



CountryOpinionSurveys

FY 2025 China

Country Opinion Survey Report

Acknowledgements

The China 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, Sofya Gubaydullina, and Qi Xue oversaw the design, reporting, and analysis of the survey results. Irina Popova and Noreen Wambui provided data support.

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Contents

Objectives

Methodology Overview

Executive Summary

Overall Views of the World Bank Group (WBG)

The WBG's Work on Development Priorities

The WBG's Instruments

The WBG's Operational Effectiveness, Engagement, and Collaboration

Communication and Outreach

Sample Demographics and Detailed Methodology



Objectives

This survey was designed to assist the World Bank Group (WBG) in gaining a better understanding of how stakeholders in China perceive the WBG. The survey explored the following questions:

- 1. Overall Views of the WBG:** How familiar are stakeholders with the WBG? How much do they trust the WBG? What opinions do stakeholders have of the WBG regarding its effectiveness and relevance to development in China? Are these perceptions improving or declining? Do stakeholders feel that the WBG has changed for the better or the worse in the last two years?
- 2. The WBG's Work on Development Priorities:** What areas of development are perceived to be the most important? Has the WBG been helpful in helping to achieve the goals of its projects in these areas? How did these projects impact the people of China, and how could the WBG have been more helpful?
- 3. WBG Instruments:** What do key stakeholders value the most regarding the WBG's work in China? What opinion do key stakeholders have of WBG's financial instruments and knowledge products? How are stakeholders using WBG knowledge work, and has it influenced government policy in China?
- 4. The WBG's Operational Effectiveness, Engagement, and Collaboration:** How is the WBG perceived as a development partner in China? How do respondents perceive its operational effectiveness? Are opinions improving or declining? How effective has the WBG been in facilitating the Government's engagement with civil society?
- 5. Communications:** What are the preferred communication channels, and do they differ between stakeholder groups? Do stakeholders recall any WBG messaging? What key topics do stakeholders recall? What information do stakeholders want from the WBG?



Methodology Overview

Fielded in November 2024 – May 2025

- 408 potential participants were asked to complete the survey
- Respondents completed the questionnaire online
- List of names provided by the WBG country team and supplemented by the fielding consultant
- Data collection conducted by an independent fielding consultant

163 participants (40% response rate)

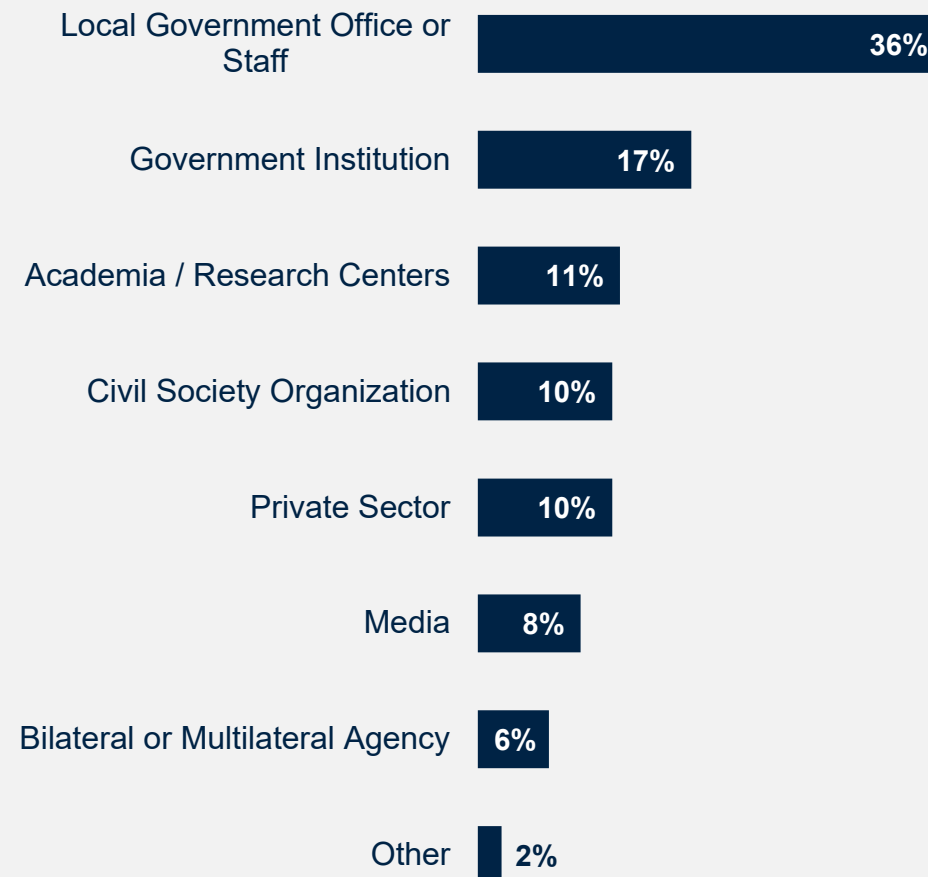
- 38% from Beijing
- 73% have collaborated with the WBG within the past 3 years

Compared to the FY22 Country Survey Results

- 389 participants (60% response rate)
- 32% from Beijing
- 77% collaborated with the WBG

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

Stakeholders in FY25 COS Sample



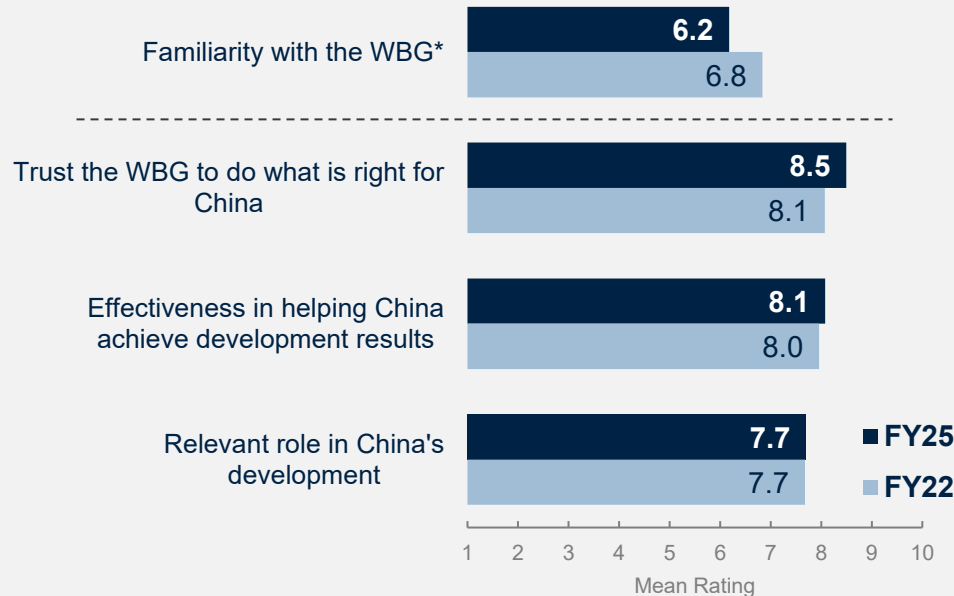
What is your primary professional affiliation? (Select only 1 response)
(Percentage of Respondents, N=163)

Executive Summary

1. Overall Views of the WBG:

Although stakeholders in FY25 reported **lower levels of familiarity** with the WBG than in the FY22 Country Survey, their levels of trust in the Bank have stayed comparatively strong, ranking just below that of government institutions. Perceptions of the WBG's **relevance** to the country's priorities and **effectiveness** in helping China achieve development results have remained positive, with the Bank receiving higher ratings for these indicators than the UN and IMF.

Compared to other East Asia and Pacific countries and IBRD countries surveyed in FY24, respondents in China viewed the WBG as more effective, and they expressed higher levels of trust in the institution.

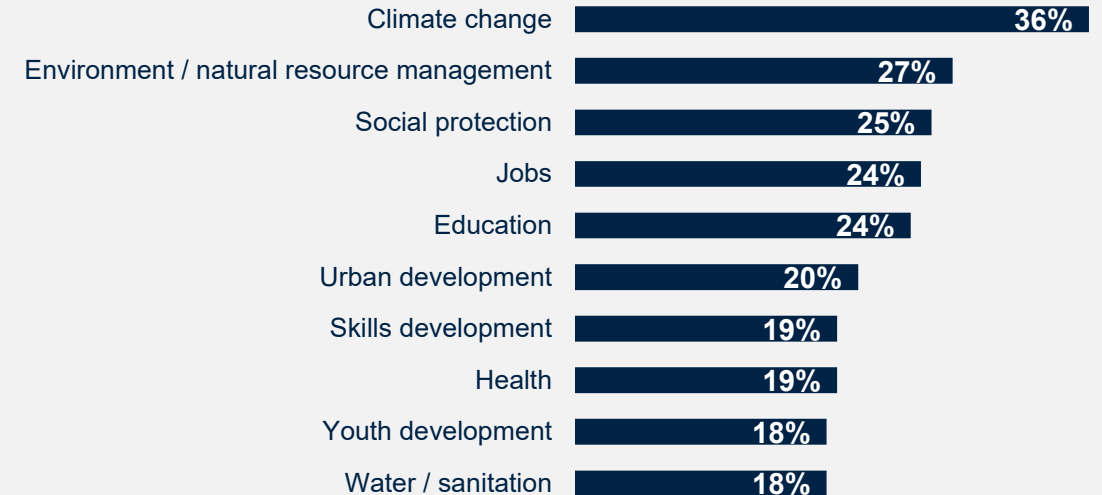


2. The WBG's Work on Development Priorities:

Climate change, environment/natural resource management, social protection, jobs, and education were indicated as the top priorities for the WBG's support in FY25. Respondents considered climate change a significantly greater priority in FY25, with the share selecting it rising from 24% to 36% — a 50% increase since FY22.

When asked how helpful the WBG was in achieving project goals, 96% said the Bank was helpful, with 74% of respondents rating it as very helpful.

In their qualitative comments regarding how to make the WBG more effective in China, respondents emphasized the importance of advancing education and youth development, particularly in underdeveloped regions. They also advocated for increased investment in climate change adaptation and water security and identified the digital transformation of agriculture as essential.



Executive Summary (continued)

Additionally, respondents highlighted the need to strengthen social security systems, employment, and human capital through integrated social protection programs and capacity building.

3. WBG's Operational Effectiveness:

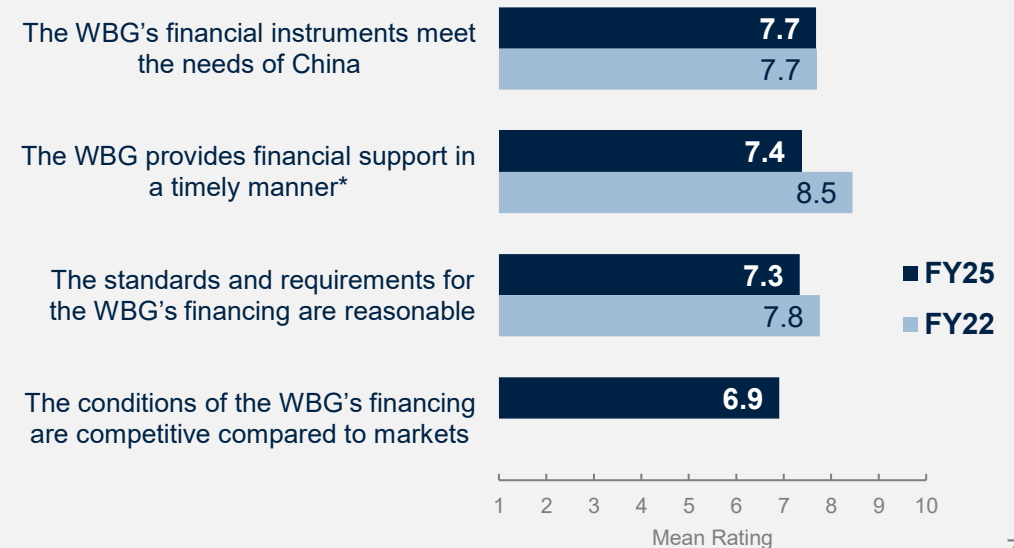
Over the past two years, WBG clients and partners identified the most significant reform-related improvements in the **technical quality** of WBG-supported projects and the **speed** of project approvals, with both areas receiving positive ratings from over 70% of respondents. Additionally, 65% noted that the WBG had become significantly or somewhat better at partnering with others to increase development finance, while 61% saw progress in how the WBG collaborates across its institutions. Although perceptions of the ease of working with the WBG were more moderate, they remained positive overall, with 58% of clients reporting improvements.

In written comments, respondents highlighted the importance of the WBG aligning its work more closely with China's specific development context, emphasizing that global solutions should be adapted rather than applied uniformly. Stakeholders also called for more thoughtful project design and planning, advocating for a balanced portfolio in terms of quantity, quality, and strategic relevance. Concerns were raised about bureaucratic delays, with respondents urging the WBG to enhance efficiency through faster project approvals and more agile responsiveness to client needs. Additionally, the WBG was encouraged to foster innovative and replicable solutions by co-developing projects with Chinese counterparts within established national frameworks.

4. WBG Instruments:

Stakeholders considered the WBG's **advisory services** to be its greatest value to China. They had the highest levels of agreement that the WBG's **financial instruments meet China's needs** and that the WBG provides financial support in a timely manner (mean=7.4, still positive, but declined significantly since FY22).

When asked about their use of the WBG's knowledge work, **respondents most often reported using the WBG's research and analytical reports** (53%), and only 14% of respondents said that they had not used the WBG's knowledge work. Moreover, 69% of respondents said that **WBG policy advice had influenced government policy** in China, including the development of new environmental regulations, advancements in energy and energy storage, and progress in private sector development, among others.

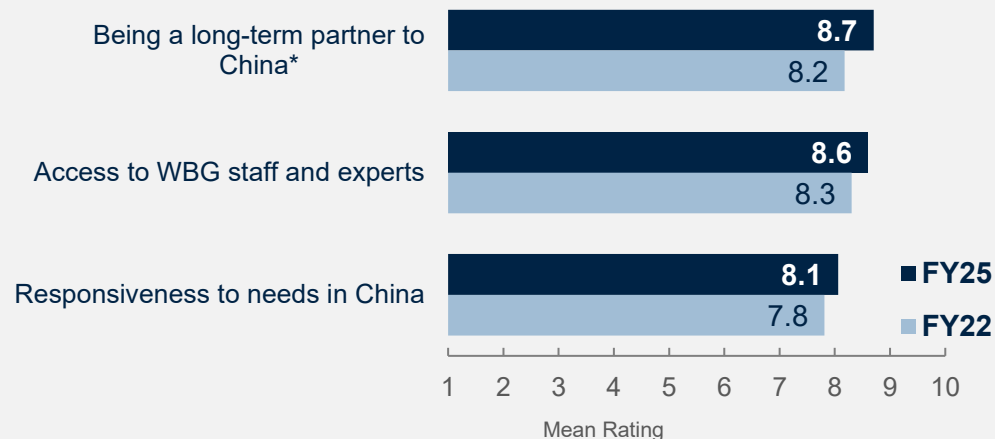


Executive Summary (continued)

Respondents called on the WBG to enhance its policy influence by offering innovative, context-specific advice, expand capacity building and technical assistance in key public sectors, and intensify the dissemination of global knowledge and best practices to support cross-country learning.

5. The WBG's Engagement and Collaboration:

In FY25, stakeholders had significantly more positive views of the WBG as a **long-term development partner** to China, and perceptions of staff **accessibility** and **responsiveness** were also very positive. The WBG received high ratings for the effectiveness of its partnerships with the **national government** and **local governments** (means=8.5 and 8.4, respectively), and perceptions of the WBG's collaboration with the **private sector** have improved (mean=7.7). In addition to its partnership with the national government, respondents would like the WBG to increase collaboration with **local governments** (57%) and **academia/research centers** (33%).



Respondents felt the WBG was rather effective at **facilitating civil society participation in policy dialogue and implementation** in China (mean=7.3); however, civil society respondents themselves tended to be more critical (mean=6.8). They recommended creating an efficient dialogue with civil society through a platform, sharing consultation documents in advance, building civil society capacity, enabling civil society leaders to join global policy discussions, and freely sharing project outcomes with NGOs.

Most stakeholders (72%) identified a **lack of access to finance** as the main challenge to private sector development in the country. To strengthen the WBG's impact on development of the private sector, respondents underscored the value of offering forward-looking policy advice, promoting two-way knowledge exchange to support business modernization, and developing scalable, demonstrable pilot projects.

6. Communications:

Over two-thirds of all respondents (72%) reported recently seeing or hearing about the WBG, and 49% of them reported hearing about the WBG's **economic forecasts**. Stakeholders reported that they prefer to obtain communication from the WBG at the events, via direct contact with staff, or via the WBG website. Respondents identified case studies of WBG projects, impact assessments, and evaluations as the most helpful materials for deepening their understanding of the Bank's role in China. The private sector stakeholders expressed strong interest in information regarding WBG's financial products and services.



Overall Views of the World Bank Group



WORLD BANK GROUP

Familiarity with the WBG has Decreased since FY22, Highest Among Bilateral/Multilateral Agencies and Media

Comparison of FY22 and FY25

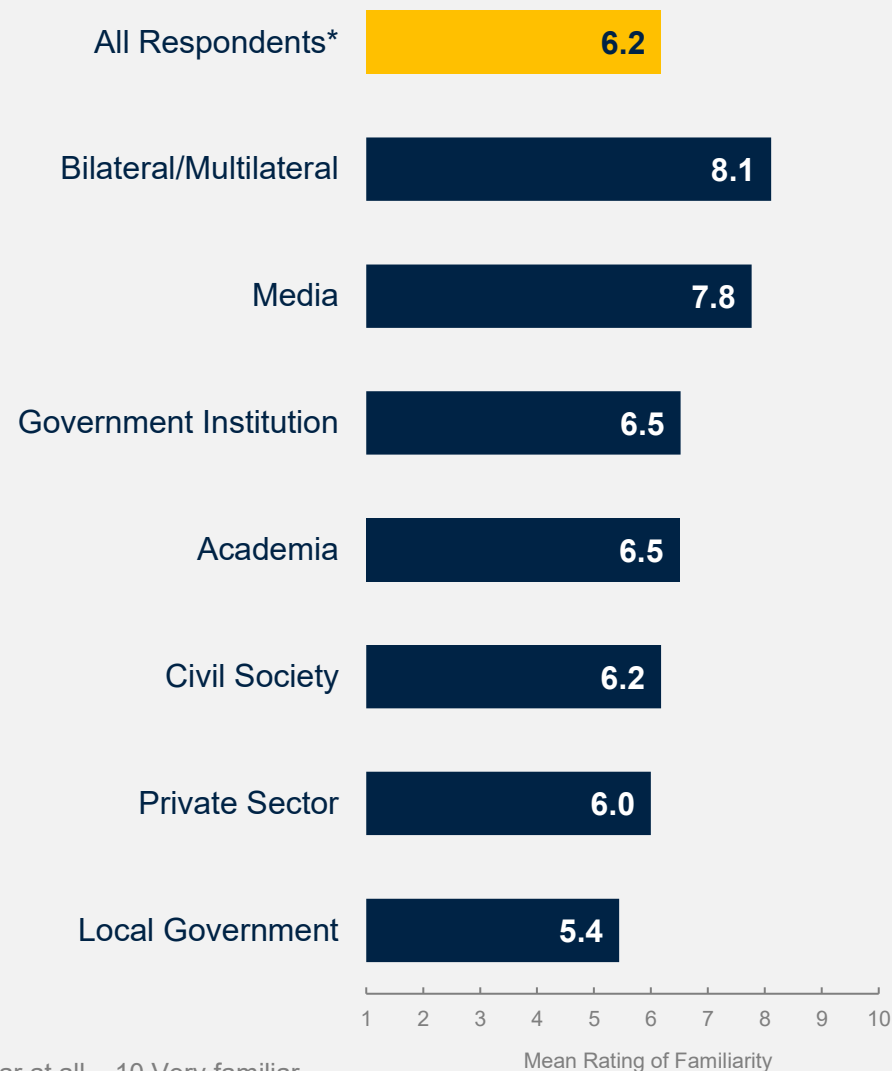
Mean familiarity: **FY25 = 6.2***
FY22 = 6.8

Collaboration with the WBG

Mean familiarity: **Collaborate with WBG = 6.9***
Do not collaborate = 4.2

Stakeholder groups

Respondents from bilateral/multilateral agencies and the media were most familiar with the WBG, whereas local government respondents were significantly less familiar.



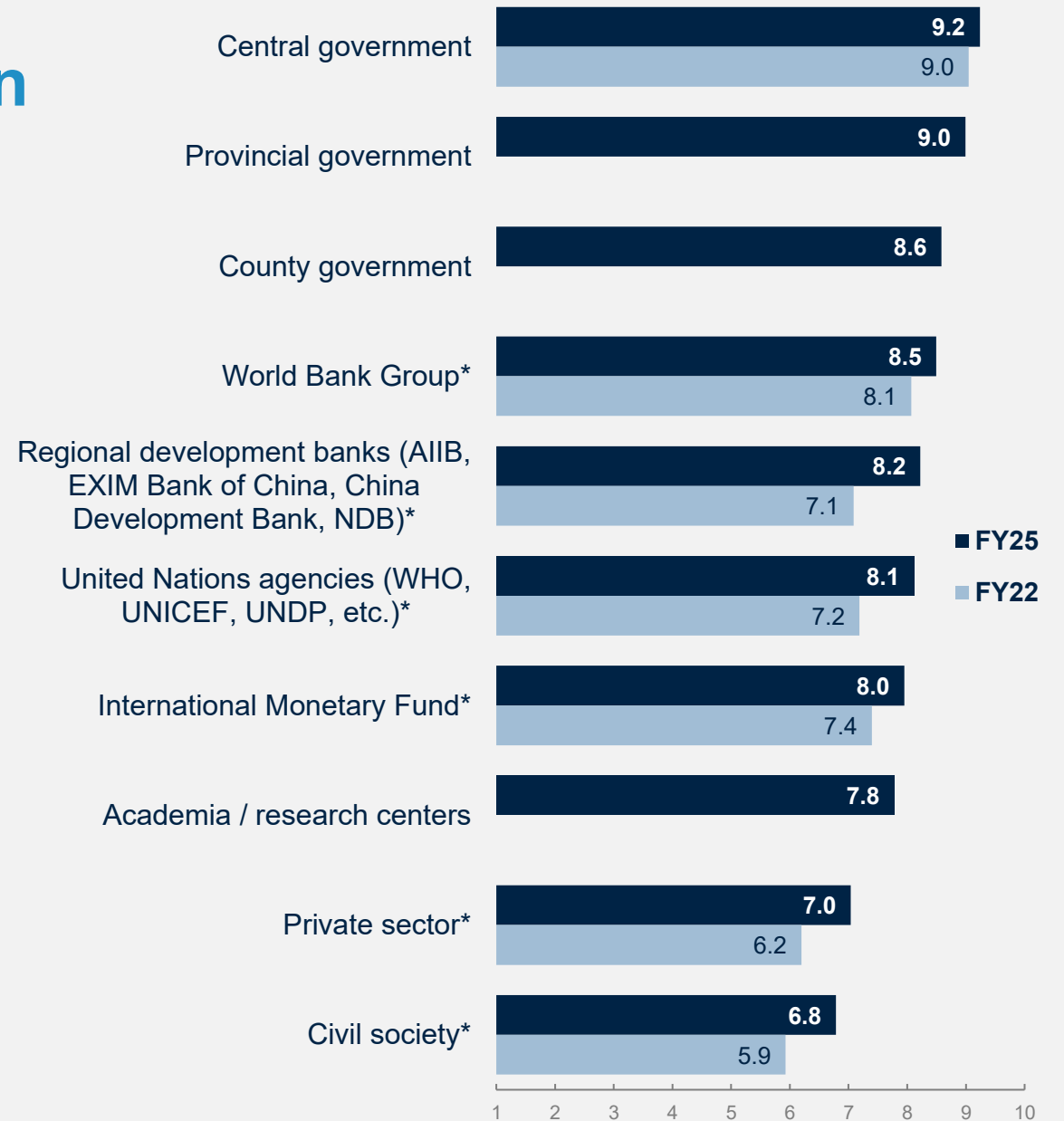
How familiar are you with the World Bank Group's work in China? Scale: 1 Not familiar at all – 10 Very familiar

*Denotes significant difference between groups

WBG is Highly Trusted; Consistently High Trust in the Central Government Among Stakeholders

Across FY22 and FY25, respondents have expressed high trust in the Central government and **increased trust in the World Bank Group.**

Since the last survey effort in FY22, stakeholders have reported significantly higher levels of trust in all institutions and groups.



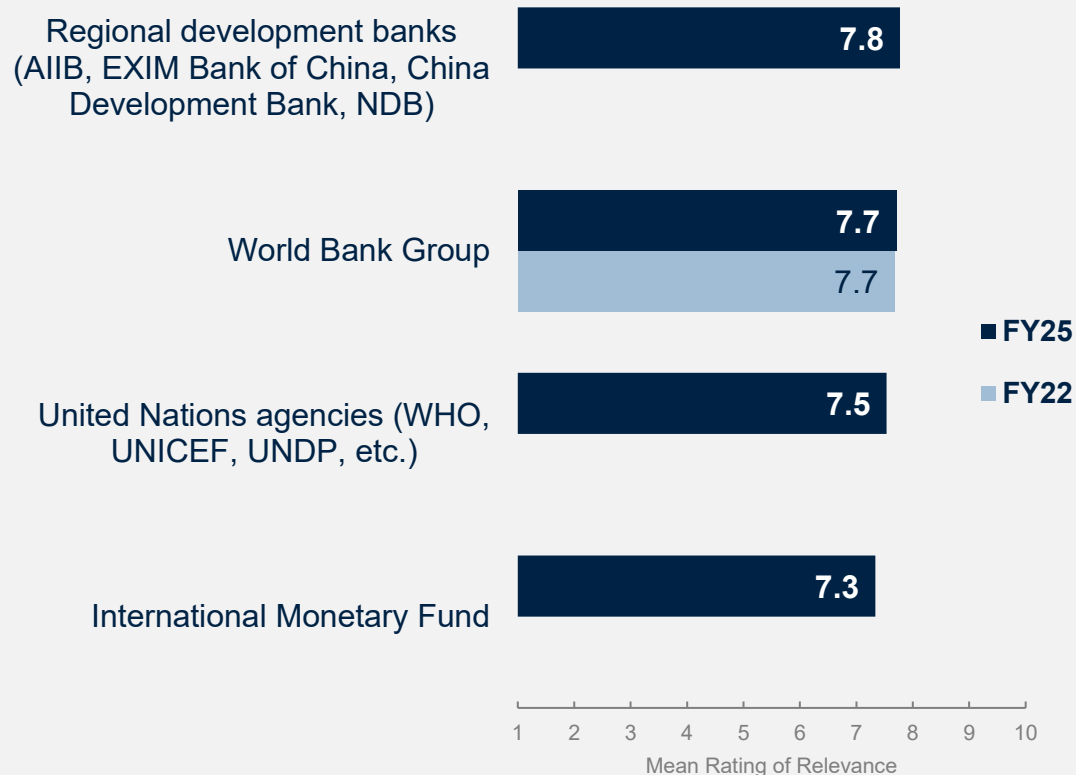
How much do you trust each of the following institutions to do what is right for China?
Scale: 1 Not at all – 10 Very much

Mean Rating of Trust

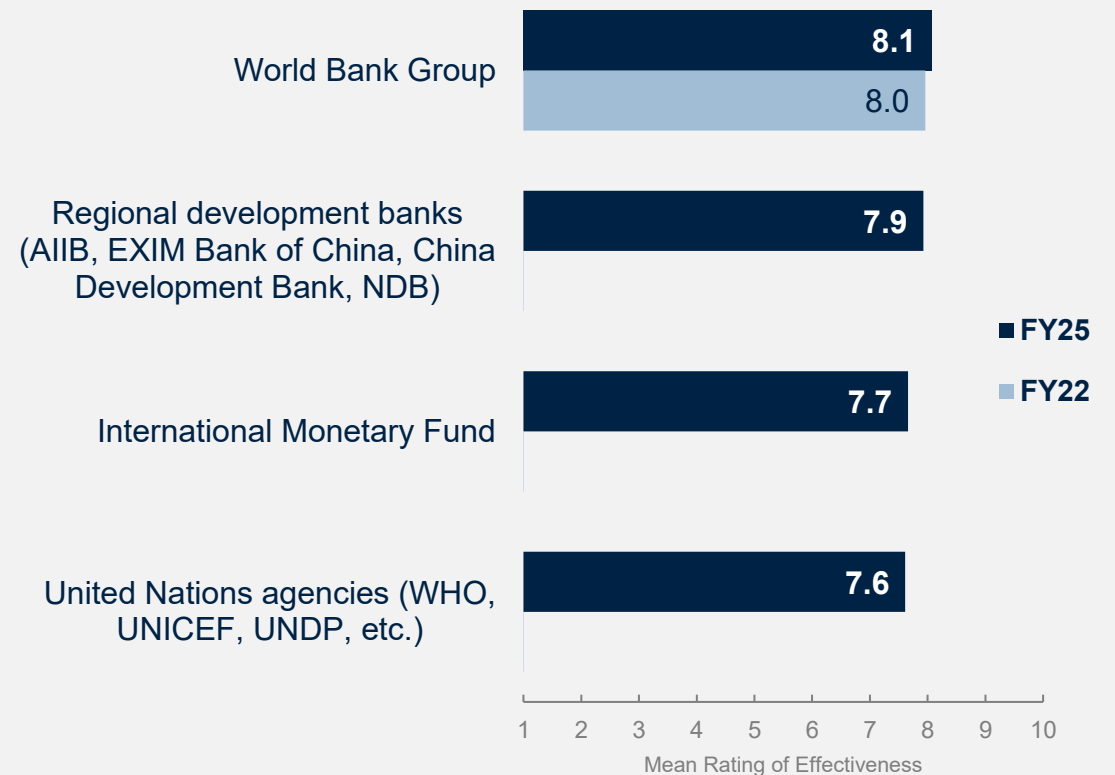
*Denotes significant difference between years

Perceptions of WBG Relevance and Effectiveness are Consistently High

RELEVANCE to China's development

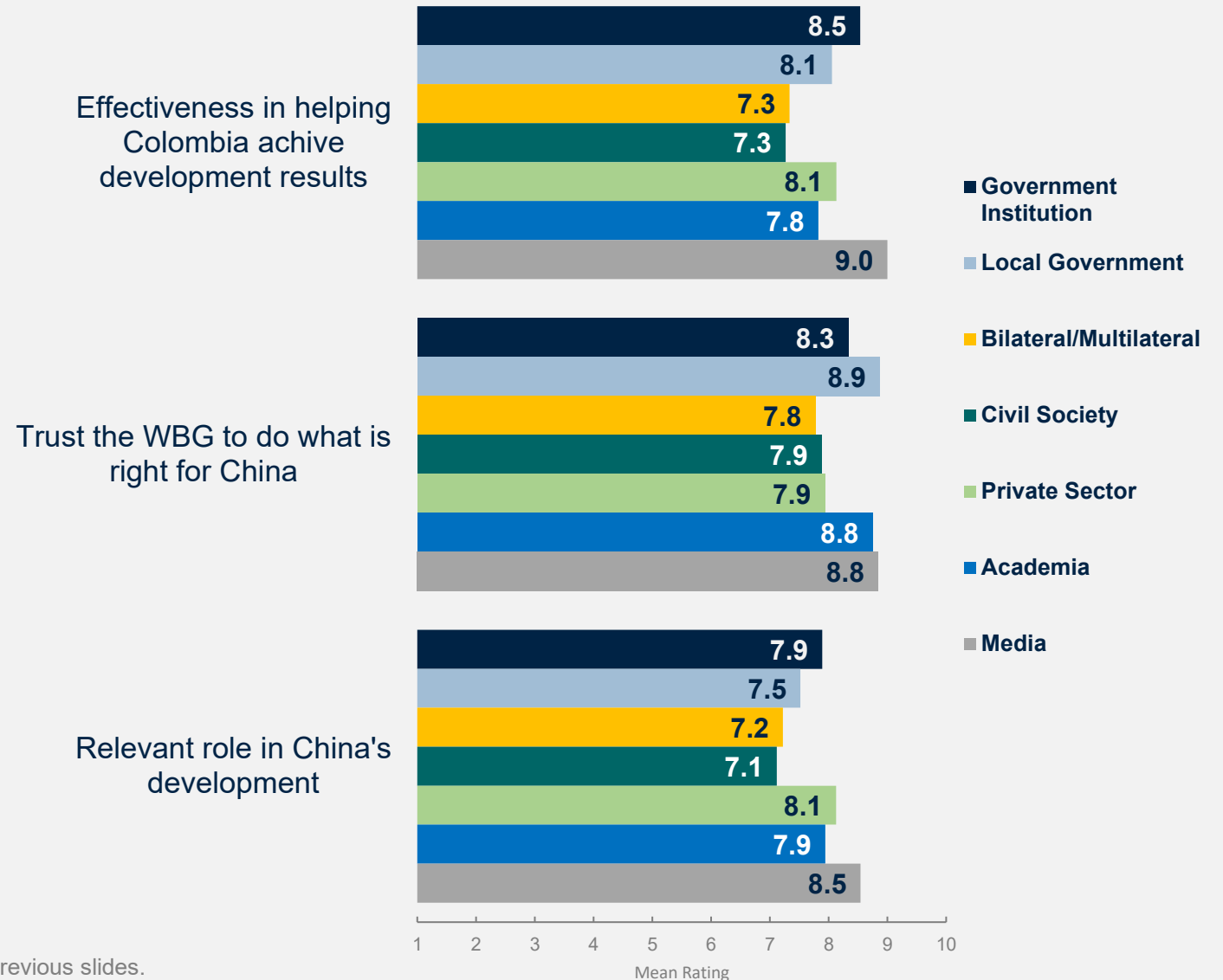


EFFECTIVENESS in achieving development results



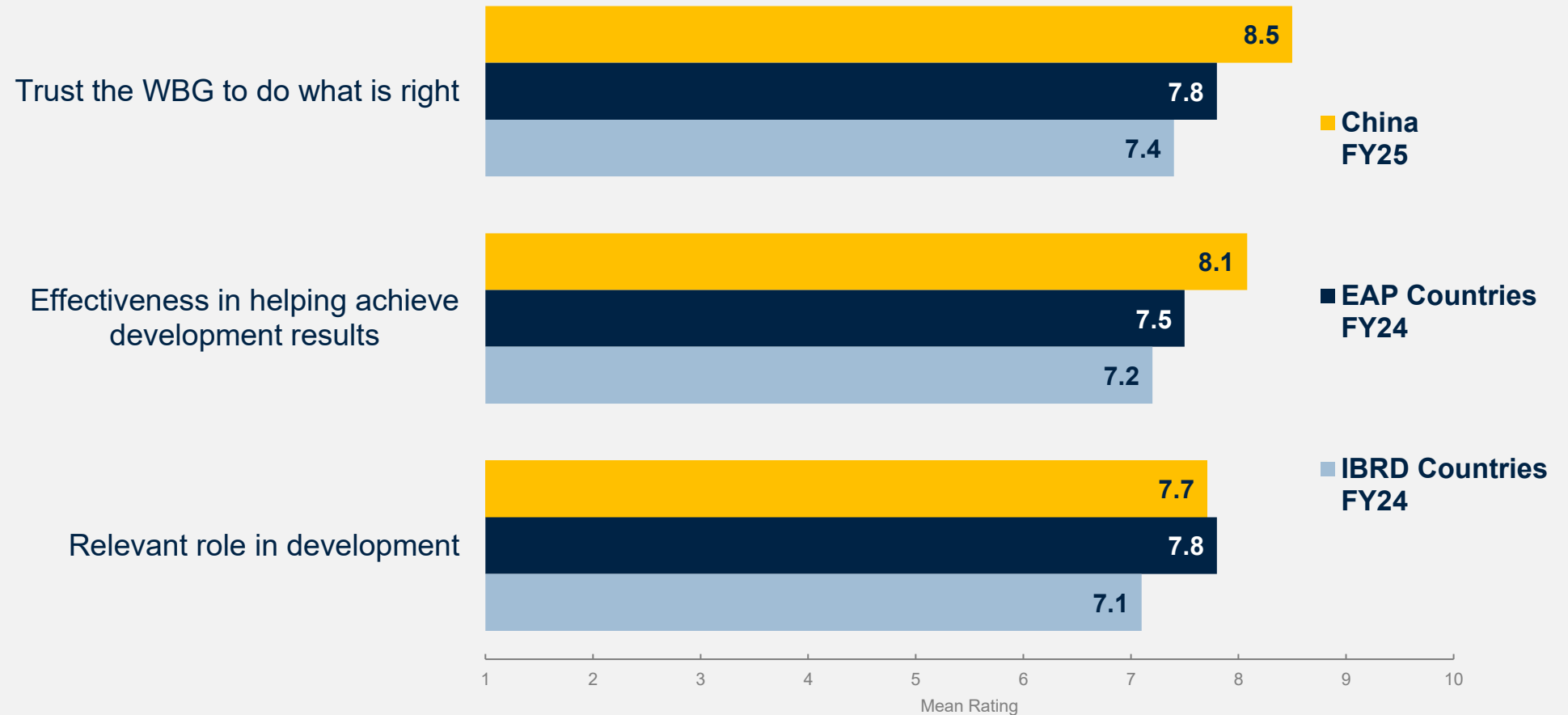
Stakeholders from Media, Government Institutions, and Local Government had More Positive Perceptions of the WBG

Respondents from **bilateral and multilateral agencies**, as well as those from **civil society**, rated the WBG's relevance and effectiveness slightly lower than other groups; however, this difference was not statistically significant.



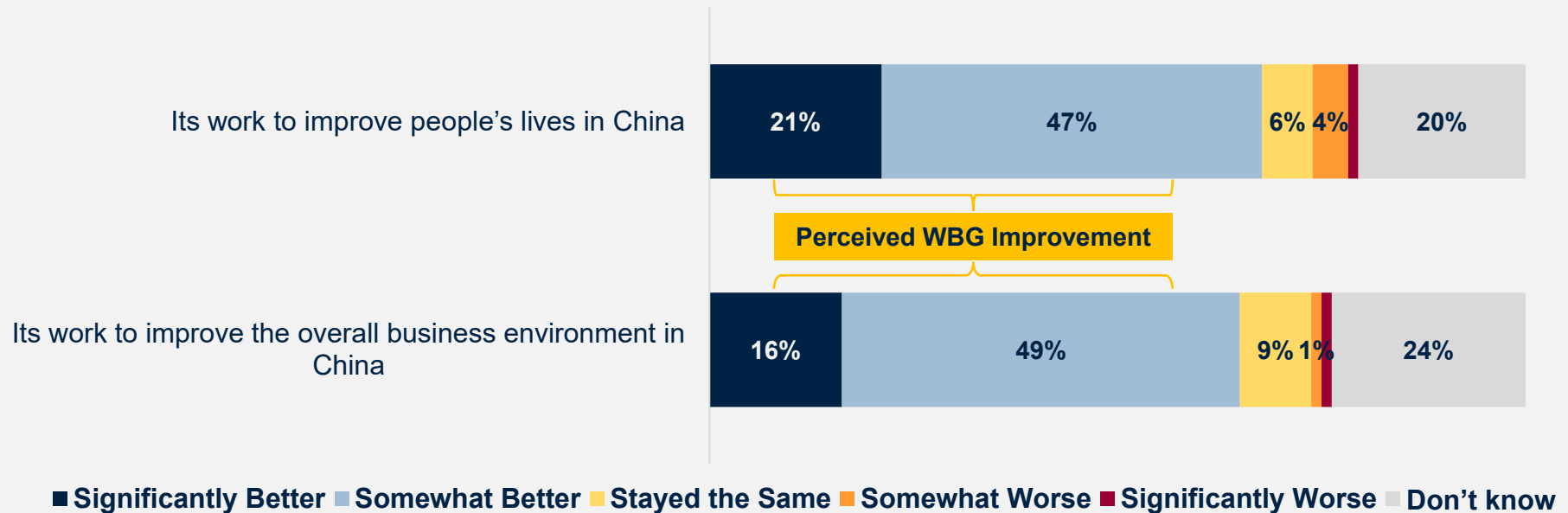
For question wording and scales, please see previous slides.

Trust and Effectiveness Ratings in China are Higher than in Other EAP and IBRD Countries



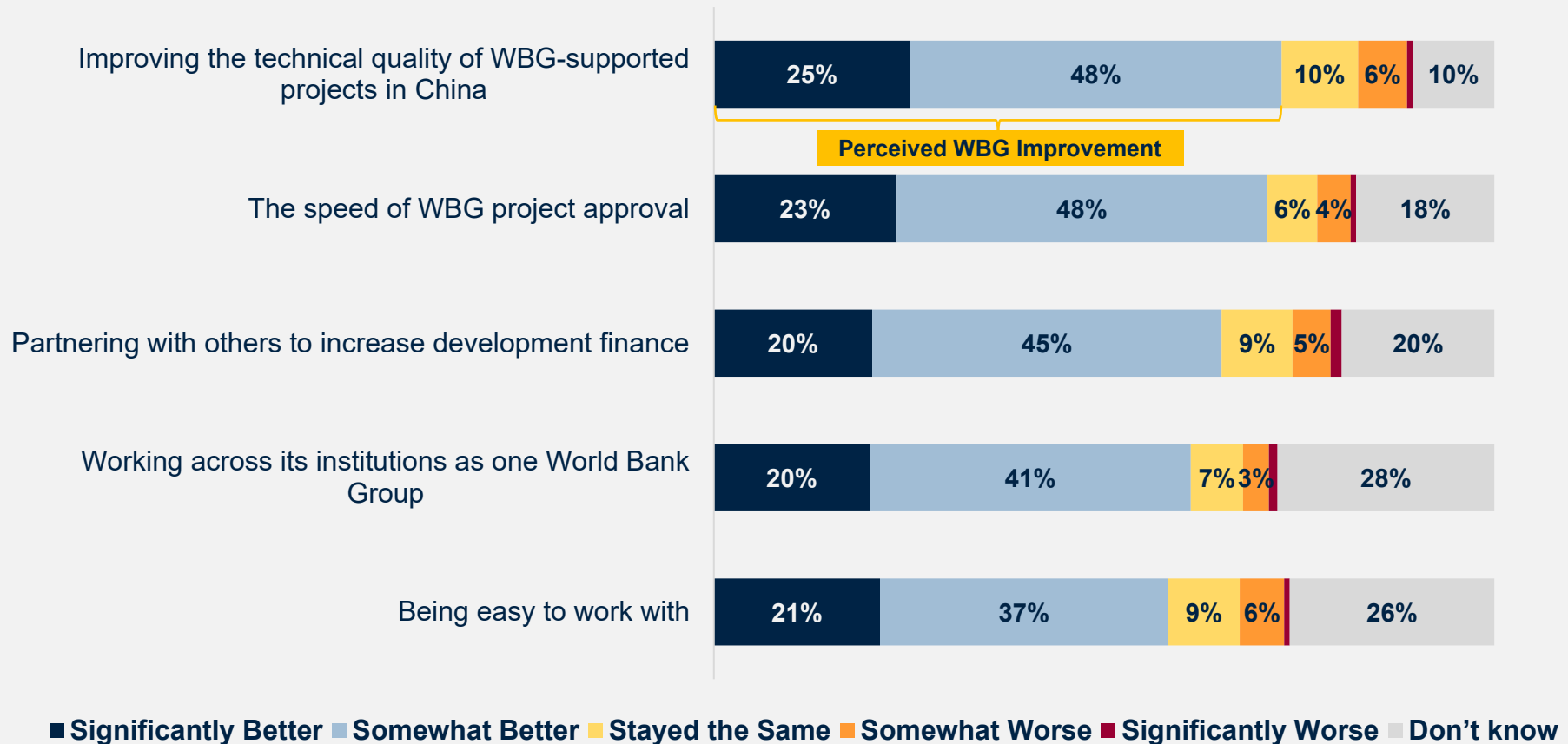
More than 65% of Stakeholders Said the Bank Was Significantly Better or Better at Improving People's Lives and the Business Environment in China in the Past Two Years

Based on your experience, *in the past two years*, how has the WBG changed in terms of...



Over 70% of WBG Clients/Partners Saw Improvement in Technical Quality and Speed of Project Approval

Based on your experience, *in the past two years*, how has the WBG changed in terms of...



The WBG's Work on Development Priorities

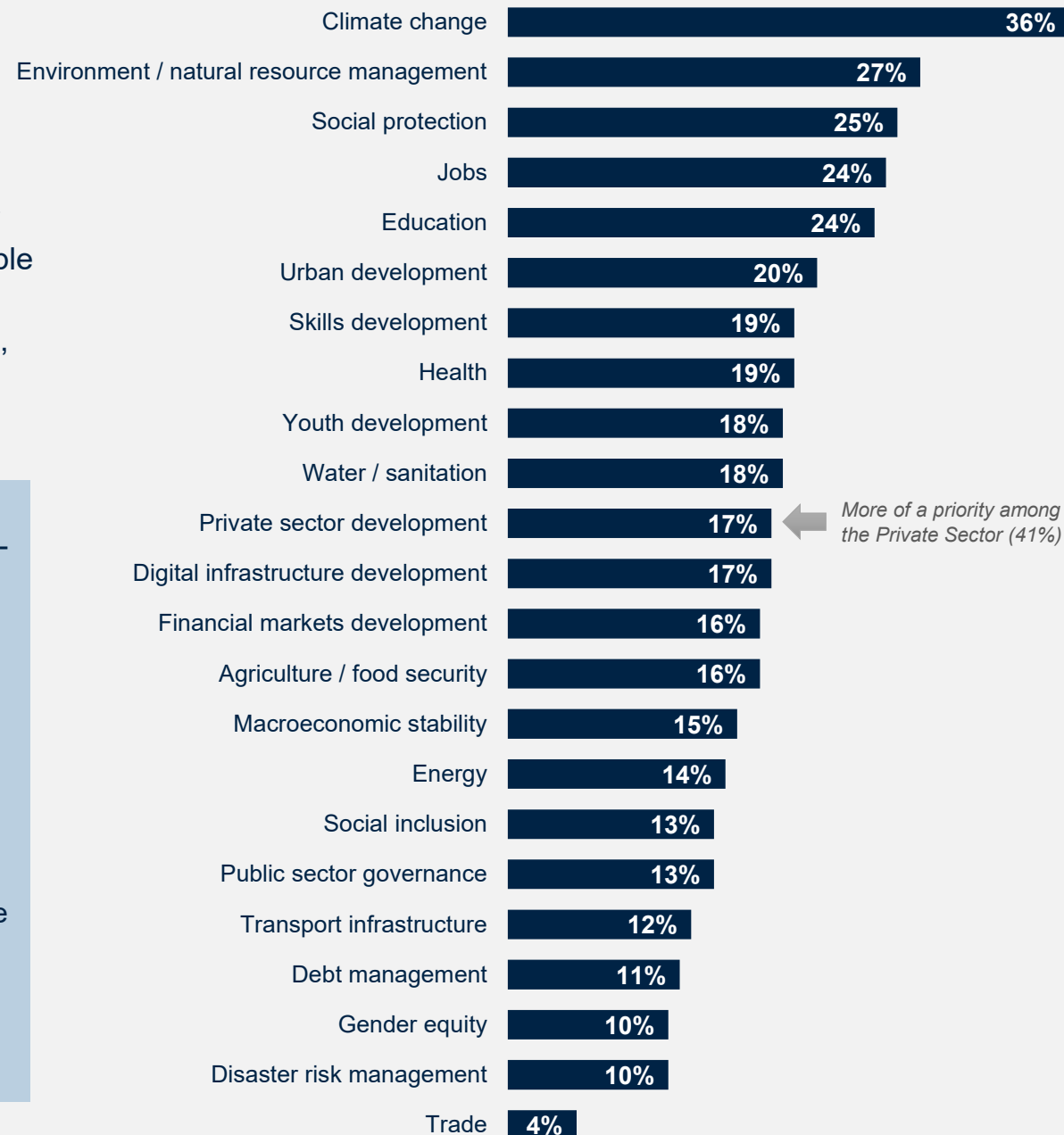


Development Areas for WBG Focus

This year, **climate change** emerged as a significantly higher priority for respondents (36%), marking a notable shift from FY22, when agriculture and rural development were the top priorities (47%). In addition, many respondents highlighted **environmental concerns** as highly important.

When asked how the WBG can be more effective in China[^], respondents emphasized the need for alignment with China's long-term development goals and local institutional realities.

- Respondents highlighted key areas such as education, youth development, and meeting the educational needs of underdeveloped regions;
- They supported investment in climate change adaptation and water security;
- Digital transformation of agriculture is seen as essential;
- They called for sharing global lessons in health service provision, including balancing the roles of the public and private sectors;
- They mentioned the need for strengthen social security systems, employment, and human capital through integrated social protection programs.



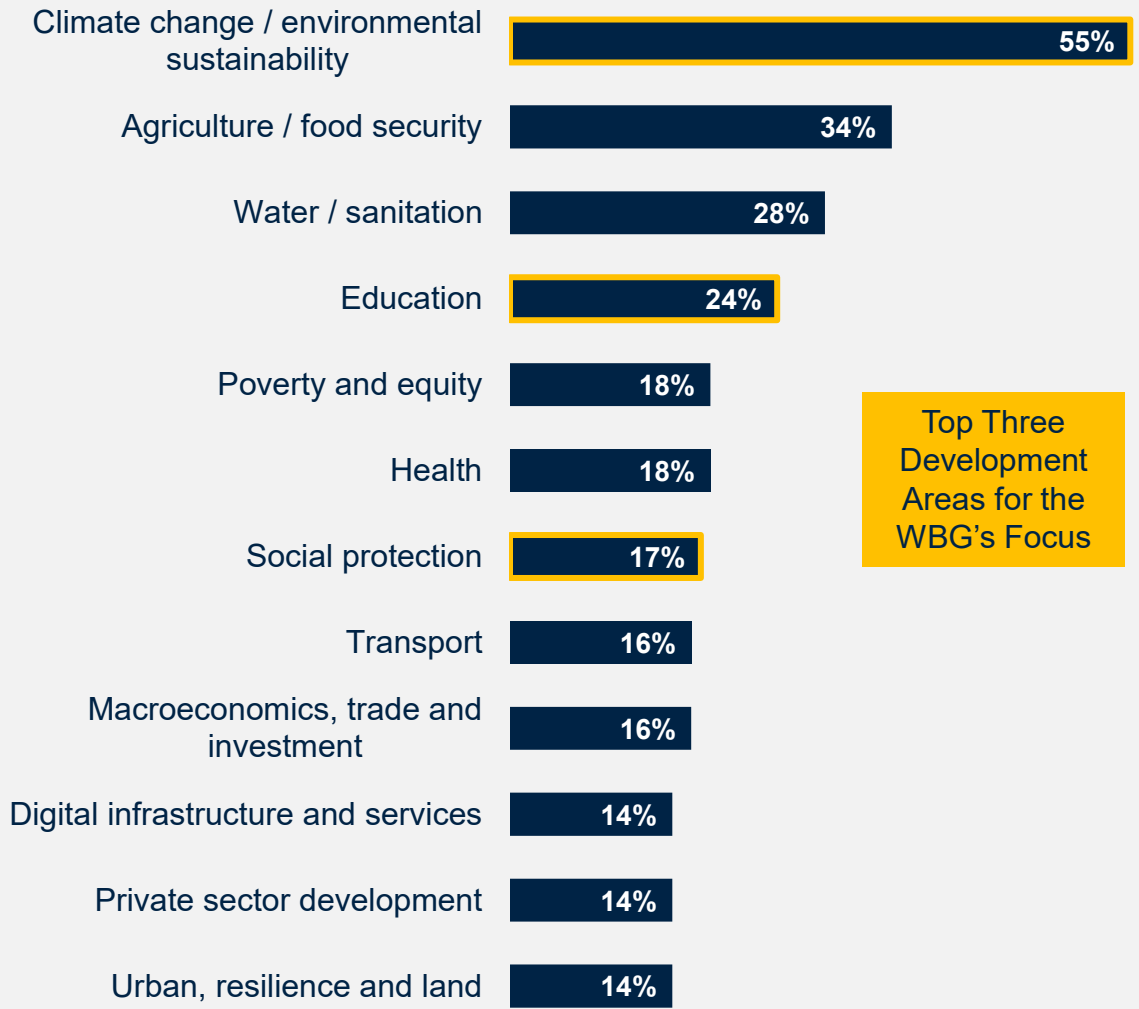
Which areas should the WBG prioritize to have the most impact on development results in China? (Select up to 5) (Percentage of Respondents, N=135)

[^]What is the most important thing the WBG could do to increase its effectiveness in these priority areas in China? (N=48) The full text of the qualitative comments can be found in the "China COS FY25 Appendices.xlsx" file.

More Than Half of All WBG Clients Indicated That They Were Most Familiar With a Project Involving Climate Change

Clients reported that they were most familiar with WBG’s projects in the area of **climate change/environmental sustainability**, followed by **agriculture/food security**, **water/sanitation**, and **education**.

Other areas, such as poverty and equity, health, and social protection, were noted by a smaller but still significant share, while transport, macroeconomics, and trade, digital infrastructure, private sector development, and urban resilience each received mentions from around one in seven respondents.



Top Three Development Areas for the WBG’s Focus

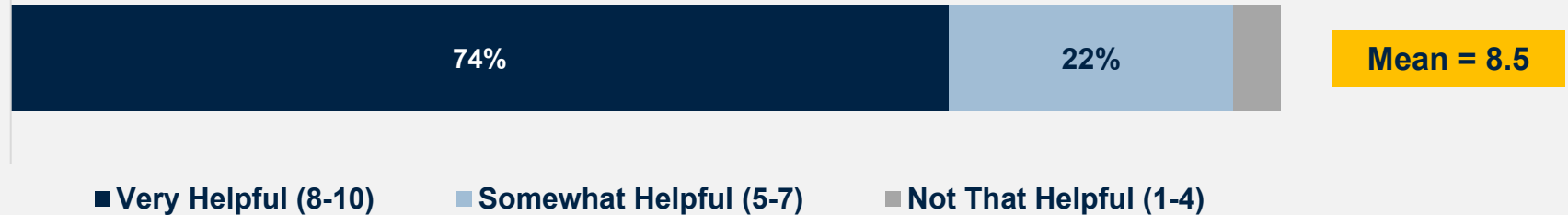
An Excel spreadsheet will be provided with full details of knowledge products identified by respondents and their responses to all knowledge related qualitative questions.



Please think about a specific WBG-supported project or initiative that you are most familiar with. Please select the development area that this WBG-supported project or initiative supported. (Select all that apply) (Asked only of those who said that they collaborate with the WBG, Percentage of Respondents, N=118)

The Majority of WBG Clients Believe WBG was Very Helpful in Achieving Project Goals

How helpful was the WBG in achieving the goals of this project or initiative?



In Open-Ended Comments, Clients Discussed the Impact the WBG-Supported Project Had on the People of China

“It accelerated energy saving and environmental protection efforts in some parts of China across multiple fields and social levels, benefiting more people.” (Local government respondent discussing China Energy Efficiency Market Mechanism Project)

“As a media professional and judge in the global poverty reduction case collection activity, I found the related cases very impressive. The supported local cooperatives and industrial chains developed steadily, providing local people with a path to increase income through industrial assistance.” (Media Sector Respondent discussing Poverty Alleviation in Guangxi and Shaanxi)

“In the barren Lanzhou New District, a vocational education city was established, expanding vocational school enrollment and improving training quality. Tens of thousands of children from poor farming families learned skills and secured decent employment.” (Civil Society Respondent discussing Gansu Vocational Education Development Project)

“This World Bank loan project [...] benefited residents in the Yangtze River Delta with cleaner drinking water [...] and provided a practical model for multi-stakeholder watershed governance.” (Local government Respondent discussing Zhejiang Qiandao Lake and Xin'an River Basin Water Resources & Ecological Environment Protection Project)



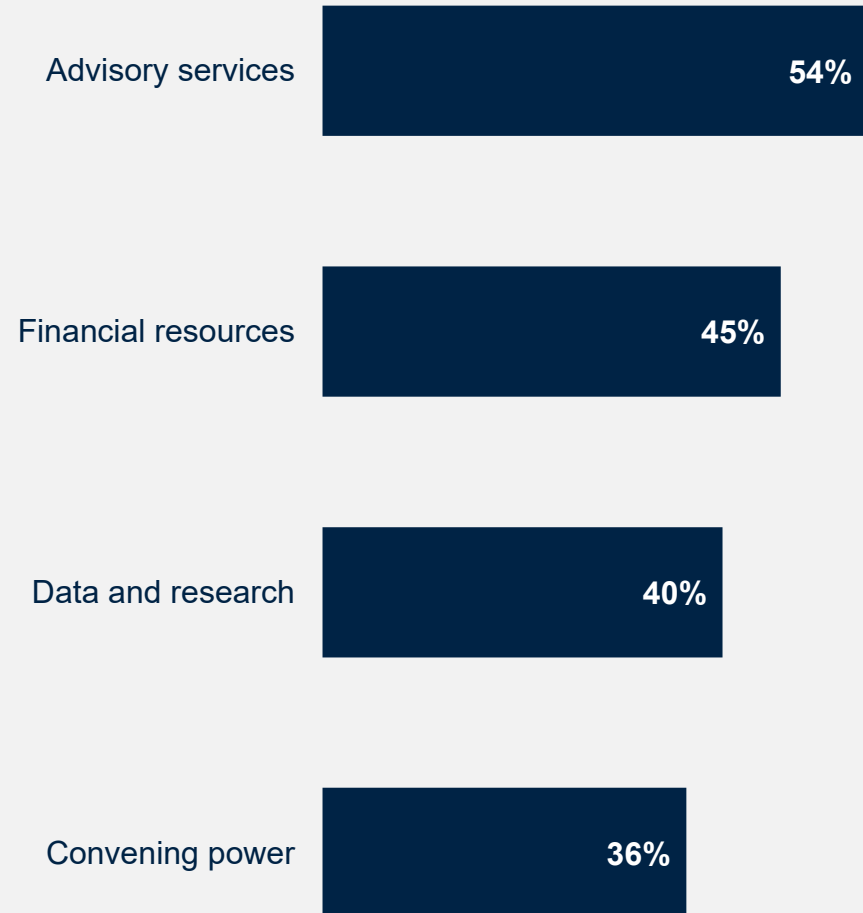
Asked only of those who said that they collaborate with the WBG, Percentage of Respondents, N=107
How helpful was the WBG in achieving the goals of this project or initiative? Scale: 1 Not helpful at all – 10 Very helpful.
[If helpful rating > 4] How did this WBG-supported project or initiative impact the people of China? (Please be specific):(N=60)

The WBG's Instruments



Advisory Services Considered the WBG's Greatest Value to China

Of note, financial resources were significantly more valuable for the private sector and civil society (71%), while data and research were for respondents from bilateral/multilateral agencies (67%), media (64%), and academia (59%).



Positive Views on WBG Financial Instruments, but Decline in Perceptions of Timeliness

Stakeholder perceptions of the WBG differ markedly: respondents from bilateral and multilateral agencies reported the lowest average ratings, whereas those from the private sector, government institutions, and media offered significantly higher ratings across this set of questions.

When asked how the WBG can be more effective in China[^], some respondents emphasized the need to:

- Prioritize sustainable financing and pilot projects in areas such as water security and climate change;
- Participate in infrastructure construction projects through investment and knowledge exchange;
- Invest in education and technology to expand Chinese knowledge and enrich culture and habits;
- Provide necessary grants and financial support where needed.

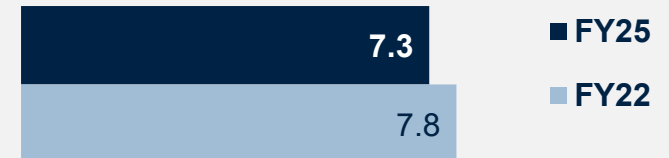
The WBG's financial instruments (i.e., loans, grants, trust funds) meet the needs of China



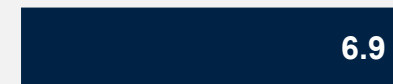
The WBG provides financial support in a timely manner*



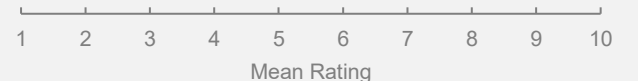
The standards and requirements for the WBG's financing are reasonable



The conditions of the WBG's financing are competitive compared to markets (private sector or other development banks)



*Denotes significant difference between years

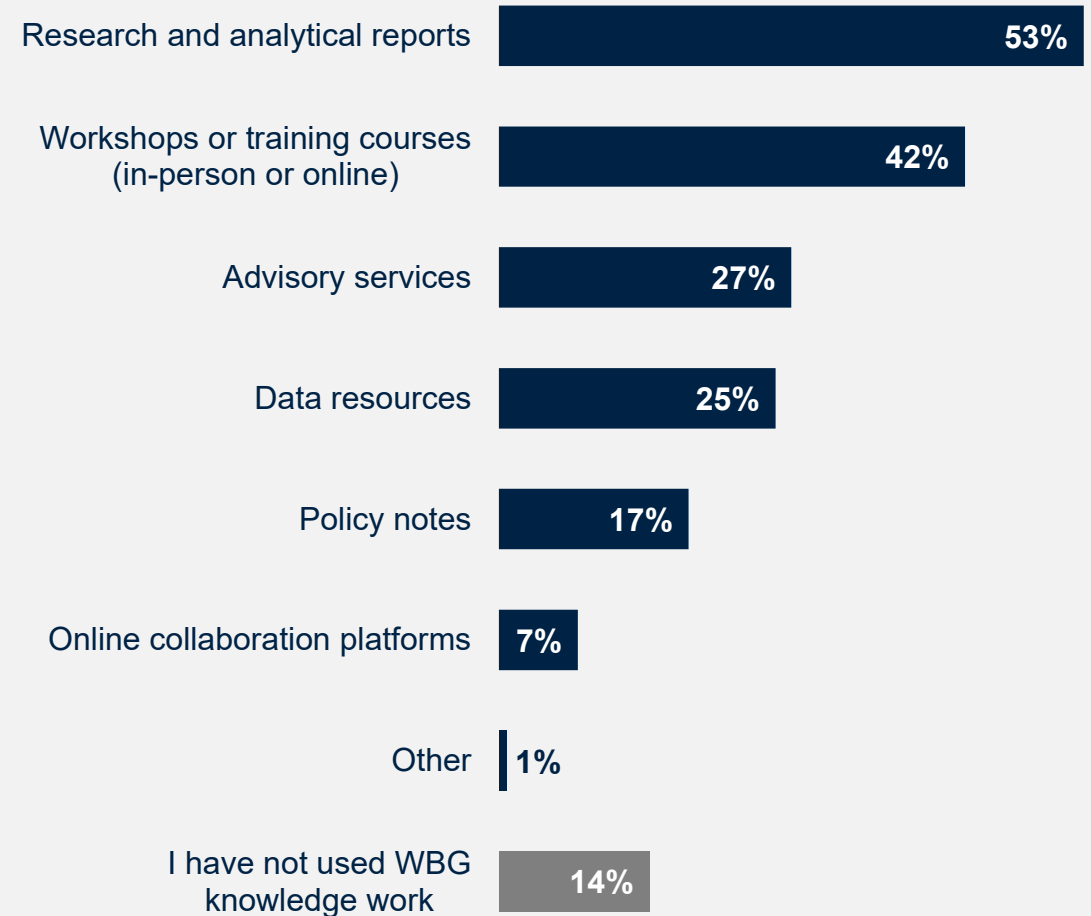


To what extent do you agree with the following statements about the WBG's financial support to China? Scale: 1 Strongly disagree – 10 Strongly agree (Asked only to those in government institutions or who said that they collaborate with the WBG, N=~120)

86% of Respondents Used WBG Knowledge Work in the Past 3 Years — Primarily Research, Analytical Reports, and Events

Different stakeholder groups used different types of WBG knowledge work:

- **Advisory services** were most frequently recalled by respondents from the private sector (62%), governments institutions (40%), and local government (37%).
- **Research and analytical reports** were primarily used by media (83%), the academic respondents (71%), bilateral and multilateral agencies (67%), and private sector respondents (54%).



An Excel spreadsheet will be provided with full details of knowledge products identified by respondents and their responses to all knowledge related qualitative questions.



As a Reliable Information Source, Stakeholders Used WBG Knowledge Work for a Variety of Purposes

For what purpose did you use this WBG knowledge work?

Research, Learning, and Knowledge Sharing

Respondents most frequently used WBG knowledge work for understanding global development issues, conducting research, and improving their personal or organizational knowledge base.

- Academic and applied research activities
- Global development knowledge acquisition
- Individual and professional skill development

Project implementation and policy application

- Project implementation and operational guidance
- Policy formulation and system improvement
- Financial instruments and procurement understanding

Sustainable development and communication

- Sustainable development and climate alignment
- Strategic communication and media engagement



69% of Respondents Report WBG Policy Advice Shaped Government Policy and Influenced Key Development Areas

Climate Change / Environmental Sustainability

- *“Green finance and sustainable development. The World Bank Group has promoted society, enterprises, governments and others to have a more realistic understanding of the significance of green sustainability through publicity, consulting projects and financial projects. For example, the cooperation with Qingdao Bank and Junchuang Leasing has encouraged partners to invest more resources and expand actions in these areas.”*
(Private Sector Respondent)
- *“Ozone Depleting Substances Quota Management Policy”*
(Government Institution Respondent)

Private Sector Development

- *“The World Bank project supports and serves rural small and medium-sized enterprises, and influences the country to introduce policies to support new agricultural business entities.”*
(Local Government Respondent)
- *“The assessment of the business environment has more or less influenced the local government's cognition, increased its level of attention, and also facilitated the formulation of corresponding policies.”*
(Media Respondent)

Social Protection

- *“Call on the central government to increase fiscal spending to support vulnerable groups in society, step up efforts to build a social security system to cover more migrant workers and the floating population, and promote household registration reform.”*
(Media Respondent)
- *“Policies to ensure the rigid pension needs of disabled elderly people first; policies to carry out capacity assessment of the elderly. Influence in the form of research reports, policy consultation, etc.”*
(Local Government Respondent)

Education

- *“In vocational schools, we emphasize school-enterprise cooperation and build competency-based courses. The Ministry of Education issued a document.”*
(Civil Society Respondent)

Energy

- *“New energy and energy storage policy”*
(Academia Respondent)



In your opinion, has the WBG's policy advice influenced a new or previous government policy in China? (Percentage of Respondents, N=415)
What government policy or action did the WBG's advice influence and in what way? (N=36) Select comments corresponding to the top 4 development priorities for the WBG's focus as identified by respondents are shown here.

Respondents Value WBG's Knowledge Work, but See Room for Improved Dissemination

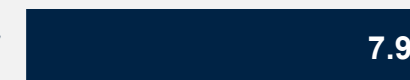
In qualitative comments, respondents pointed out that the WBG could:

- Enhance policy influence through knowledge and innovation:** Respondents emphasized the importance of the WBG continuing to offer forward-looking, independent, and depoliticized policy advice grounded in international best practices. They call for the introduction of advanced and innovative ideas, tailored to national contexts, to guide government decision-making and promote efficient, effective reforms.
- Expand capacity building and experience sharing:** Stakeholders seek more training and technical assistance to improve public sector service delivery, especially in healthcare, agriculture, and education. They value opportunities to learn from global experiences and comparative lessons, particularly in the areas of health system reform, grassroots service delivery, and rural development.
- Strengthen knowledge dissemination and cross-country learning:** Respondents encourage the WBG to intensify its efforts to share advanced knowledge, global best practices, and international experiences with China and other countries.

WBG's knowledge work makes a significant contribution to development results



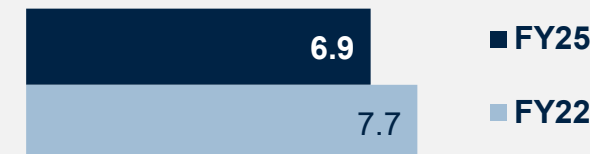
I am satisfied with the quality of the WBG's knowledge work in China^



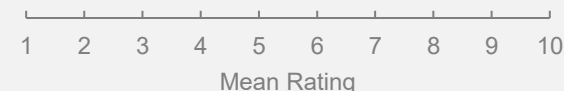
Working with the WBG increases China's institutional capacity^



The WBG's publications are adequately disseminated*^



*Denotes significant difference between years



How significant a contribution do you believe the WBG's knowledge work makes to development results in China? Scale: 1 Not significant at all – 10 Very significant
To what extent do you agree with the following statements? Scale: 1 Strongly disagree – 10 Strongly agree

If you rated the quality of the WBG's knowledge work between 1-4, how could the WBG improve the quality of its knowledge work in China? (Please be specific) (N=2)

What is the most important thing the WBG could do to increase its effectiveness in these priority areas in China? (Please be specific) (N=48)

^Only asked to those who indicated that they had used WBG knowledge work in the past 3 years (N=~120)

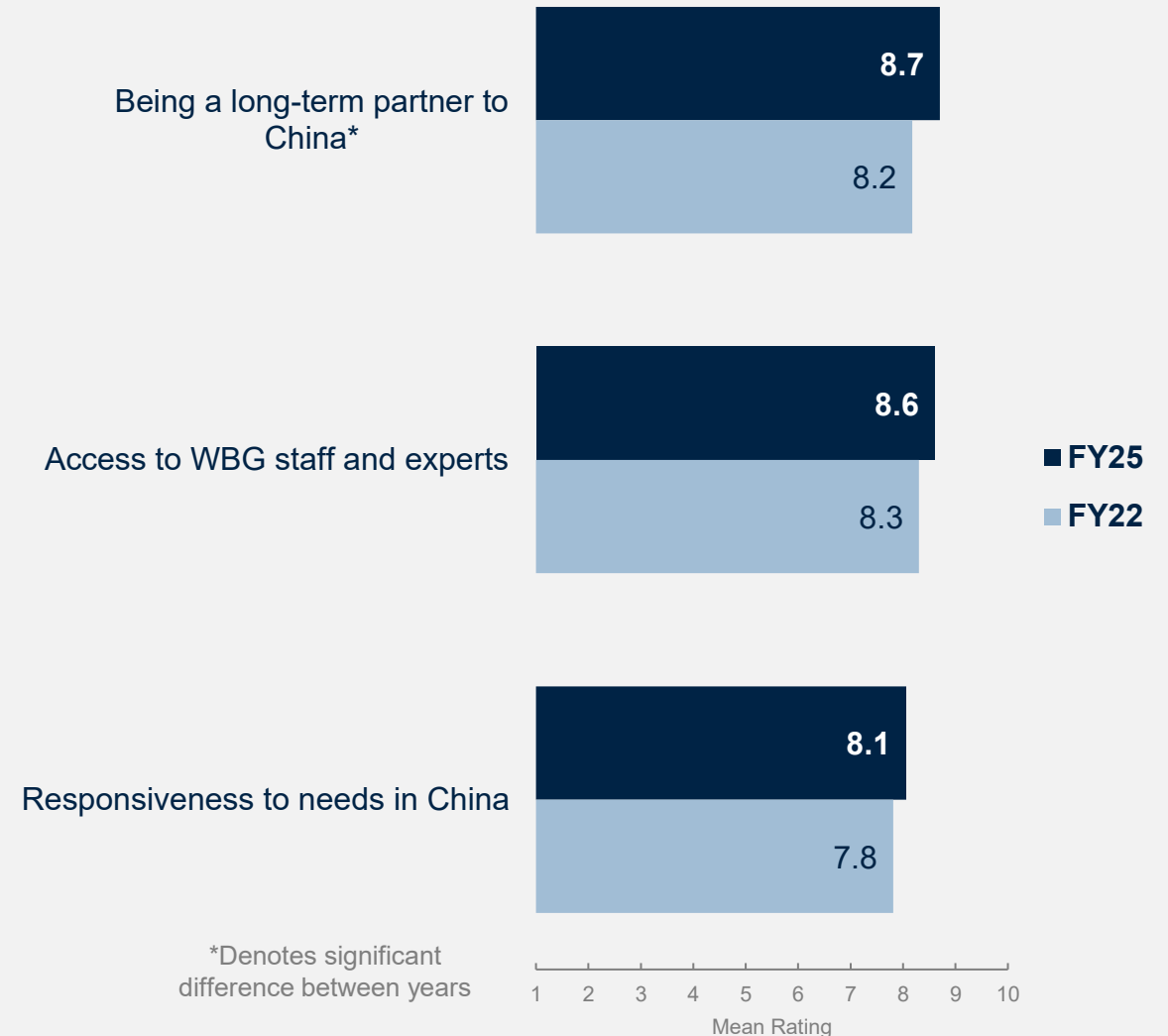
The WBG's Operational Effectiveness, Engagement and Collaboration



WBG Viewed as a Reliable Partner, with Growing Recognition of Responsiveness

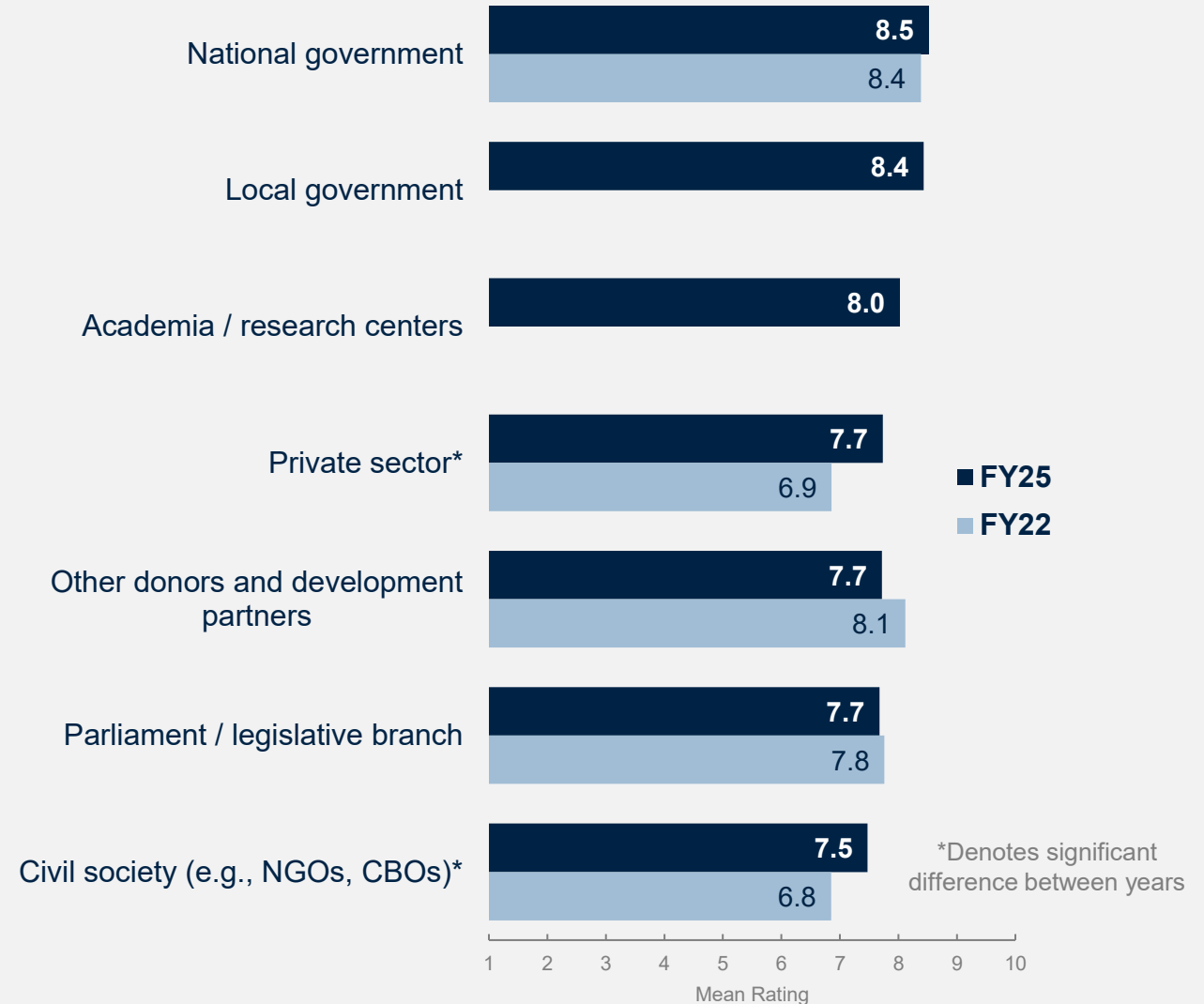
Regarding WBG's operational effectiveness, respondents highlighted the following: ^

- **Contextual Adaptation and Local Relevance:** Respondents emphasized the need for WBG to better understand China's development path and adapt global experiences to China's unique national conditions, rather than applying one-size-fits-all solutions.
- **Project Design and Planning:** Stakeholders want WBG to ensure a balance in project numbers, quality, and coverage, and to contribute to the formulation of long-term, strategic development plans tailored to China's evolving needs.
- **Efficiency and Responsiveness:** Calls were made for faster project approvals and better responsiveness to client needs, suggesting that bureaucratic delays may be hindering operational impact.
- **Collaborative Innovation within National Frameworks:** WBG is encouraged to co-develop innovative, demonstrable, and replicable projects in collaboration with China while also working closely within the Chinese government's institutional framework.



WBG Partnerships in China Viewed Positively; Collaboration with Private Sector and Civil Society Seen as Improving

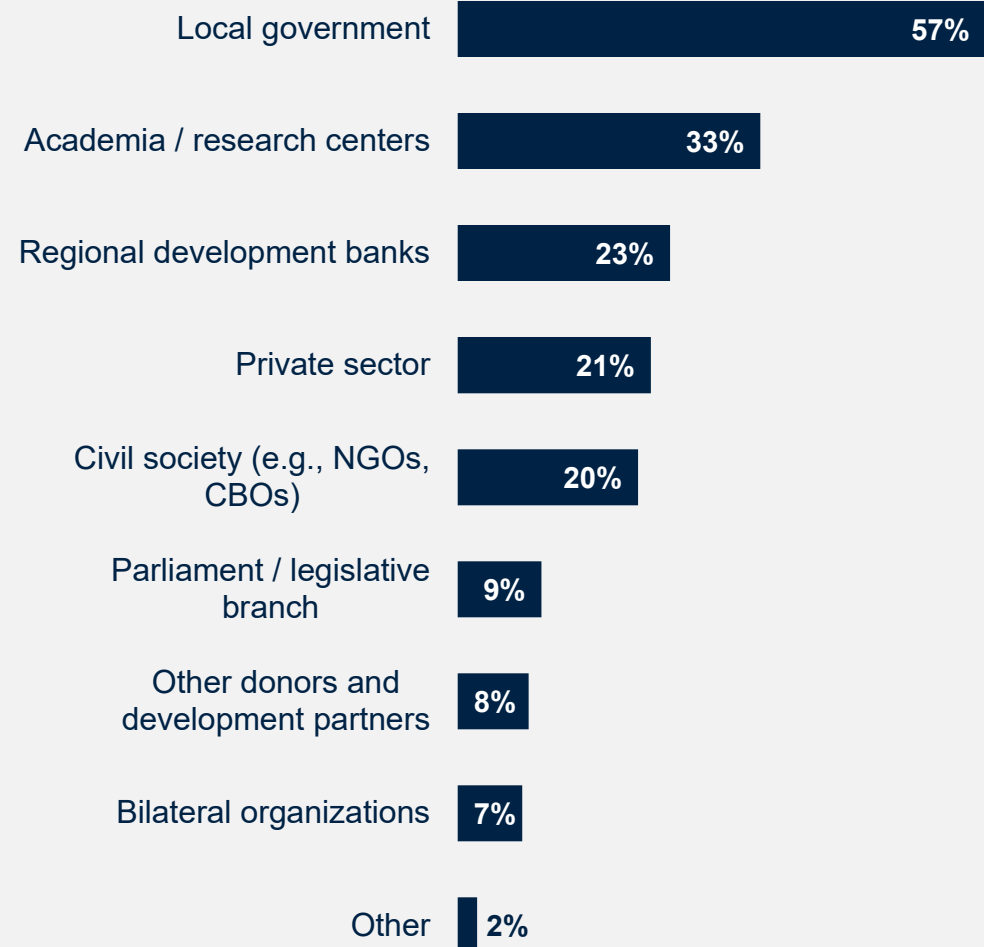
Notably, respondents from both the **private sector** and **civil society** gave relatively high ratings for the WBG's collaboration with their respective groups, with average scores of 8.0 and 7.6, respectively.



Stakeholders Want the Bank to Collaborate More With Local Government and Academia

Stakeholders want the WBG to strengthen collaboration with domestic actors, particularly **local governments** and **academia** to ensure that projects are grounded in local realities and informed by local expertise.

- Work directly with local governments to tailor interventions to community needs
- Partner with academic and research institutions to co-produce knowledge
- Complement financial assistance with technical and institutional support, ensuring that collaboration leads not just to funding, but also to long-term capacity building and policy impact

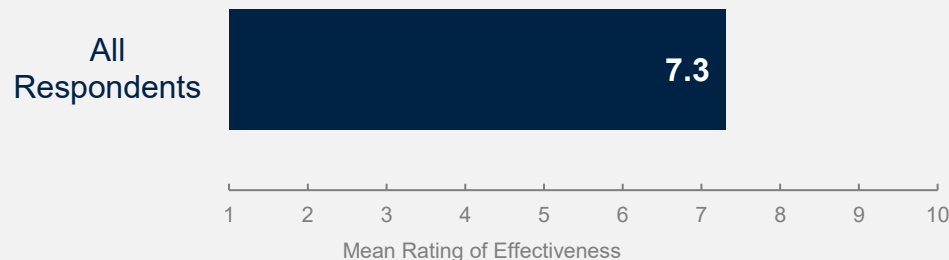


In addition to its partnership with the national government, which of the following should the WBG collaborate with more to have greater impact in China? (Select up to 2) (Percentage of Respondents, N=143)

^ What is the most important thing the WBG could do to increase its effectiveness in these priority areas in China? (N=48)

The full text of the qualitative comments can be found in the "China COS FY25 Appendices.xlsx" file.

WBG Effectiveness in Facilitating Civil Society Participation



Respondents from **bilateral / multilateral agencies** gave the lowest ratings (mean = 5.4) for the WBG's effectiveness at facilitating civil society participation in development policy dialogue and implementation in China. **Civil society** respondents also gave a moderate rating (mean=6.8).

“Establish a simple and efficient platform and dialogue mechanism, fully share consultation documents in advance, support civil society capacity building, support civil society leaders to participate in global policy dialogues, and share the results and experiences of some projects with non-governmental organizations free of charge.” (Civil Society respondent)

Some Examples of the WBG's Effective Facilitation of Civil Society Participation

“World Bank supports innovative civil society projects through Small Grants Program and Development Marketplace Competition.”
(Government Institutions Respondent)

“The World Bank supported the development of distributed photovoltaic power generation in China through the China Renewable Energy Scale-up Project (CRESP) Phase I and Phase II. In this process, civil society organizations participated in the research and formed policy recommendations.”
(Civil Society Respondent)

“In the World Bank-financed Xin'an River project, the World Bank innovatively introduced the environmental NGO, The Nature Conservancy (TNC), to provide very important support for TNC's pilot watershed co-governance model in China.”
(Civil Society Respondent)

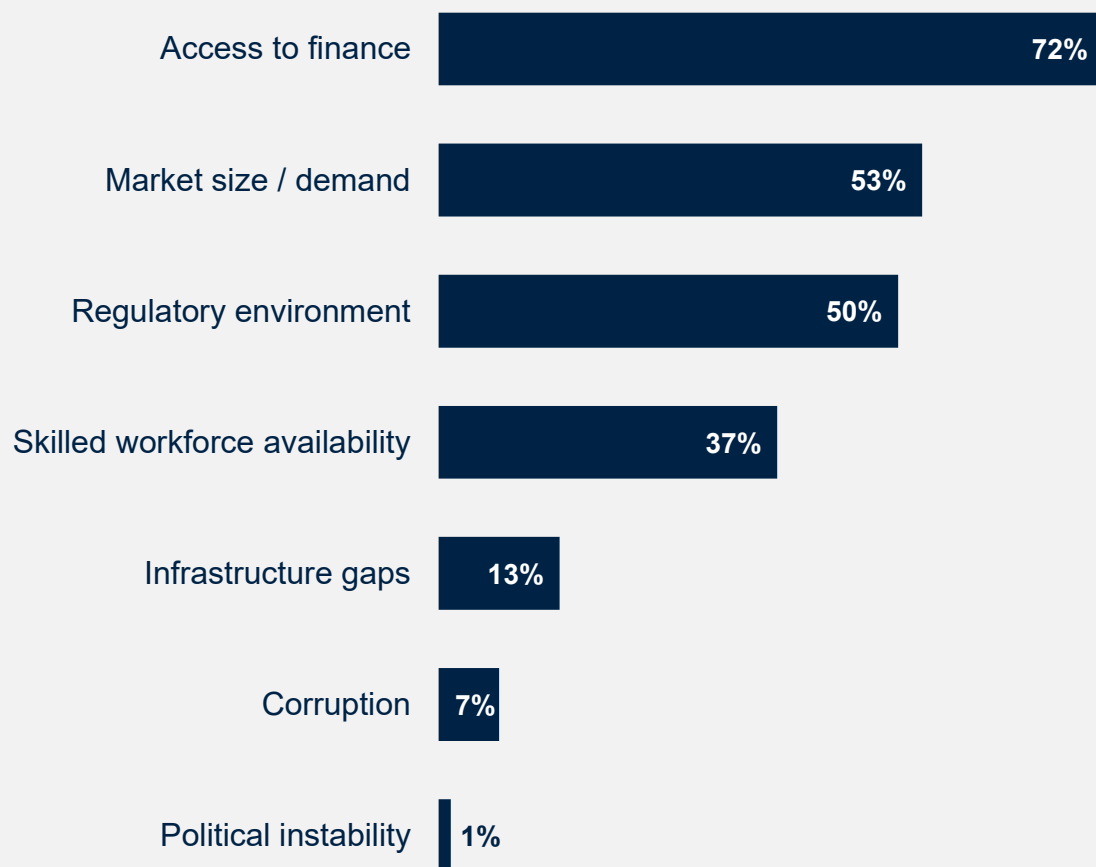


How effective is the WBG in facilitating civil society participation in development policy dialogue and implementation in China? Scale: 1 Not effective at all – 10 Very effective

[If effectiveness rating < 5] How could the WBG be more effective in facilitating civil society participation in development policy dialogue and implementation? (Please be specific) (N=9) [If effectiveness rating > 4] Please share examples of the WBG's effective facilitation of civil society participation in development policy dialogue and implementation. (Please be specific) (N=94) The full text of the qualitative comments can be found in the “China COS FY25 Appendices.xlsx” file.

The WBG Working With the Private Sector

What are the biggest challenges facing private sector development in China?



To Make the WBG More Effective in Private Sector Development, Respondents Discussed:

- Strengthening collaboration with local and national government agencies to create an **enabling environment**
- Providing forward-looking policy advice to support **market-oriented reforms**
- Facilitating two-way knowledge exchange and promoting advanced, global ideas that can help local businesses modernize and **align with international standards**
- Supporting the development of demonstrative and **replicable** pilot projects

What are the biggest challenges facing private sector development in China? (Select up to 3)

(Percentage of Government & Private Sector Respondents, N=76)

What is the most important thing the WBG could do to increase its effectiveness in these priority areas in China? (Please be specific) (N=48)

The full text of the qualitative comments can be found in the "China COS FY25 Appendices.xlsx" file.



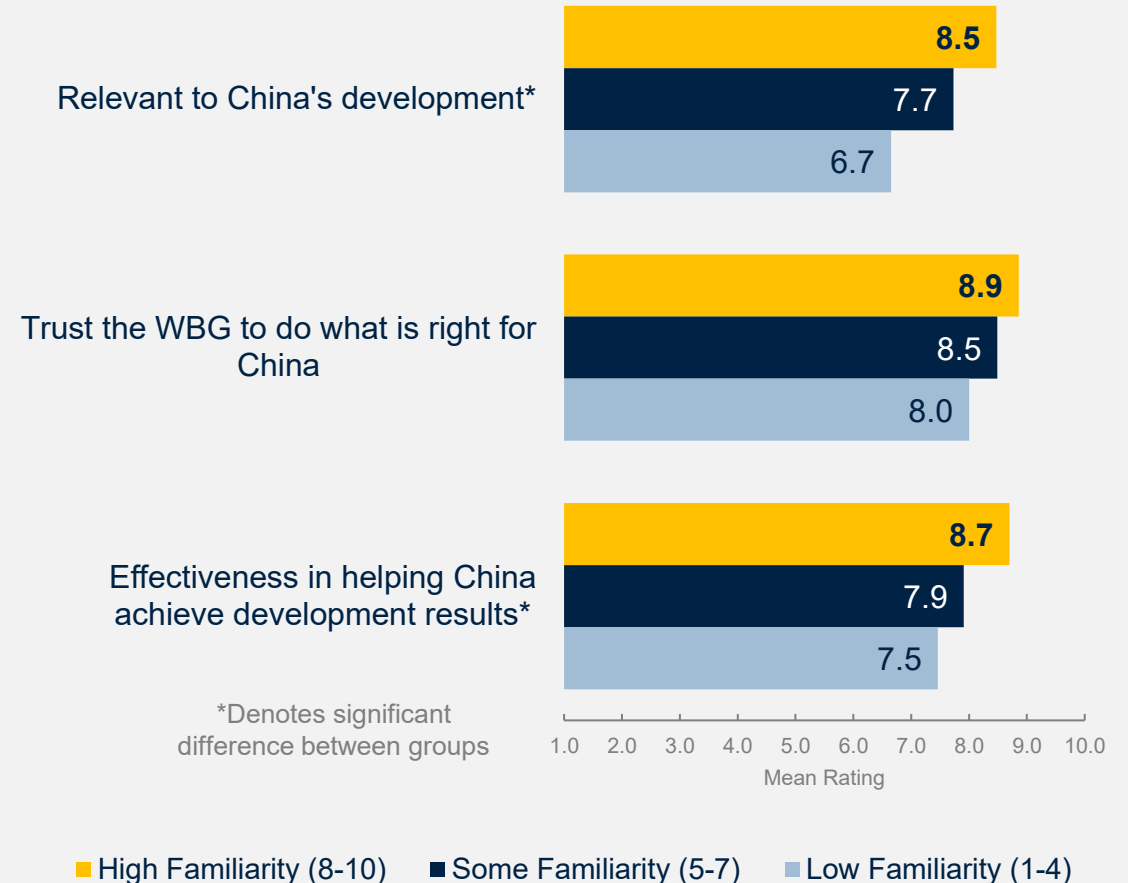
Communication and Outreach



WORLD BANK GROUP

Outreach and Engagement Is Important Because Familiarity Leads to More Positive Perceptions

Greater engagement with the WBG not only meets stakeholder demand but also fosters more positive perceptions. Stakeholders highly familiar with the WBG (ratings of 8–10) consistently rate its relevance and effectiveness higher than those with low familiarity (ratings of 1–4).



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



How familiar are you with the World Bank Group's work in China? Scale: 1 Not familiar at all – 10 Very familiar
 How much do you trust each of the following institutions to do what is right for China? Scale: 1 Not at all – 10 Very much
 How relevant is each of the following organizations to China's development? Scale: 1 Not at all – 10 Very much
 How effective is each of the following organizations in helping China achieve development results? Scale: 1 Not at all – 10 Very much

WBG Events, Direct Contact, and WBG Website are Stakeholders' Top Choice for Receiving Information from the Institution

Stakeholder preferences vary and should inform targeted outreach. For example, while most respondents prefer the WBG events, stakeholders from the private sector and the media prefer social media channels.

	Preferred WBG Channels							
	All Respondents	Government Institutions	Local Government	Bilateral /Multilateral Agency	Civil Society	Private Sector	Academia	Media
WBG event / conference / workshop (in person or online)	53%	74%	53%	44%	53%	38%	60%	33%
Direct contact with WBG staff (e.g., in person, virtually, phone, email)	44%	42%	38%	44%	47%	54%	53%	42%
WBG website (including blogs)	44%	42%	47%	44%	47%	38%	47%	25%
WBG social media channels (e.g., Facebook, LinkedIn, Instagram, Twitter/X)*	30%	21%	21%	33%	13%	54%	27%	67%
WBG e-Newsletters*	28%	16%	17%	44%	53%	23%	27%	50%
WBG publications	21%	16%	17%	44%	27%	8%	27%	25%
WBG direct messaging (e.g., WhatsApp)	19%	26%	23%	11%	13%	15%	7%	25%
WBG podcasts	5%	0%	6%	0%	13%	15%	0%	0%



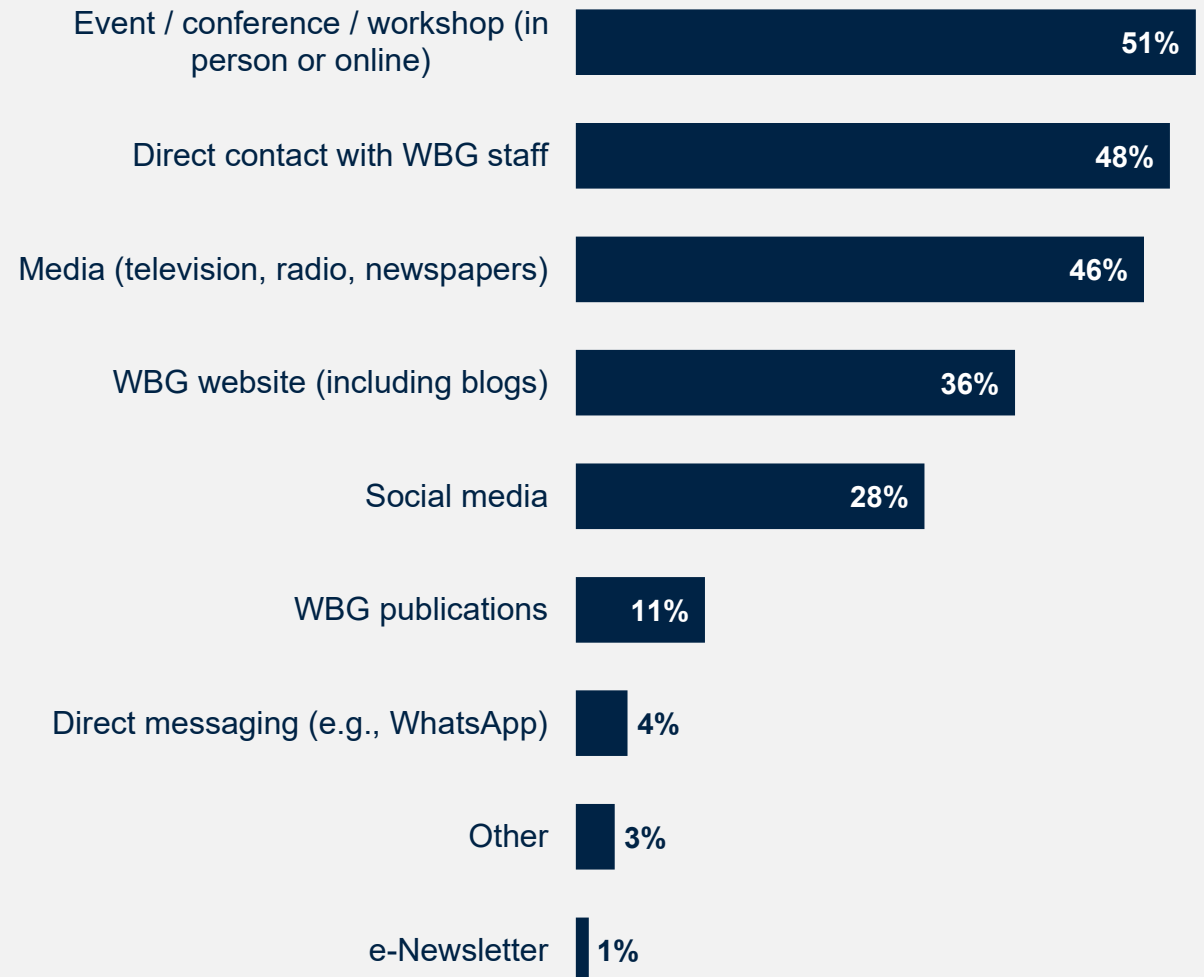
How would you prefer to obtain information from the WBG? (Select up to 3) (Percentage of Respondents, N=213)

* Denotes significant difference between years

72% the Respondents Recalled Seeing or Hearing About the WBG Recently, Most Often through WBG Events, Direct Contact, and the Media

Although WBG e-newsletters were identified as a preferred communication channel by 28% of respondents, only **1%** of respondents **recalled** receiving information through them recently.

Respondents consistently selected their preferred and recalled information sources, with **WBG events, conferences, and workshops** standing out as both preferred and recent engagement channels.



To Better Understand the WBG's Role in China, Stakeholders Wanted Information on Case Studies and the Results of Its Impact Assessments and Evaluations

	Preferred Information About the WBG							
	All Respondents	Government Institution	Local Government	Bilateral/Multilateral	Civil Society	Private Sector	Academia	Media
Case studies of WBG projects	68.7%	78.9%	68.0%	44.4%	80.0%	53.8%	73.3%	66.7%
Impact assessments and evaluations	38.1%	36.8%	36.0%	44.4%	40.0%	38.5%	26.7%	58.3%
WBG research and knowledge	35.8%	42.1%	24.0%	55.6%	46.7%	23.1%	33.3%	66.7%
Sector-specific strategies	31.3%	31.6%	32.0%	66.7%	33.3%	23.1%	33.3%	8.3%
Overview of WBG financial products and services	22.4%	15.8%	22.0%	22.2%	26.7%	53.8%	6.7%	8.3%
Regular updates on WBG activities	22.4%	15.8%	18.0%	22.2%	33.3%	23.1%	33.3%	25.0%
Information on how to work / partner with WBG	15.7%	5.3%	12.0%	11.1%	26.7%	15.4%	26.7%	25.0%
Other	1.5%	0.0%	2.0%	0.0%	0.0%	0.0%	6.7%	0.0%



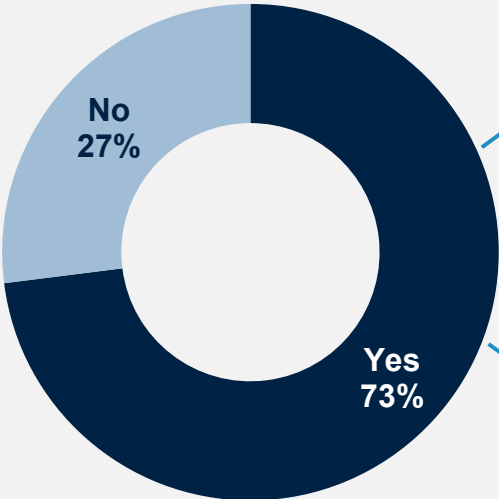
What information would be most helpful to you in understanding the WBG's role in China? (Select up to 3)
 (Percentage of Respondents, N=214) *Significant difference between stakeholder groups

Sample Demographics and Detailed Methodology

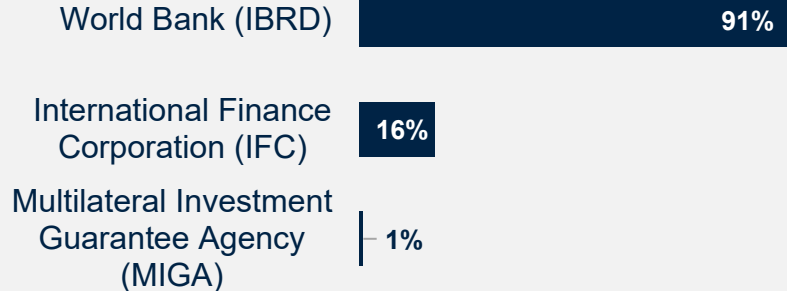


Sample Demographics

In the past 3 years, have you worked or collaborated with the WBG in China?
(N=163)



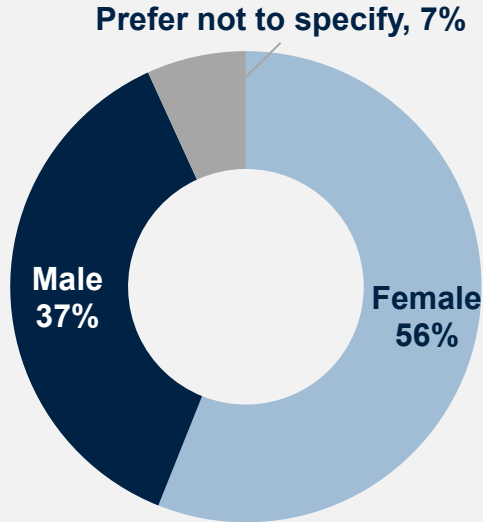
Which of the following WBG agencies have you worked or collaborated with in China?
(N=119)



Which best represents your geographic location?
(N=130)



What is your gender?
(N=132)

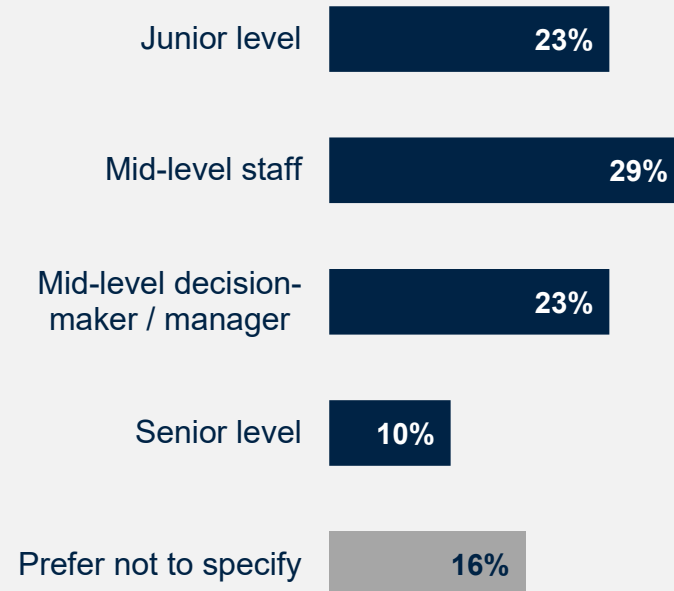


^ Also includes Inner Mongolia, Ningxia, Shaanxi, Shanxi, Sichuan, Yunnan, Guizhou, Guangxi;
^^ Also includes Zhejiang, Jiangsu, Shandong, Hebei; ^^ Also includes Jilin and Heilongjiang.

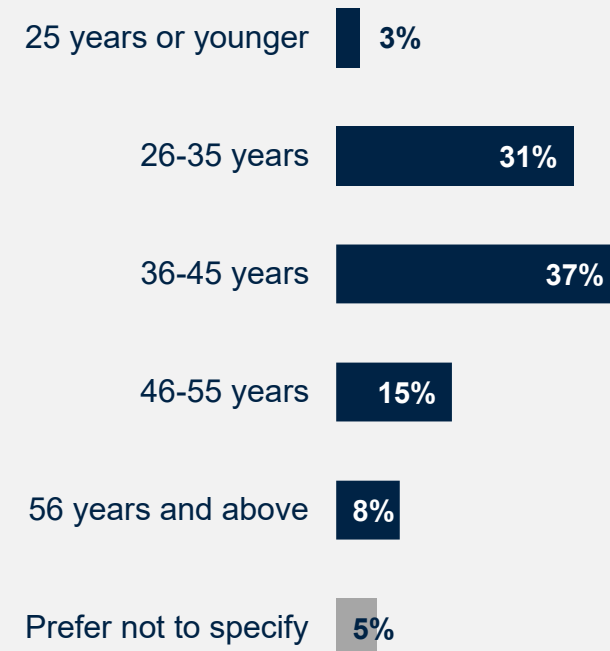


Sample Demographics (continued)

*Within your organization,
would you describe yourself as...*
(N=132)



What's your age?
(N=132)



Detailed Methodology

From **November 2024 to May 2025**, a total of 408 stakeholders in China 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 fielding consultant. Participants were drawn from government institutions, local government, bilateral or multilateral agencies, civil society organizations, the private sector, academia and research centers, and the media.

Of these stakeholders, **163 participated in the survey (40% response rate)**. Respondents received the questionnaire link via email, WeChat, or in person and completed it online.

This year’s survey results were compared to the FY22 Country Opinion Survey, which had a response rate of 60% (N=389).

Comparing responses across Country Opinion 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. However, the stakeholder compositions for both survey years should be taken into consideration when interpreting these comparisons. Significant differences among stakeholder groups are noted throughout the report where relevant.

Key statistically significant findings (tested at the research standard of $p < .05$) are noted throughout the report with an asterisk.

Percentage of Respondents	FY 2022	FY 2025
Government Principals: Office of the President, Prime Minister, Minister, Parliamentarian	0%	0%
Government Institutions: Employee of a Ministry, Department, Project Implementation Unit, Independent Government Institution, Judiciary, State-Owned Enterprise	29%	17%
Local Government	35%	36%
Bilateral/Multilateral Agency: Embassy, Development Organization, Development Bank, UN Agency	2%	6%
Civil Society Organization: Local and regional NGO, Community-Based Organization, Private Foundation, Philanthropy, Professional/Trade Association, Faith-Based Group, Youth Group	4%	10%
Private Sector: Private Company, Financial Sector Organization, Private Bank	8%	10%
Academia / Research Center	14%	11%
Media	4%	8%
Other	4%	2%
Total Number of Respondents	389	163

Detailed Methodology (continued)

Breakdowns for individual questions by stakeholder group and by year can be found in the “China COS FY25 Appendices.xlsx” file published in the WBG Microdata Library, along with the survey microdata and this report.

Please note that not all questions were asked of every respondent in FY25. Some questions – particularly those requiring more in-depth knowledge of WBG projects and operations – were only presented to a subset of stakeholders. Consequently, for year-over-year comparisons, some FY22 means shown in this report are based only on the subset of respondents who received the same questions in FY25, rather than the full FY22 sample. As a result, these means may differ from those published in the original FY22 report. Please refer to the questionnaire for details on question routing. The questionnaire is published in the WBG Microdata Library, along with the survey microdata, appendices, and this report.

The open-ended comments to this survey were analyzed with ChatGPT, a generative AI tool, and reviewed by the World Bank staff for accuracy.



CountryOpinionSurveys

Thank you

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

countrysurveys@worldbankgroup.org

