



CountryOpinionSurveys

FY 2024 The Kingdom of Saudi Arabia Country Opinion Survey Report

Acknowledgements

The Kingdom of Saudi Arabia (Saudi Arabia) 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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Contents

Objectives

Methodology Overview

Overall Attitudes Toward the World Bank Group

World Bank Group's Support for Development Areas

World Bank Group's Engagement on the Ground in Saudi Arabia

World Bank Group's Knowledge Work

The Future Role of the World Bank Group in Saudi Arabia

Communication and Outreach

Sample Demographics and Detailed Methodology



Objectives

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

- 1. Overall Attitudes Toward the WBG:** How familiar are stakeholders with the WBG? What are the key stakeholders' opinions of the WBG regarding its effectiveness, relevance, alignment with Saudi Arabia's development priorities, and other key indicators?
- 2. Development Priorities:** What areas of development are perceived to be the most important? How effective is the WBG perceived to be in these areas?
- 3. Engagement on the Ground:** How is the WBG perceived as a development partner in Saudi Arabia?
- 4. WBG Knowledge Work:** What do key stakeholders value the most regarding the WBG's work in Saudi Arabia? What opinion do key stakeholders have of WBG knowledge products? What are stakeholders' suggestions for improving WBG's effectiveness?
- 5. Communication and Outreach:** What are the preferred communication channels? What key topics do stakeholders recall when the WBG communicates?



Methodology Overview

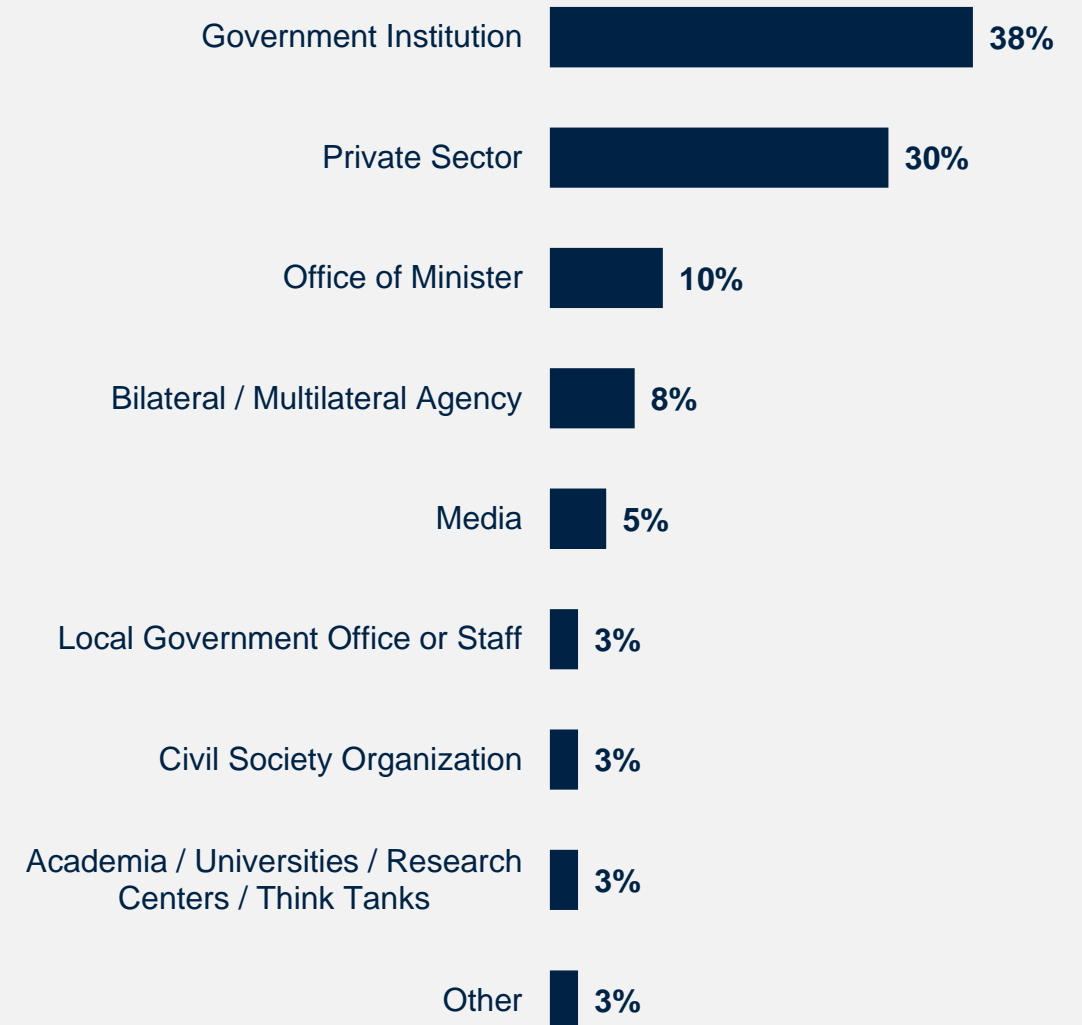
■ Fielded June – September 2024

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

■ 40 participants (21% response rate)

- 33% currently collaborate 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=40)

Overall Attitudes toward the World Bank Group

“The World Bank Group must have effective cooperation and needs to have a clear presence in the corporate, government, private sector and civil society sectors to show the culture. The World Bank Group needs to advertise because we only hear about it in the news. If they do free educational courses, even online, communicate with ministries such as the Ministry of Foreign Affairs. The World Bank has never done something like the United Nations that allows employees to participate with them for a certain period. They can draw employees to work with them and thus transfer expertise to their field of work.”

(Government Institution Respondent)



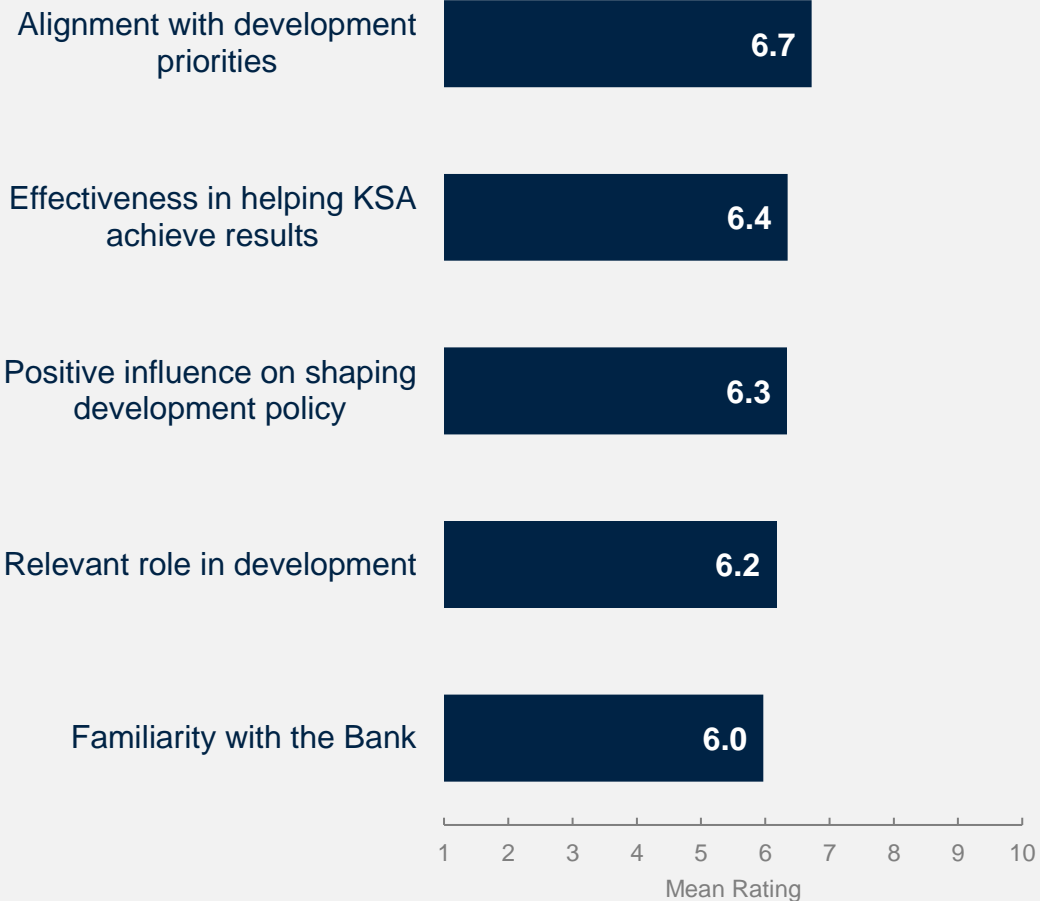
WORLD BANK GROUP



In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Saudi Arabia? (N=24)

Key Performance Indicators

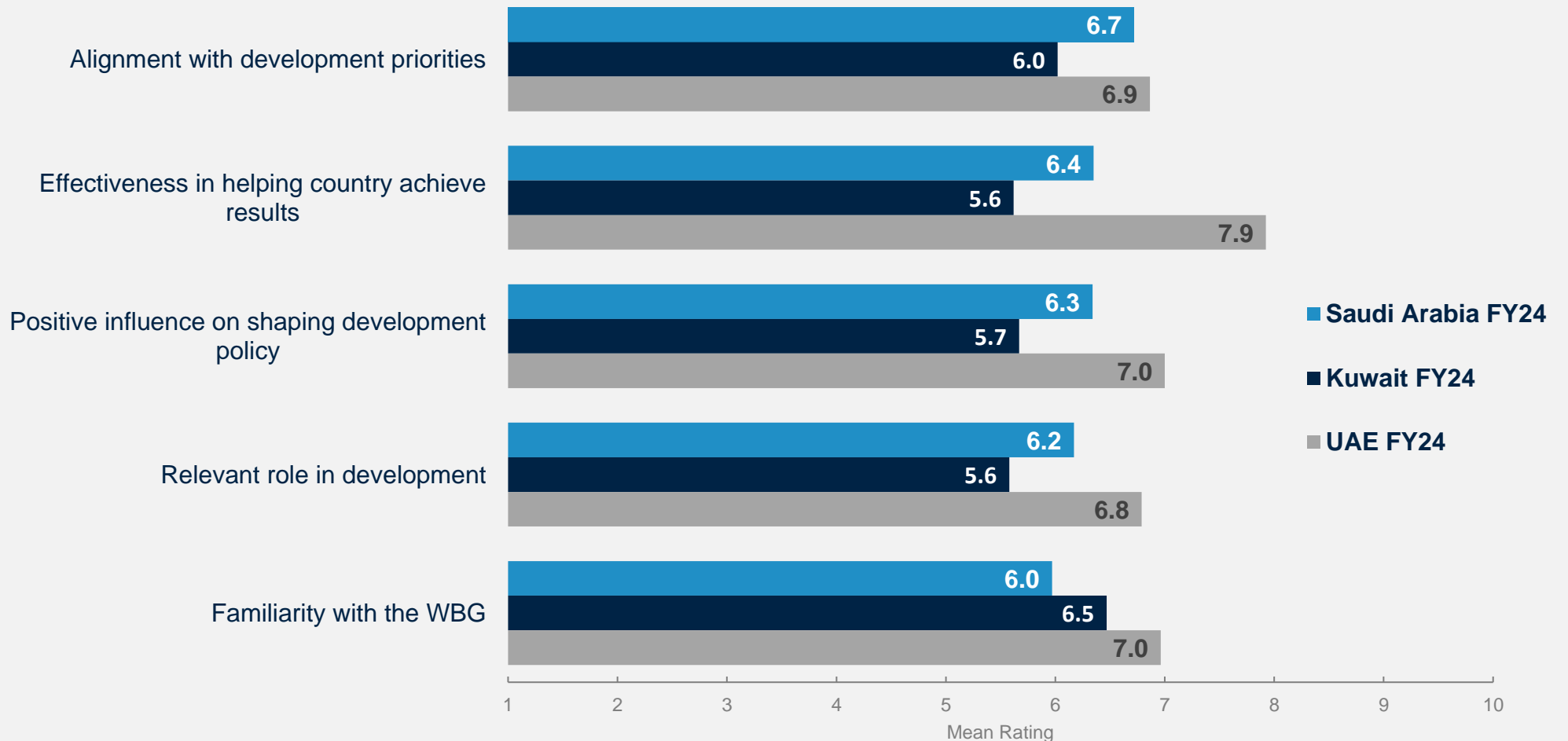
Respondents gave the highest ratings for the WBG’s **alignment** with Saudi Arabia’s development priorities. They also gave rather positive ratings for the WBG’s **effectiveness** in helping Saudi Arabia achieve development results, having a **positive influence** on shaping development policy, and the WBG’s **relevance** regarding the country’s development. **Familiarity** with the WBG received the lowest rating among respondents.



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

The WBG's Key Performance Indicators in Saudi Arabia Compared to Other Countries in the Region Surveyed in FY24

Ratings among Saudi Arabian respondents tended to be lower than those among UAE respondents but more positive than those of Kuwaiti respondents. Of note, of all three countries, Saudi Arabian respondents reported the lowest levels of **familiarity** with the WBG.



World Bank Group's Support for Development Areas

“Contributing to market stability and increasing benefits for investors, in addition to providing the needs of the local market and contributing to the vision's projects and initiatives.”

(Government Institution Respondent)



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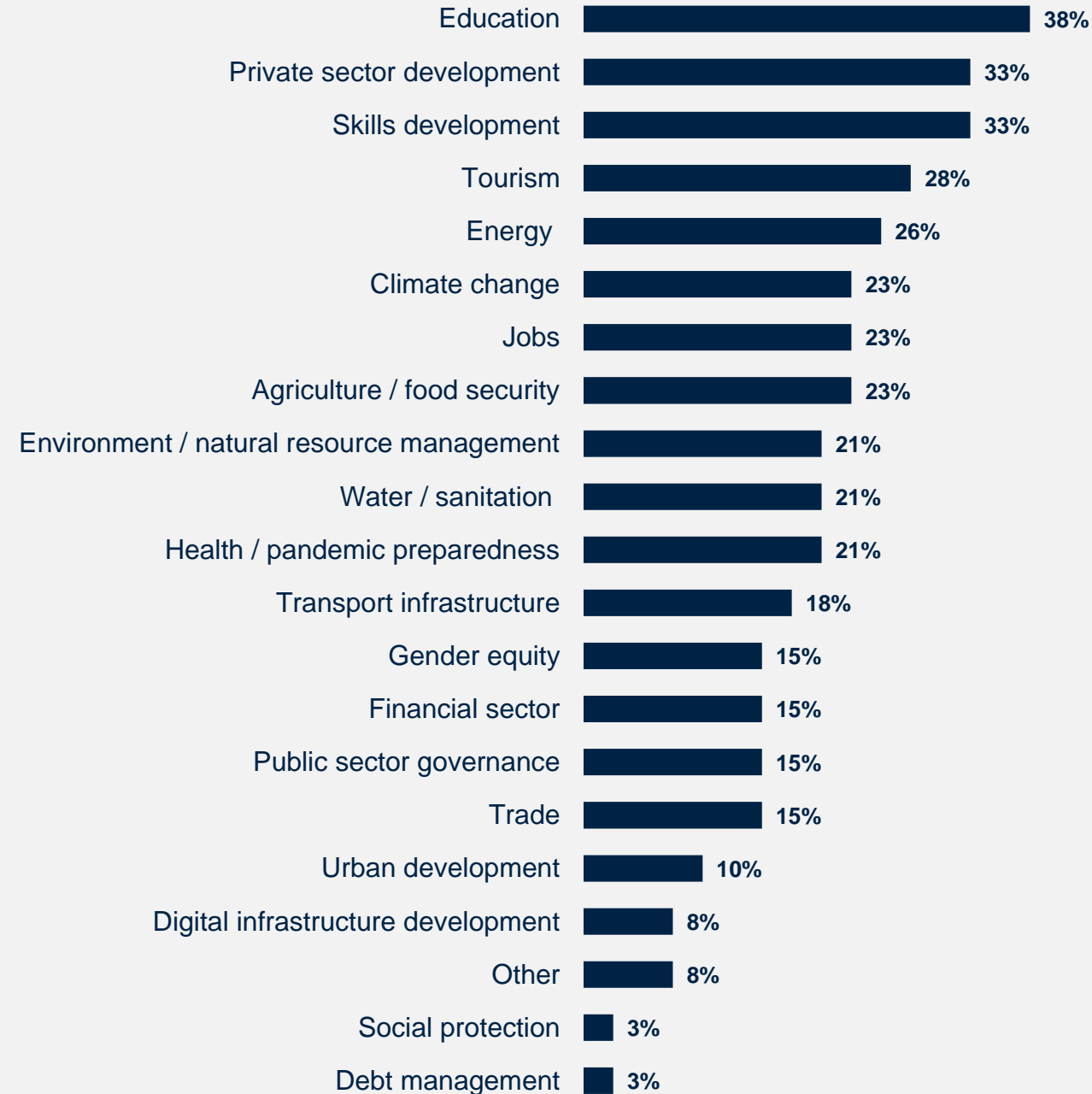


In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Saudi Arabia? (N=24)

Development Areas for the WBG to Prioritize

Approximately 4 in 10 respondents identified **education** as the top area where stakeholders would like the WBG to focus its resources in Saudi Arabia.

Respondents also considered **private sector development** and **skills development**, followed by **tourism** and **energy**, key areas the WBG should prioritize.



World Bank Group's Engagement on the Ground in Saudi Arabia

“Effective partnership with the public and private sectors towards achieving the goals of the Kingdom of Saudi Arabia’s Vision 2030.” (Bilateral / Multilateral Agency Respondent)



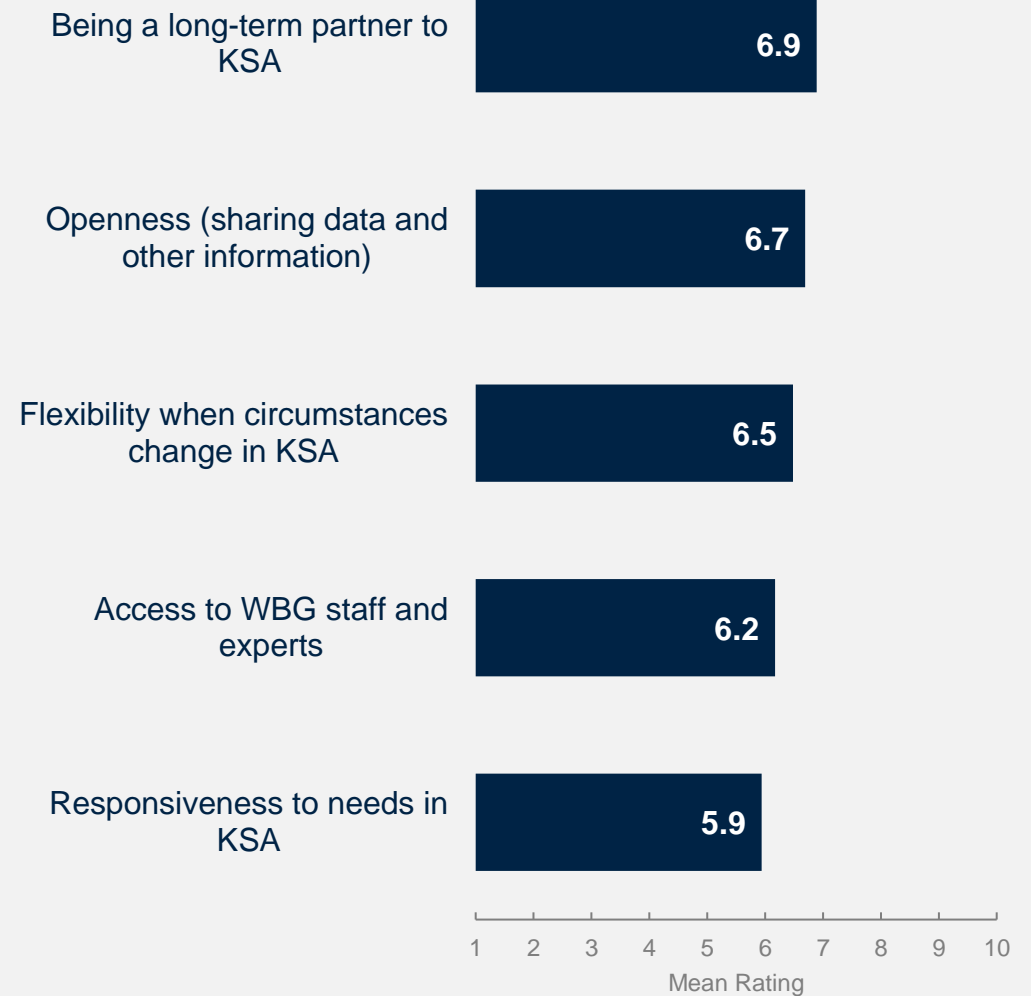
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In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Saudi Arabia? (N=24)

The WBG is Seen as a Long-Term Partner to Saudi Arabia, that is Open and Flexible

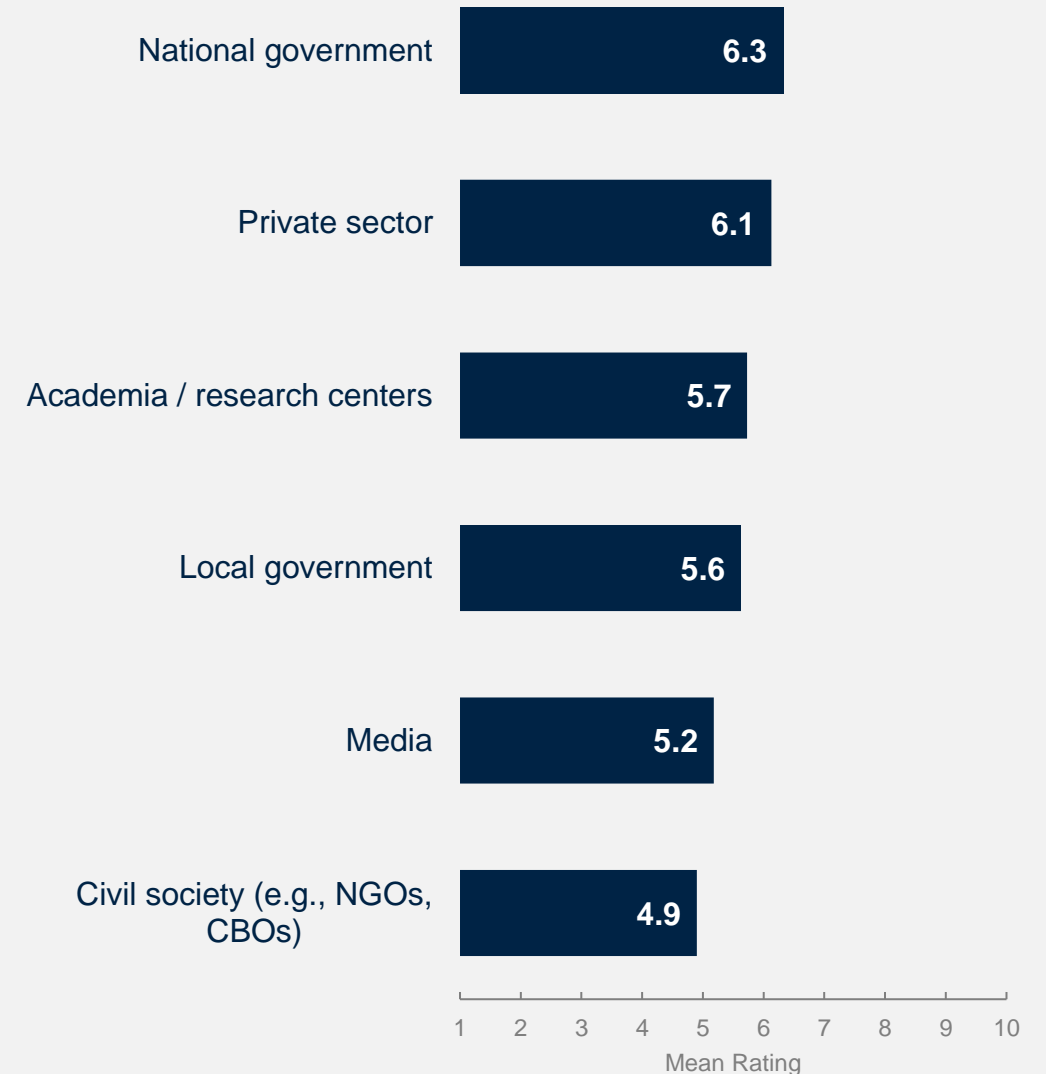
Respondents gave the highest ratings for the WBG being a **long-term partner** to Saudi Arabia, followed by its **openness** and **flexibility**. However, respondents gave the lowest ratings for the WBG's **accessibility** and **responsiveness**.



The WBG is Seen as Most Effectively Collaborating with the National Government

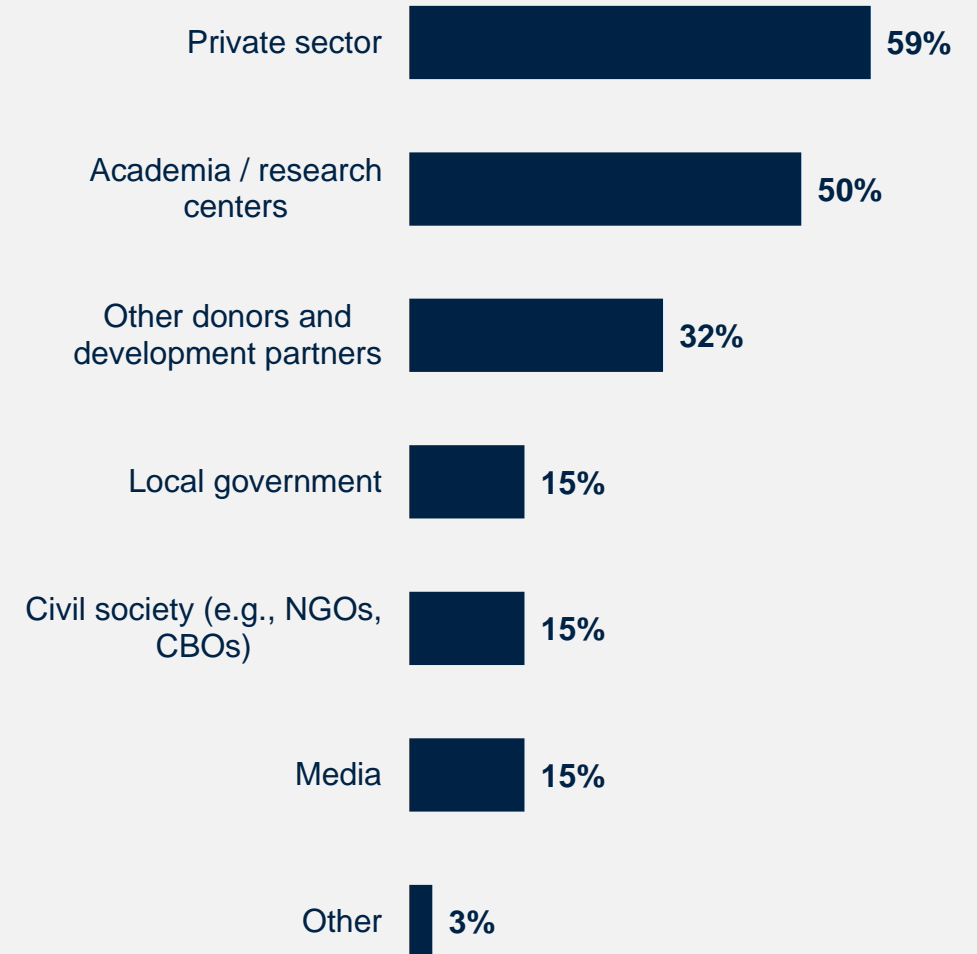
Respondents perceived the WBG as most effectively collaborating with the **national government**, followed by the **private sector**.

The effectiveness of the WBG's collaboration with **civil society** and **media** received the lowest ratings.



Stakeholders Want the WBG to Collaborate More with the Private Sector and Academia

A majority of respondents indicated that the WBG should collaborate more with the **private sector** and **academia**, in addition to its partnership with the national government in Saudi Arabia. Respondents also welcomed more WBG collaboration with **other donors and development partners**.



World Bank Group's Knowledge Work

“Active participation in development and growth projects and research advisory services.”
(Media Respondent)



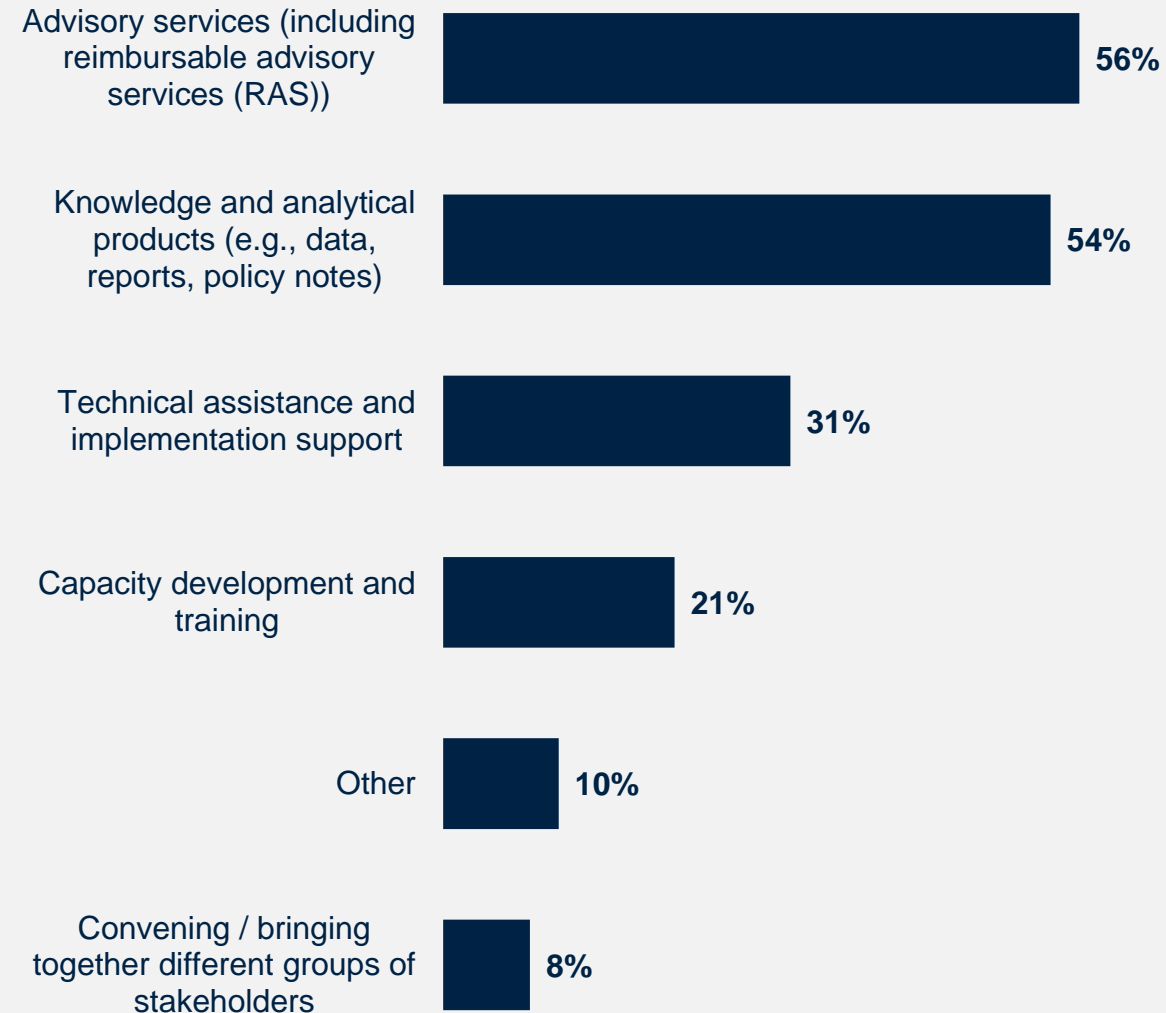
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In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Saudi Arabia? (N=24)

Advisory Services and Knowledge Products were Considered the WBG's Greatest Values to Saudi Arabia

The majority of respondents indicated that they most valued the WBG's **advisory services** and its **knowledge and analytical products**. The WBG's **technical assistance and implementation support**, and **capacity development and training** were also considered highly valuable.

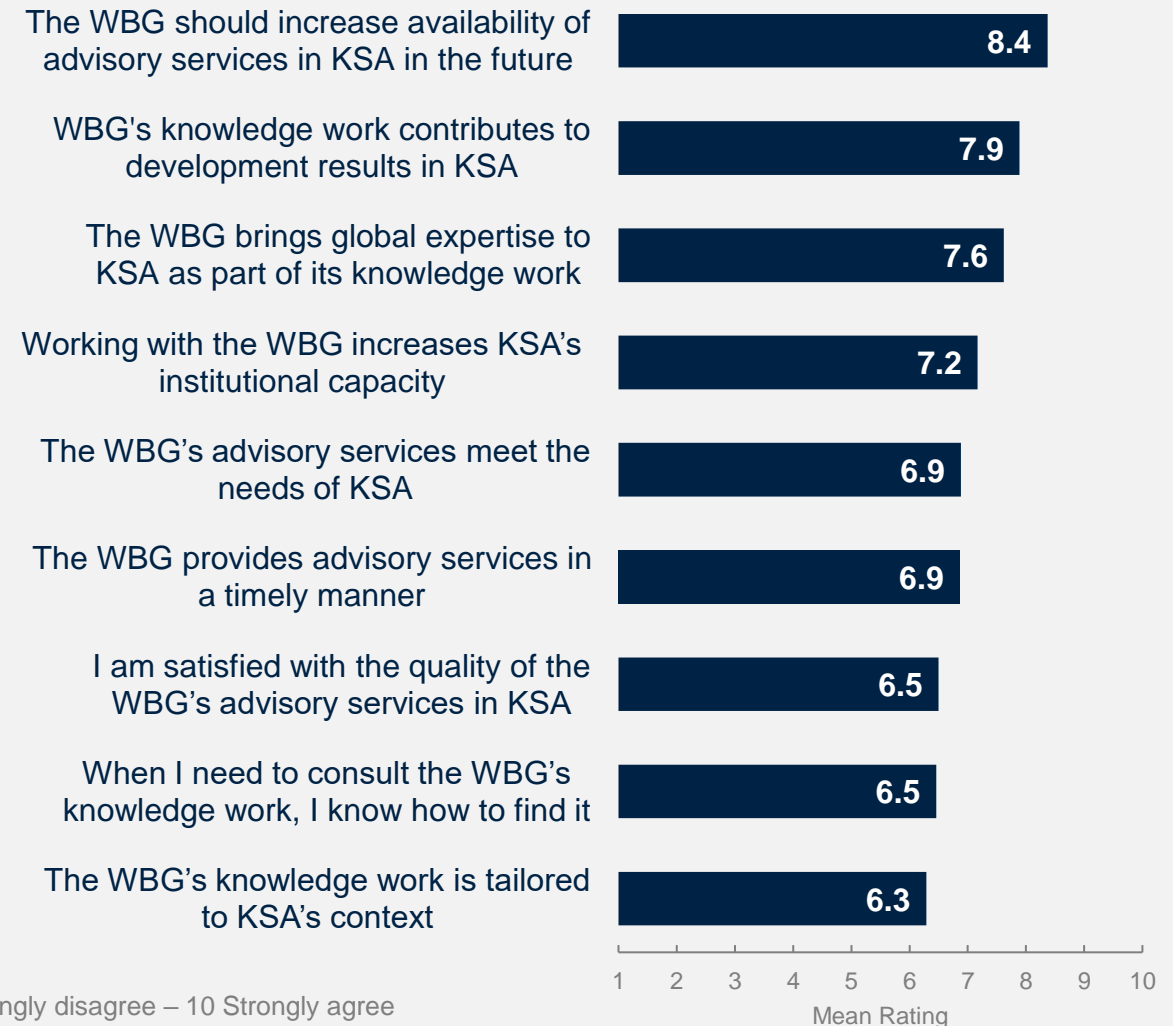


36% of Respondents Used WBG's Knowledge Work; Stakeholders Reported Positive Views on WBG's Knowledge Work

Although just over a third of respondents indicated that they had used the WBG's knowledge work in the past, nearly all respondents agreed that the WBG should **increase its availability of advisory services** in Saudi Arabia in the future. They also agreed that the WBG's knowledge work **contributes to development results** and **brings global expertise** to Saudi Arabia.

Respondents had lower levels of agreement that they were **satisfied with the quality** of the WBG's advisory services and that they **know how to find** the WBG's knowledge work when they need it.

The WBG's **knowledge work being tailored to Saudi Arabia's context** received the lowest ratings. In their qualitative comments also address that WBG should enhance knowledge work by aligning its research and recommendations with country's socio-economic context.



To what extent do you agree with the following statements? Scale: 1 Strongly disagree – 10 Strongly agree
 How significant a contribution do you believe the WBG's knowledge work makes to development results in Saudi Arabia? Scale: 1 Not significant at all – 10 Very significant
 Have you ever used the WBG's knowledge work, including participating in workshops or training programs?
 (Percentage of Respondents, N=33)

The Future Role of the World Bank Group in Saudi Arabia

“Transferring services that can be provided by the private sector from the state to the private sector by choosing a framework that suits the circumstances and data in the Kingdom, which differ from more advanced countries and also differ from less developed countries. ... Involving local experts and consultants to provide accurate information and appropriate expectations for solutions and challenges.”

(Government Institution Respondent)



WORLD BANK GROUP



In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Saudi Arabia? (N=24)

How Can the WBG Increase Its Effectiveness in Saudi Arabia?

Open-Ended Responses

When asked the most important thing the WBG could do to improve its effectiveness in Saudi Arabia, respondents discussed a number of areas:

Focus Areas: Respondents discussed the need to focus on key development areas and align the WBG's support with Saudi Arabia's priorities, such as strengthening private sector development and increasing opportunities via rural development, education, and training.

Knowledge: Respondents expressed the need for more tailored knowledge work adapted to Saudi Arabia's context. Increased collaboration with local experts could help to ensure relevance and accuracy in advisory services, capacity building, and empirical research.

Engagement: Respondents felt the WBG should be more open and transparent. In particular, they wanted the WBG to increase its engagement with the private sector, civil society, and local stakeholders.

Communication: Respondents suggested the WBG expand its outreach to foster more of a local presence and increase awareness of its work and partnering opportunities in the country.



In your opinion, what is the most important thing the World Bank Group could do to increase its effectiveness in Saudi Arabia? (N=24)

Communication and Outreach

“Disseminating and raising awareness of the Bank’s services, whether in general or by directing them directly to the relevant parties.” (Government Institution Respondent)



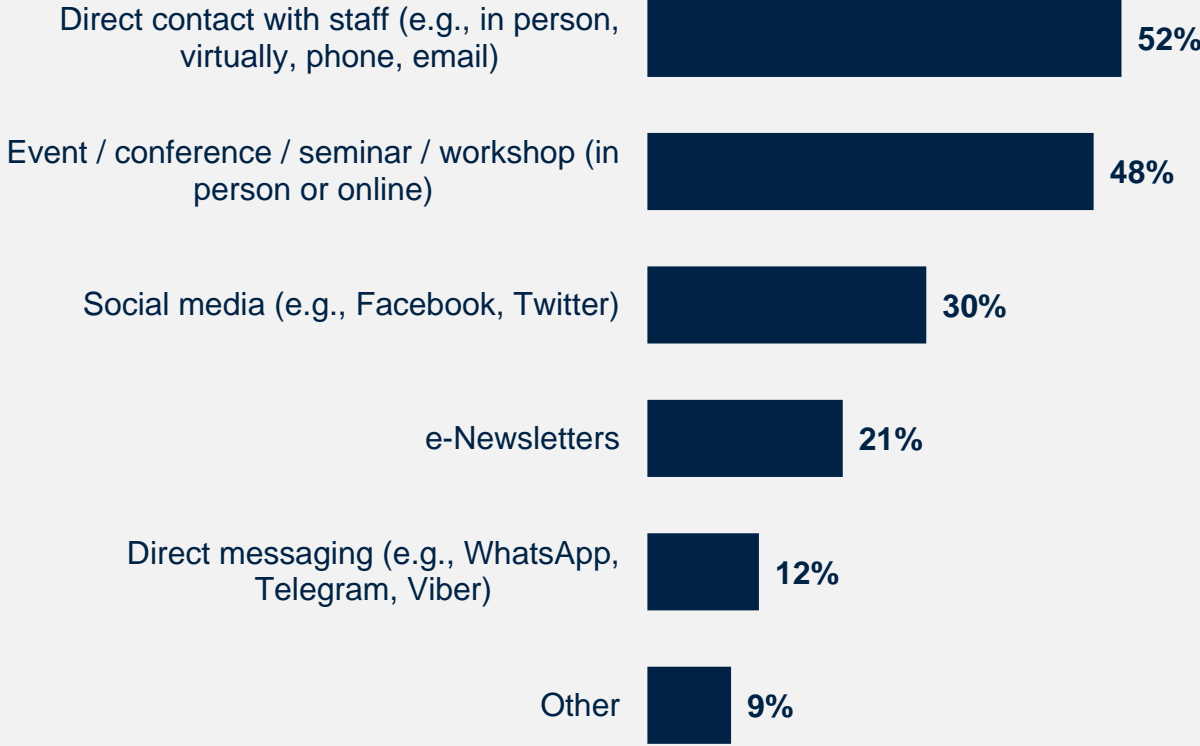
WORLD BANK GROUP



In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Saudi Arabia? (N=24)

Direct Contact and WBG Events were the Most Preferred Channels for Receiving WBG Communications

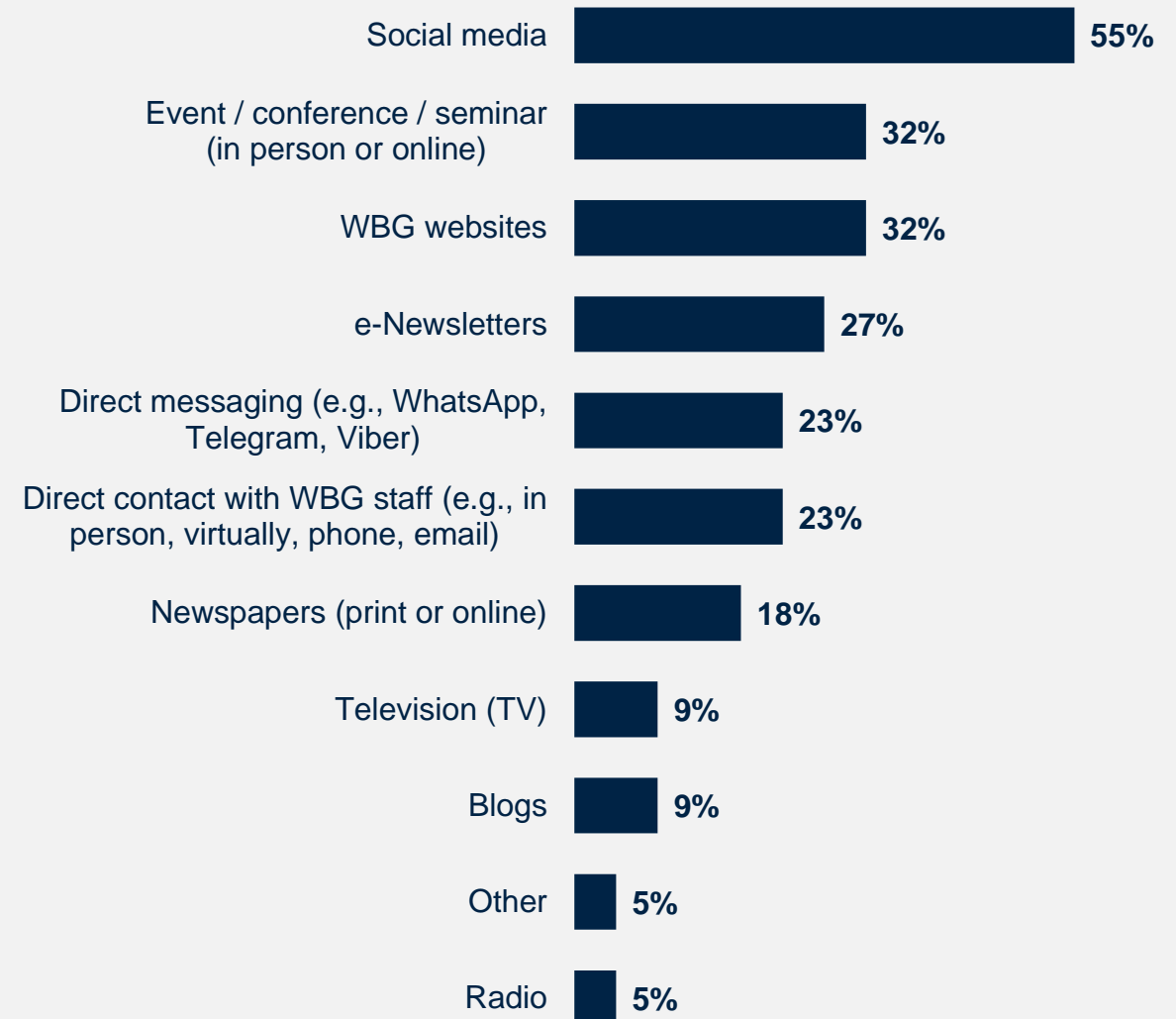
More than half of respondents preferred receiving the Bank's communications through **direct contact with staff** and nearly half preferred WBG **events/conferences/seminars/workshops** (in person or online). Fewer respondents preferred social media or e-Newsletters.



Nearly 7 in 10 Respondents Recalled Seeing or Hearing about the WBG Recently, Most Often on Social Media

67% of respondents recalled seeing or hearing something about the WBG recently.

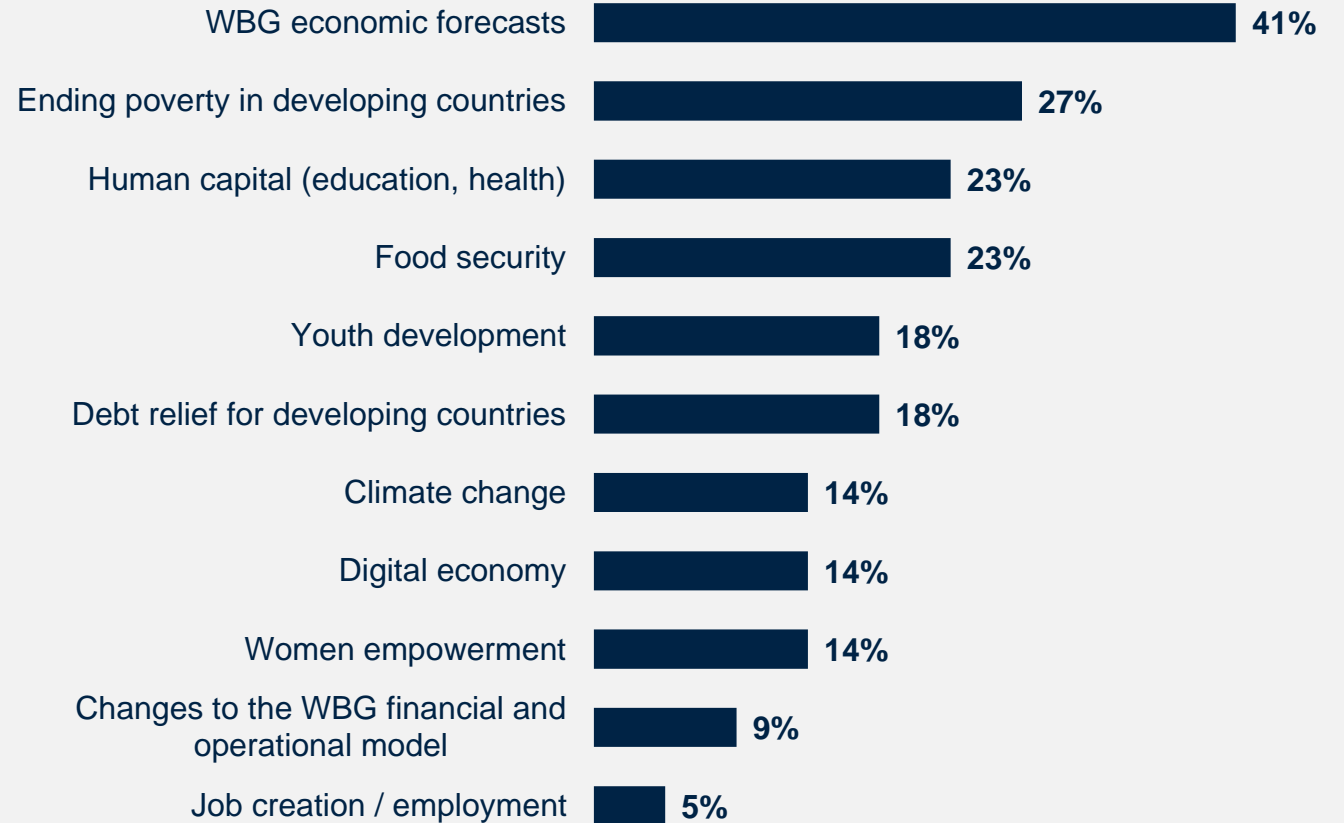
Respondents most often reported seeing that information through **social media**, followed by WBG **events/conferences/seminars, websites, and e-Newsletters**.



The WBG's Economic Forecasts were the Most Frequently Recalled Topic

Respondents most frequently recalled the WBG's **economic forecasts**, followed by its work or research on **ending poverty in developing countries, human capital, and food security**.

WBG's work or research on...

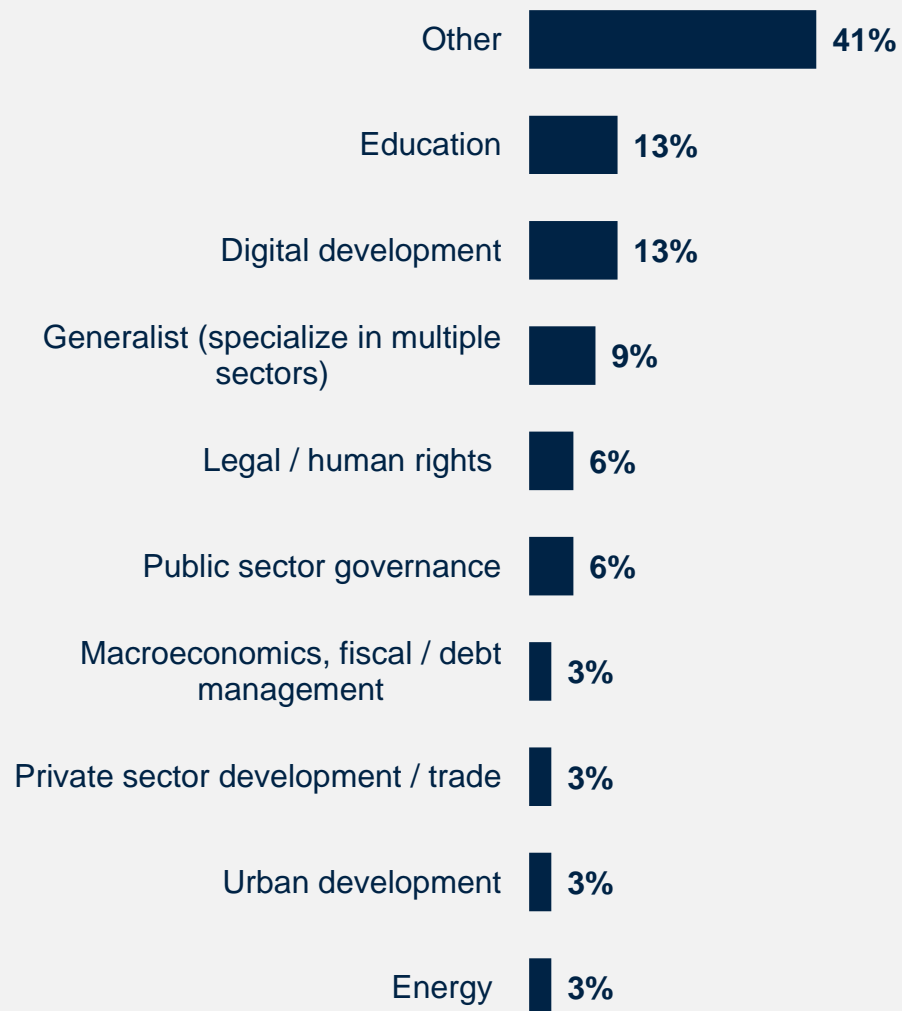


Sample Demographics and Detailed Methodology

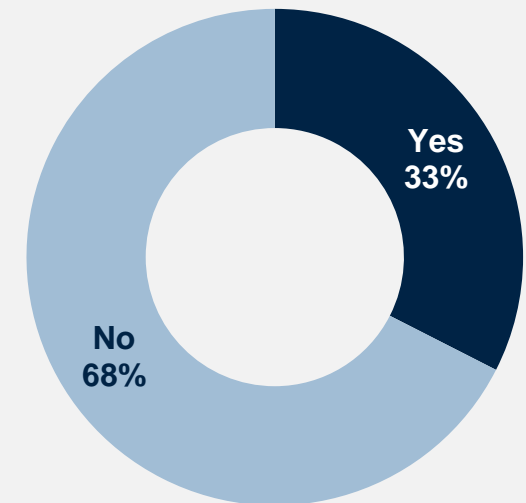


Sample Demographics

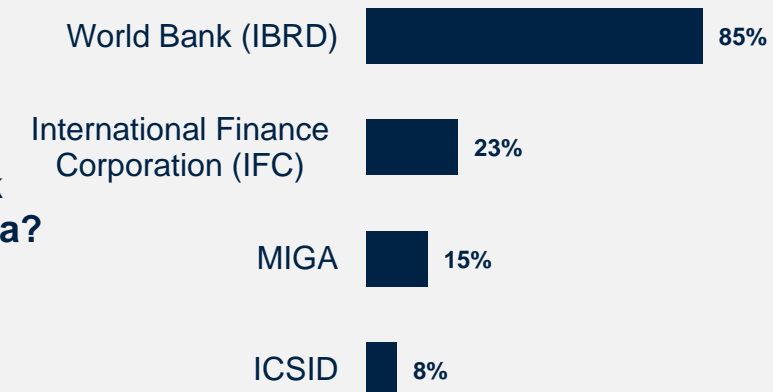
What is the primary specialization of your work? (N=32)



Do you collaborate/work with the World Bank Group (WBG) in Saudi Arabia? (N=40)

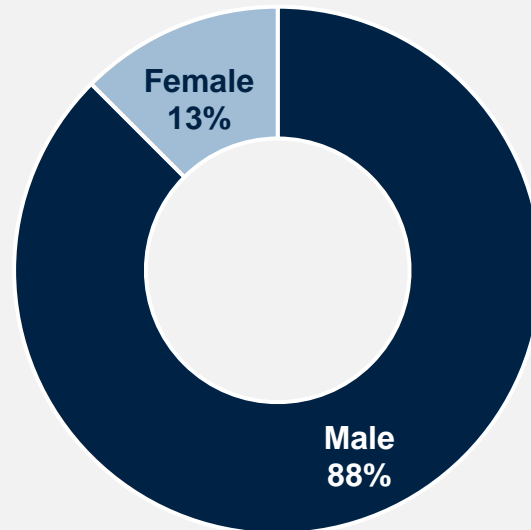


Which of the following WBG agencies do you collaborate/work with in Saudi Arabia? (N=13)

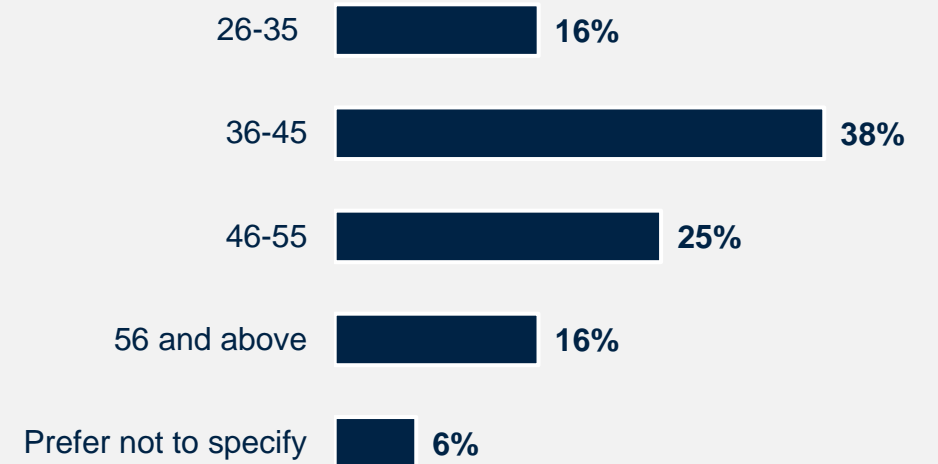


Sample Demographics (continued)

What is your gender?
(N=32)



What's your age?
(N=32)



Detailed Methodology

From **June 2024 to September 2024**, a total of 188 stakeholders in Saudi Arabia were invited to provide their opinions on the WBG’s work by participating in a Country Opinion Survey (COS). A list of potential participants was compiled by the WBG country team and the field agency. Participants were drawn from the Office of Minister, government institutions, local governments, bilateral and multilateral agencies, the private sector, civil society, academia, and the media.

Of these stakeholders, **40 participated in the survey (21% response rate)**. Respondents completed the questionnaire online.

Breakdowns for individual questions can be found in the “Saudi Arabia COS FY24 Appendices with data breakdowns.xlsx” file published in the WBG Microdata Library, along with the survey microdata and this report.

Percentage of Respondents	FY 2024
Government Principals: Office of Minister	10%
Government Institutions: Employee of a Ministry / Ministerial Department / Project Implementation Unit / Independent Government Institution / State-Owned Enterprise	38%
Local Government	3%
Bilateral/Multilateral Agency: Embassy, Development Organization, Development Bank, UN Agency	8%
Civil Society Organization: Local and regional NGOs, Community-Based Organization, Private Foundation, Professional/Trade Association, Faith-Based Group, Youth Group	3%
Private Sector: Private Company, Financial Sector Organization, Private Bank	30%
Academia / Universities / Research Centers / Think Tanks	3%
Media	5%
Other	3%
Total Number of Respondents	40



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



CountryOpinionSurveys

Thank you

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

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