



CountryOpinionSurveys

FY 2025 Timor-Leste Country Opinion Survey Report

Acknowledgements

The Timor-Leste 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 Timor-Leste 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 are the key stakeholders' opinions of the WBG regarding its effectiveness, relevance, alignment with Timor-Leste's development priorities, and other key indicators? Are opinions improving or declining?
- 2. The WBG's Work on Development Priorities:** What areas of development are perceived to be the most important? Have the priorities changed over the past four years? How effective is the WBG perceived to be in these areas? What are stakeholders' suggestions for increasing the WBG's effectiveness in Timor-Leste?
- 3. WBG Instruments:** What do key stakeholders value the most regarding the WBG's work in Timor-Leste? What opinion do key stakeholders have of WBG financial instruments and knowledge products? Are opinions improving or declining?
- 4. The WBG's Engagement and Collaboration:** How is the WBG perceived as a development partner in Timor-Leste? Are opinions improving or declining?
- 5. Communications:** What are the preferred communication channels, and do they differ between stakeholder groups? Do stakeholders recall any WBG messaging? What key topics does the WBG communicate that stakeholders recall?



Methodology Overview

Fielded in March – June 2025

- 537 potential participants were asked to complete the survey
- Respondents completed the questionnaire either on paper (receiving and returning it via courier), on an online platform, or with a representative of the field agency
- List of names provided by the WBG country team and supplemented by the field agency
- Data collection managed on the ground by the field agency

235 participants (44% response rate)

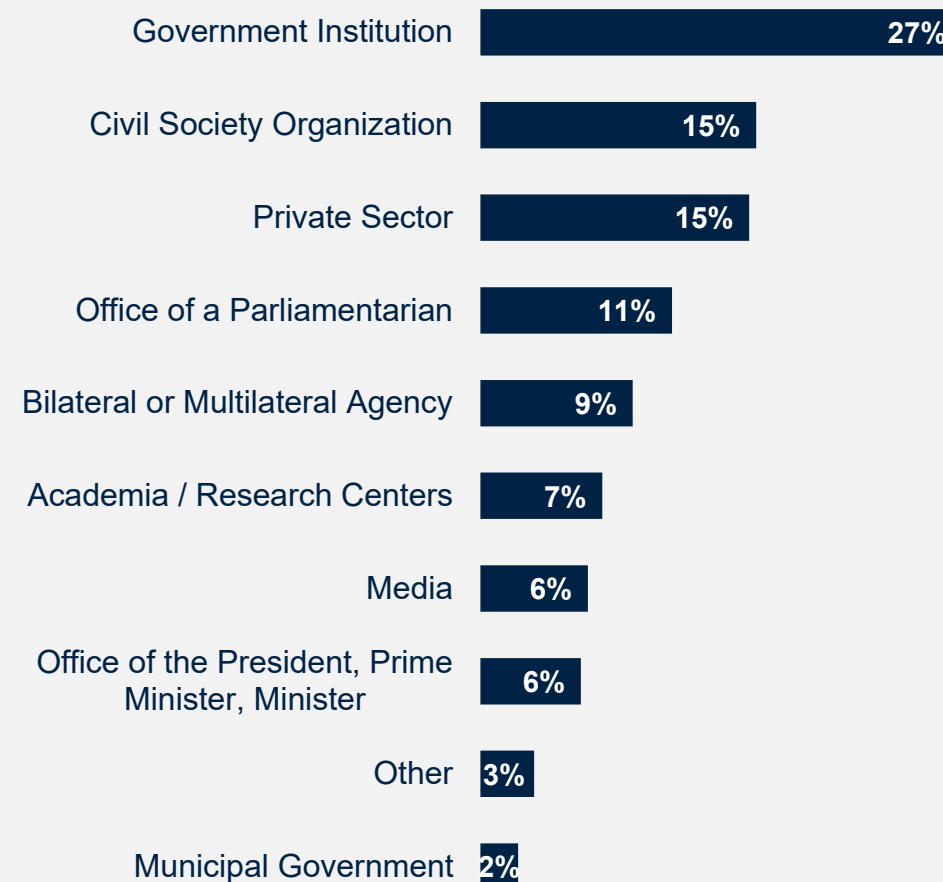
- 71% from Dili
- 53% collaborate/work with the WBG in Timor-Leste

Compared to the FY20 Country Survey Results

- 107 participants (51% response rate)
- 42% collaborated with the WBG

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

Stakeholders in FY25 COS Sample



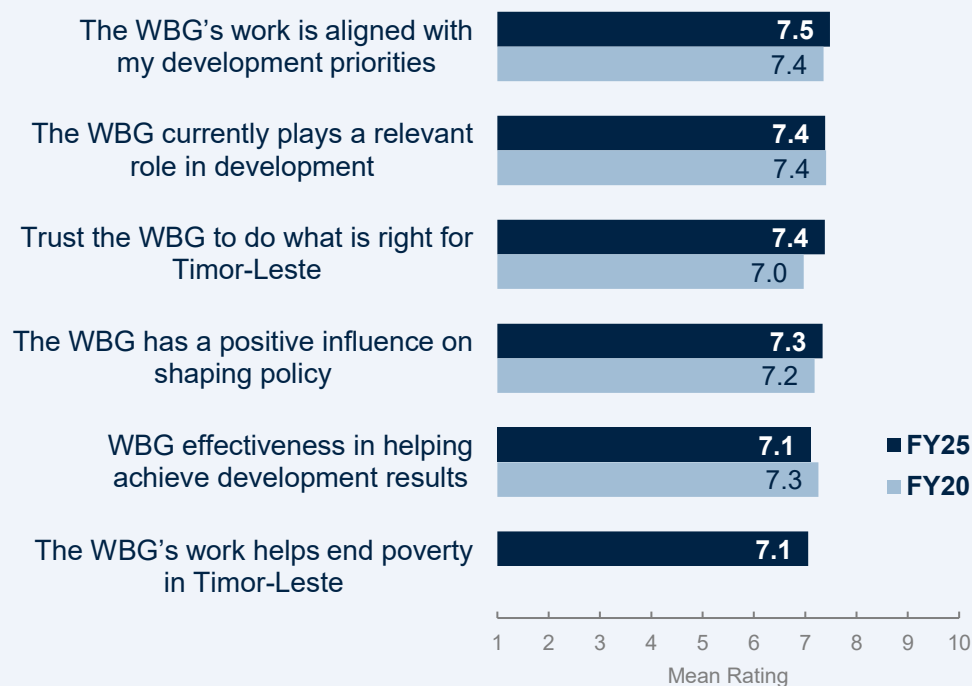
What is your primary professional affiliation? (Select only 1 response)
(Percentage of Respondents, N=234)

Executive Summary

1. Overall Views of the WBG:

Stakeholders in FY25 reported **similar levels of familiarity** with and **trust in the WBG** compared to the FY20 Country Survey. Trust in the WBG was lower only for the Central Bank in Timor-Leste. **Perceptions of the WBG's relevance** to the country's development, **alignment** with Timor-Leste's priorities, **influence** on development policy, and **effectiveness** in helping the country achieve results were positive, similar to the FY20 survey results.

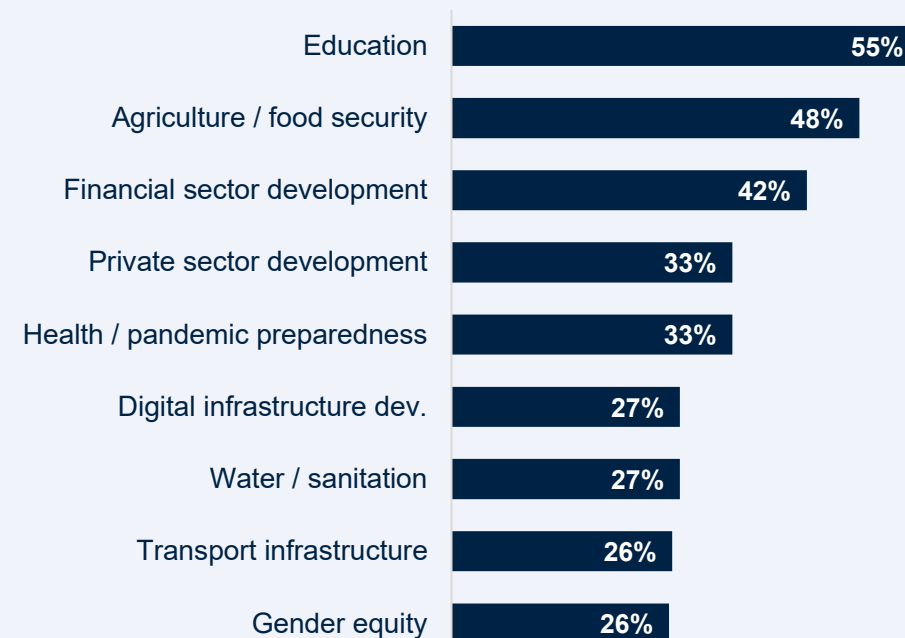
Stakeholder ratings on key performance indicators in Timor-Leste were somewhat lower than stakeholder ratings in other East Asian countries but mostly higher than those in other IDA countries surveyed in FY24-FY25.



2. The WBG's Work on Development Priorities:

Education, agriculture, and financial sector development were indicated as the top priorities for the WBG's support in FY25. This year, respondents considered the **financial sector** and **digital infrastructure development** much more of a priority for the WBG's involvement than in FY20.

In terms of the effectiveness of the WBG's work in these priority areas, its support in the **transport** sector received the highest effectiveness ratings; however, these ratings were significantly lower than in the FY20 survey. In addition, the WBG's work in **education, public sector governance, agriculture, and climate change** was also rated lower than in FY20.

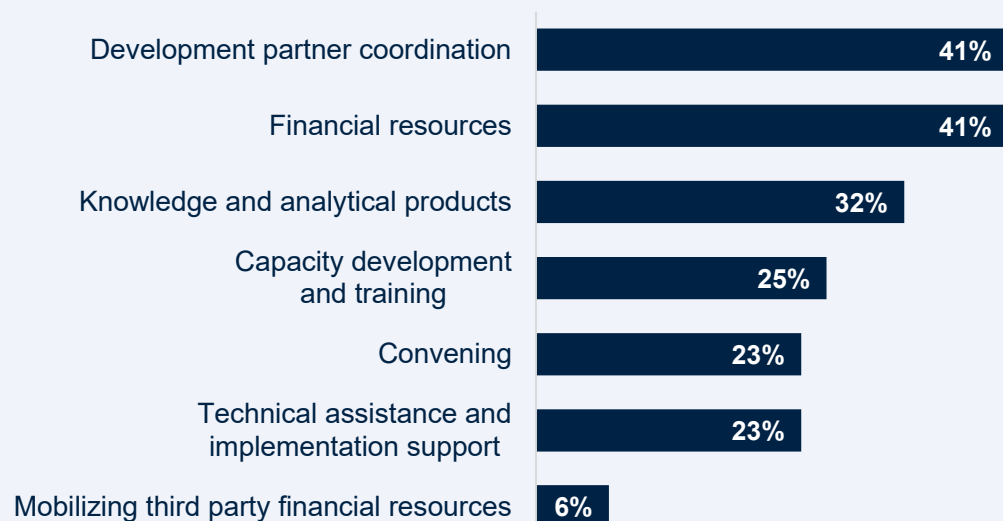


Executive Summary (continued)

In their qualitative comments regarding how to make the WBG more effective in Timor-Leste, respondents consistently mentioned **key development areas** – human development, agriculture, private sector development, infrastructure, and governance. In addition, respondents stressed the need for **more inclusive development**, including youth, women, and rural areas. Increased **capacity building and technical support** were discussed to ensure the sustainability of development and the importance of **better monitoring and evaluation** to promote government accountability. Respondents also suggested that the WBG should **engage more with the government and private sector** to facilitate the adoption of effective growth policies.

3. WBG Instruments:

Stakeholders considered the WBG's **development partner coordination** and **financial resources** to be its greatest value to Timor-Leste.



Ratings for the WBG's financial instruments were similar to those in FY20, with respondents having the highest levels of agreement that the WBG **effectively monitors and evaluates its projects** and that the WBG **insists on accountability** through its lending (both means=7.4). In their open-ended responses, stakeholders consistently discussed their desire for the WBG to **increase its financial support** to Timor-Leste and that this increased financial support should include **more technical support and capacity building**, especially in public financial management. In addition, respondents suggested that the WBG **increase its monitoring and evaluation** of projects to ensure accountability and the effective, efficient use of WBG funds.

Half of all respondents indicated that they had used the WBG's knowledge work (50%). These respondents had the highest levels of agreement that the WBG **brings global expertise** to Timor-Leste (mean=7.8), and all ratings regarding the WBG's knowledge work were similarly positive as in the FY20 survey.

In their written comments regarding how to improve the WBG's effectiveness in Timor-Leste, stakeholders discussed the importance of the WBG's knowledge work. They consistently emphasized the **need for WBG knowledge work to accompany any financial support** provided by the WBG. Respondents discussed the need for **more capacity-building across all levels and sectors**. Respondents also called for **increased implementation and technical support** to ensure the effectiveness and sustainability of WBG-supported projects. Finally, respondents discussed the need for **more research and policy advice on public financial management and on creating a more investment-friendly environment for private sector growth**.



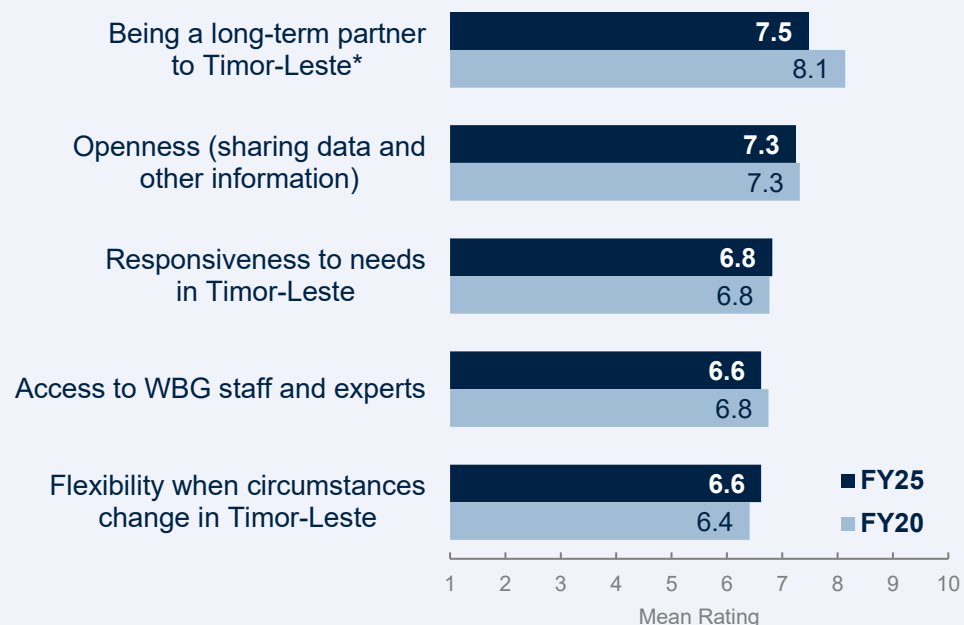
Executive Summary (continued)

4. The WBG's Engagement and Collaboration:

In FY25, stakeholder perceptions of the WBG as a **long-term partner** to Timor-Leste significantly declined but all other aspects of the WBG's partnership with Timor-Leste were consistent with the FY20 survey.

Perceptions of the WBG's collaboration with the **national government**, other **development partners**, the **private sector**, and **civil society** were quite positive and similar to the FY20 survey results. The WBG received the highest ratings for the effectiveness of its **collaboration with other donors and development partners** (mean=7.6).

In addition to its partnership with the national government, respondents would like the WBG to **collaborate more with private sector** (35%), **academia** (29%), and **civil society** (27%) in Timor-Leste.



Respondents' comments answering the question of how the WBG can be more effective in Timor-Leste noted the importance for the WBG to **improve the effectiveness of its collaboration with the government and increase its engagement with stakeholders outside of government**, allowing the WBG to **better tailor its initiatives** to the realities on the ground; **create a broader base to disseminate the WBG's knowledge and advice** to generate more support for WBG policy suggestions; **increase transparency** into WBG operations and decision-making process to ensure more government accountability; **create a feedback loop** in which stakeholders can provide input regarding project design, implementation, and effectiveness; and **further coordination and dialogue** among different stakeholder groups, the government, and other development partners.

5. Communications:

Stakeholders most preferred WBG **events (in person or online)** (52%), **direct contact with staff** (46%), **social media** (44%), and **e-newsletters** (31%) as channels to obtain information about the WBG.

38% of respondents recalled seeing or hearing about the WBG recently, primarily on WBG websites (48%), TV (44%), or social media (44%), and most often regarding the WBG's work on economic diversification (58%), economic forecasts (54%), or ending poverty in development countries (53%).

Survey findings suggest **communications about climate change** can be more impactful by relating them to stakeholders' top concerns for the impact of climate change: flooding, water availability, and food security.



Overall Views of the World Bank Group



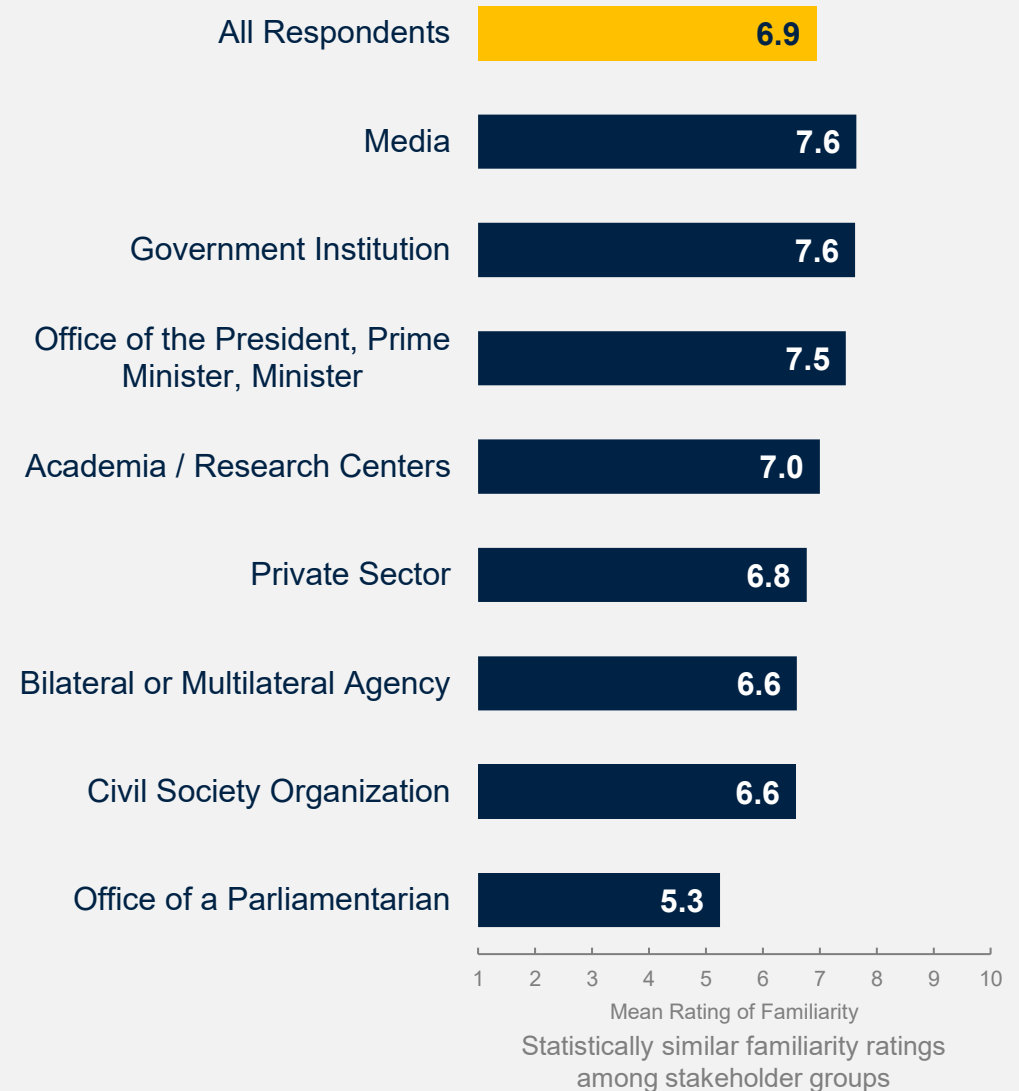
Familiarity With the WBG Consistent With the FY20 Survey Results

- Comparison of FY20 and FY25:** Respondents in this year's Country Survey reported statistically similar levels of familiarity with the World Bank Group compared to respondents in the FY20 Survey:

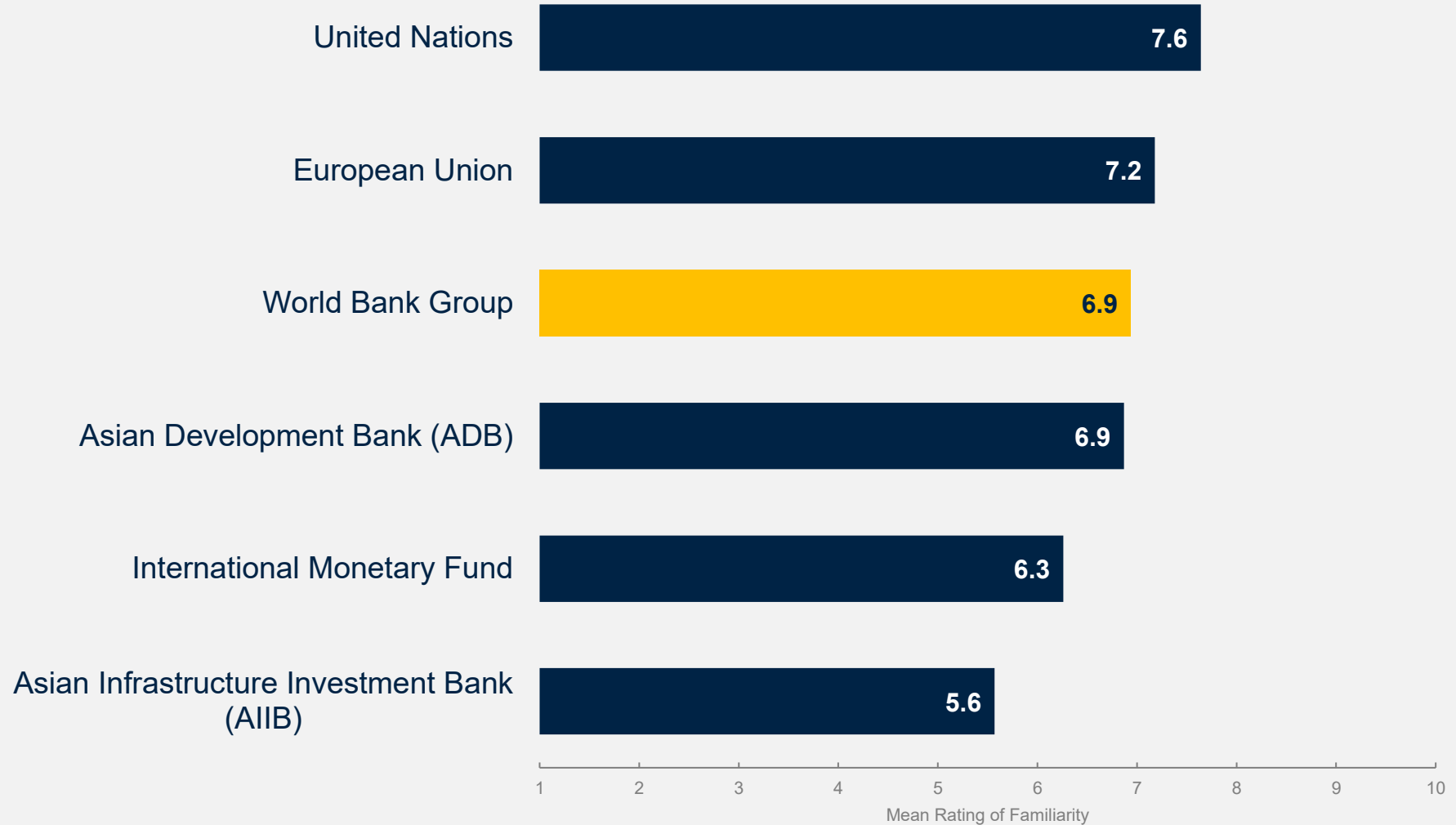
Mean familiarity: **FY25 = 6.9**
 FY20 = 6.7

- 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 = 7.6**
 Do not collaborate = 6.2



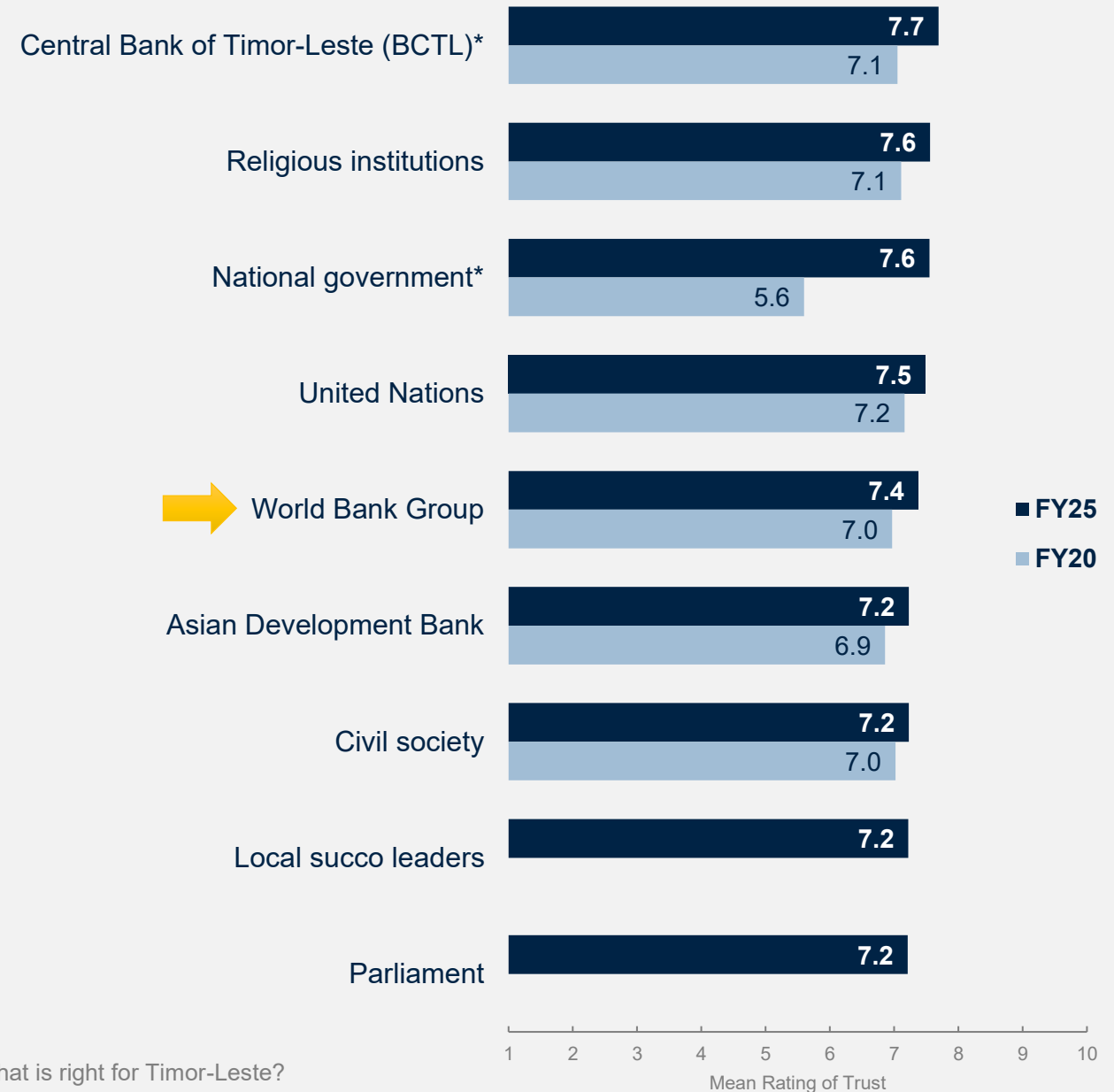
Respondents Reported Being Most Familiar With the Work of the UN and EU in Timor-Leste



The Central Bank of Timor-Leste is Rated the Most Trusted Institution

Respondents gave the highest ratings of trust for the **Central Bank** (significantly improved compared to FY20), **religious institutions**, and the **national government** (also significantly improved). Ratings of trust in the WBG were statistically similar to all other institutions, except for the Central Bank of Timor-Leste.

- Significant stakeholder group differences were found in the trust ratings for several institutions, but not the WBG. Results of this analysis can be found in the “Timor-Leste COS FY25 Appendices.xlsx” file.

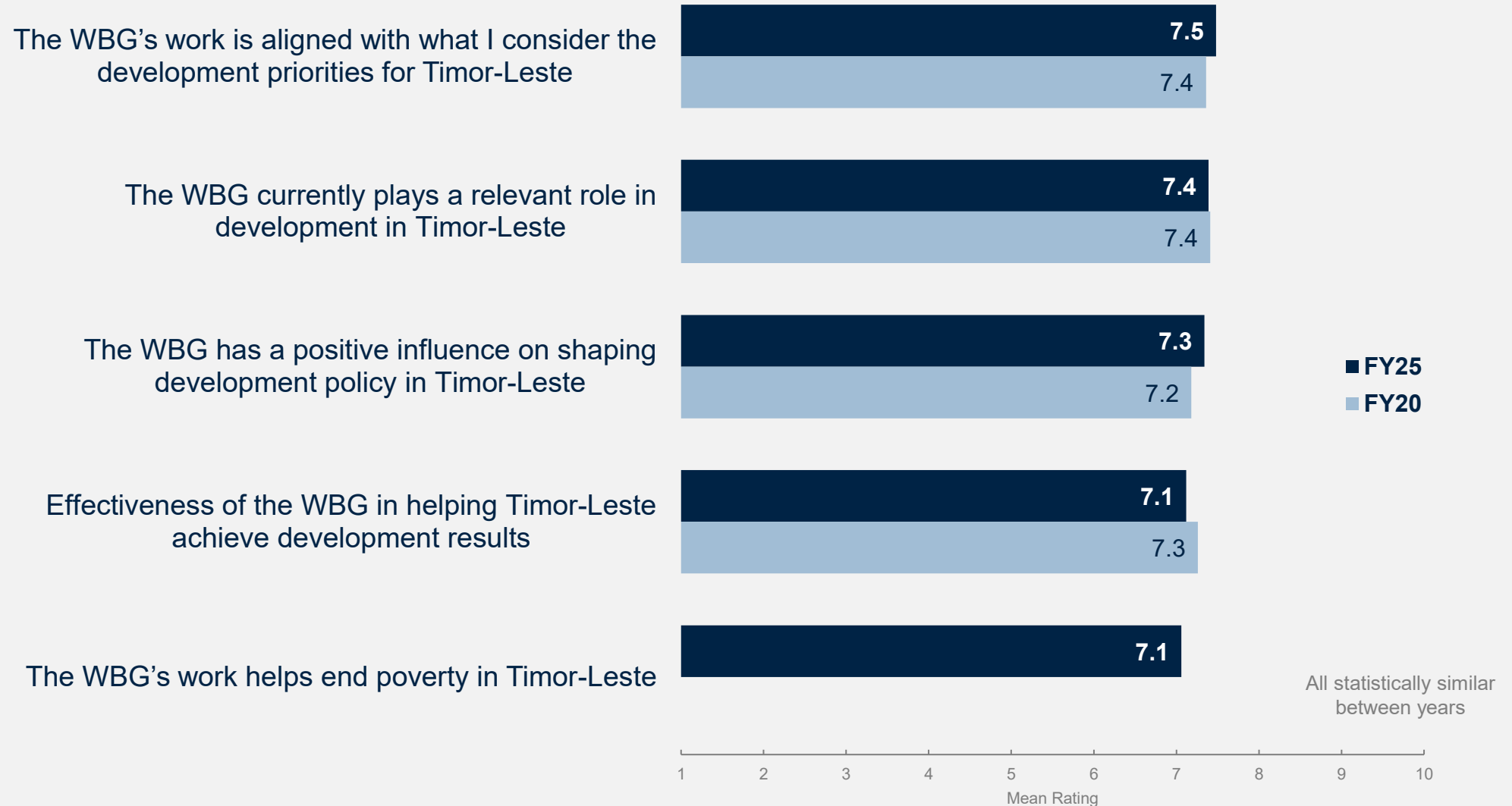


How much do you trust each of the following institutions to do what is right for Timor-Leste?

Scale: 1 Not at all – 10 Very much

The WBG was rated significantly lower than the Central Bank of Timor-Leste but was statistically similar to all other institutions..

Overall Perceptions of the WBG Were Positive, Consistent With the FY20 Survey Results

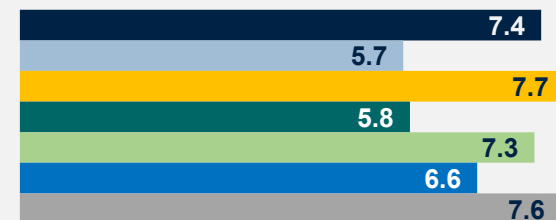


Stakeholders from Government Institutions, Civil Society, and Academia Had More Positive Perceptions of the WBG and Its Work

Trust the WBG to do what is right for Timor-Leste



Effectiveness in helping Timor-Leste achieve development results*



The WBG has a positive influence on shaping development policy in Timor-Leste*



The WBG currently plays a relevant role in development in Timor-Leste*



The WBG's work is aligned with what I consider the development priorities for Timor-Leste*



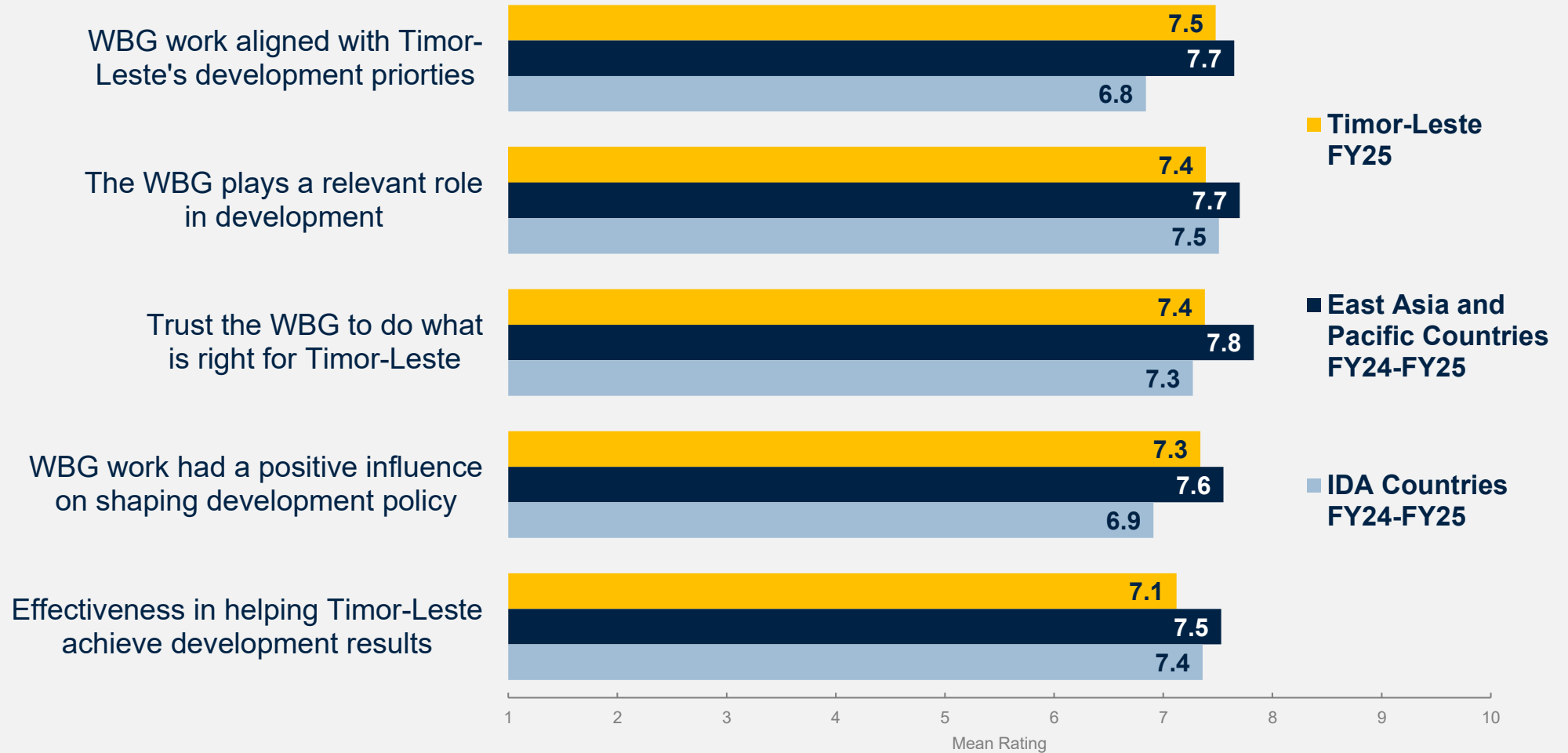
- Office of the President, PM, Minister
- Office of a Parliamentarian
- Government Institution
- Bilateral or Multilateral Agency
- Civil Society Organization
- Private Sector
- Academia / Research Centers

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

*Significant difference between stakeholder groups



Stakeholders in Timor-Leste Perceived the WBG Somewhat Lower Than Those in Other FY24-FY25 East Asia and Pacific Countries, but Mostly Higher Than FY24-FY25 IDA Countries



East Asia and Pacific FY24-FY25 countries included: Cambodia, China, Lao PDR, Papua New Guinea, Solomon Islands, Thailand, and Vietnam.

IDA countries in FY24-FY25 included: Bangladesh, Benin, Bhutan, Burkina Faso, Burundi, Cambodia, Chad, China, Comoros, Democratic Republic of Congo, Ethiopia, Guinea-Bissau, Kosovo, Lao PDR, Lesotho, Liberia, Malawi, Maldives, Mauritania, Rwanda, Senegal, Sierra Leone, Solomon Islands, Somalia, South Sudan, Sri Lanka, Tajikistan, Togo, and Zambia.



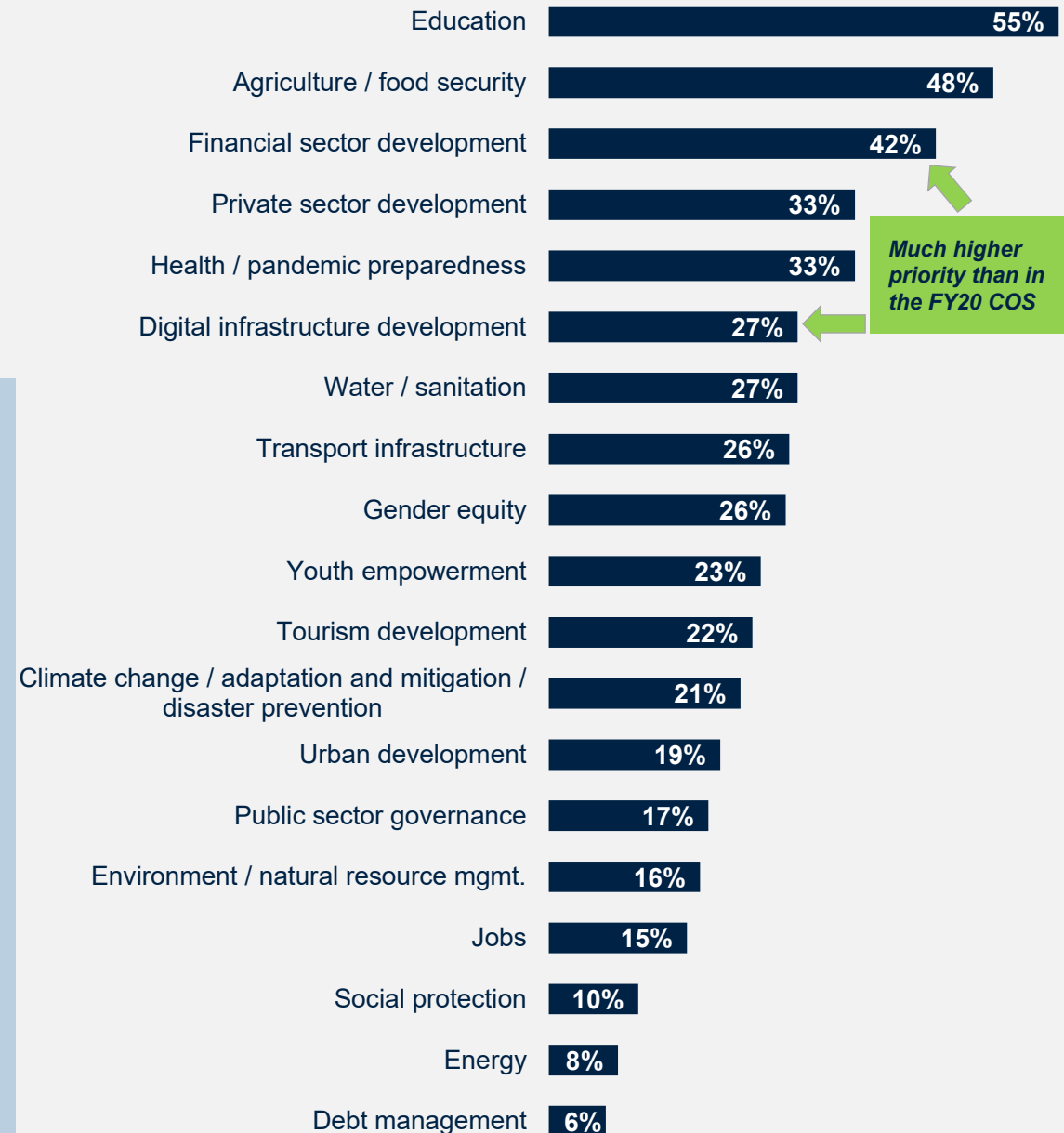
The WBG's Work on Development Priorities



Education, Agriculture, and Financial Sector Development Were Stakeholders' Top Areas for WBG Focus

Respondents answering the question of how the WBG can be more effective in Timor-Leste[^] discussed key development areas and the need for the WBG's focus to be aligned with these areas.

- Respondents consistently mentioned key development areas – human development, agriculture, private sector development, infrastructure, and governance.
- In addition, respondents discussed the need for more inclusive development, including youth, women, and rural areas.
- Increased capacity building and technical support were also discussed to ensure the sustainability of development.
- Respondents discussed the need for the WBG to engage more with the government and private sector to better understand their needs and capacity and to facilitate the adoption of effective policies.
- Respondents also discussed the need for more monitoring and evaluation to promote government accountability ensuring WBG support was appropriately used as intended.



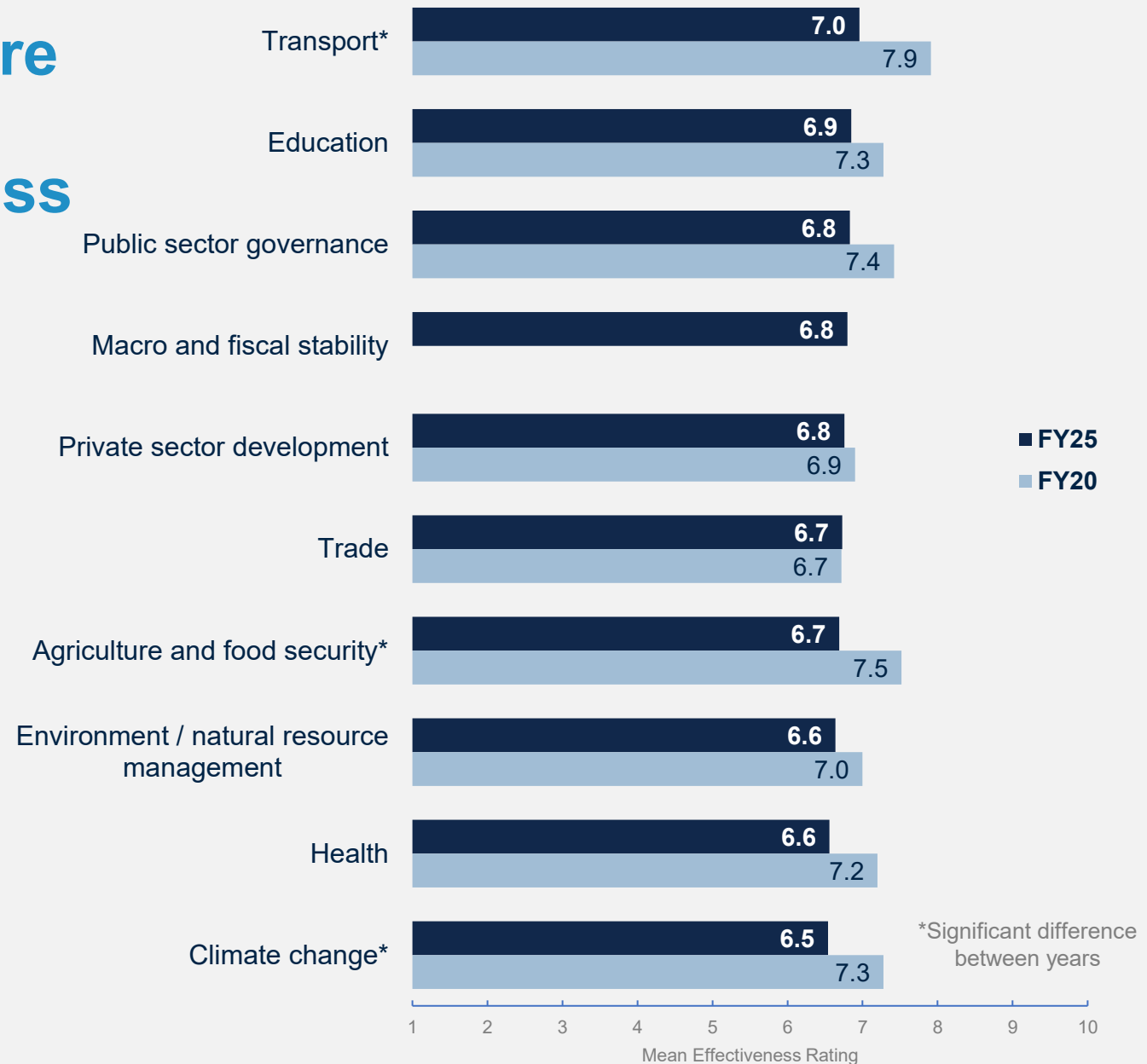
Which areas should the WBG prioritize to have the most impact on development results in Timor-Leste? (Select up to 5) (Percentage of Respondents, N=226)

[^]In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Timor-Leste? (N=189)



The WBG's Work in Transport Infrastructure Received the Highest Ratings of Effectiveness

- Of note, effectiveness ratings for the WBG's work in **transport, agriculture and food security, and climate change** significantly declined since the FY20 survey.
- Significant stakeholder group differences were found in the effectiveness ratings across all development areas. For the most part, respondents from the Office of a Parliamentarian and those from bilateral or multilateral agencies gave lower ratings than respondents from other stakeholder groups. It should be noted that respondents from these two stakeholder groups also reported the lowest ratings of familiarity with the WBG and its work. Further details of this analysis can be found in the "Timor-Leste COS FY25 Appendices.xlsx" file.



The WBG's Instruments



Stakeholders Considered Development Partner Coordination and Financial Resources To Be The WBG's Greatest Values to Timor-Leste

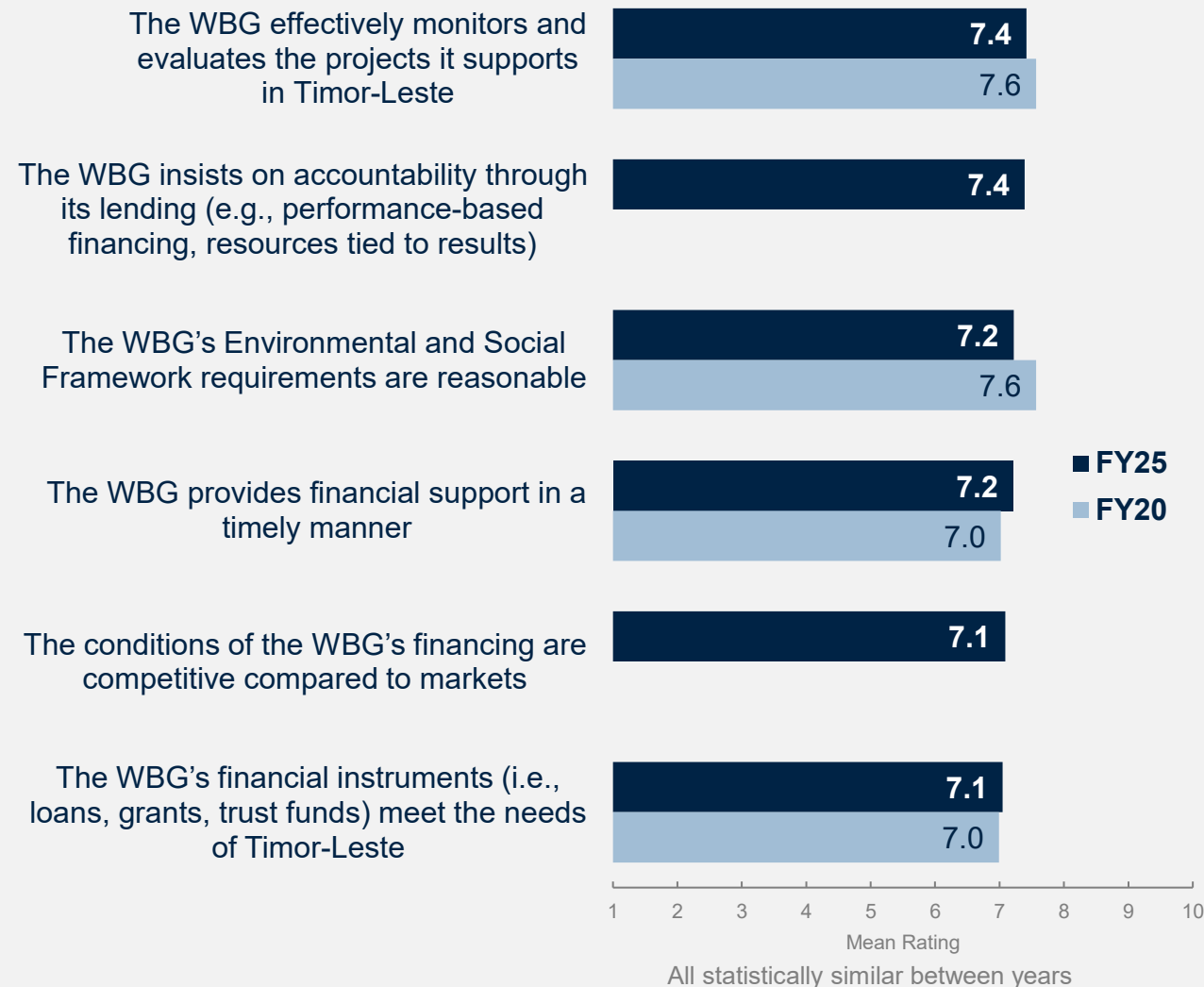


Perceptions of the WBG's Financial Instruments Consistent with FY20 Results

- Significant stakeholder group differences were found in the ratings for the WBG's financial instruments meeting Timor-Leste's needs, the WBG's financing being competitive, and the WBG providing financial support in a timely manner. For the most part, respondents from the Office of a Parliamentarian and those from bilateral or multilateral agencies gave lower ratings than respondents from other stakeholder groups. Further details of this analysis can be found in the "Timor-Leste COS FY25 Appendices.xlsx" file.

In respondents' comments answering the question of how the WBG can be more effective in Timor-Leste[^], they discussed that the WBG should increase its financial support and work to ensure it is impactful.

- Respondents consistently discussed their desire for the WBG to increase its financial support to Timor-Leste, particularly in infrastructure, agriculture, and private sector development.
- Respondents also discussed that this increased financial support should include more technical support and capacity building, especially in public financial management.
- In addition, respondents suggested that the WBG increase its monitoring and evaluation of projects to ensure accountability and the effective, efficient use of WBG funds.



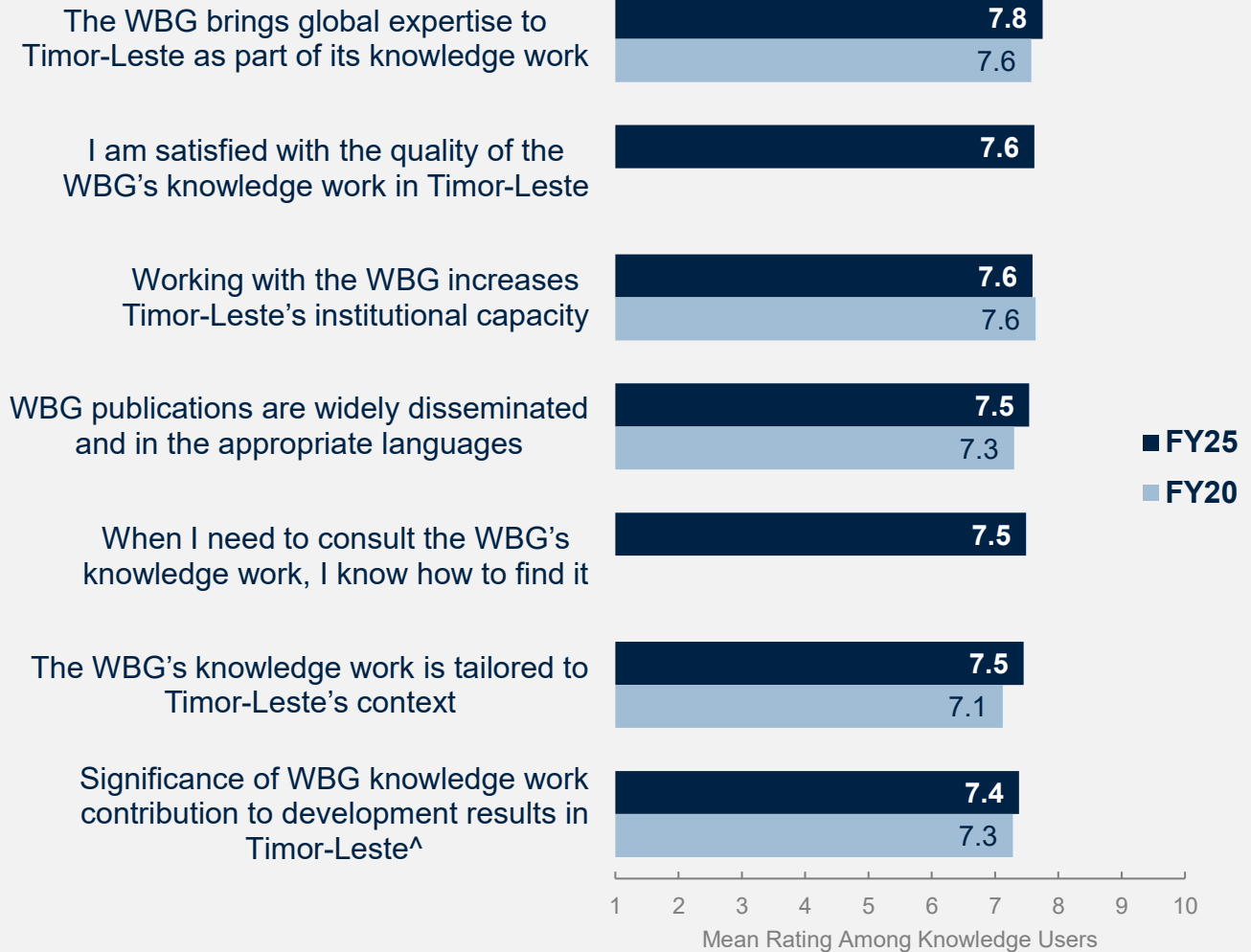
To what extent do you agree with the following statements? Scale: 1 Strongly disagree – 10 Strongly agree

[^]In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Timor-Leste? (N=189)

50% of Respondents Used the WBG's Knowledge Work and Were Positive About It, Similar to FY20 Results

Respondents' comments answering the question of how the WBG can be more effective in Timor-Leste^{^^} discussed the importance of the WBG's knowledge work:

- Respondents consistently mentioned the need for WBG knowledge work to accompany any financial support provided by the WBG.
- Respondents discussed the need for more capacity-building across all levels of government and across all relevant sectors.
- Respondents also discussed increasing implementation and technical support to ensure the effectiveness and sustainability of WBG-supported projects.
- Respondents discussed the need for more research and policy advice on public financial management and creating a more investment-friendly environment for private sector growth.



Have you ever used the WBG's knowledge work, including participating in workshops or training programs? (Percentage of Respondents, N=229)

[^]How significant a contribution do you believe the WBG's knowledge work makes to development results in Timor-Leste?

Scale: 1 Not significant at all – 10 Very significant. Asked all respondents

To what extent do you agree with the following statements? Scale: 1 Strongly disagree – 10 Strongly agree (Only asked those who used WBG knowledge)

^{^^}In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Timor-Leste? (N=189)

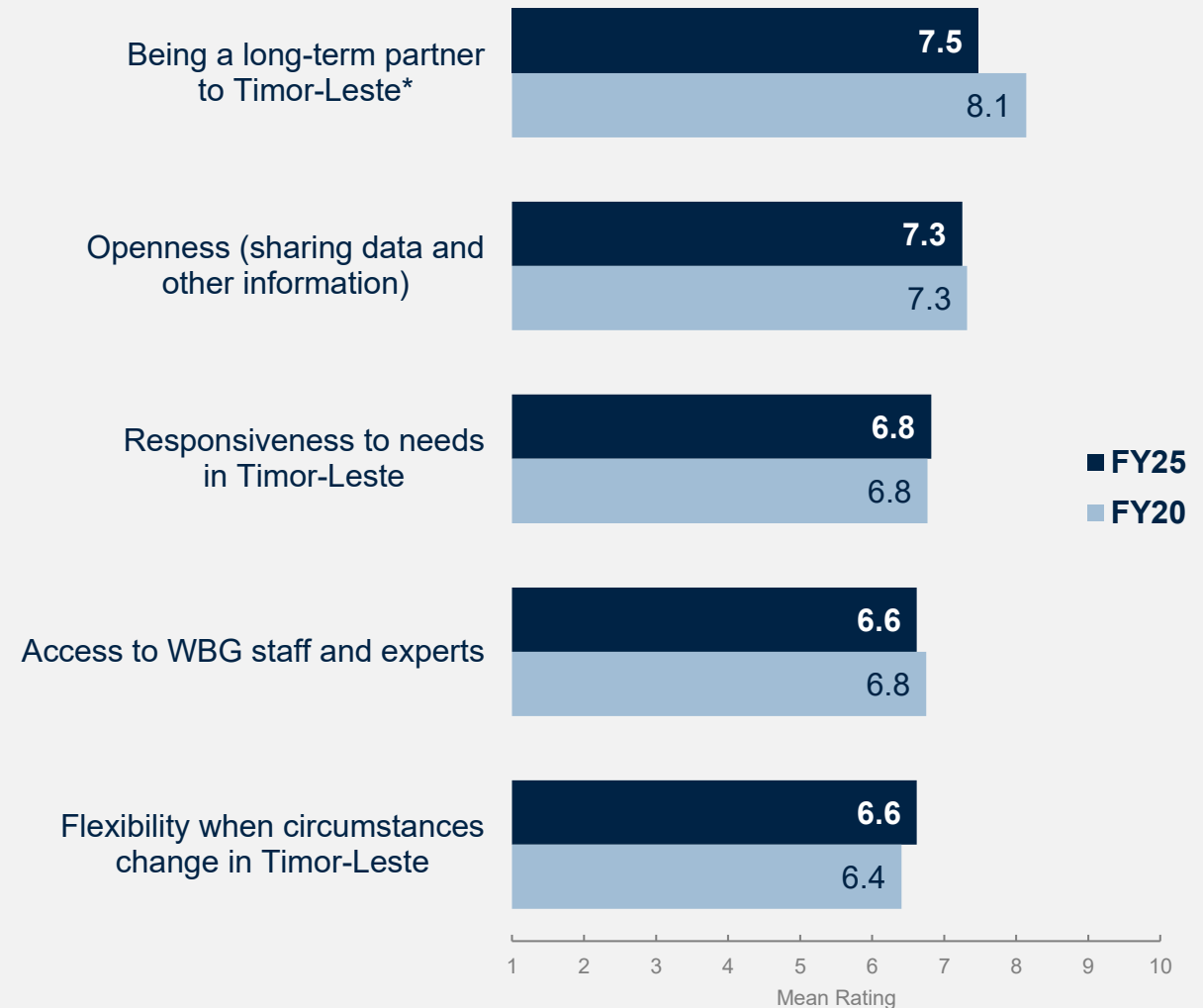


The WBG's Engagement and Collaboration



Perceptions of the WBG as a Long-Term Partner Have Declined, but Other Aspects of Partnership With Timor-Leste, Remain Consistent to FY20 Results

- Significant stakeholder group differences were found in ratings for the WBG’s openness, responsiveness, accessibility, and flexibility. For the most part, respondents from the Office of a Parliamentarian and those from the private sector and bilateral or multilateral agencies gave lower ratings than respondents from other stakeholder groups. Further details of this analysis can be found in the “Timor-Leste COS FY25 Appendices.xlsx” file.



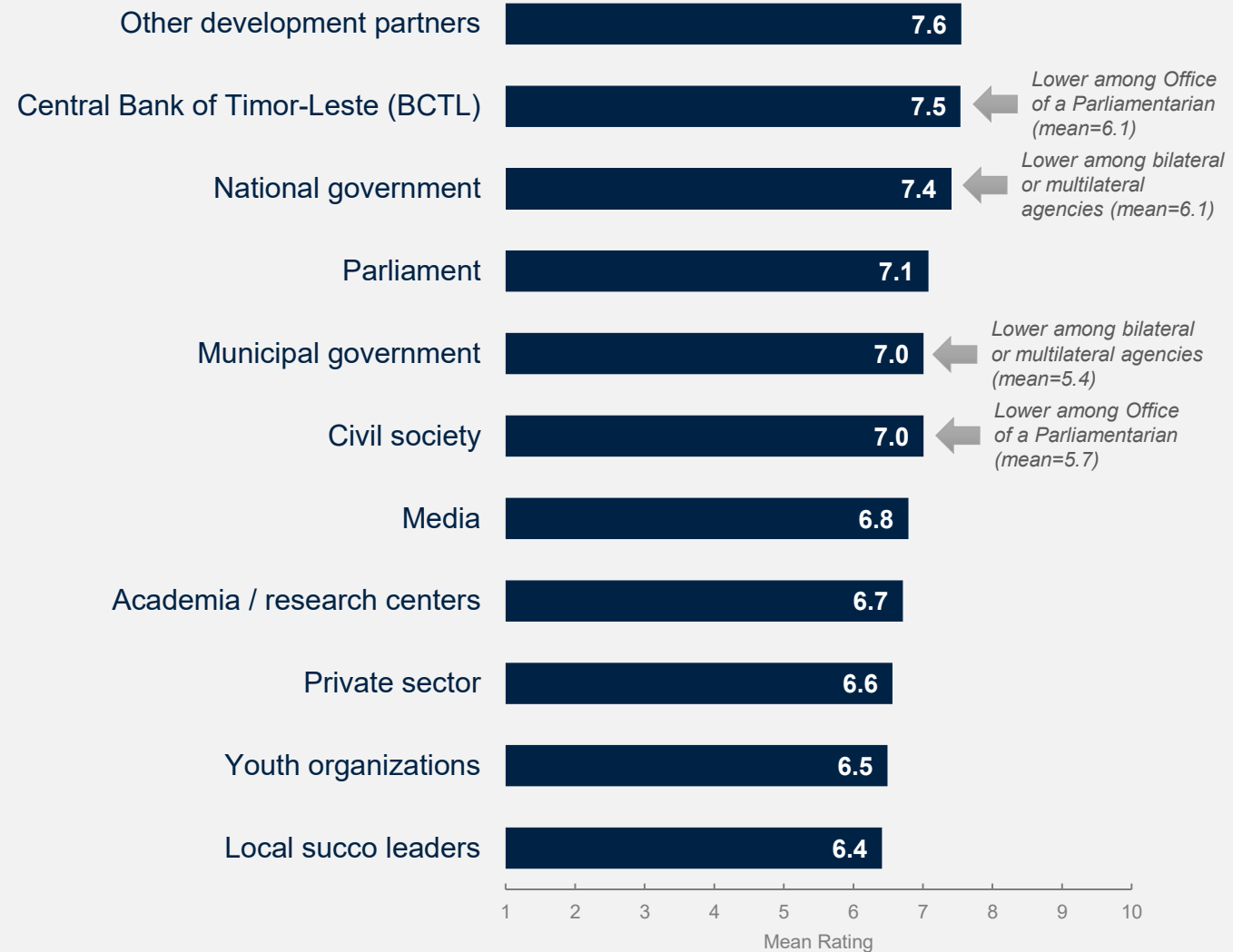
*Significant difference between years



To what extent is the WBG an effective development partner in terms of the following?
Scale: 1 To no degree at all – 10 To a very significant degree

The WBG's Collaboration With Other Development Partners, the Central Bank, and the Government of Timor-Leste Rated Highest

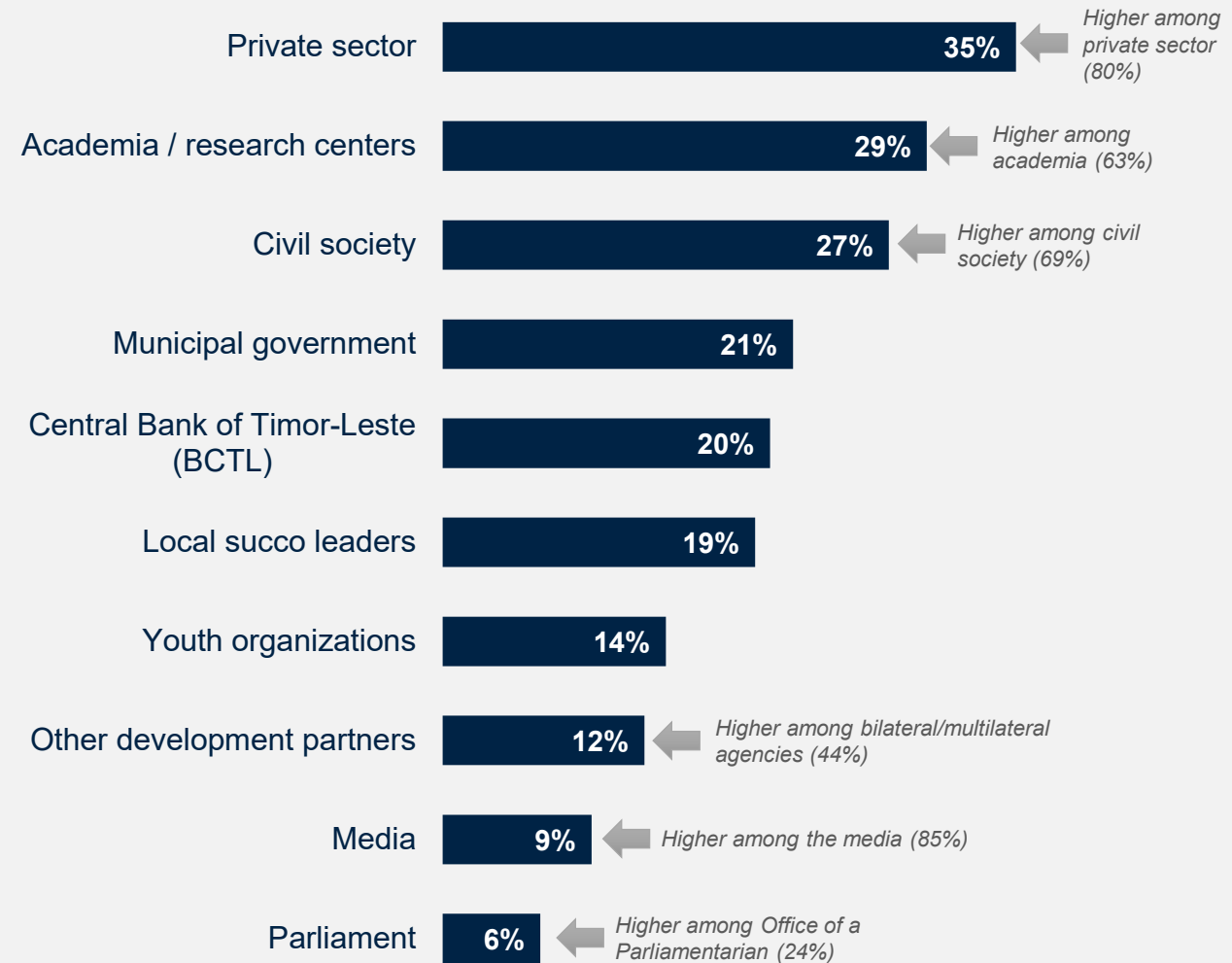
Of note, compared to the FY20 COS results, ratings in this year's survey were statistically similar for WBG collaborations with the national government, other development partners, the private sector, and civil society.



Stakeholders Want the Bank to Collaborate More With Private Sector, Academia, and Civil Society in Timor-Leste

Respondents' comments answering the question of how the WBG can be more effective in Timor-Leste[^] discussed the need for the WBG to not only improve the effectiveness of its collaboration with the government but also to increase its engagement with stakeholders outside of government, allowing the WBG to:

- Better tailor its initiatives to the realities on the ground, including the specific needs, context, and capacity of the people, region, etc.
- Create a broader base to disseminate the WBG's knowledge and advice and generate more support for WBG policy suggestions
- Increase transparency into WBG operations and the decision-making process to ensure more government accountability
- Create a feedback loop in which stakeholders can provide input regarding project design, implementation, and effectiveness
- Further coordination and dialogue among different stakeholder groups, the government, and other development partners



In addition to its partnership with the national government, which of the following should the WBG collaborate with more to have a greater impact in Timor-Leste? (Select up to 2) (Percentage of Respondents, N=222)

[^]In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Timor-Leste? (N=189)



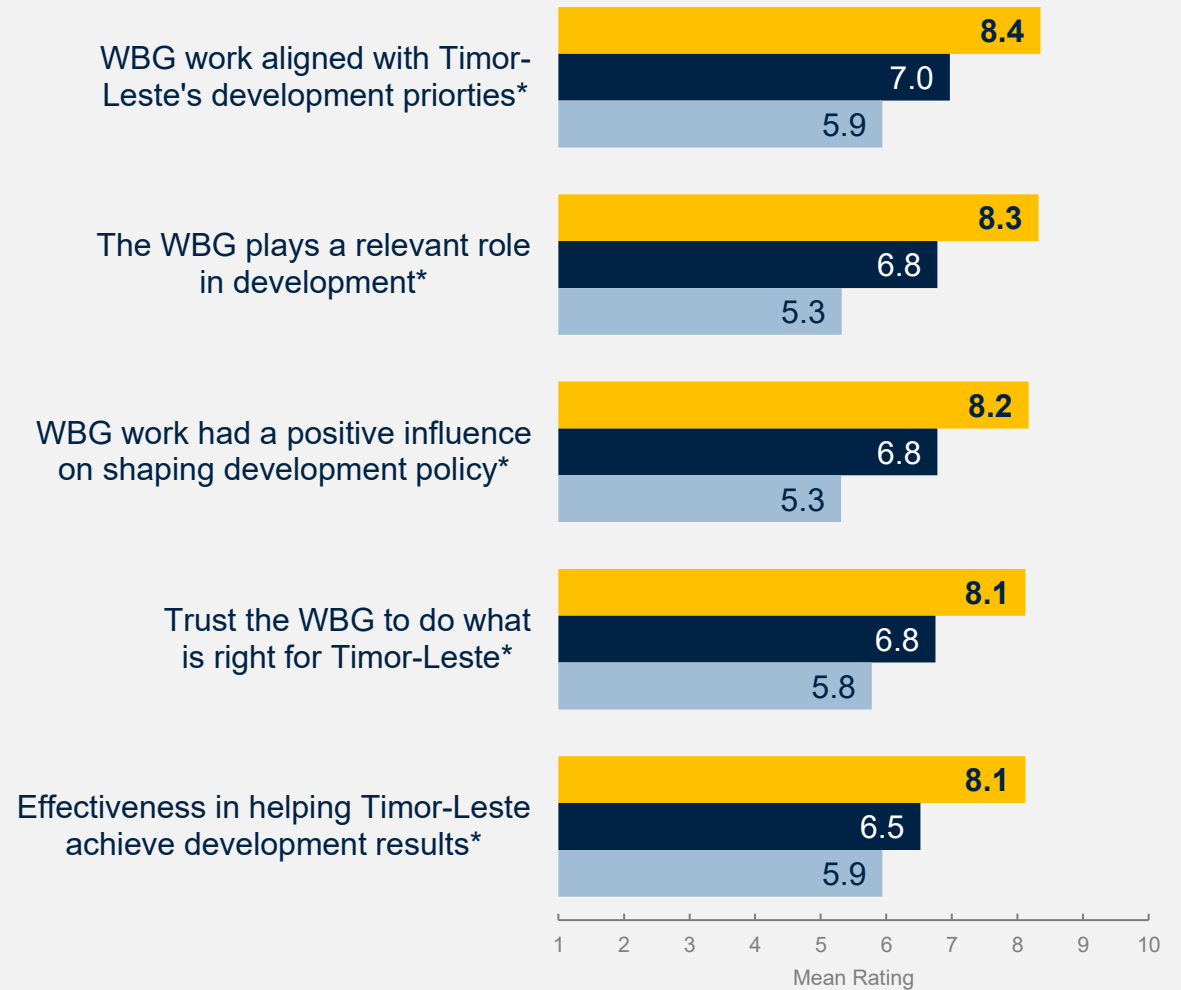
Communication and Outreach



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

In addition to respondents indicating a desire for more engagement with the WBG, such engagement can engender more positive perceptions of the WBG and its work.

Respondents' comments answering the question of how the WBG can be more effective in Timor-Leste[^] discussed the need for greater communication efforts from the WBG to build awareness of the WBG's work in Timor-Leste, engendering support in the future, facilitating more of a feedback loop with beneficiaries, as well as increasing trust in the WBG and transparency in how the WBG works with the government.



How familiar are you with the work of the WBG in Timor-Leste?

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

*Significant difference between levels of familiarity

How much do you trust the WBG to do what is right for Timor-Leste? Scale: 1 Not at all – 10 Very much
 How effective is the WBG in helping Timor-Leste achieve development results? Scale: 1 Not at all – 10 Very much
 To what extent do you agree with the following statements? Scale: 1 Strongly disagree – 10 Strongly agree

[^]In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Timor-Leste? (N=189)



Events, Direct Contact, and Social Media Were the Most Preferred WBG Channels for Stakeholders to Obtain Information

Key differences between stakeholder groups should be taken into consideration for targeted outreach (e.g., government principals were the most likely to prefer social media while private sector respondents preferred direct contact).

Top Two Preferred WBG Channels

	All Respondents	Office of the President, Prime Minister, Minister	Office of a Parliamentarian	Government Institution	Bilateral or Multilateral Agency	Civil Society Organization	Private Sector	Academia / Research Center	Media
Event / conference / seminar / workshop <i>(in person or online)</i>	52%	54%	20%	59%	61%	57%	47%	63%	62%
Direct contact with staff* <i>(e.g., in person, virtually, by phone, email)</i>	46%	31%	16%	49%	44%	54%	53%	56%	62%
Social media* <i>(e.g., Facebook, X (previously Twitter))</i>	44%	54%	72%	46%	28%	46%	35%	38%	0%
e-Newsletters	31%	39%	56%	25%	44%	23%	32%	25%	23%
Direct messaging <i>(e.g., WhatsApp, Telegram, Viber)</i>	12%	15%	20%	7%	11%	17%	21%	0%	15%
Other	4%	0%	0%	5%	0%	3%	3%	6%	15%



How would you prefer to obtain information from the WBG? (Select up to 2) (Percentage of Respondents, N=227)

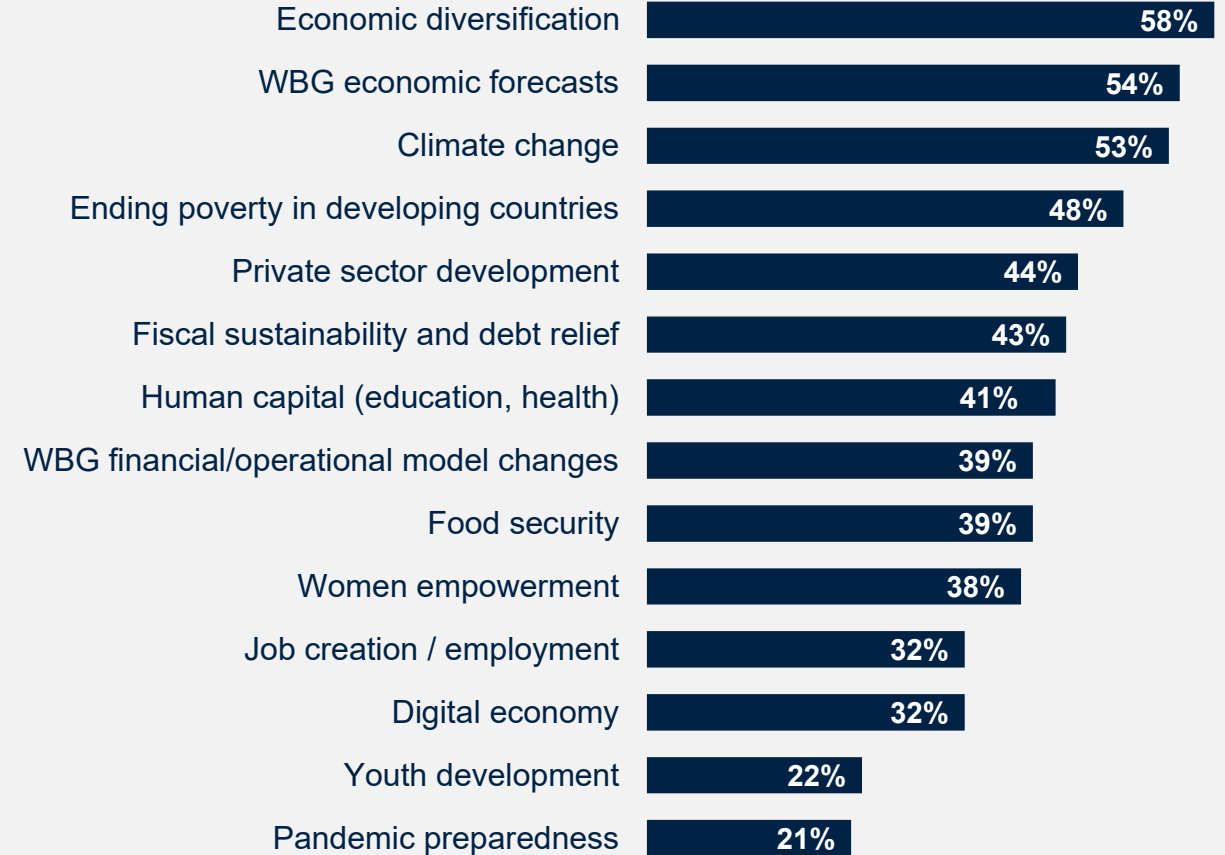
*Significant difference between stakeholder groups

38% of Respondents Recalled Seeing/Hearing About the WBG Recently, Most Often on WBG Websites, TV, or Social Media; Most Often About Economic Diversification, Economic Forecasts, Climate Change, and Ending Poverty

Where did they see/hear it?



What did they see/hear about?

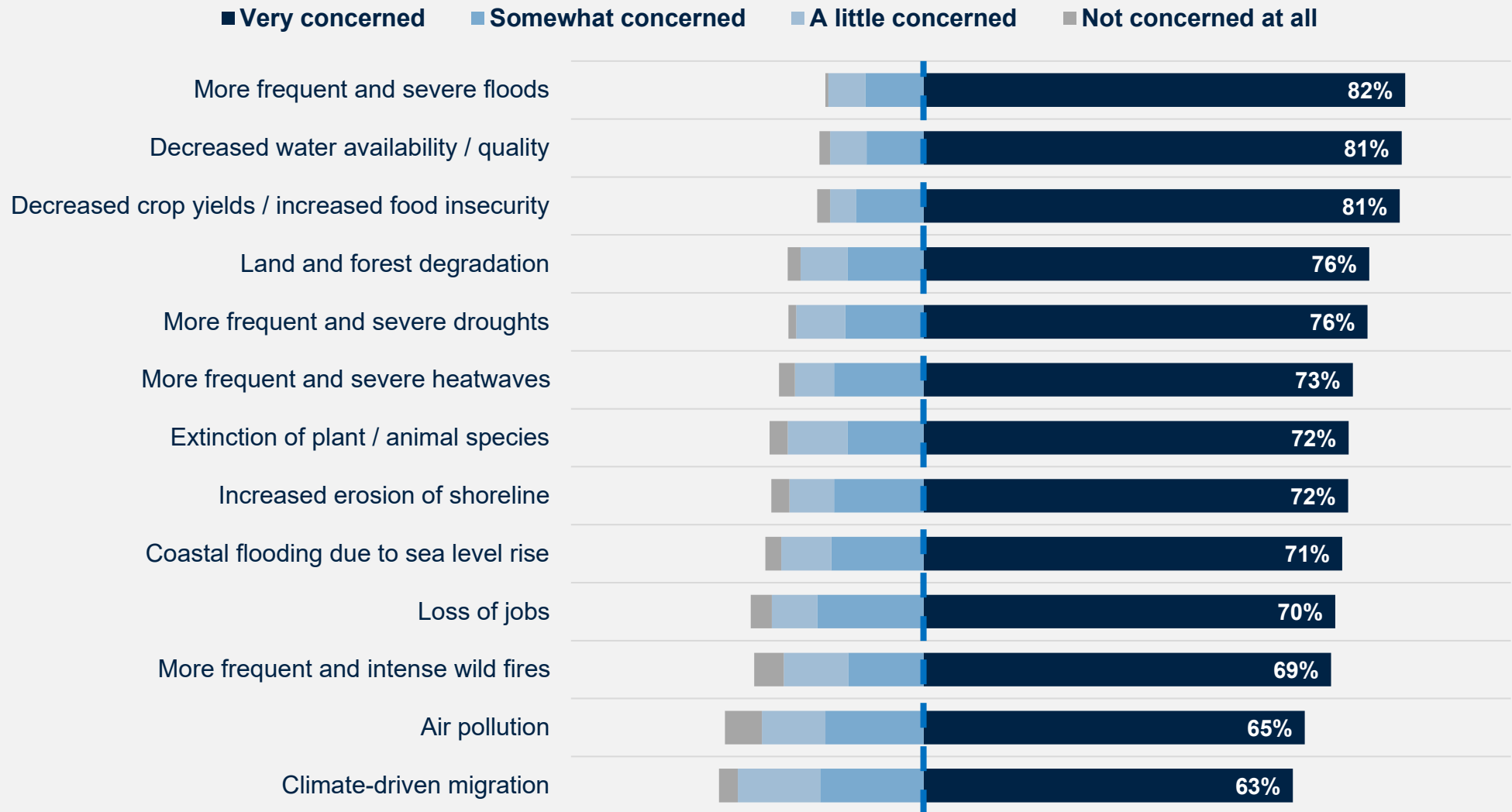


Do you recall seeing or hearing anything about the WBG recently? (N=231)

If you answered "Yes", where do you recall seeing or hearing this information? (Select all that apply) (Percentage of Respondents, N=87)

If you answered "Yes", what do you recall seeing or hearing about the WBG? (Select all that apply) (Percentage of Respondents, N=87)

Climate Change Communications Can Be More Impactful When Related to Stakeholders' Top Concerns: Flooding, Water Availability, and Food Security



How concerned are you about the following potential impacts of climate change in Timor-Leste? (Percentage of Respondents, N≈223)

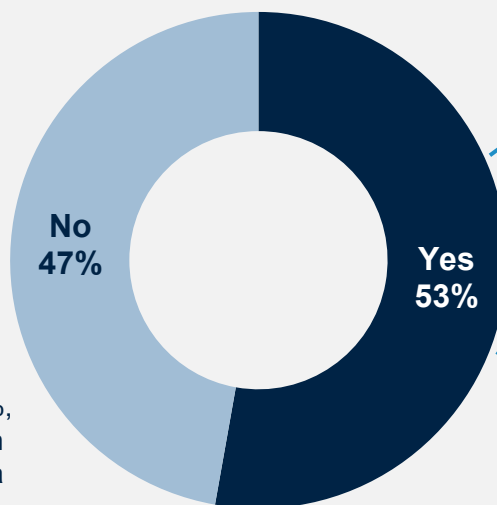
Sample Demographics and Detailed Methodology



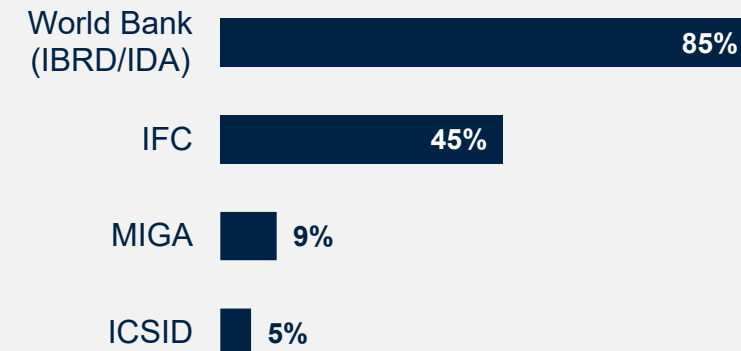
Sample Demographics

Do you collaborate/work with the World Bank Group (WBG) in Timor-Leste? (N=231)

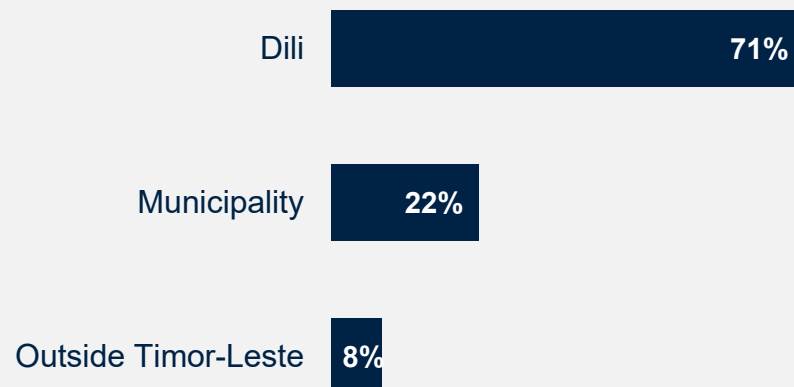
Respondents from government institutions and bilateral or multilateral agencies were the most likely to collaborate with the WBG (81% and 75%, respectively) whereas respondents from academia, the media, and the office of a Parliamentarian were significantly less likely (25%, 31%, and 32%, respectively).



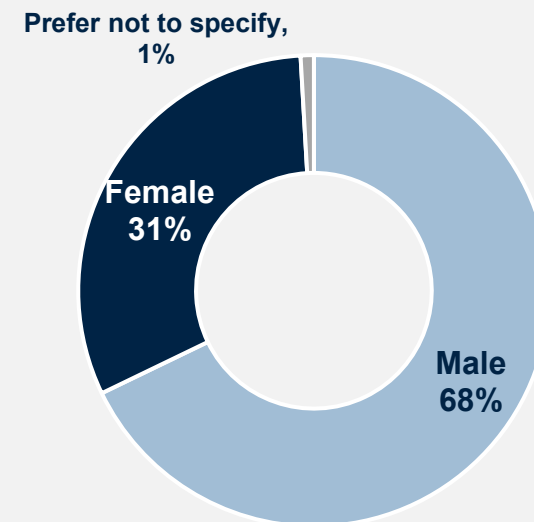
Which of the following WBG agencies do you collaborate/work with in Timor-Leste? (N=122)



Which best represents your geographic location? (N=227)

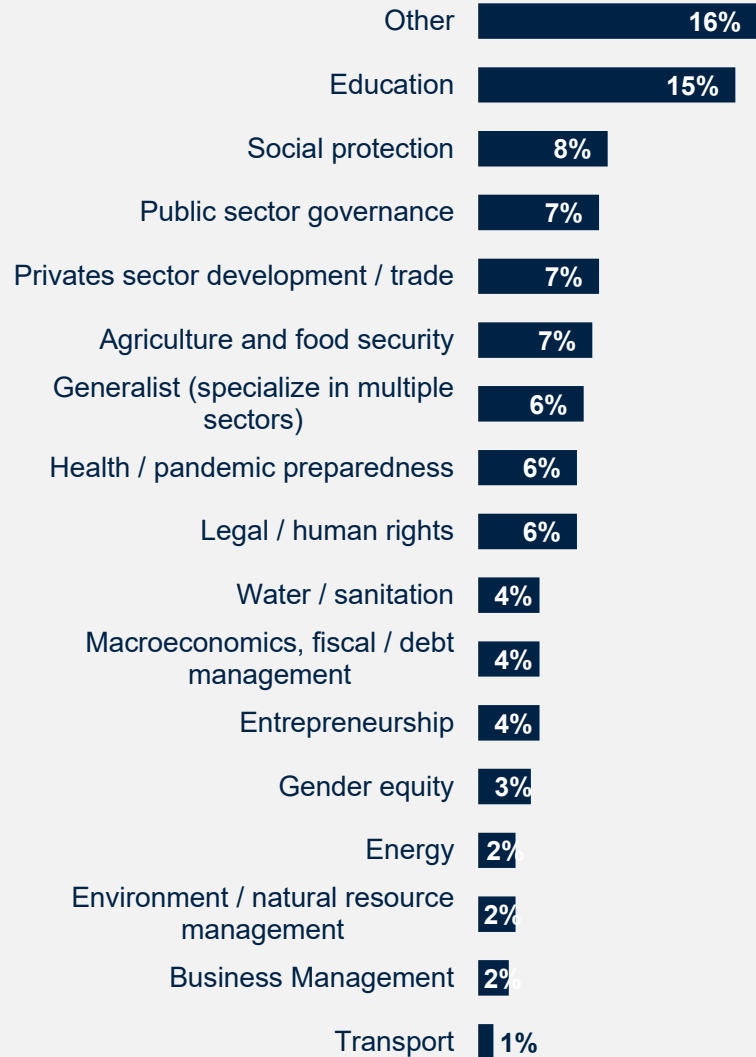


What is your gender? (N=228)

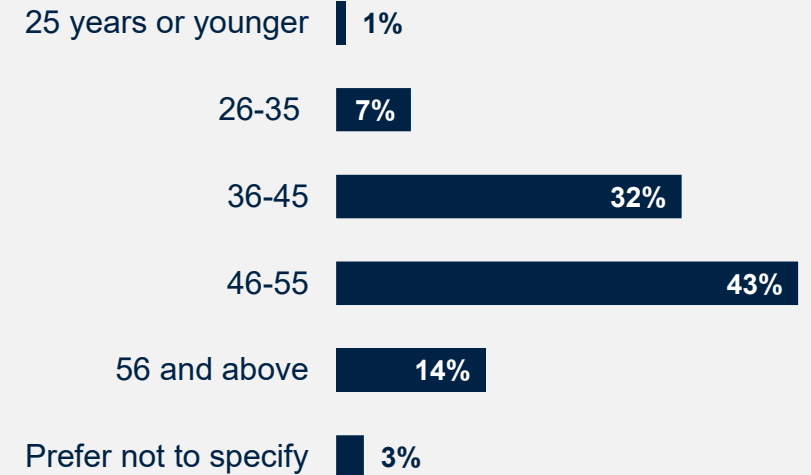


Sample Demographics (continued)

What is the primary specialization of your work? (N=225, Top 17 of 20 shown)



What is your age? (N=263)



Detailed Methodology

From **March – June 2025**, a total of 537 stakeholders in Timor-Leste 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 offices of the President, Prime Minister, Ministers, and Parliamentarians, government institutions, local government, bilateral or multilateral agencies, civil society organizations, the private sector, academia and research centers, and the media.

Of these stakeholders, **235 participated in the survey (44% response rate)**. Respondents completed the questionnaire either on paper (receiving and returning it via courier), on an online platform, or with a representative of the field agency.

This year’s survey results were compared to the FY20 Country Opinion Survey, which had a response rate of 51% (N=107).

Comparing responses across Country Opinion Surveys reflects changes in attitudes over time, as well as changes in respondent samples, methodology, and to the survey instrument itself. To reduce the influence of the latter factor, only those questions with similar response scales/options were analyzed. In addition, the stakeholder compositions for both survey years are fairly similar. It should be noted, however, that the FY25 sample has more than twice as many respondents as the FY20 sample, which should be taken into consideration when interpreting these comparisons.

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 “Timor-Leste COS FY25 Appendices.xlsx” file published in the WBG Microdata Library, along with the survey microdata and this report.

Percentage of Respondents	FY 2020	FY 2025
Government Principals: Office of the President, Prime Minister, Minister, Parliamentarian	17%	16%
Government Institutions: Employee of a Ministry, Department, Project Implementation Unit, Independent Government Institution, Judiciary, State-Owned Enterprise	23%	27%
Local / Municipal Government	2%	2%
Bilateral/Multilateral Agency: Embassy, Development Organization, Development Bank, UN Agency	15%	9%
Civil Society Organization: Local and regional NGO, Community-Based Organization, Private Foundation, Philanthropy, Professional/Trade Association, Faith-Based Group, Youth Group	16%	15%
Private Sector: Private Company, Financial Sector Organization, Private Bank	12%	15%
Academia / Research Center	6%	7%
Media	4%	6%
Other	5%	3%
Total Number of Respondents	105	234



What is your primary professional affiliation? (Select only 1 response)

*Not all respondents provided information about their professional affiliation. Therefore, the total number of respondents listed in the table is lower than the N reported in the methodology.



CountryOpinionSurveys

Thank you

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

countrysurveys@worldbankgroup.org

