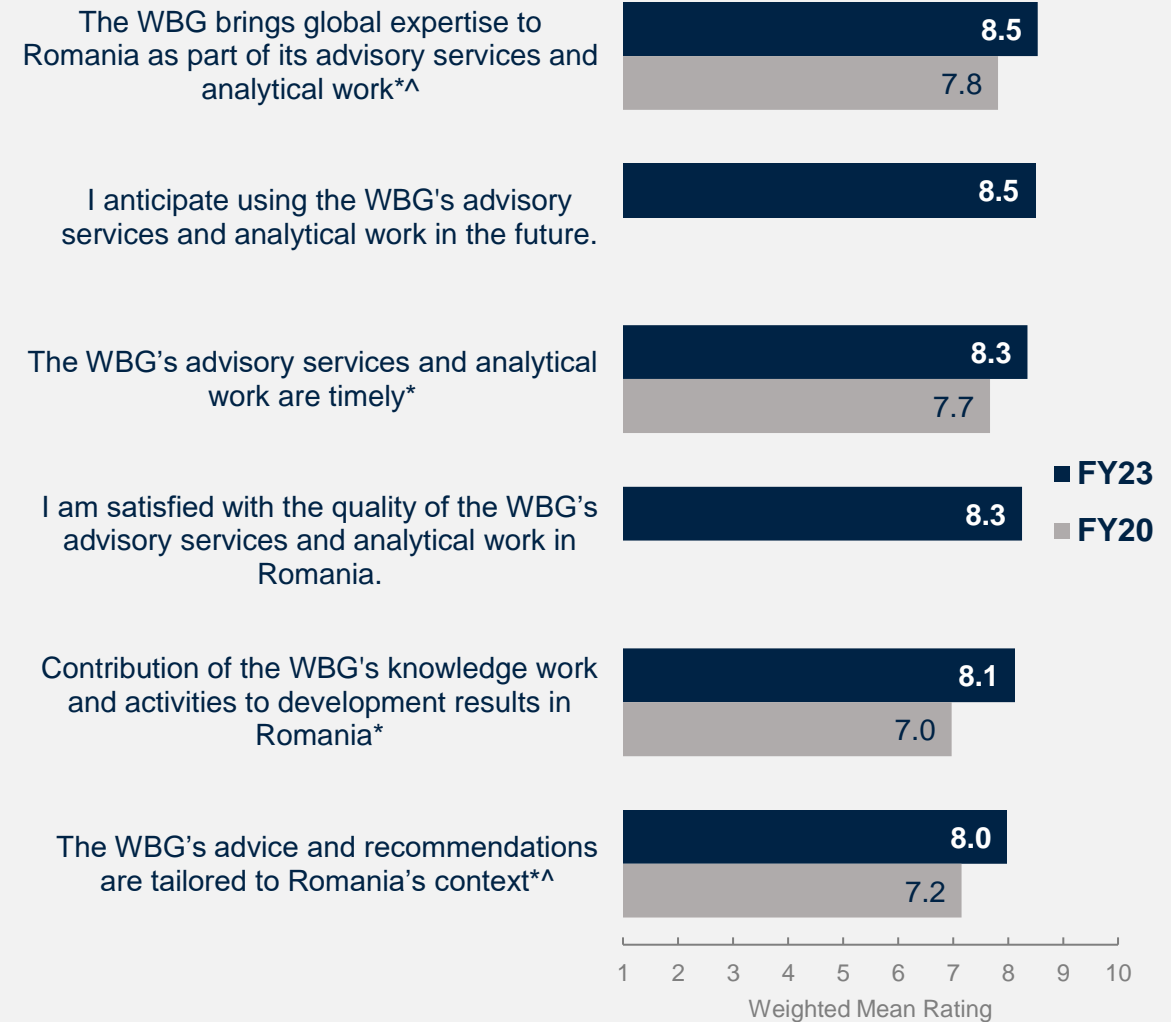
Stakeholders Value WBG Knowledge Work, Anticipate Using it in the Future

Respondents rated WBG's knowledge products exceptionally high across all questions. Ratings for comparable questions were significantly higher in FY23 compared to the previous survey cycle. Respondents had the highest levels of agreement that WBG brings **global expertise** to Romania and that they **anticipate using the WBG's advisory services** and analytical work in the future.

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

"I think the most important aspect of support is the mechanism for implementing the recommendations. There are a number of excellent WBG reports that have not been implemented. Although implementation is not the responsibility of the WBG, more attention to implementation, monitoring, and reporting mechanisms needs to be emphasised in WBG reports and recommendations."

(Local Government Respondent)



To what extent do you agree/disagree with the following statements? Scale: 1 Strongly disagree – 10 Strongly agree;
How significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in Romania? Scale: 1 Not significant at all – 10 Very significant

[^]Compared to "Are source of relevant information on global good practices" and "Are adaptable to Romania's specific development challenges and country circumstances", respectively, asked in FY20. *Significantly different between years

The Future Role of the World Bank Group in Romania

“World Bank has done an excellent job with [the] digitalization of public services in Moldova. This could be replicated in Romania. Also, there continue to be deplorable and inhumane conditions in public and privately run institutions for the elderly and persons with disabilities. Responsible de-institutionalization is necessary.” (Bilateral / Multilateral Agency Respondent)

“Financial support for development of transport infrastructure, mainly building roads.”
(Government Institution Respondent)

“Massive investments in increasing the quality of education, conditioned by the authorities to fulfill certain pre-established indicators.”
(Civil Society Respondent)



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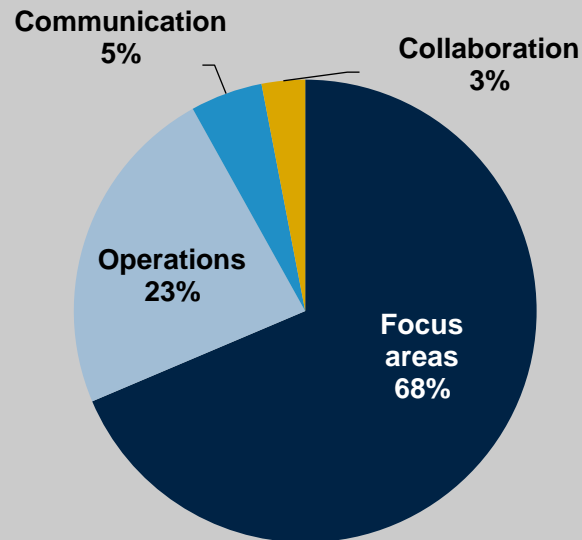


In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Romania? (N=78)

What the WBG could do to Increase its Effectiveness in Romania

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

Categories of responses



Focus: Respondents consistently mentioned education, health, and public sector reform at the national and local levels (digitalization, capacity building, increasing transparency, accountability, and anti-corruption policies) as the key areas for the WBG to focus its resources. Some respondents felt social inclusion was an important area: among other vulnerable groups, they mentioned the LGBTQ community, Roma, elderly people, and persons with disabilities. Among other important areas, respondents mentioned infrastructure development (roads, regional interconnectivity), capital market development, sustainable development, and agricultural development.

“Assistance in strengthening good governance, performance in the public sector, reform of public institutions in the sense of transparency of the legislative process and meritocracy, reform of the public health system, the education system, social equity in the sense of restructuring the national wage, pension, and welfare system.”

(Government Institution Respondent)

“Reforming the public system by reducing the number of public system employees (overcrowded: 1.3 million employees) and streamlining services, increasing their quality through computerization and digitization.”

(Civil Society Respondent)

“WBG can provide support on sexual and reproductive health, maternal and child health, and in combating gender-based violence. Access to these services is severely restricted in Romania and service providers lack sustainable, uniform training and are vulnerable to misinformation and false narratives. ...”

(Civil Society Respondent)

“Development of basic infrastructures and regional interconnectivity: energy, logistics, financial. Capital market development, modernisation of Financial Supervisory Authority regulations. Agricultural development based on efficiency and sustainability.”

(Private Sector Respondent)

“Territorial administrative reform; Increasing the role of metropolitan areas; Supporting domestic production; Romania's energy independence; Transport infrastructure: highways, corridors, urban bypasses, rail and river transport.”

(Local Government Respondent)



In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Romania? (Please be specific) (N=78)

What the WBG Could Do to Increase its Effectiveness in Romania

Operations / Collaboration: Respondents stressed that effective implementation of the WBG's recommendations and monitoring and evaluation of the results would be the key to successful development outcomes in Romania. Considering the local context when developing policy/program recommendations, for example, via collaboration with local firms and CSOs, is also of importance.

"I think the most important aspect of support is the mechanism for implementing the recommendations. There are a number of excellent WBG reports that have not been implemented. Although implementation is not the responsibility of the WBG, more attention to implementation, monitoring, and reporting mechanisms needs to be emphasized in WBG reports and recommendations." (Local Government Respondent)

"Involve more actively the private sector and civil society when conducting analyses. Ensure that the involved stakeholders implement their recommendations."
(Government Institution Respondent)

"WBG support should mean [the] transfer of expertise and competencies to Romanian institutions, not just consultancy."
(Bilateral / Multilateral Agency Respondent)

"Monitoring the results undertaken by state institutions in the areas of education, health, access to services, infrastructure, project implementation time, etc."
(Bilateral / Multilateral Agency Respondent)

"The analyses / studies must be realistic, up-to-date (not out of the box) and objective. Conclusions and recommendations should take into account the particularities (not always beneficial) of the public governance system in RO."
(Civil Society Respondent)

"... I would like WBG to work in partnership with local companies and expertise, not just hire those experts from local companies, thus stifling the development of the local consultancy market."
(Private Sector Respondent)

Communication: Respondents mainly focused on the need for greater transparency around the WBG's work, the areas of its collaboration with the government, and better dissemination of the project results.

"Improved communication with civil society, in particular, with grassroots organisations working in development regions... It would be important that the collaboration with the Romanian Government is more transparent; for example, we know very little about the collaboration between WBG and the Ministry of European Investments and Projects in the 2014-2020 financial year. ... for any public policy to which WBG has contributed, it would be desirable to have a public communication on the evaluation of the implementation of the action plan and a follow up after the intervention."
(Civil Society Respondent)



In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Romania? (Please be specific) (N=78)

Communication and Outreach

“Increased presence in public information and in showing their results and projects”

(Local Government Respondent)

“... for any public policy to which WBG has contributed, it would be desirable to have a public communication on the evaluation of the implementation of the action plan and a follow up after the intervention.”

(Civil Society Respondent)



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In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Romania? (N=78)

Research Papers / Official Statistics, e-Newsletters, and Newspapers were Most Common Information Sources

Respondents relied the most on **research papers / official statistics**, **e-newsletters**, and **newspapers** to get information about economic and social development issues. There were no significant differences in information channels among various stakeholder groups.

Top Information Sources

	All Respondents	Government Institution	Local Government	Bilateral / Multilateral Agency	Civil Society	Private Sector	Academia
Research papers / Official statistics	67%	66%	49%	80%	71%	73%	88%
e-Newsletters	57%	57%	51%	70%	56%	63%	56%
Newspapers (Print or online)	50%	47%	46%	30%	47%	63%	56%
Television (TV)	38%	39%	46%	60%	32%	17%	44%
Social media	23%	18%	38%	10%	26%	33%	6%
Radio	13%	14%	24%	0%	18%	0%	13%
Podcasts	9%	7%	5%	10%	21%	10%	0%
Other	7%	6%	8%	20%	3%	10%	6%
Blogs	5%	7%	5%	0%	3%	7%	6%



How do you get most of your information about economic and social development issues in Romania? (Choose no more than 3) (Percentage of Respondents, N=221)



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

e-Newsletters and **events** were the most preferred channels to obtain information from the WBG. The **website** and **direct contact with the WBG staff** were also important, particularly for respondents from bilateral and multilateral agencies.

	All Respondents	Preferred WBG Source					
		Government Institution	Local Government	Bilateral / Multilateral Agency	Civil Society	Private Sector	Academia
e-Newsletters*	66%	59%	61%	40%	74%	80%	100%
Event/conference/seminar/workshop	58%	66%	53%	60%	53%	53%	63%
Website	44%	48%	47%	60%	29%	40%	50%
Direct contact with staff	40%	33%	44%	50%	38%	40%	38%
Interviews and press conferences	18%	20%	11%	10%	21%	20%	19%
Social media	18%	17%	17%	40%	24%	20%	6%
Direct messaging	11%	9%	14%	10%	21%	7%	0%
Podcasts	10%	11%	8%	10%	18%	3%	0%
Blogs	3%	5%	3%	0%	0%	3%	0%
Other	0%	1%	0%	0%	0%	0%	0%



How would you prefer to obtain information from the WBG?
(Choose no more than 3) (Percentage of Respondents, N=219)

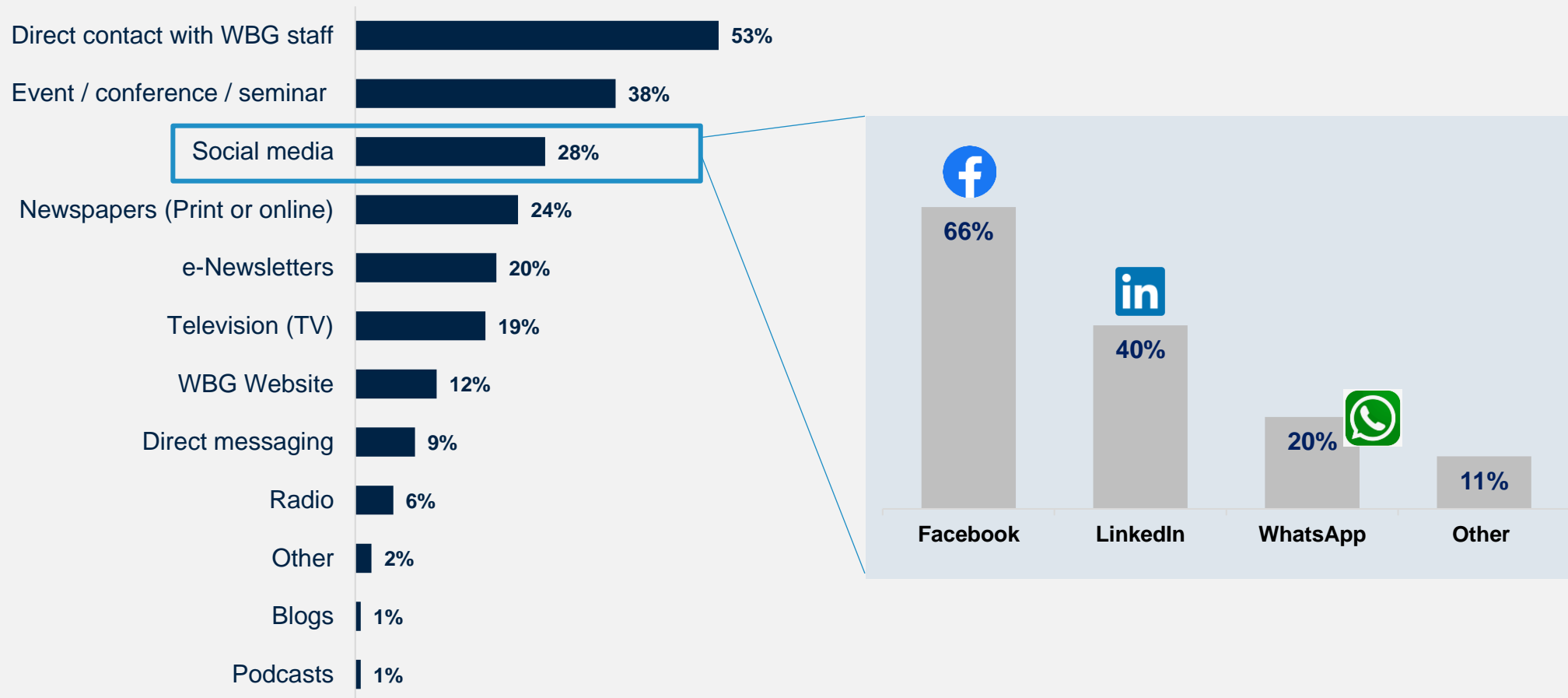
*Significantly different between stakeholder groups



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58% of Respondents Engaged with the WBG in the Last 30 Days

58% of respondents recalled hearing or seeing something about the WBG in the last 30 days. Respondents reported seeing that information most often via **direct contact with the WBG staff**, via **WBG events**, or on **social media**. Among those who selected “Social media”, respondents most frequently reported seeing WBG-related messages on **Facebook**, followed by **LinkedIn** and **WhatsApp**.



Do you recall seeing or hearing anything about the WBG in the last 30 days? (N=220)

Where do you recall seeing or hearing this information? (Check all that apply) (Percentage of Respondents, N=127)

What social media platforms do you recall seeing this information on? (Check all that apply) (Percentage of Respondents, N=35)

WBG's Work on Strengthening Institutions and its Economic Forecasts were Most Commonly Recalled Topics

Respondents most frequently recalled seeing messages about the WBG's work on **strengthening institutions for high-quality public services and effective governance** in Romania.

- Respondents from the private sector were significantly less likely to recall WBG's work on strengthening institutions (17%), while they were more likely to hear about global economic forecasts (58%).

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

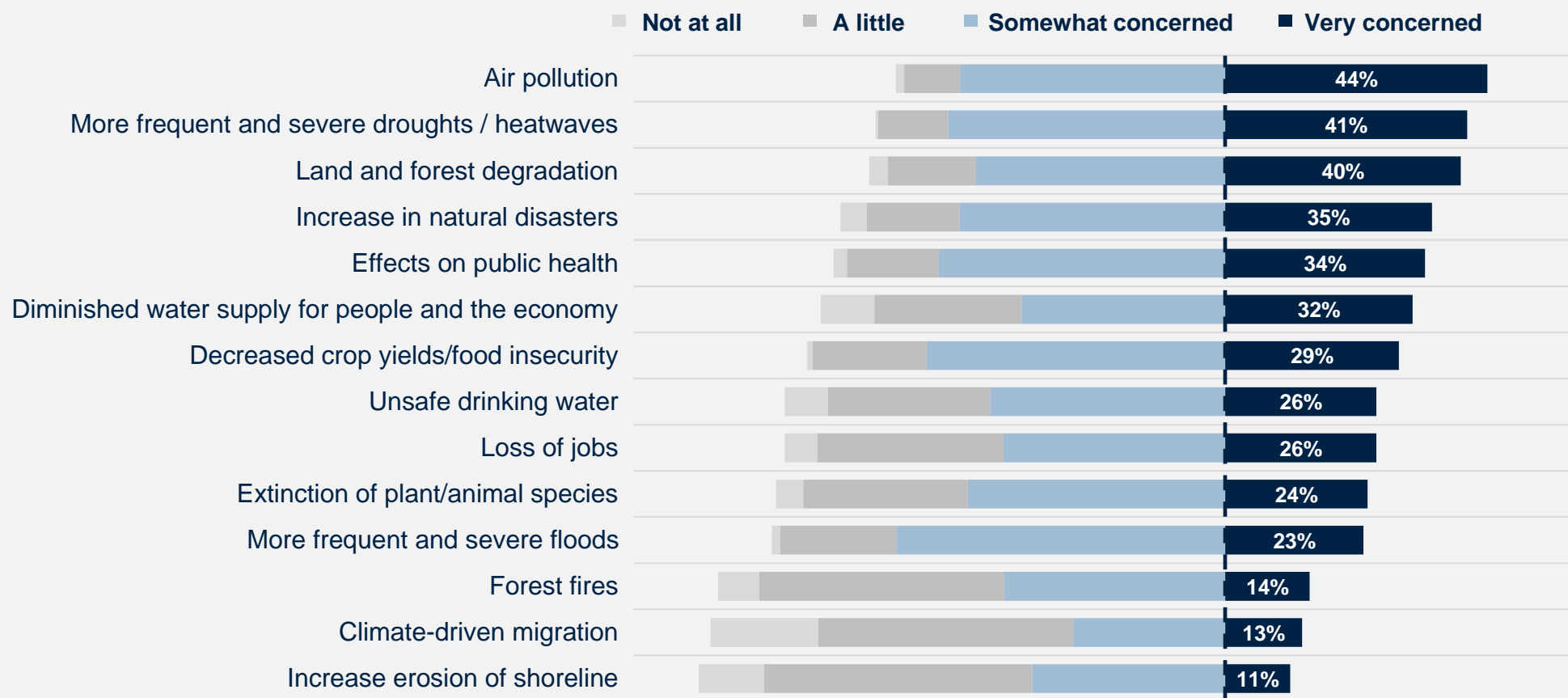
"[Organize] Several public seminars with high media popularization."
(Private Sector Respondent)

"More transparency and open programs at small NGOs"
(Civil Society Respondent)



Climate Change Communications can be More Impactful when Related to Stakeholders' Top Concerns: Pollution, Extreme Weather Conditions, Land and Forest Degradation

Respondents expressed rather moderate levels of concern about the potential impacts of climate change in Romania. Only about 4 in 10 respondents were very concerned about **air pollution, more frequent and severe droughts / heatwaves, and land and forest degradation**. These key areas of concern, however, should be taken into consideration to make communications about climate change more impactful in Romania.

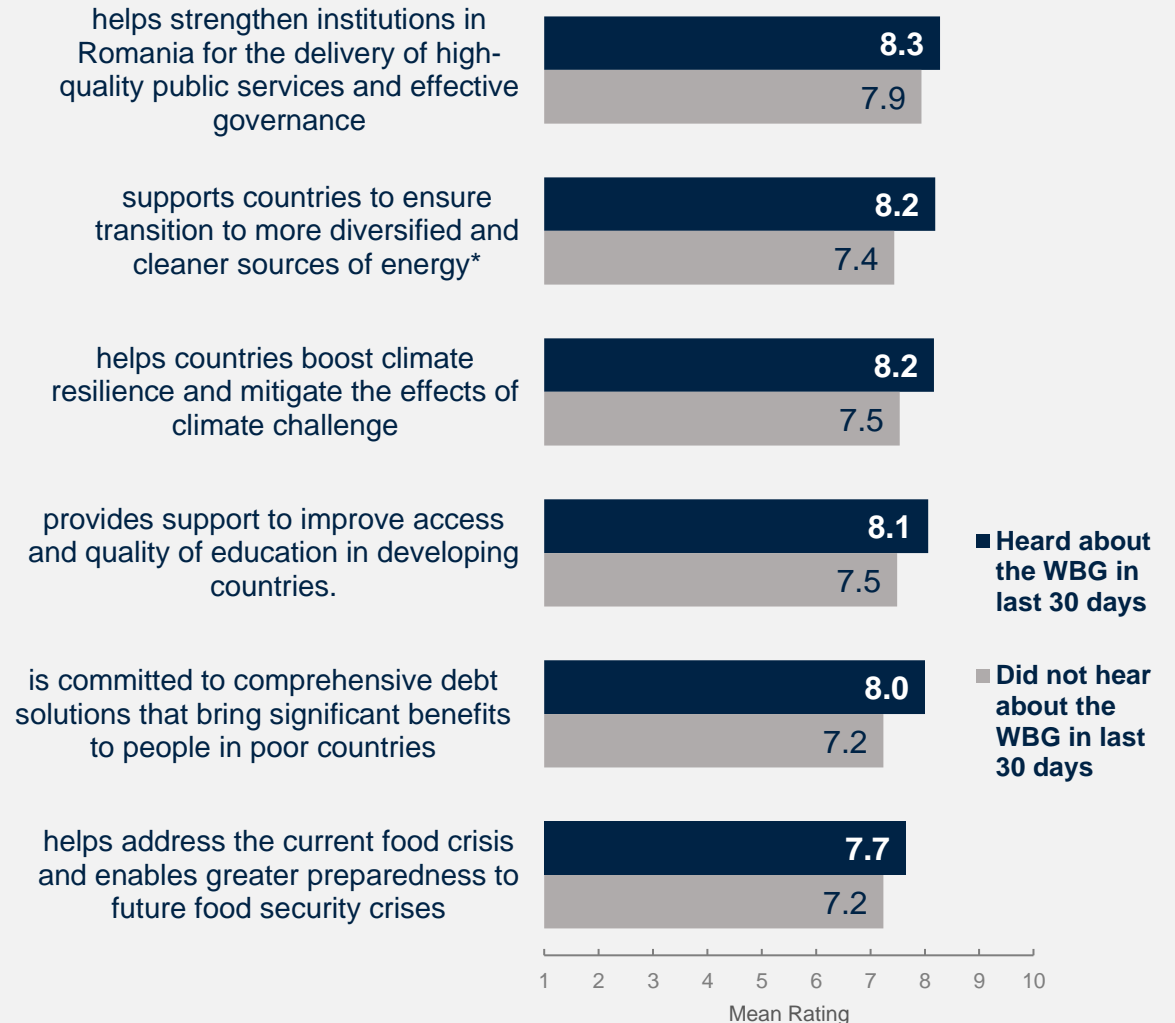


Message Recall Leads to Message Agreement and More Positive Perceptions of the WBG

Respondents who recalled seeing or hearing something about the WBG in the last 30 days consistently **gave higher ratings on all key messages** regarding the WBG's work. Notably, the difference was not statistically significant in the case of Romania (unlike in other countries we surveyed), suggesting a rather favorable image of the WBG among its stakeholders in Romania.

However, 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.

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More Frequent Engagement → More Message Recall

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

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



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

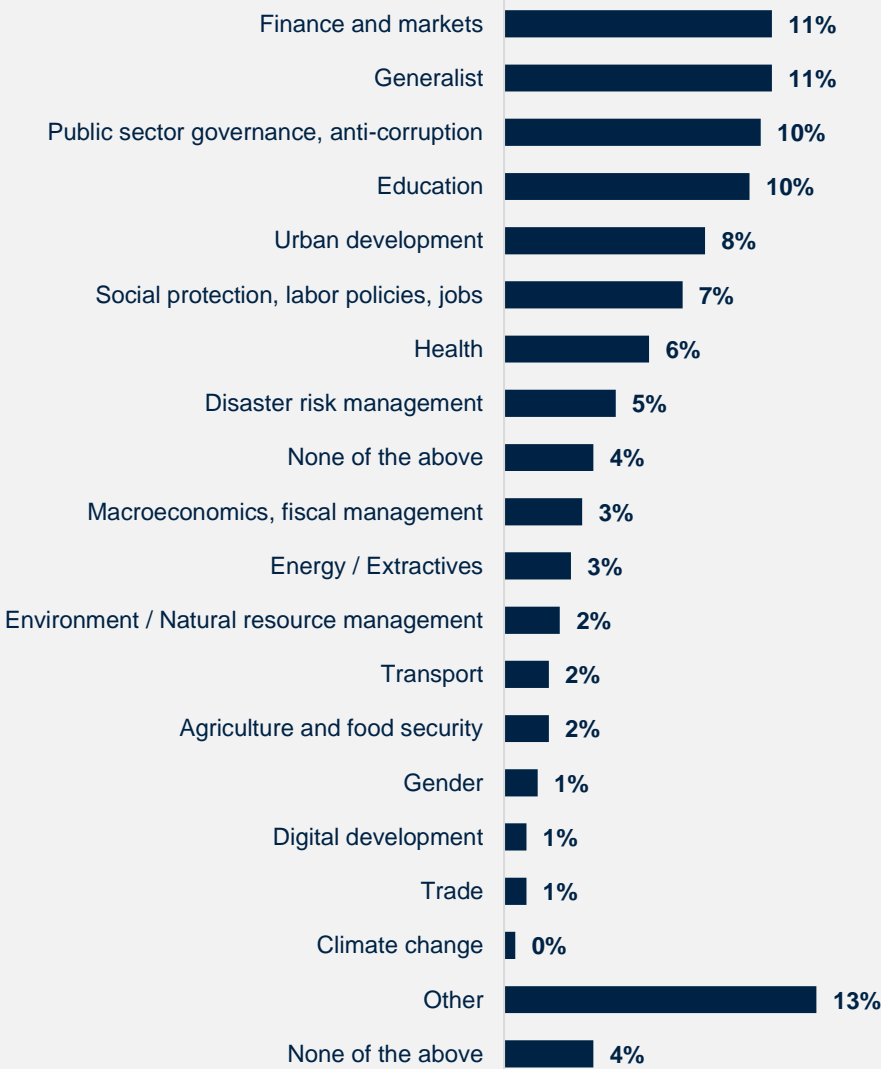


Demographics of the Sample and Detailed Methodology



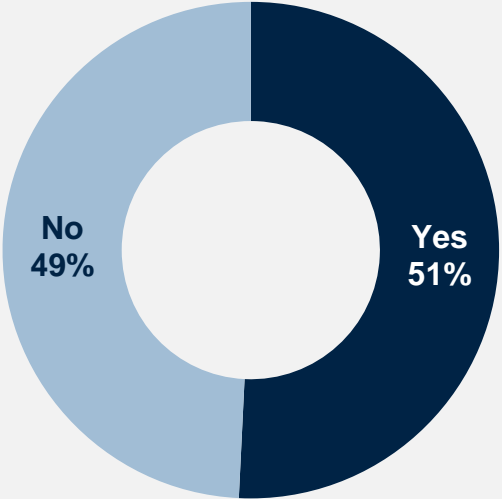
Demographics of the Sample

Which of the following best describes your current affiliation? (N=220)



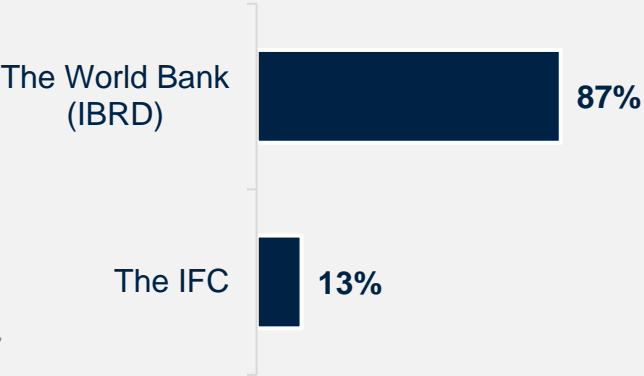
Currently, do you professionally collaborate/ work with the WBG in your country? (N=260)

Respondents from government institutions were significantly more likely to indicate that they collaborate with the WBG (75%) compared to respondents from other stakeholder groups.



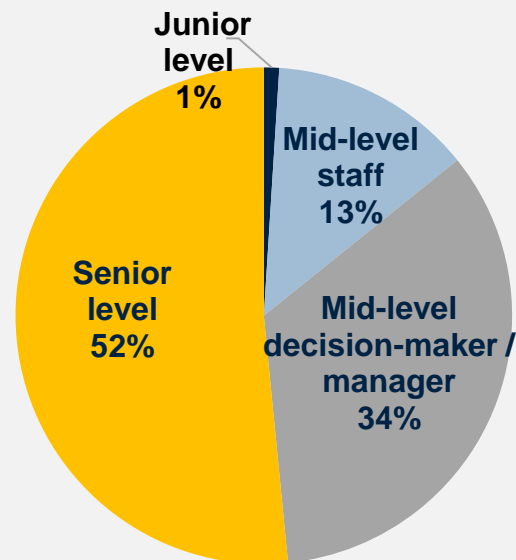
Which of the following agencies of the WBG do you primarily collaborate/work with in Romania? (N=132)

Respondents from the private sector were significantly less likely to indicate that they collaborate with the World Bank (25%) compared to respondents from other stakeholder groups.

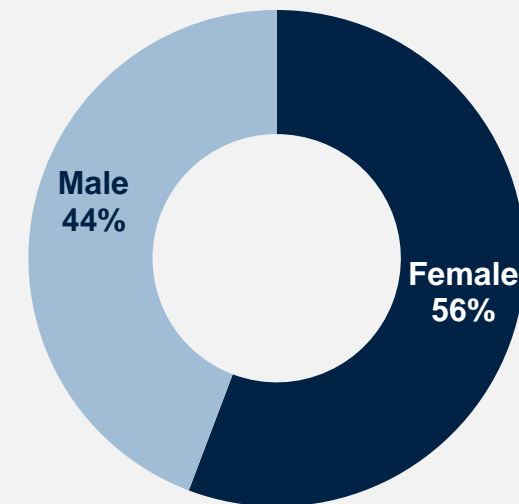


Demographics of the Sample

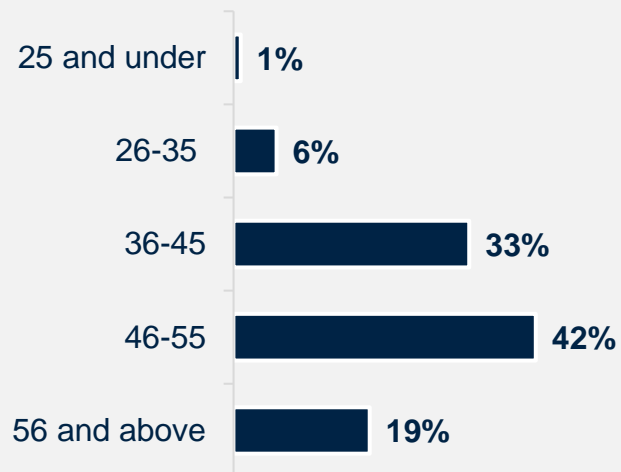
Within your organization, would you describe yourself as... ?
(N=218)



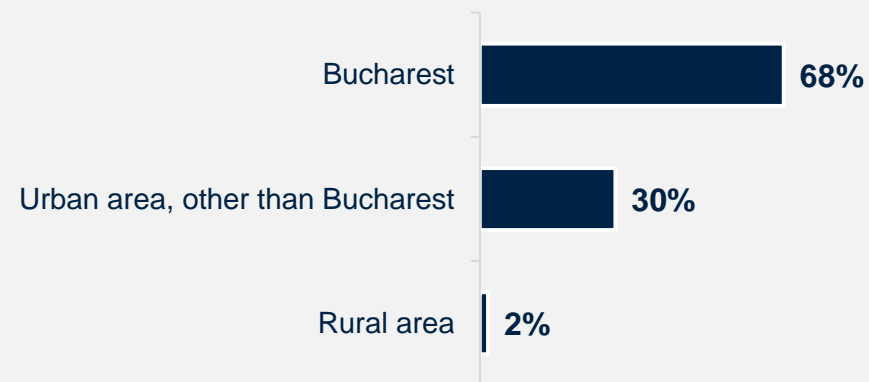
What's your gender?
(N=217)



What's your age?
(N=217)



Which best represents your geographic location?
(N=218)



Detailed Methodology

From **May 2023** to **July 2023**, a total of **1,900** stakeholders of the WBG in Romania were invited to provide their opinions about the WBG's work in the country by participating in a Country Opinion Survey (COS). A list of potential participants was compiled by the WBG country team and the fielding agency. Participants were drawn from the Office of the President, Prime Minister, Minister; Parliament, Government Institutions, Local Governments, Bilateral/ Multilateral Agencies, Private Sector, Civil Society, Academia, and the Media.

A total of **260 stakeholders participated in the survey (14% response rate)**. Respondents completed the questionnaire via an online platform.

The results of this year's survey were compared to the FY20 Survey with a response rate of 40% (N=391).

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. Data were weighted to reach the same stakeholder composition in two years (please see the table to the right).

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 "Romania COS FY23 Appendices with data breakdowns.xlsx" file published in the WBG Microdata Library, along with the survey microdata and this report.

Percentage of Respondents	FY 2020	FY 2023	FY2020 weighted	FY 2023 weighted
Government Principals: Office of the President, Prime Minister, Minister, Parliamentarian	4%	4%	4%	4%
Government Institutions: Employee of a Ministry, Department, Project Implementation Unit, Independent Government Institution, Judiciary, State-Owned Enterprise	26%	35%	31%	31%
Local Government	17%	17%	17%	17%
Bilateral/Multilateral Agency: Embassy, Development Organization, Development Bank, UN Agency	2%	5%	2%	5%
Civil Society Organization: NGOs, Community-Based Organization, Private Foundation, Professional /Trade Association, Faith-Based Group, Youth Group	18%	17%	18%	17%
Private Sector: Private Company, Financial Sector Organization, Private Bank	27%	13%	18%	18%
Academia/Research Institute/Think Tank	5%	8%	5%	8%
Media	1%	2%	1%	2%
Other (includes Liberal Professions)	-	-	-	-
Total Number of Respondents	341	F260		

Indicator Questions

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

A2_6. To what extent do you trust the World Bank Group to do what is right? Scale: 1 To no degree at all – 10 To a very significant degree

A3. How effective has the World Bank Group been in achieving development results in Romania? Scale: 1 Not effective at all – 10 Very effective

To what extent do you agree/disagree with the following statements about the WBG's work in Romania? Scale: 1 Strongly disagree – 10 Strongly agree

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

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

A7. To what extent does the World Bank Group influence the development agenda in Romania? Scale: 1 To no degree at all – 10 To a very significant degree

A8. How significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in your country?
Scale: 1 Not significant at all – 10 Very significant

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

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

C2. Responsiveness to needs

C3. Access to WBG staff and experts

C4. Flexibility when circumstances change

C5. Being a long-term partner

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

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

C7_1. Collaboration with the central government

C7_4. Collaboration with other donor and development partners

C7_5. Collaboration with the private sector

C7_6. Collaboration with civil society

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

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

C8_4. The WBG provides financial support in a timely manner.

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

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





CountryOpinionSurveys

Thank you

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

countrysurveys@worldbankgroup.org

