



Country Opinion Surveys

FY 2023 Türkiye

Country Opinion Survey Report

Acknowledgements

The Türkiye 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.

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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 Türkiye 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 when it comes to its effectiveness, relevance, alignment with Türkiye'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 Türkiye? 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 June 2023 – August 2023

- 1,151 potential participants were asked to complete a mostly quantitative survey
- Respondents completed the questionnaire online
- List of names provided by the WBG country team and supplemented by the fielding agency
- Process managed on the ground by the fielding agency

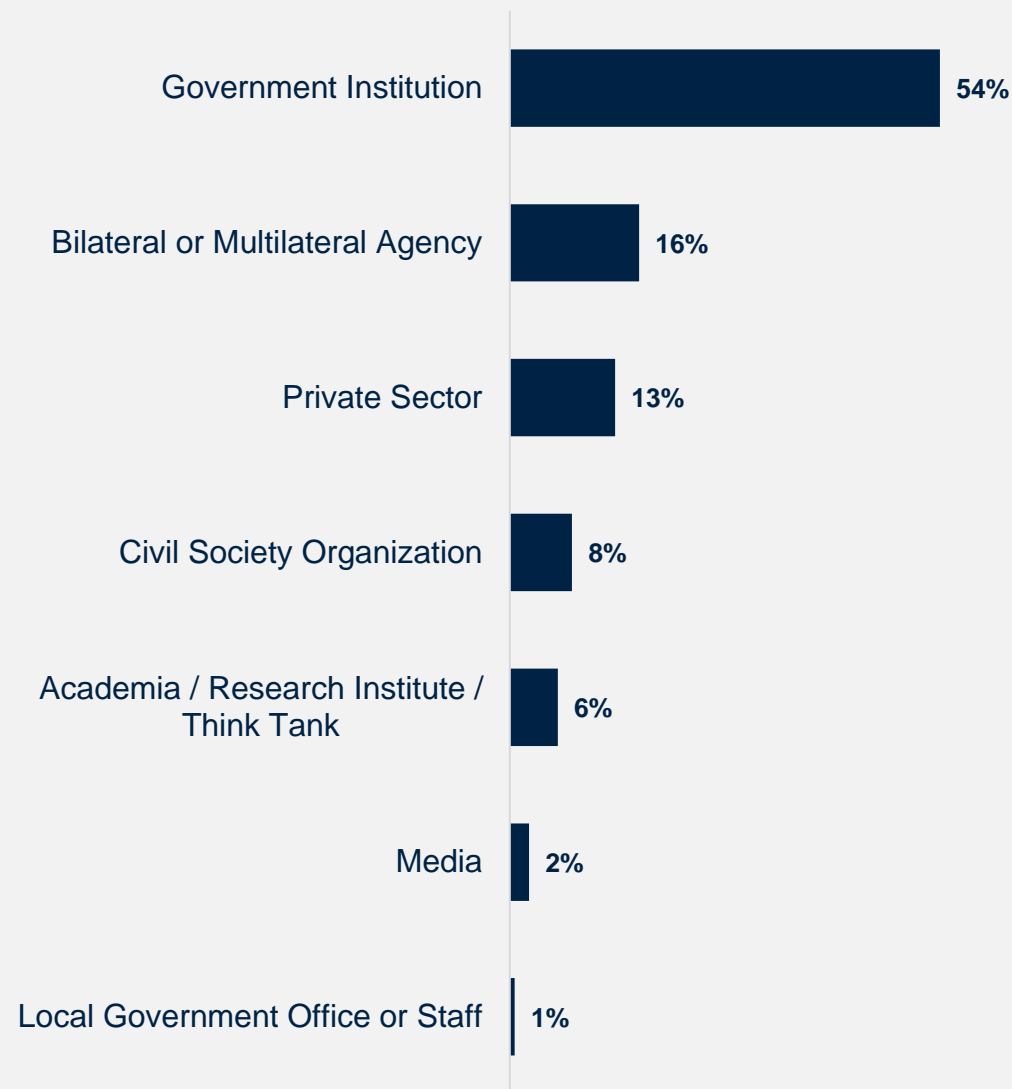
■ 167 participants (15% response rate)

- 66% from Ankara, 28% from Istanbul
- 79% currently collaborate with the WBG

■ Compared to FY20 Country Survey

- 289 participants (35% response rate)
- Respondents completed the questionnaire online
- 38% 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=167)



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Overall Context

“Prioritizing Turkey and developing projects on global issues such as women's empowerment, climate change, water security, and food safety.”
(Government Institution Respondent)



WORLD BANK GROUP



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

Familiarity with the World Bank

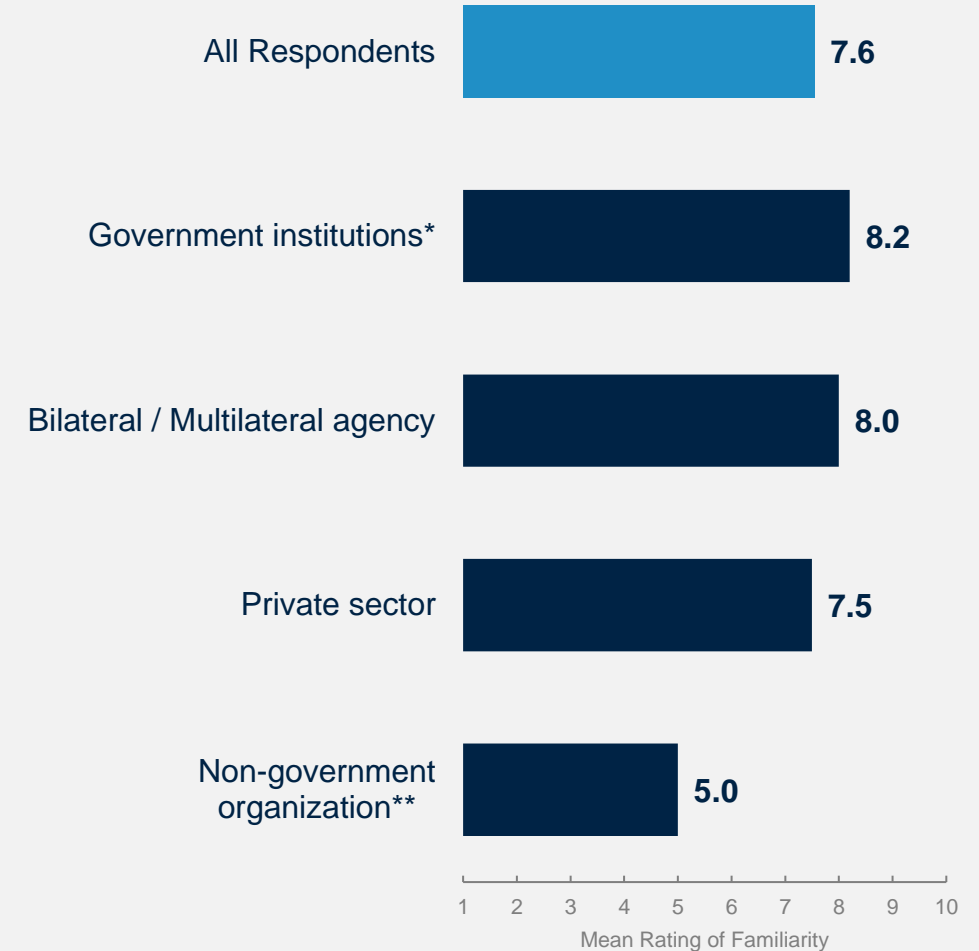
- **Year comparison:** Respondents in this year's Country Survey reported significantly higher levels of familiarity with the World Bank than respondents in the FY20 Survey:

Mean familiarity: **FY23 = 7.6**
 FY20 = 6.4

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

Mean familiarity: **Collaborate with WBG = 8.1**
 Do not collaborate = 5.5

- Mean familiarity of those who collaborated with the WBG was significantly higher in this year's survey compared to the FY20 one (weighted mean in FY23 = 8.1; weighted mean in FY20 = 7.3)



How familiar are you with the work of the World Bank Group in Türkiye?
Scale: 1 Not familiar at all – 10 Extremely familiar (N=167) Statistically similar across stakeholder groups

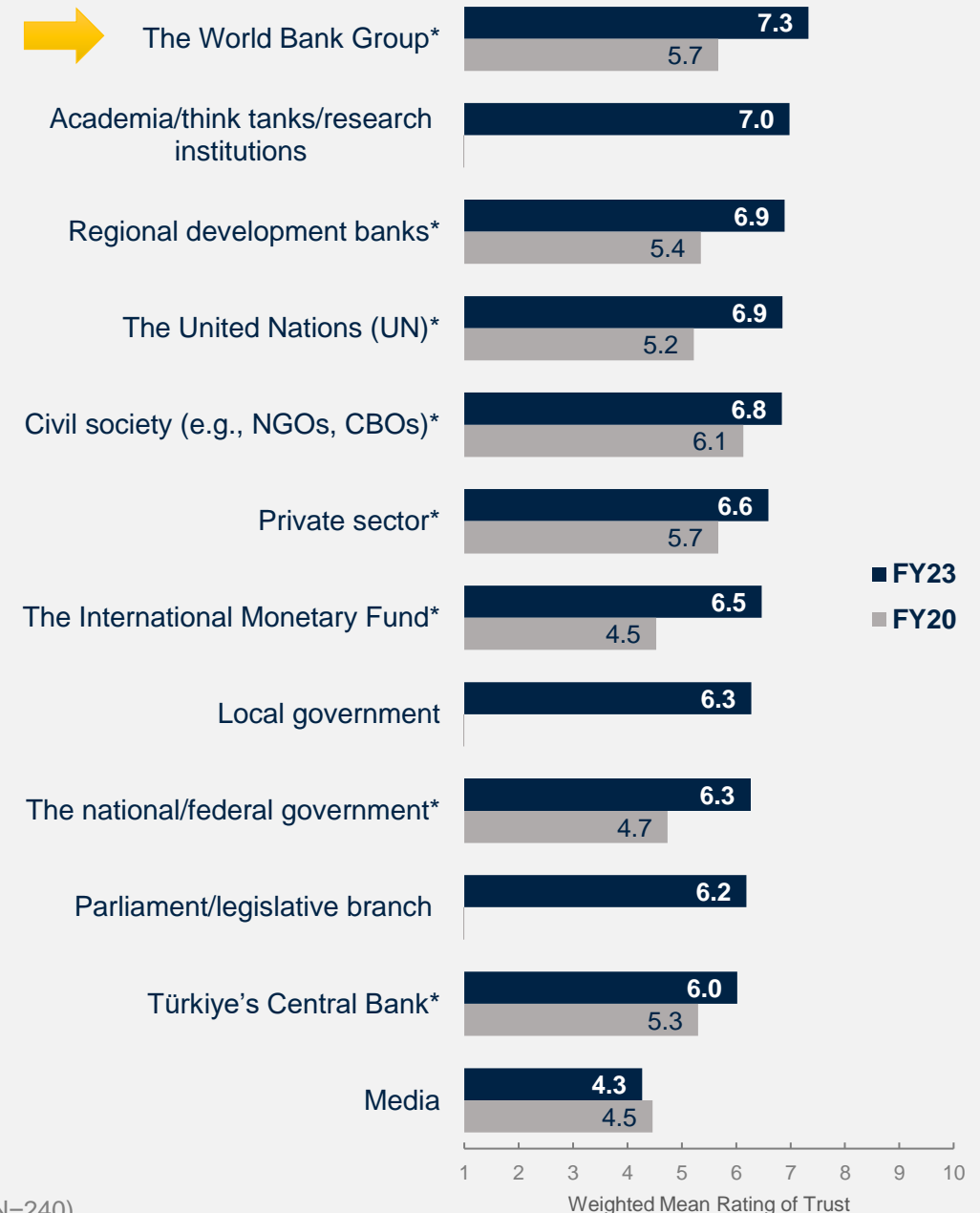
* **Government institutions** included respondents from the government institutions and local government;
** **Non-government institutions** included respondents from civil society organizations, academia, and the media.

The WBG is the Most Trusted Institution in Türkiye

Ratings of trust were significantly higher in Türkiye in FY23 than in the FY20 survey for all institutions except for the media.

Respondents gave the **highest ratings of trust for the World Bank Group** and **academia**. At the same time, the **media** were the least trusted among the institutions studied.

- Respondents from the **private sector** gave the highest rating of trust in the WBG (mean = 8.0), whereas respondents from **non-government institutions** had the lowest trust ratings (mean = 5.8).
- Compared to FY20, weighted mean trust ratings in the WBG improved significantly both among those who collaborated with the WBG and those who did not collaborate.



Overall Attitudes toward the World Bank Group

“The Bank’s effectiveness will only increase if its visibility is enhanced through the successful implementation of projects. Good management and ownership of projects by those implementing them is crucial for the projects to turn into benefits. By communicating more effectively with the managers and groups implementing the projects, the Bank can increase both the success of the projects and its effectiveness in Turkey.”

(Government Institution Respondent)



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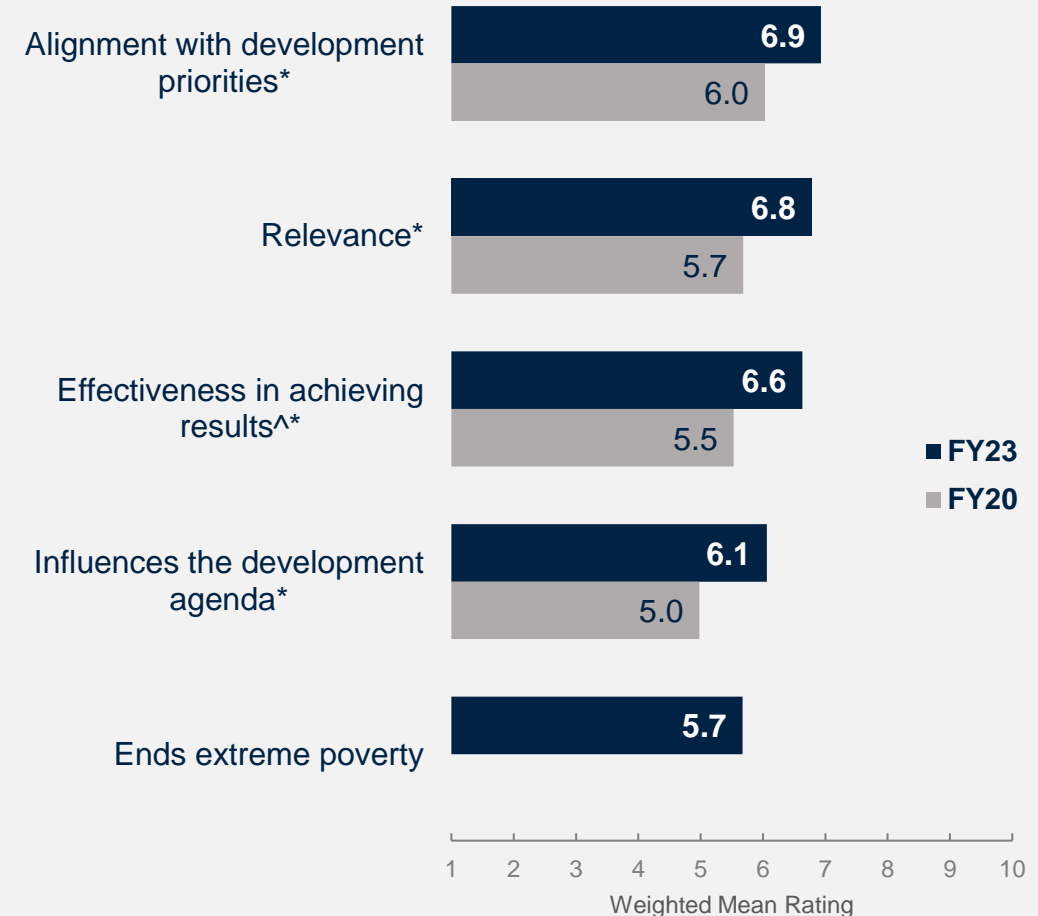


In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Türkiye? (N=78)

Significant Improvement Across Key Performance Indicators

In FY23, respondents perceived the WBG as significantly more **aligned with development priorities** in Türkiye, more **relevant** and **effective** in achieving development results, as well as having more **influence** on the development agenda in Türkiye.

This increase in ratings was mainly driven by **significantly improved perceptions of those who collaborated** with the WBG – in this group, increases in all key performance indicators (KPIs), except for alignment with the country's priorities, were statistically significant. Perceptions of those who did not collaborate with the WBG remained statistically similar to the FY20 findings.



*Significantly different between years



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



Private Sector Respondents Demonstrate Consistently Positive Perceptions of the WBG

Among all stakeholder groups, **private sector** respondents gave the highest ratings across all KPIs, while respondents from **non-government organizations** gave significantly lower ratings. Of note, non-government respondents also reported the lowest levels of familiarity with the WBG.



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

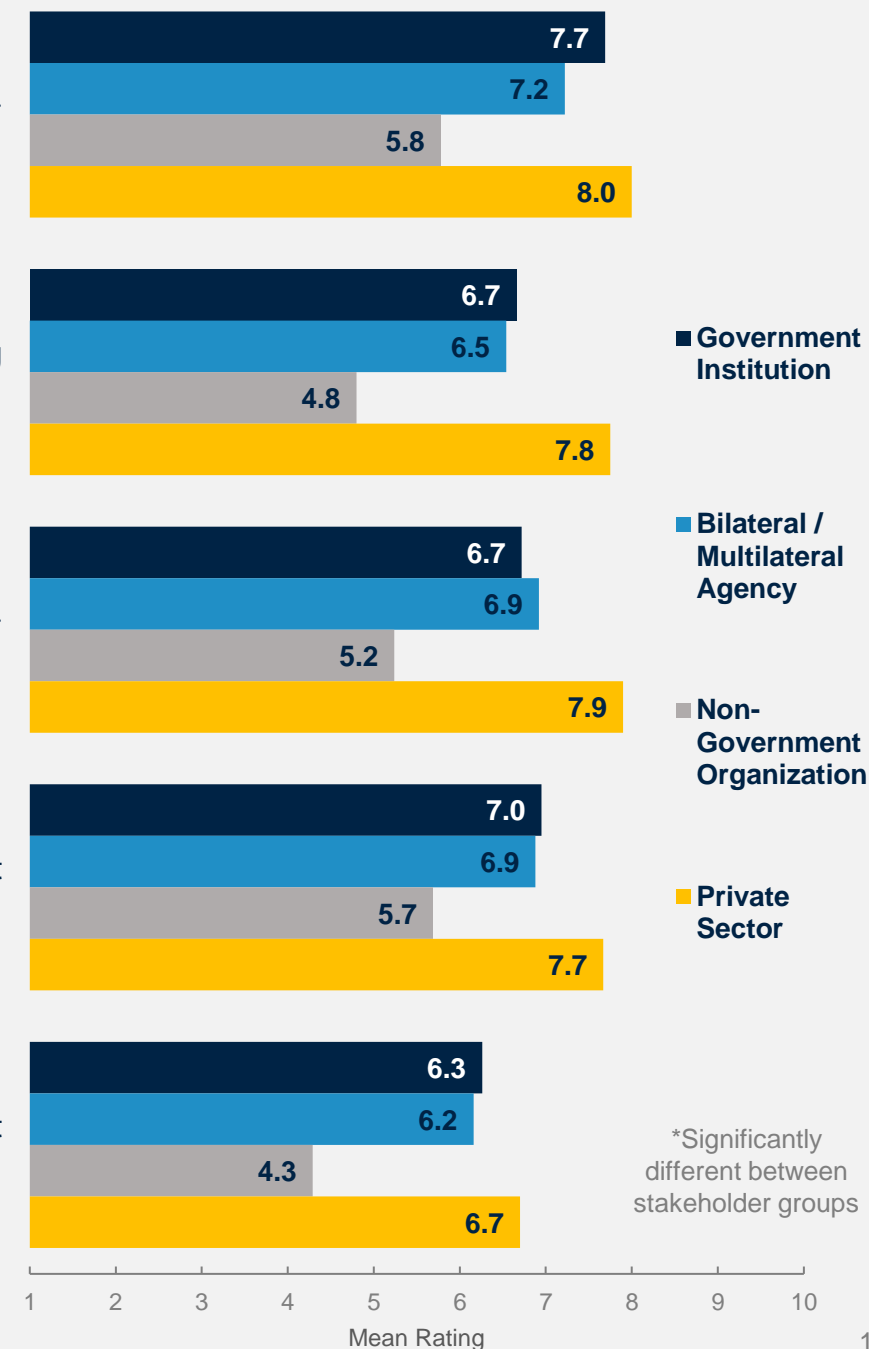
Trust in the WBG*

Effectiveness achieving results*

Relevance*

Alignment with development priorities*

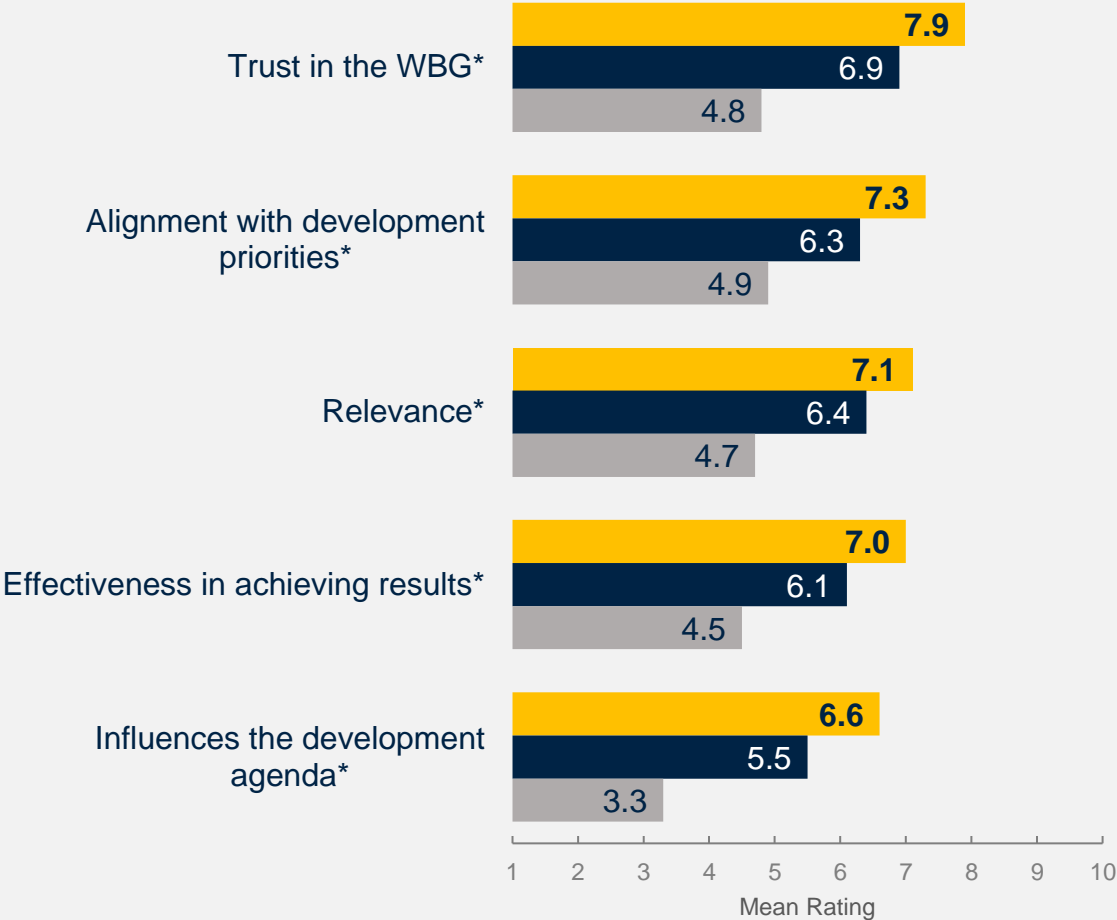
Influences the development agenda*



Familiarity Leads to More Positive Perceptions

Comparing ratings of key performance indicators among respondents highly familiar with the WBG (ratings of 8-10 on a 10-point scale) and those with little familiarity with the WBG (ratings of 1-4 on a 10-point scale), one can see that the more familiar stakeholders are with the WBG, the more positive perceptions they have of the WBG and its work.

Meaningful engagement and outreach can continue to increase positive perceptions.



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

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

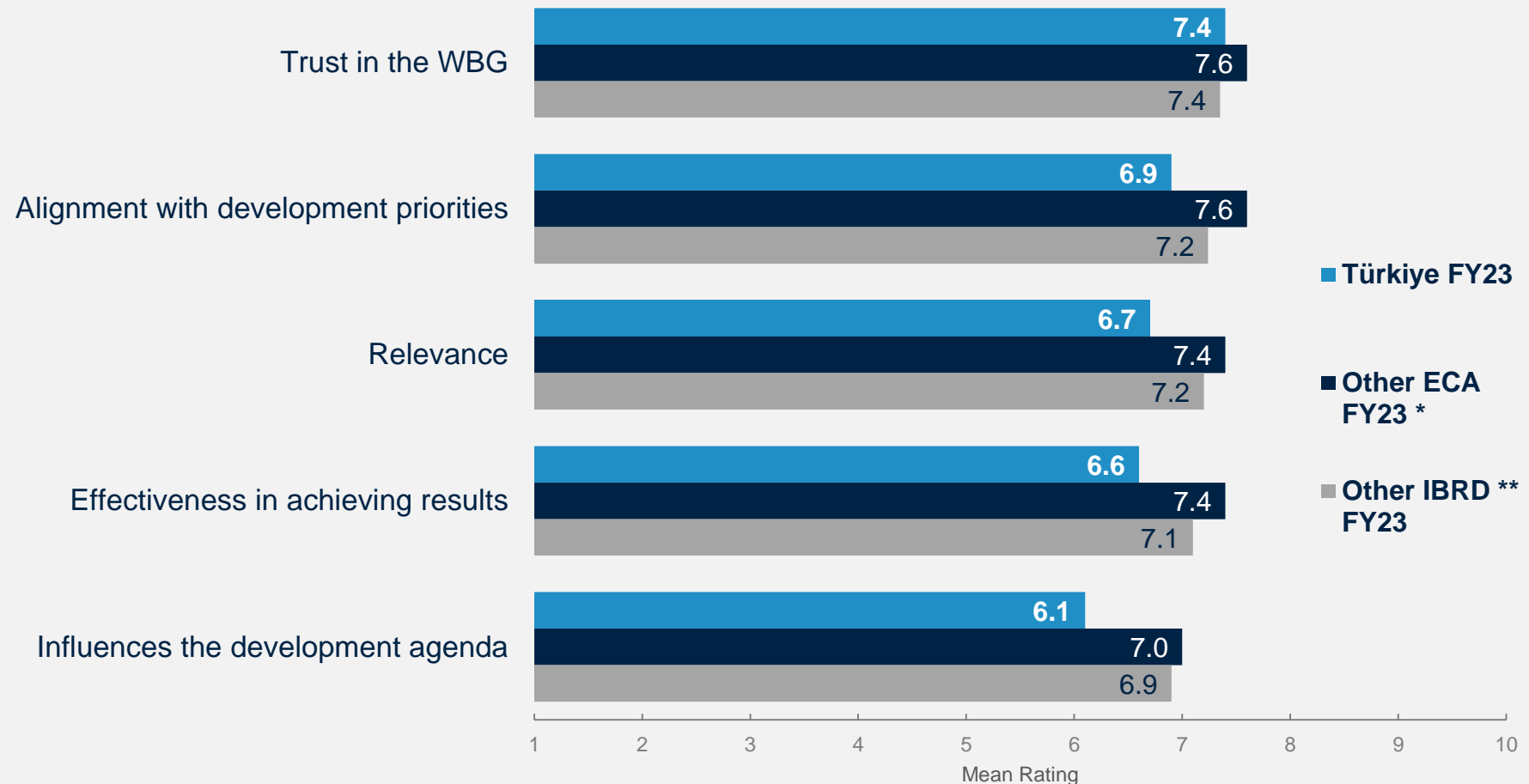
*Significantly different between levels of familiarity



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

KPI Ratings are Lower in Türkiye than in other FY23 Europe and Central Asia and IBRD Countries

However, trust ratings were on par with other IBRD countries.



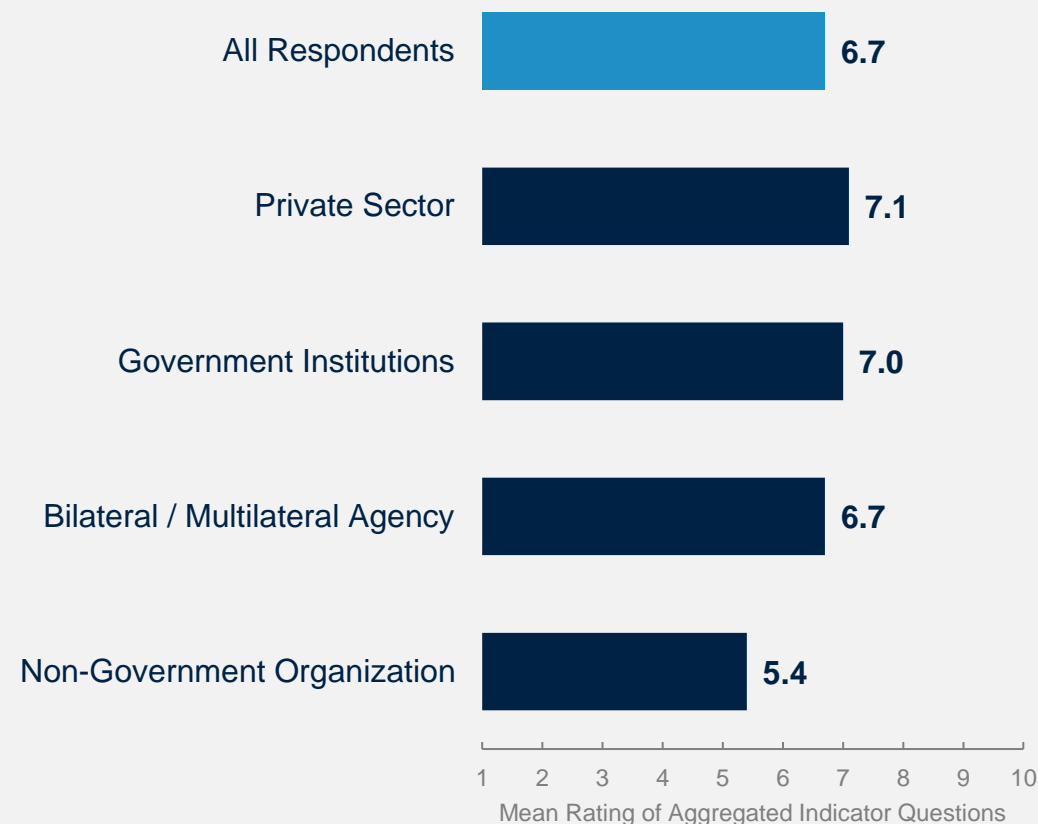
Stakeholder Trends across Performance Indicators

Respondents from the **private sector** and **government institutions** had the highest mean ratings across the aggregated responses to the nineteen COS indicator questions whereas respondents from **non-government organizations** had the lowest ratings.

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

Mean rating: **Collaborate with WBG = 7.0**

Do not collaborate = 5.8



World Bank's Support in Development Areas

“To contribute more to the infrastructure of Organized Industrial Zones and the development of technology and innovation centers. To increase and further develop projects in the field of education. To ensure more effective use of communication channels while doing so..” (Government Institution Respondent)



WORLD BANK GROUP



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

Development Areas for WBG Focus

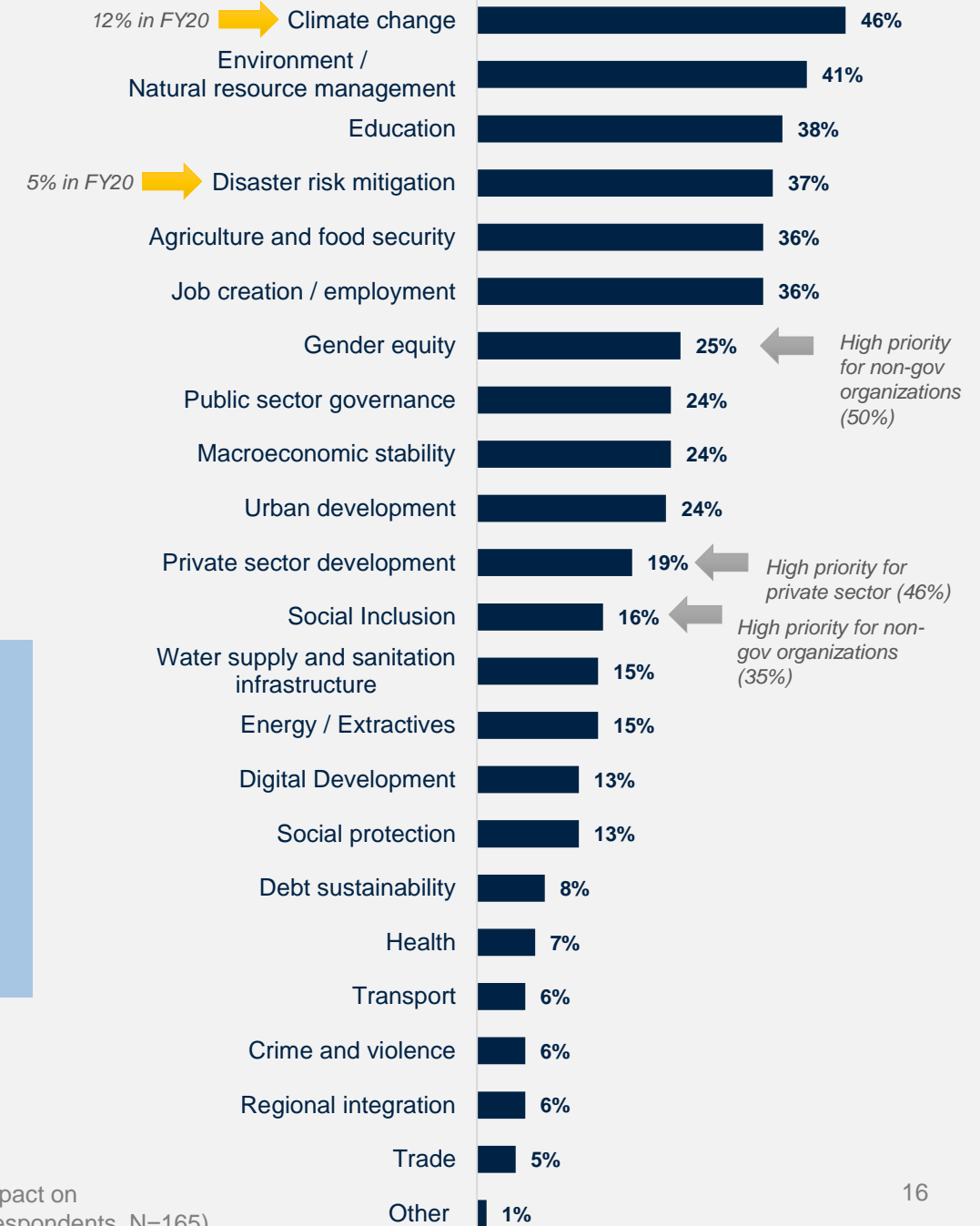
In FY23, **climate change** was the top area where stakeholders would like the WBG to focus its resources, followed by **environment/natural resource management**, **education**, **disaster risk management**, **agriculture**, and **job creation**.

- Although education and job creation/employment were among the top priorities identified in FY20, respondents in this year's survey considered **climate change** and **disaster risk management** a much greater priority for the WBG's focus.

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

"Contributing more to Equitable Education and ensuring that the eastern part of Turkey has access to digital education as much as the western parts of Turkey." (Civil Society Respondent)

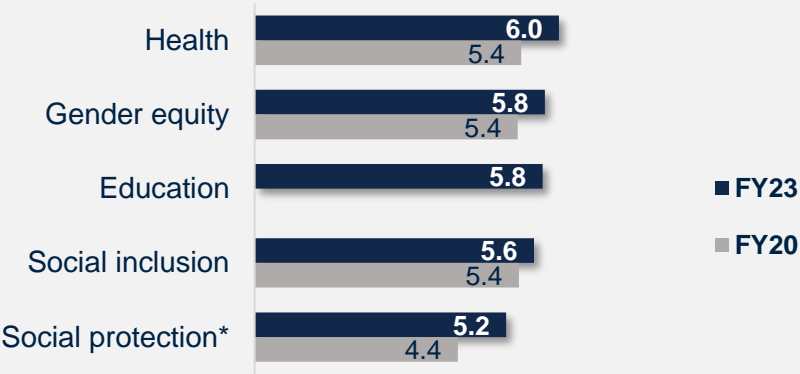
"Increasing the awareness of environmental sustainability among SMEs can help make the economic system more sustainable at a broader level." (Bilateral/Multilateral Respondent)



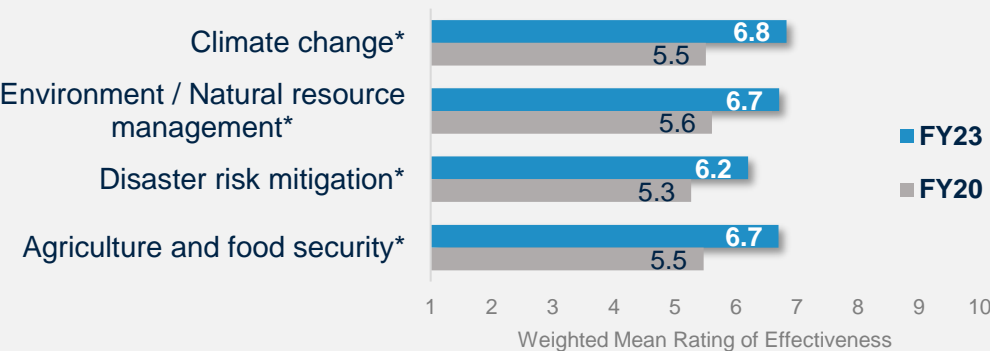
Effectiveness of WBG's Support in Sectoral Areas

There was a positive trend in effectiveness ratings in most sectoral areas, with many of them having increased significantly compared to FY20. The WBG's work in **water supply and sanitation infrastructure** received the highest ratings of effectiveness (weighted mean=7.2).

Human Development



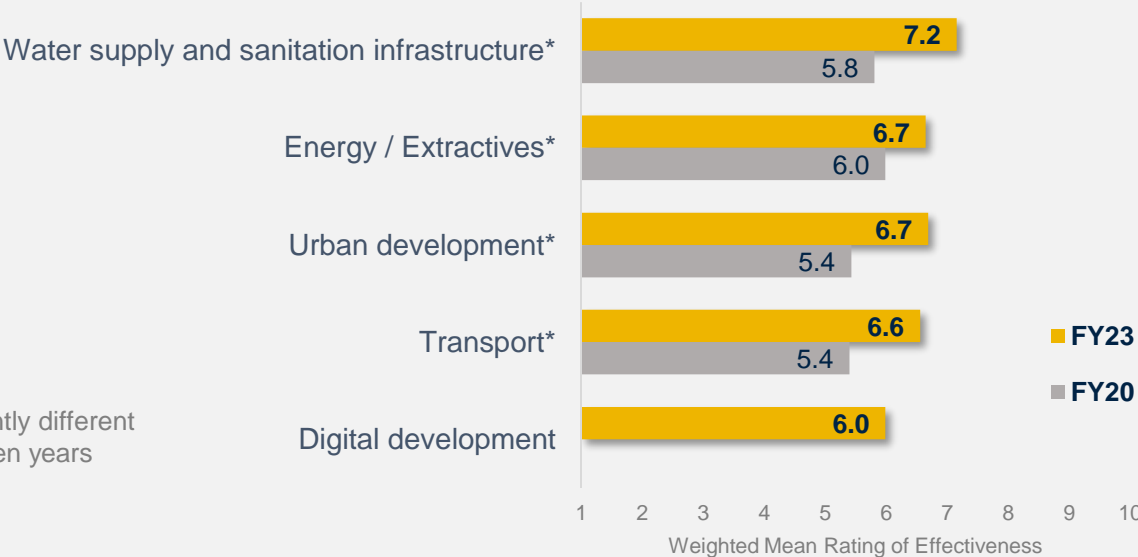
Environmental Sustainability



Finance / Institutions / Economic Growth



Infrastructure



*Significantly different between years



How **effective** do you believe the WBG is in terms of the work it does in the following areas of development in Türkiye? Scale: 1 Not effective at all – 10 Very effective (If you have NO exposure to/experience in working in any of the sectors listed below, please respond “Don’t know”)

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

“Increasing the awareness of environmental sustainability among SMEs can help make the economic system more sustainable at a broader level.”
(Bilateral/Multilateral Agency Respondent)



WORLD BANK GROUP



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

Financial Resources are the Bank's Greatest Value in Türkiye

In FY23, **financial resources (57%)** were considered the WBG's greatest value in Türkiye, according to respondents (34% in FY20).

While **capacity building and training** were selected by only a quarter of the respondents, they discussed the importance of training and capacity building in qualitative comments, in the context of the Bank's operational effectiveness in Türkiye (please see some examples below).

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

"...Improving technical and institutional capacity should also be among the priority targets during the project cycle. Narrowing the gap between the predicted results of the projects on paper and the field reality should be considered as a permanent gain along with the projects and the necessary infrastructure for the team, staff, and equipment with both field experience (application experience) and project management ability."

(Government Institution Respondent)

"As these types of projects are typically undertaken by public institutions, it is imperative that workflows within these institutions are redesigned to be effective and efficient. This will require an increase in both the quantity and quality of staff capacity..."

(Government Institution Respondent)



The WBG Consistently Seen as a Long-Term Partner

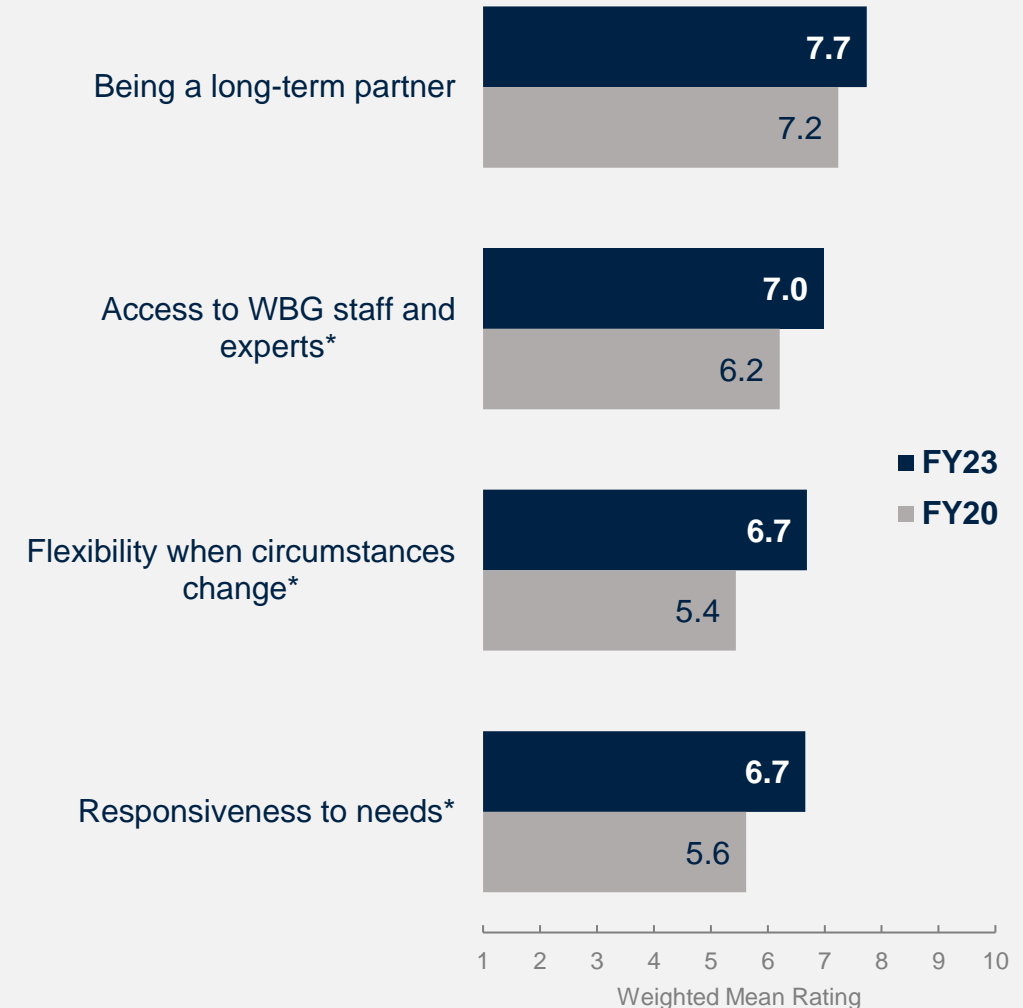
In FY23, respondents perceived the WBG as a significantly more **responsive**, **accessible**, and **flexible** long-term partner than in FY20.

- While perceptions of responsiveness have significantly improved among those respondents who collaborate with the WBG, perceptions of flexibility have improved significantly both among those who collaborate with the WBG and those who do not.
- As with other aspects of WBG work in Türkiye, respondents from **non-government organizations** gave somewhat lower ratings to all four questions compared to other stakeholder groups.

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

"[The WBG should] establish long-term and permanent relationships with institutions in Turkey."

(Private Sector Respondent)



To what extent is the WBG an effective development partner in Türkiye, in terms of each of the following?
Scale: 1 To no degree at all – 10 To a very significant degree ^Compared to the mean of institutional flexibility and flexibility to changes in the country context asked in FY20. *Significantly different between years



The WBG is Increasingly Seen as Collaborating Effectively with Stakeholders

In FY23, respondents perceived the WBG as collaborating significantly more effectively with **the national government**, with **other donors/development partners**, and with **civil society** than in FY20.

- Of note, respondents from **bilateral/multilateral agencies** gave the lowest ratings for WBG's collaboration with other development partners (mean = 5.9), while respondents from non-government organizations rated the Bank's collaboration with civil society at the same level as in FY20 (mean=5.5).

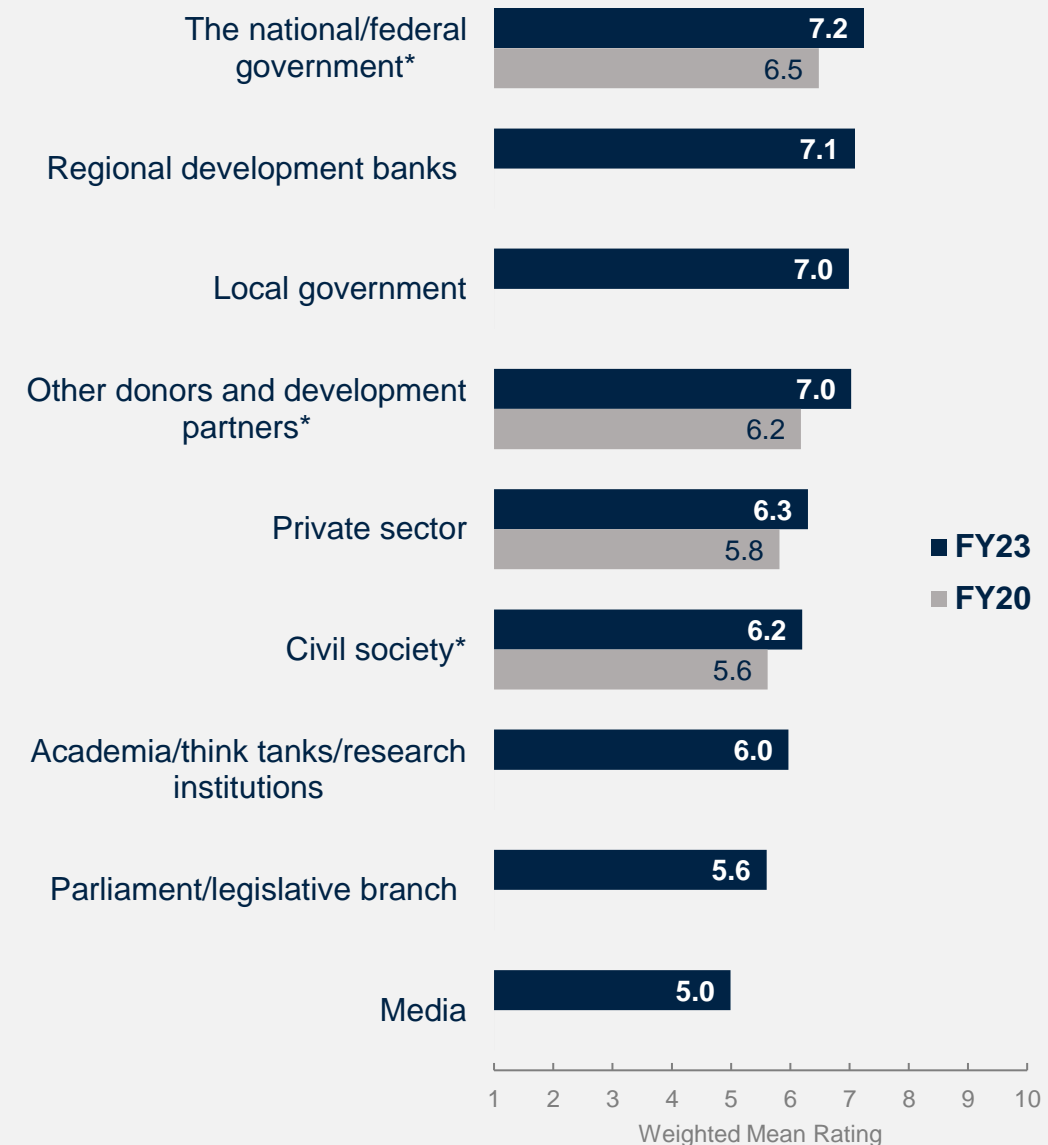
In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Türkiye?

"More presence and engagement with donors and UN organizations. This is a repeated feedback that I've heard about the WB in the country. This is especially important with the earthquake transition to recovery, as we move from the humanitarian agenda. WB has done a great job coordinating with other IFIs, but need to make sure to inform donors and coordinate with humanitarian actors on the ground as well (and not just at the technical level)."

(Bilateral/Multilateral Respondent)

"Involvement and inclusion of civil society organizations in all processes."

(Civil Society Respondent)



Stakeholders want the Bank to Collaborate More with Local Government and Civil Society

Respondents in this year's survey indicated that the WBG should collaborate more with **local government** and **civil society**, followed by **the national government**.

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

"The number of local governments involved in World Bank projects needs to expand across the country."
(Government Institution Respondent)

"[The WBG should] cooperate with non-governmental organizations in order to ensure more effective use of resources. It is necessary to pay attention to how much of the resources allocated to the country are used directly for the target.."
(Academia Respondent)

High priority for non-
gov organizations
(72%)



Local government

Civil society (e.g., NGOs, CBOs)

The national/federal government

Private sector

Other donors and development
partners

Regional development banks

Academia/think tanks/research
institutions

Parliament/legislative branch

Media

Other

54%

46%

Top priority for
non-gov
organizations
(88%)

39%

33%

32%

31%

31%

10%

7%

2%



Which THREE of the following groups should the WBG collaborate with more in Türkiye? (Choose no more than 3)
(Percentage of Respondents, N=147)

World Bank Group's Financial Instruments and Knowledge Work

"Thematic reports, public knowledge base, clearer information on implemented projects and dissemination of good practice examples."
(Government Institution Respondent)

"Influence the public sector reform and help stabilize the economy. The works on social protection and inclusion of refugees in this regard have progressed but more can be done. WBG can play an additional leadership role on the conditionality of loans for social inclusion."
(Bilateral/Multilateral Respondent)



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

WBG Lending is Seen as Increasingly Timely and Meeting Türkiye's Needs

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

- An increase in perceptions of the **timeliness** of the WBG support was significant both among those who collaborate with the WBG and those who do not collaborate.
- Respondents from **bilateral/multilateral agencies** gave significantly lower ratings for the WBG's insisting on accountability and for meeting the country's needs than other stakeholder groups.

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

"Improve project management efficiency and speed. Allocate additional resources as required for development."

(Bilateral/Multilateral Agency)

The WBG insists on accountability through its lending

8.3

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

7.7

The WBG provides financial support in a timely manner.*^

7.6

5.2

The WBG's financial instruments meet the needs of Türkiye*

7.1

5.5

■ FY23

■ FY20

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



Most Respondents Have Used the WBG's Knowledge Work

More than half of all respondents (52%) reported that they have used the WBG's knowledge work in the past.

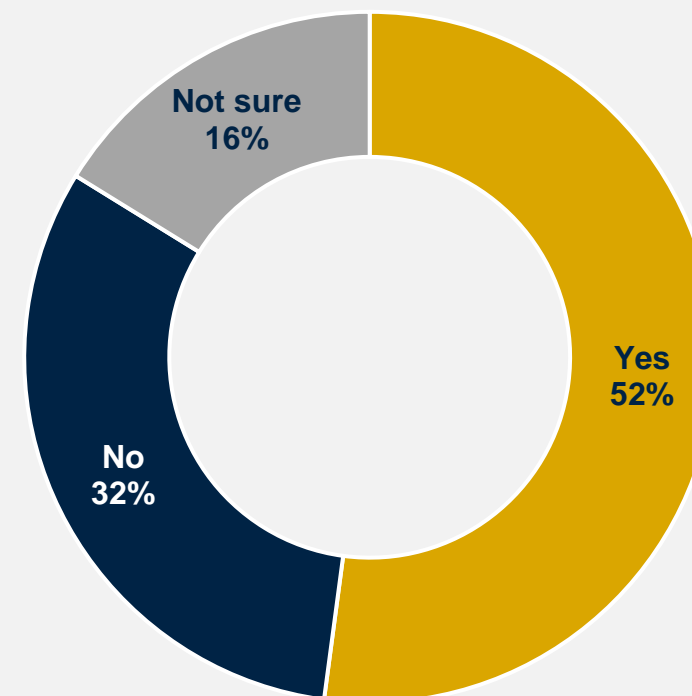
Respondents from **the private sector** and **government institutions** were more likely to have used WBG's knowledge work (58% and 57%, respectively) compared to respondents from other stakeholder groups.

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

"Organizing more frequent training events"
(Private Sector Respondent)

"It is important to accurately identify the needs of institutions and develop customized solutions instead of using general recommendations. Additionally, improving communication with counterpart institutions is essential."
(Government Institution Respondent)

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

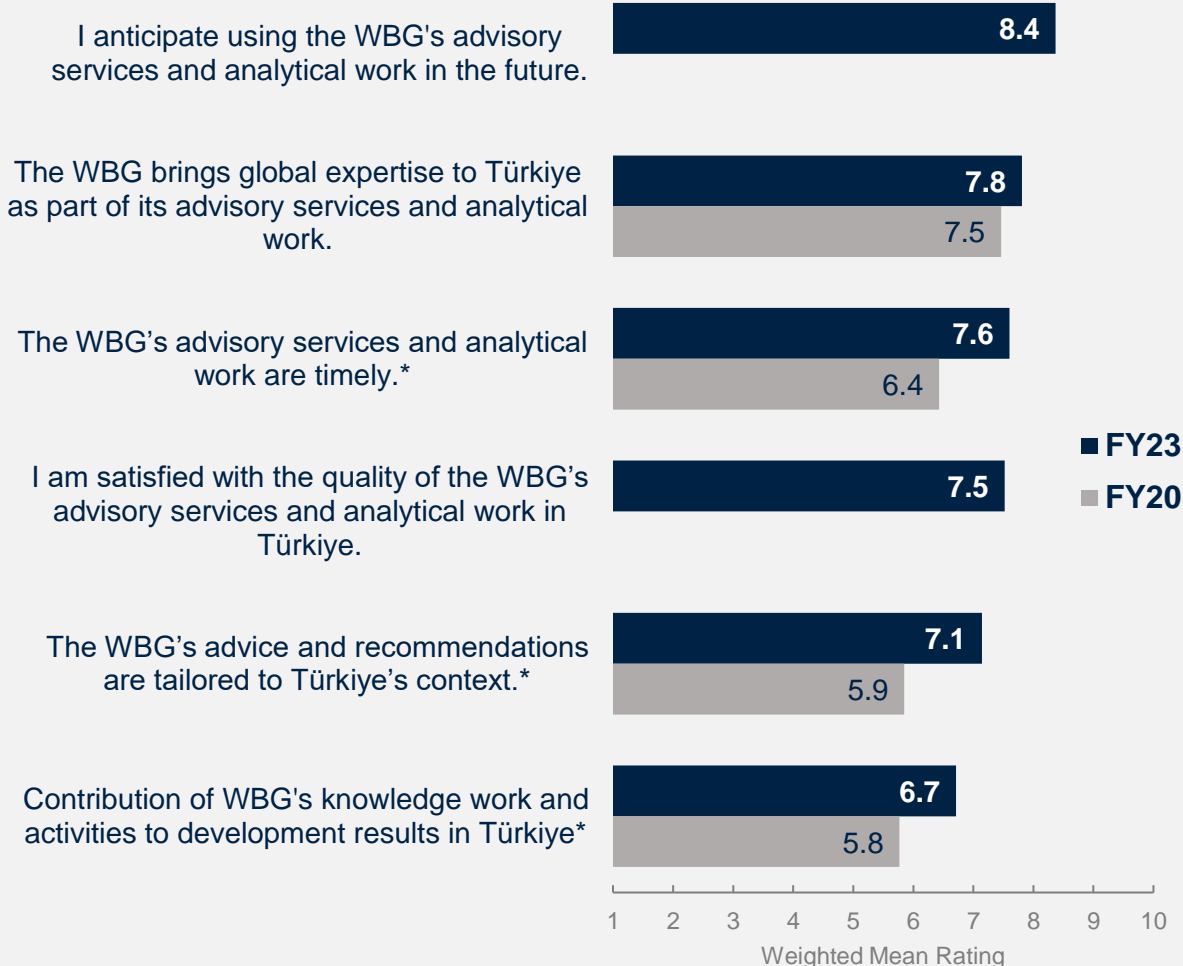


Stakeholders Value WBG Knowledge Work, Anticipate Using it in the Future

Perceptions of the WBG knowledge work have improved significantly since FY20 for most indicators.

Respondents had the highest levels of agreement that they **anticipate using** the WBG's advisory services and analytical work in the future and that the WBG **brings global expertise** to Türkiye as part of its advisory services and analytical work.

- Improved perceptions were mainly driven by respondents who **collaborate** with the WBG, except for the ratings for the timeliness of the WBG's knowledge work, which grew significantly among both collaborators and non-collaborators.
- Respondents from **bilateral/multilateral agencies** were the most critical about WBG's knowledge work (mean across all questions = 6.2), with significantly lower ratings on the timeliness of the knowledge work and its being tailored to the Türkiye's context.



The Future Role of the World Bank Group in Türkiye



WORLD BANK GROUP

What the WBG could do to Increase its Effectiveness in Türkiye

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

Topics covered by respondents



Respondents provided a total of **78 comments** to the question about the most important things the WBG could do to help increase its effectiveness in Türkiye. Over a third of respondents touched upon the issues of **operational effectiveness**, discussed the areas for the WBG to **focus** on, and highlighted the need for greater **engagement** with various stakeholder groups. A few respondents commented on WBG **knowledge products** and stressed the need for better **communication** around WBG work in the country and the results. Other respondents mentioned WBG’s **financial products** and discussed possible areas of new loan/grant programs. The chart on the left shows the proportional distribution of these topics in respondents’ comments*. Individual quotes are included below and throughout this report.

“It is critical to simplify the procedures and clearly share these procedures with the beneficiary at the project design stage, and to provide detailed training and capacity development before the project starts, especially on environmental social requirements and purchasing procedures, and even to provide funding for external support.” (Government Institution Respondent)

“The World Bank carries out many projects with many institutions, and some projects intersect on the basis of geography or activity. I think the bank should make such projects talk to each other from the design stage. In addition, the capacity of institutions, as well as the World Bank, on this issue, that is, on cooperation, needs to be increased. Institutions may avoid cooperation due to competition between them.”

(Government Institution Respondent)

“Renewable energy and climate change are critical issues that demand more attention.”

(Government Institution Respondent)

What the WBG could do to Increase its Effectiveness in Türkiye

“First of all, it is very important to increase accessibility to clean water. While the entire environmental infrastructure is being created or rehabilitated, it should also try to minimize the negative social impact on society and make this visible. It is important to use TV, the most common mass media tool in the country, in this sense. Environmental, social, and financial sustainability should be explained to all citizens and these concepts should be internalized.” (Government Institution Respondent)

“Contributing more to Equitable Education and ensuring that the eastern part of Turkey has access to digital education as much as the western parts of Turkey.” (Civil Society Respondent)

“Influence the public sector reform and help stabilize the economy. The works on social protection and inclusion of refugees in this regard have progressed but more can be done. WBG can play an additional leadership role in the conditionality of loans for social inclusion.” (Bilateral/Multilateral Respondent)

“Cooperation with NGOs and municipalities aiming to protect and improve the rights of marginalized social segments, including LGBTQ+ people.” (Civil Society Respondent)

“It may be fruitful to work more widely with academic experts in Turkey. In particular, it is important that expert staff outside the three major provinces are able to participate in WB work.” (Academia Respondent)

“It is important to increase the number of experts in the country office, be more active in the field, work closely with relevant public institutions and stakeholder organizations, have more active communication, and more effective coordination.” (Bilateral/Multilateral Respondent)

“Communication and Visibility: Communication strategies should be created with a perspective that is understandable, explainable, visible, and demonstrable for all segments of the society of the implemented projects...” (Government Institution Respondent)



Communication and Outreach

“[The WBG should] obtain opinions from a wider range of society and to communicate what they are doing to a broader audience..”

(Media Respondent)

“Open, transparent information sharing.”

(Academia Respondent)



WORLD BANK GROUP



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

Research Papers, Official Statistics, and Social Media were Most Common Information Sources

Respondents relied on **research papers**, **official statistics**, and **social media** to get information about economic and social development issues. However, respondents from bilateral/multilateral agencies preferred **newspapers** as their main information source.

	Top 2 Information Sources				
	All Respondents	Government Institution	Bilateral / Multilateral Agency	Non-Government Organization	Private Sector
Research papers / Official statistics	67%	62%	78%	74%	67%
Social media	64%	66%	48%	61%	83%
Newspapers (Print or online)	50%	49%	65%	35%	56%
e-Newsletters*	31%	41%	4%	35%	22%
Television (TV)	24%	32%	13%	13%	17%
Blogs	15%	11%	26%	22%	11%
Podcasts*	8%	1%	13%	22%	11%
Other	4%	1%	4%	9%	6%
Radio	3%	3%	4%	4%	0%



How do you get most of your information about economic and social development issues in Türkiye? (Choose no more than 3) (Percentage of Respondents, N=140)

*Significantly different between stakeholder groups



WORLD BANK GROUP

Events were Most Preferred for Obtaining WBG Information

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

		Preferred WBG Source			
	All Respondents	Government Institution	Bilateral / Multilateral Agency	Non-Government Organization	Private Sector
Event/conference/ seminar/workshop	60%	61%	57%	65%	58%
Website	45%	51%	30%	30%	53%
Social media	44%	45%	39%	35%	58%
Direct contact with staff	41%	41%	52%	39%	32%
e-Newsletters	39%	32%	39%	48%	58%
Direct messaging	15%	16%	17%	13%	11%
Interviews and press conferences	11%	7%	17%	17%	11%
Podcasts	8%	4%	17%	13%	5%
Blogs	7%	5%	4%	13%	11%



How would you prefer to obtain information about the World Bank Group and its work? (Choose no more than 3) (Percentage of Respondents, N=141)

*Significantly different between stakeholder groups

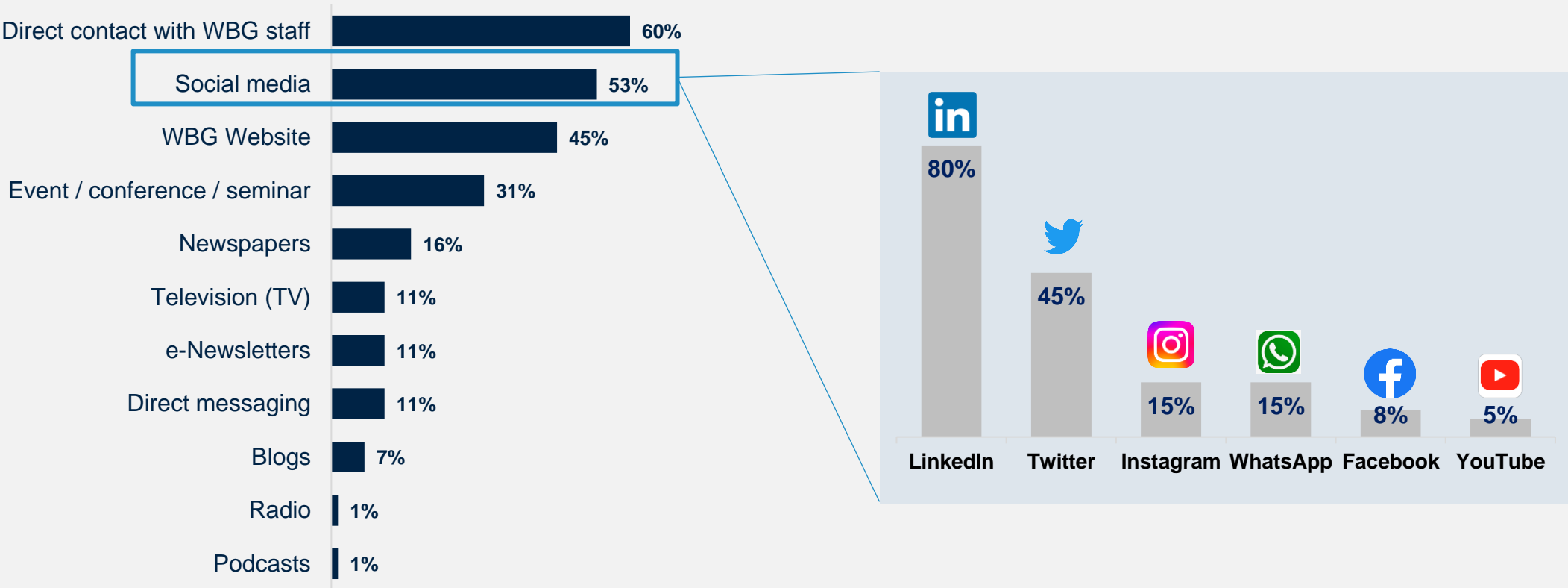


WORLD BANK GROUP

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

53% of respondents recalled hearing or seeing something about the WBG in the last 30 days. Respondents from **government institutions** and **bilateral/multilateral organizations** were the most likely to recall seeing or hearing something about the WBG (63% and 67%, respectively), while respondents from **non-government organizations** were significantly less likely to do so (9%).

Respondents reported getting this information most often through direct contact with the WBG staff or seeing it on social media. Among those who selected “Social media”, respondents most commonly reported seeing something on **LinkedIn or Twitter**.

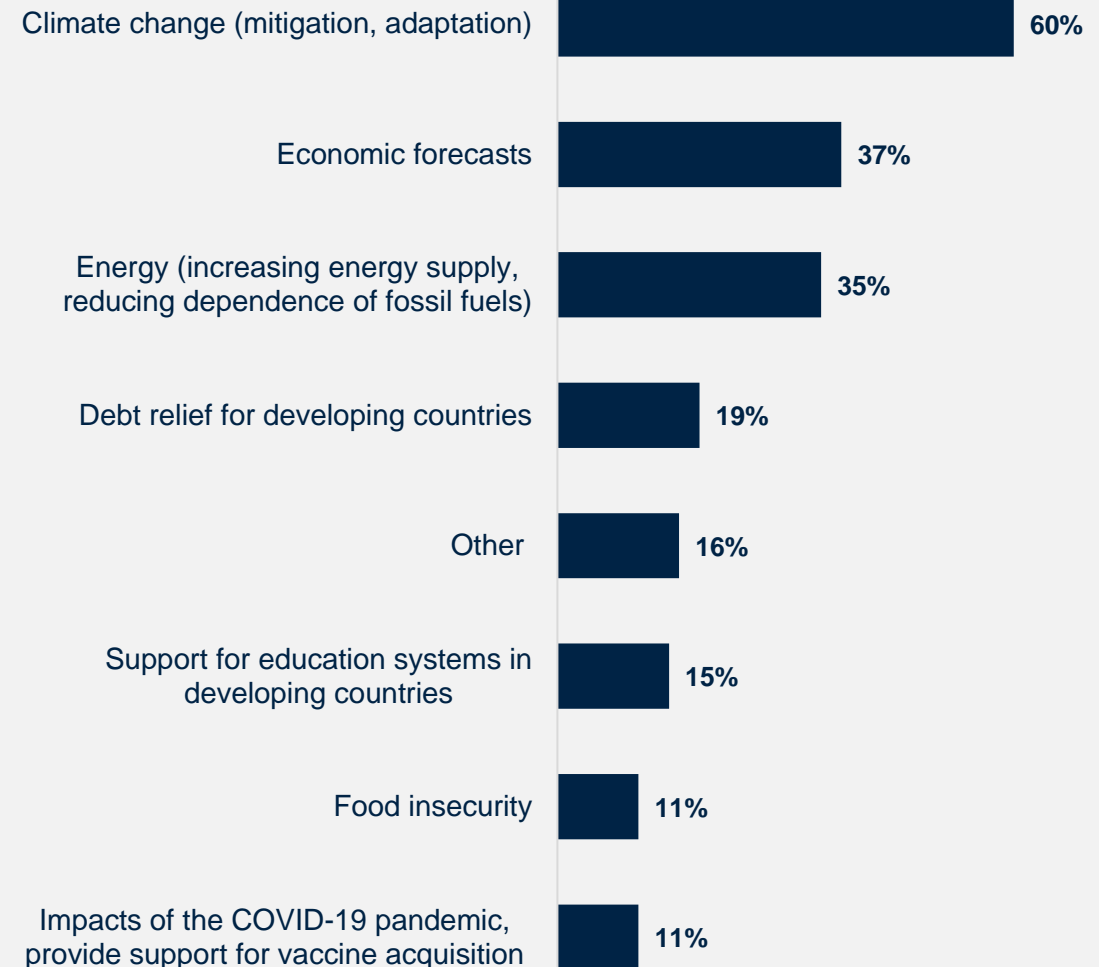


WBG Work on Climate Change, Economic Forecasts, and Energy were the Most Commonly Recalled Topics

Respondents most frequently recalled WBG's work or research on **climate change** and **energy**, as well as its **economic forecasts**.

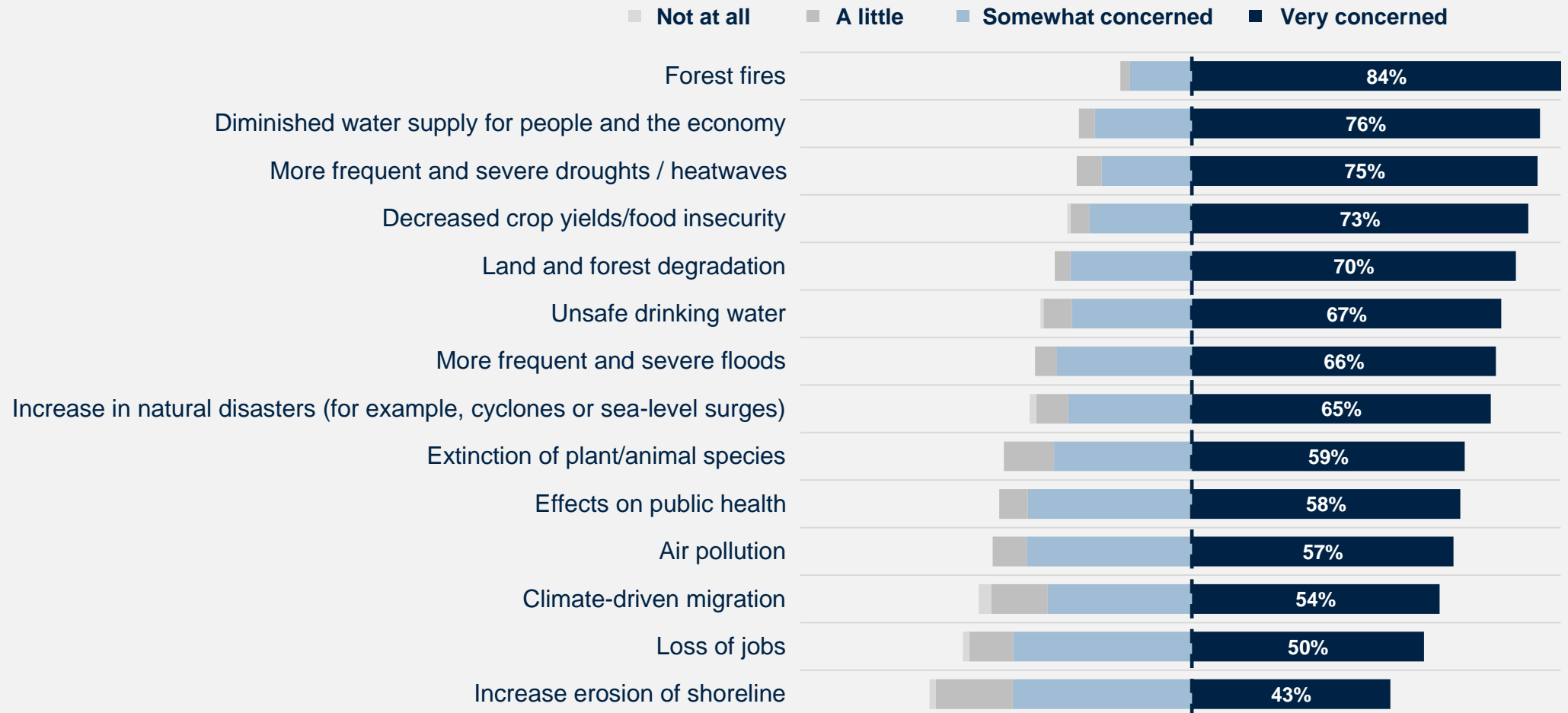
- Respondents who selected the "Other" option, consistently mentioned WBG's **relief and recovery** efforts in the aftermath of the earthquake in Türkiye.

World Bank Group work or research on...



Climate Change Communications Can be More Impactful When Related to Stakeholders' Top Concern: Forest Fires

A majority of respondents were very concerned about the **forest fires** when it comes to the potential impacts of climate change in Türkiye. **Diminished water supply** and more frequent and severe **droughts** were also of great concern to respondents. These key areas of concern should be taken into consideration to make communications about climate change more impactful.



Message Recall 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. The difference was significant for climate change-related work.

These respondents also reported significantly **higher levels of familiarity** (mean=8.6) compared to those who reported not hearing or seeing anything about the WBG (means=6.8).

In addition, respondents who recalled seeing or hearing something about the WBG gave significantly higher ratings for the WBG's **effectiveness** (mean=7.0), **relevance** (mean=7.2), **alignment** (mean=7.3), and **influence** (mean=6.5) compared to those who reported not hearing or seeing anything about the WBG recently (means=6.2, 6.3, 6.5, and 5.6, respectively).

These findings suggest that respondents who are more frequently exposed to information about the WBG, or who actively engage with WBG staff and knowledge work (read research papers, etc.) are also more likely to hold more positive views about the WBG's work.

The WBG helps countries boost climate resilience and mitigate the effects of climate challenge*



The WBG supports countries to ensure transition to more diversified and cleaner sources of energy



The WBG is working with governments, the private sector, and other partners to support critical facilities during the COVID-19 pandemic



The WBG is committed to comprehensive debt solutions that bring significant benefits to people in poor countries



The WBG provides support to improve access and quality of education in developing countries.



The WBG helps address the current food crisis and enables greater preparedness to future food security crises



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

■ Heard about the WBG in last 30 days

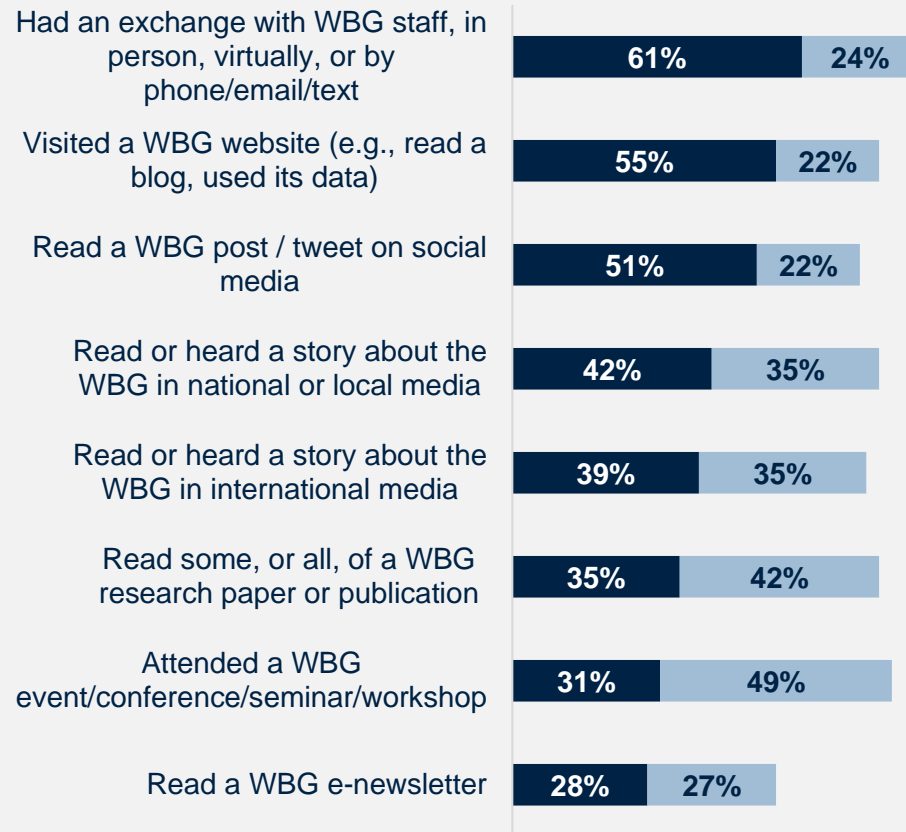
■ Did not hear about the WBG in last 30 days



More Frequent Engagement → More Message Recall

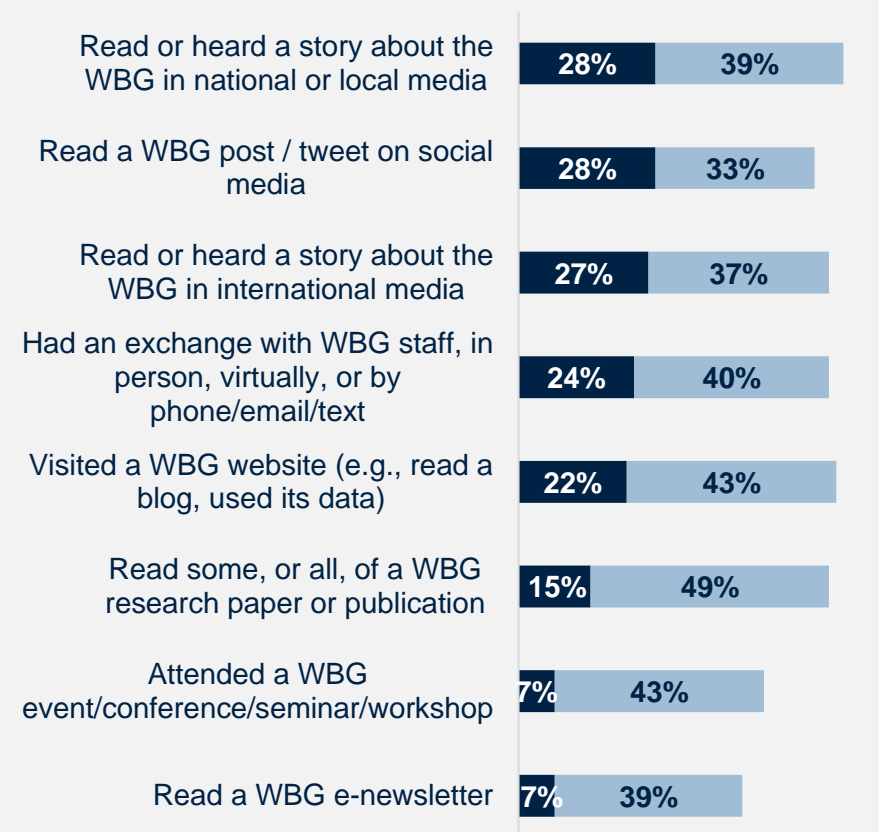
Respondents who recalled hearing something about the WBG in the last 30 days had significantly more frequent interactions with the institution **across all channels**.

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



■ Every few days/weeks ■ Every few months

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



■ Every few days/weeks ■ Every few months

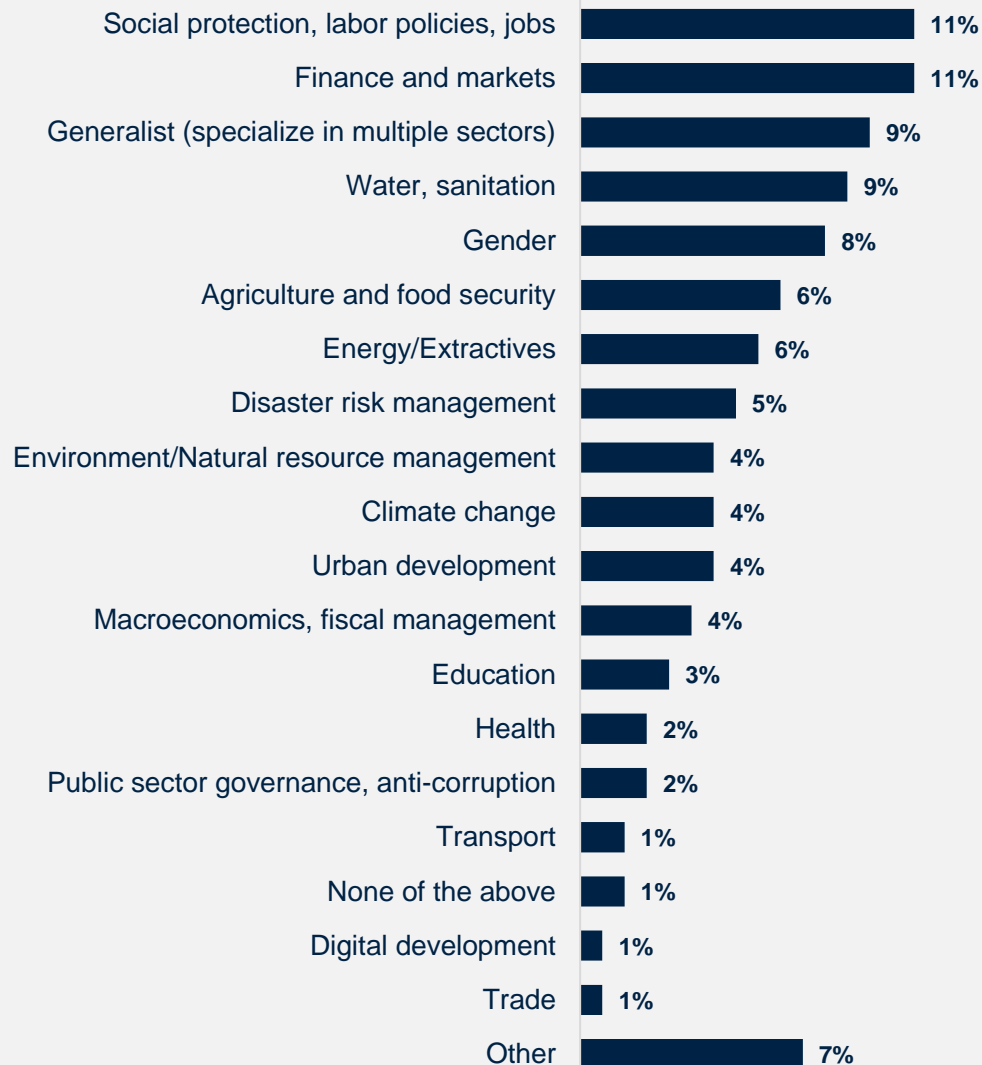


Demographics of the Sample and Detailed Methodology

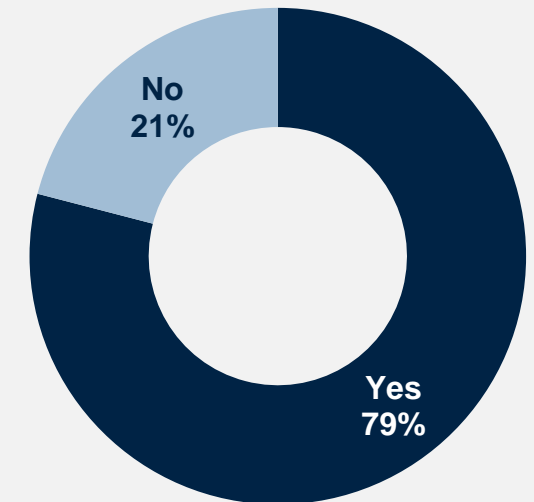


Demographics of the Sample

Which, if any, of the following is the primary specialization of your work? (N=139)

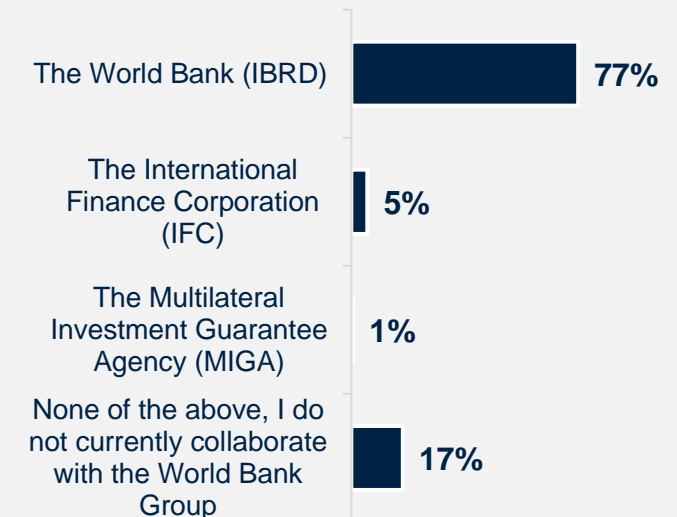


Currently, do you professionally collaborate/work with the WBG in Türkiye? (N=167)



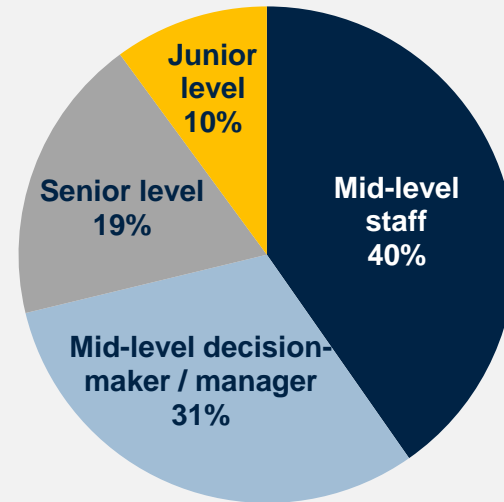
Respondents from government institutions and bilateral/multilateral agencies were significantly more likely to indicate that they collaborate with the WBG (48% and 55%, respectively) compared to respondents from other stakeholder groups.

Which of the following agencies of the WBG do you primarily collaborate/work with in Türkiye? (N=167)

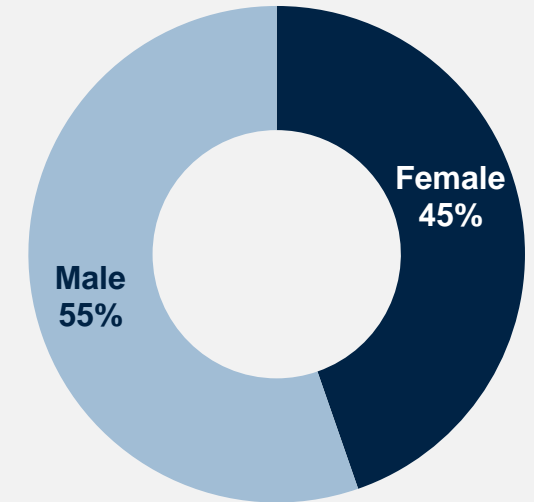


Demographics of the Sample

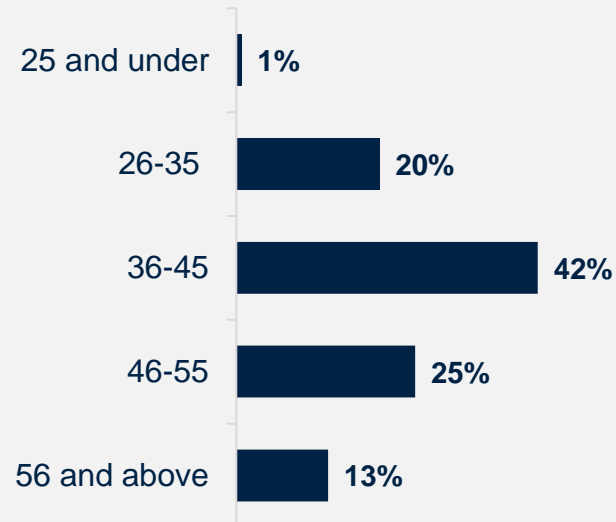
Within your organization, would you describe yourself as... ?
(N=139)



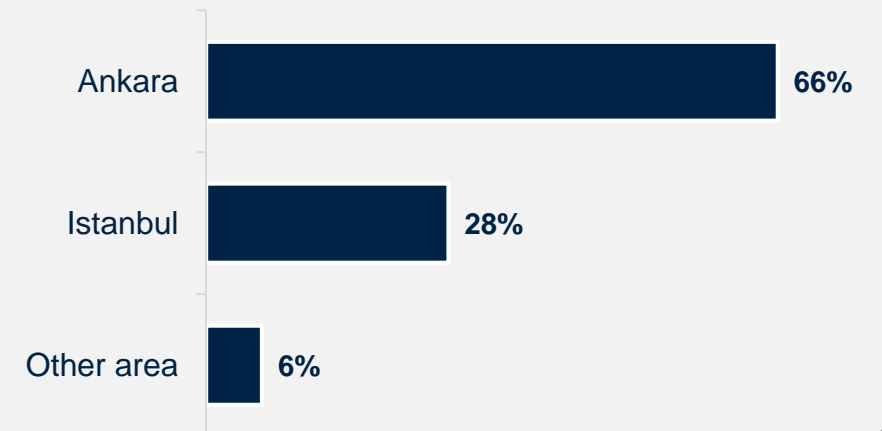
What's your gender?
(N=141)



What's your age?
(N=141)



Which best represents your geographic location?
(N=140)



Detailed Methodology

From **June 2023 to August 2023**, a total of 1,151 stakeholders in Türkiye were invited to provide their opinions on the WBG's work by participating in a Country Opinion Survey. 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, office of a parliamentarian, government institutions, local governments, bilateral/multilateral agencies, the private sector, civil society, academia, and the media.

Of these stakeholders, **167 participated in the survey (15% response rate)**. Respondents completed the questionnaires online.

The results of this year's survey were compared to the FY20 Survey with a response rate of 35% (N=289).

Comparing responses across Country Surveys reflects changes in attitudes over time, but also changes in respondent samples and the survey instrument itself. To reduce the influence of the latter factor, only those questions with similar response scales/options were analyzed. To address the differences in the sample composition, the data were weighted to reach comparable 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 "Türkiye 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	FY 2020 weighted	FY 2023 weighted
Government Institutions	42%	54%	50%	50%
Bilateral/Multilateral Agency	6%	35%	9%	11%
Private Sector	26%	17%	20%	20%
Civil Society	26%	5%	20%	20%
Total Number of Respondents	264	167		

Indicator Questions

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

A1_5. 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

A2. How effective has the World Bank Group been in achieving development results in Türkiye? 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 Türkiye? Scale: 1 Strongly disagree – 10 Strongly agree

A3. The World Bank Group currently plays a relevant role in development in Türkiye.

A4. The World Bank Group's work is aligned with what I consider the development priorities for Türkiye.

A5. The World Bank Group's work helps end extreme poverty in Türkiye.

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

A7. 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 Türkiye, in terms of each of the following?

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

C2. Responsiveness to needs

C3. Access to WBG staff and experts

C5. Flexibility when circumstances change

C6. Being a long-term partner

To what extent is the WBG an effective development partner in Türkiye, 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 national/federal government

C7_5. Collaboration with the private sector

C7_6. Collaboration with civil society

C7_7. Collaboration with other donor and development partners

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

C8_1. The WBG's financial instruments meet the needs of Türkiye (i.e., investment lending, Development Policy Loan, Trust Funds).

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 Türkiye.

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





CountryOpinionSurveys

Thank you

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

countrysurveys@worldbankgroup.org

