

World Bank Country Opinion Survey Program

FY 2012 Annual Review

Prepared by World Bank External Affairs

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Objectives

In an environment where the Bank must demonstrate its impact and value, it is critical that the institution collects and tracks empirical data on how its work is perceived by clients, partners and other stakeholders in our client countries.

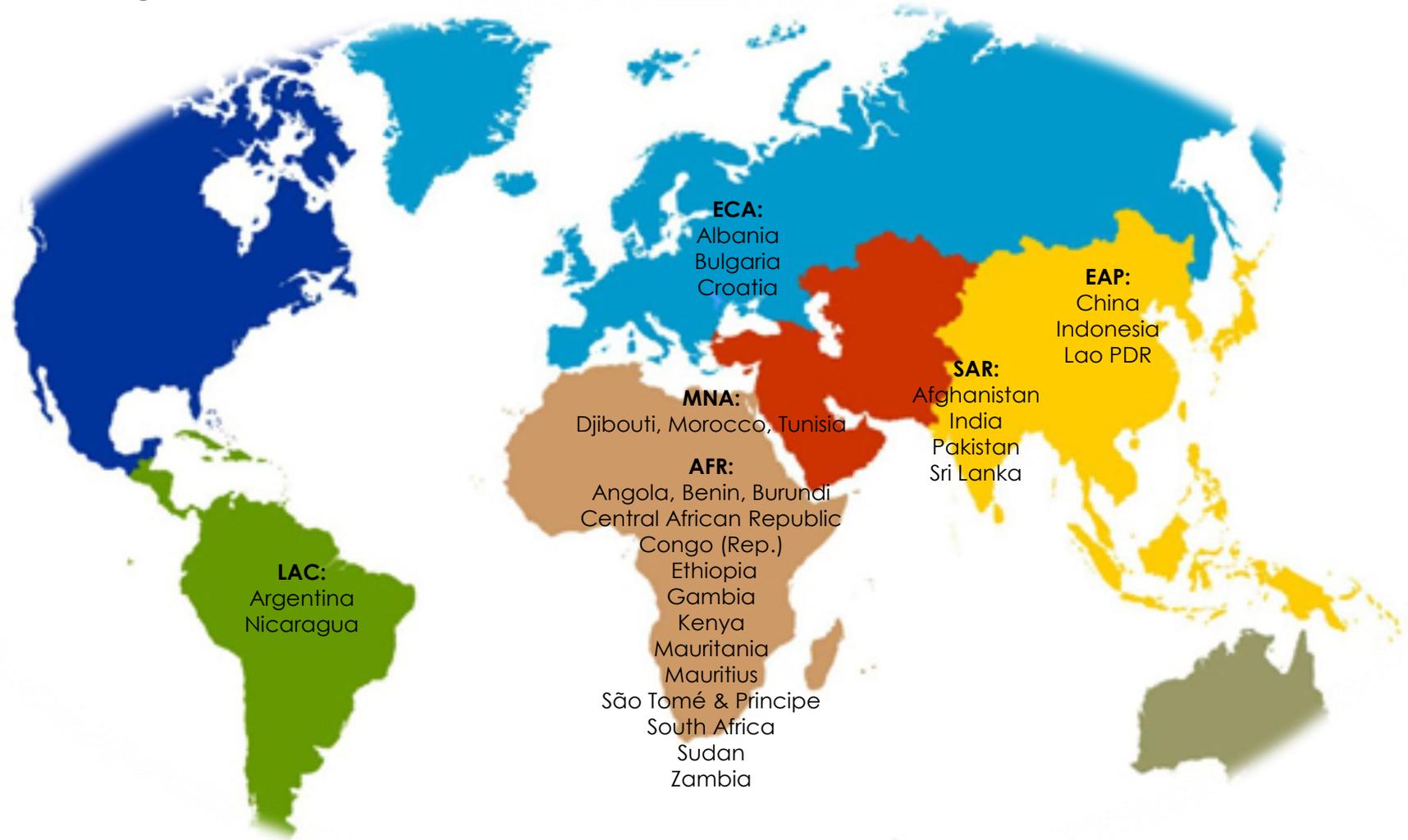
Objectives

In FY 2012, the Country Opinion Survey Program was scaled up in order to:

- **Annually assess perceptions** of the World Bank among key stakeholders in a representative sample of client countries;
- **Track these opinions over time**, representative of: regions, stakeholders, country lending levels, country income/size levels, etc.
- **Inform strategy and decision making:** apply findings to challenges to ensure real time response at several levels: corporate, regional, country
- **Obtain systematic feedback** from stakeholders regarding:
 - The general environment in their country;
 - Value of the World Bank in their country;
 - World Bank's presence (work, relationships, etc.);
 - World Bank's future role in their country.
- **Create a feedback loop** that allows data to be shared with stakeholders.

FY 2012 Client Countries Surveyed

- Over a three year period, every client country is surveyed and the findings are tracked, and a census of the Bank's clients is covered.



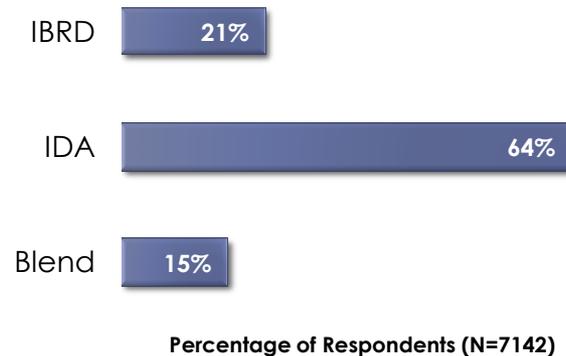
FY 2012 Country breakdown

Country	N	Loan Type	Country	N	Loan Type
Africa			Europe/Central Asia		
Angola	119	IDA	Albania	198	IBRD
Benin	600	IDA	Bulgaria	178	IBRD
Burundi	325	IDA	Croatia	198	IBRD
CAR	322	IDA		574	
Ethiopia	326	IDA	Latin America/Caribbean		
Gambia	150	IDA	Argentina	104	IBRD
Kenya	373	IDA	Nicaragua	240	IDA
Mauritania	110	IDA		344	
Mauritius	153	IBRD	Middle East/North Africa		
South Africa	54	IBRD	Djibouti	118	IDA
Congo, Republic of	361	IDA	Morocco	96	IBRD
São Tomé and Príncipe	125	IDA	Tunisia	58	IBRD
Sudan	152	IDA		272	
Zambia	312	IDA	South Asia		
	3482		Afghanistan	397	IDA
East Asia			India	261	Blend
China	207	IBRD	Pakistan	512	Blend
Indonesia	265	IBRD	Sri Lanka	296	Blend
Lao PDR	532	IDA		1466	
	1004		Total FY 2012 N = 7142		

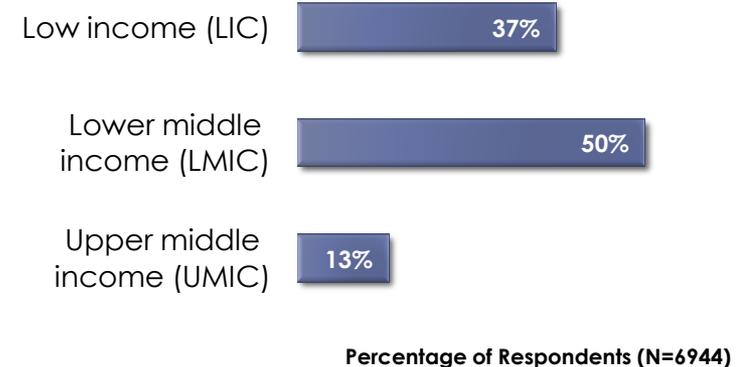
FY 2012 Country breakdown

- Every year a range of client countries will be surveyed, ensuring representation from different income/country level/status.

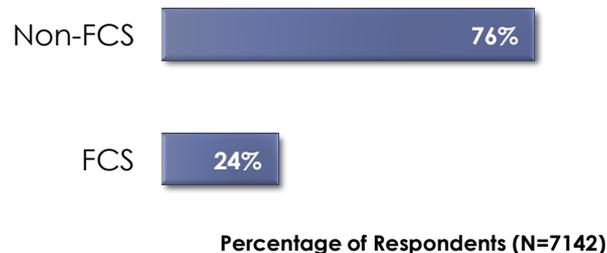
Loan Type



Income Level



FCS Status (Fragile and conflict affected states)



Methodology (FY 12)

- Country Opinion Surveys **fielded from July 2011 thru July 1, 2012**
- **15,029 potential respondents** from 29 countries
 - List of names provided by the World Bank and consulting firms on the ground
 - Countries not representative of the globe
- **7,086 actual respondents** (47% response rate)
- **Full collaboration with, and input from, country teams.**
- **Corporate indicator questions** asked in every survey (effectiveness, results, outreach, knowledge, etc).
- **Survey instrument revised for relevance** in each country circumstance.
- **All surveys translated** and back translated for precise accuracy.
- Overall design, analysis and reporting done by EXT (public opinion research group).
- Process managed **on ground by local firms**

Respondents representative of a range of stakeholder groups



Which of the following best describes your current position?

(Please mark only ONE response) (Respondents chose from a list.)

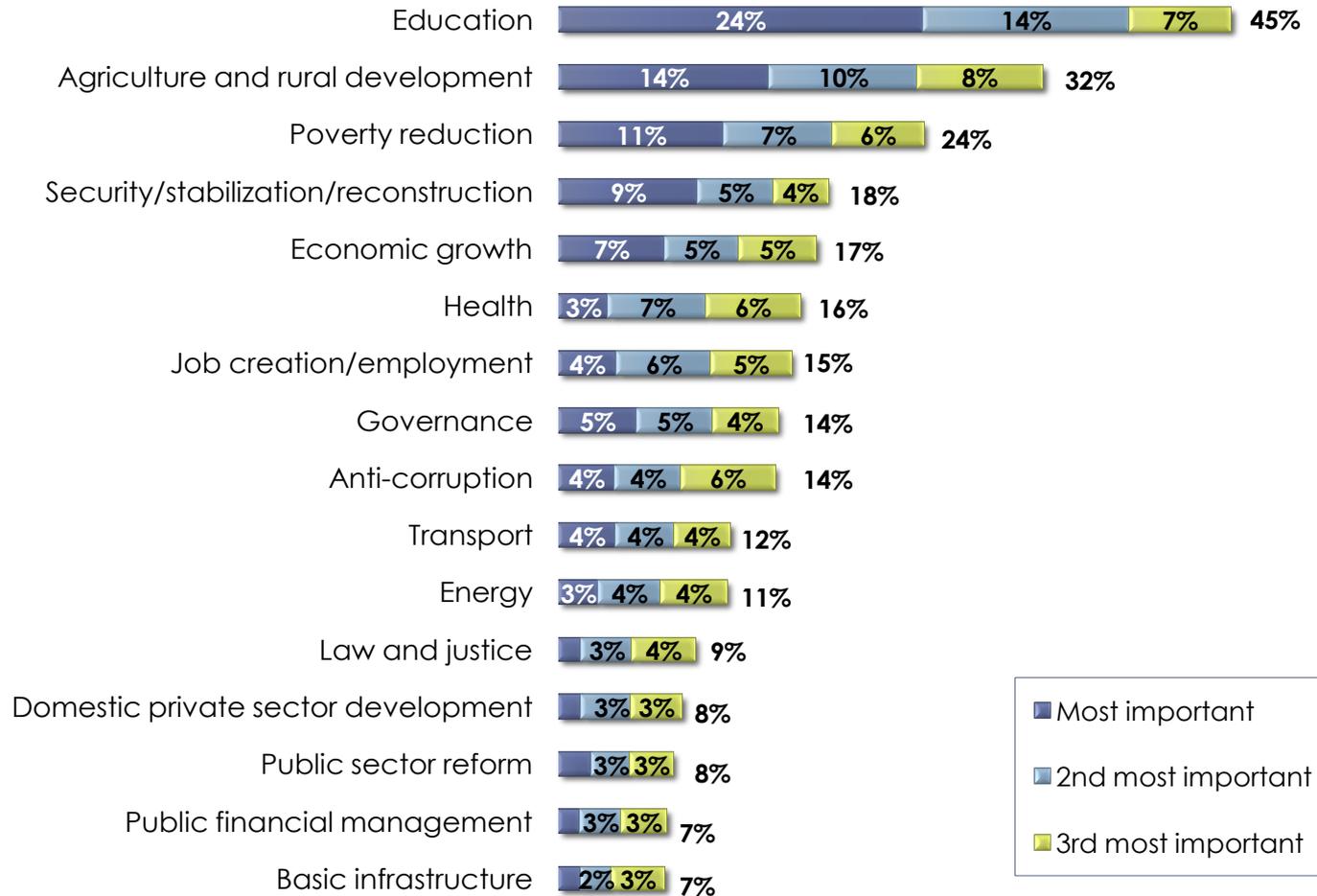
COUNTRY OPINION SURVEY RESEARCH FINDINGS

Context of FY 12 research findings

- FY 12 sample represents the nearly fully scaled up version of the Country Opinion Survey Program.
- Hence, the findings are truly a snapshot in history – more representative of country/lending/income type and stakeholders than regions.
- Over time, and only with full regional participation and commitment (starting this fiscal year), findings can be tracked and will be representative across the board.
- Full regional reporting of FY 12 will be done across the Bank; all country reports are presented to teams.

DEVELOPMENT PRIORITIES IN A COMPLICATED ENVIRONMENT

Development priorities



Percentage of Respondents (N=4287)

When considering development priorities, which ONE development priority below is the most important in ____? Which ONE is the second most important priority? Which ONE is the third most important priority? (Respondents chose from a list. Top 15 shown.)

Development priorities

Development Priority	LIC	LMIC	UMIC	FCS
Education	42%	49%	42%	41%
Agriculture and rural development	43%	33%	12%	41%
Poverty reduction	19%	29%	31%	20%
Governance	12%	16%	18%	11%
Job creation/ employment	11%	15%	24%	12%
Economic growth	10%	13%	39%	8%
Security/stabilization/reconstruction*	23%	12%	0%	18%
Transport	17%	9%	9%	16%

Top 3 development priorities

*Only asked in a subset of countries

Reducing poverty

Contributing Area (N=5093)	ALL	LIC	LMIC	UMIC	FCS
Agriculture and rural development	41%	42%	43%	23%	42%
Education	38%	32%	41%	41%	28%
Economic growth	30%	30%	30%	32%	29%
Job creation/employment	24%	18%	27%	33%	19%
Security/stabilization/ reconstruction*	19%	24%	10%		19%
Health	13%	16%	11%	10%	10%
Anti-corruption	13%	14%	12%	10%	12%
Energy	11%	16%	8%	5%	13%
Basic infrastructure	11%	11%	12%	4%	12%
Food security	11%	12%	10%	5%	11%
Water and sanitation	11%	11%	10%	10%	13%

Top 3 contributing areas

*Only asked in a subset of countries

Which THREE areas of development listed below do you believe would contribute most to reducing poverty in ____? (Respondents chose from a list. Responses combined. Top 11 shown.)

When reforms are slow...

Attributed Cause (N=6158)	ALL	LIC	LMIC	UMIC	FCS
The Government works inefficiently	32%	33%	31%	31%	39%
There is not an adequate level of citizen/civil society participation	28%	27%	29%	31%	29%
Political pressures and obstacles	26%	27%	26%	25%	30%
Reforms are not well thought out in light of country challenges	26%	24%	27%	27%	20%
Ongoing conflict and instability*	25%	28%	17%	--	25%
Lack of/inadequate levels of capacity in Government	22%	23%	19%	27%	19%
The World Bank is not sensitive enough to political/social realities on the ground	19%	15%	20%	21%	25%
The World Bank works too slowly	17%	18%	17%	9%	27%

Top 3 attributed causes

* Only asked in a subset of countries

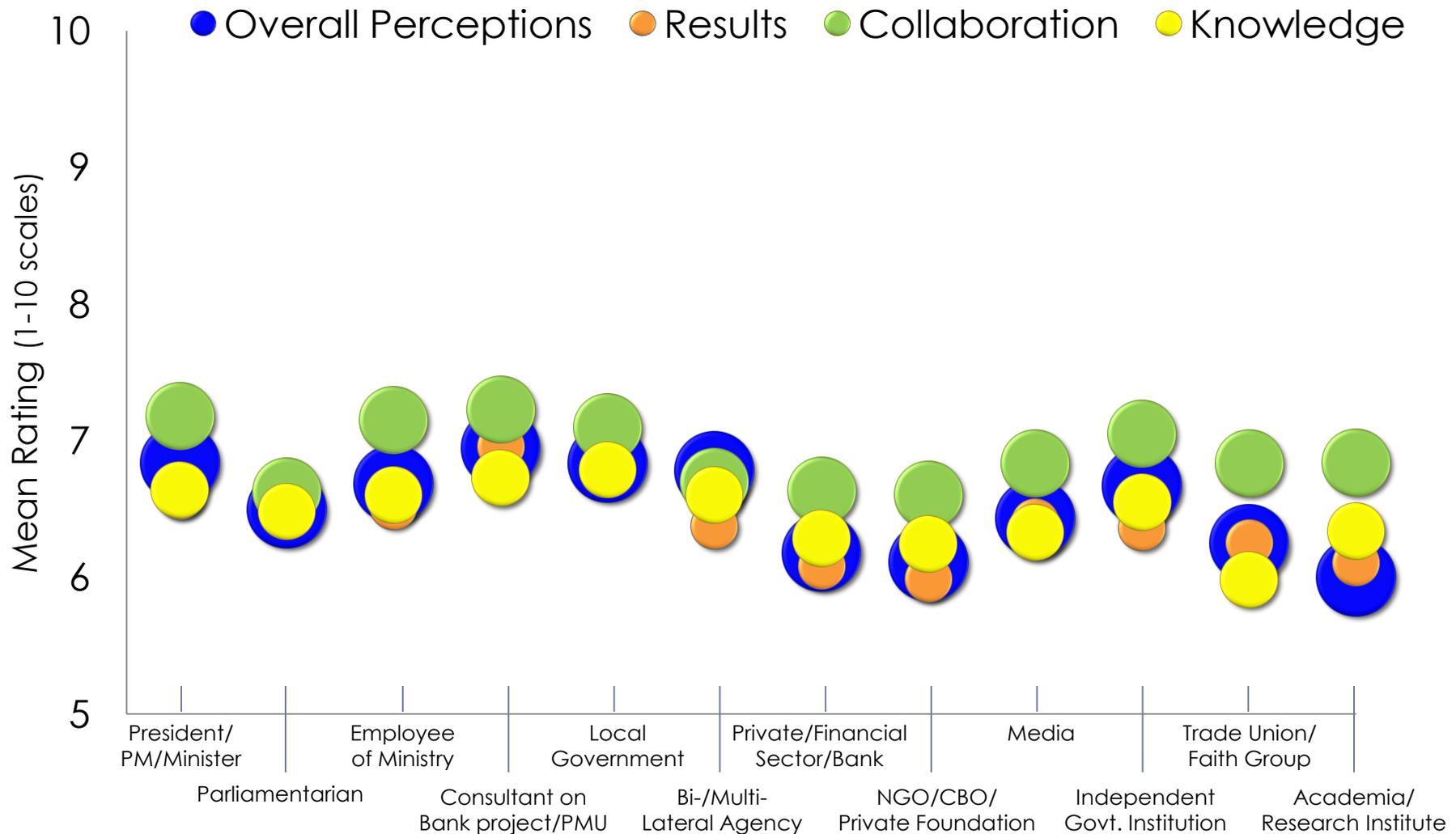
When World Bank assisted reform efforts fail or are slow to take place, which TWO of the following would you attribute this to? (Respondents chose from a list. Responses combined. Top 8 shown.)

PERCEPTIONS OF THE BANK: ACROSS THE GLOBE + OVER TIME

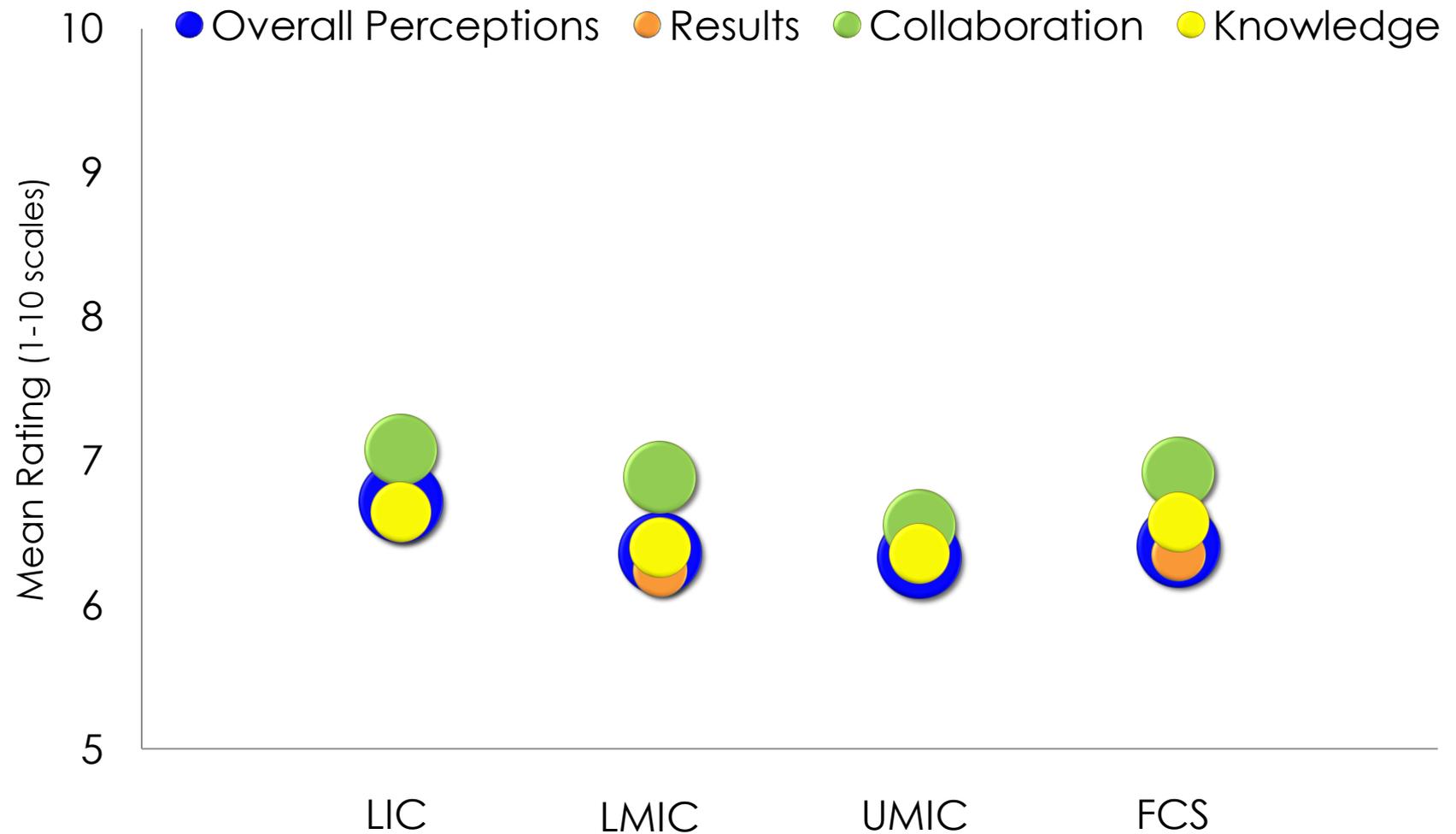
A Snapshot of Perceptions

- For a quick glance at perceptions of the World Bank across the globe, four indices were created:
 1. **Overall Perceptions** combines respondents' ratings of agreement that the Bank currently plays a relevant role in their country and that the Bank is aligned with their development priorities
 2. **Results** combines respondents' ratings for the Bank's overall effectiveness in their country with their ratings for the extent to which the Bank's work helps to achieve development results in the country
 3. **Collaboration** combines respondents' ratings for the extent to which the Bank collaborates with Government, other donors, and groups outside the Government
 4. **Knowledge** combines respondents' ratings for the extent to which the Bank's knowledge is adaptable to country-specific development challenges/circumstances and ratings for how significant a contribution the Bank's knowledge makes to development results in the country

A Snapshot across Stakeholders

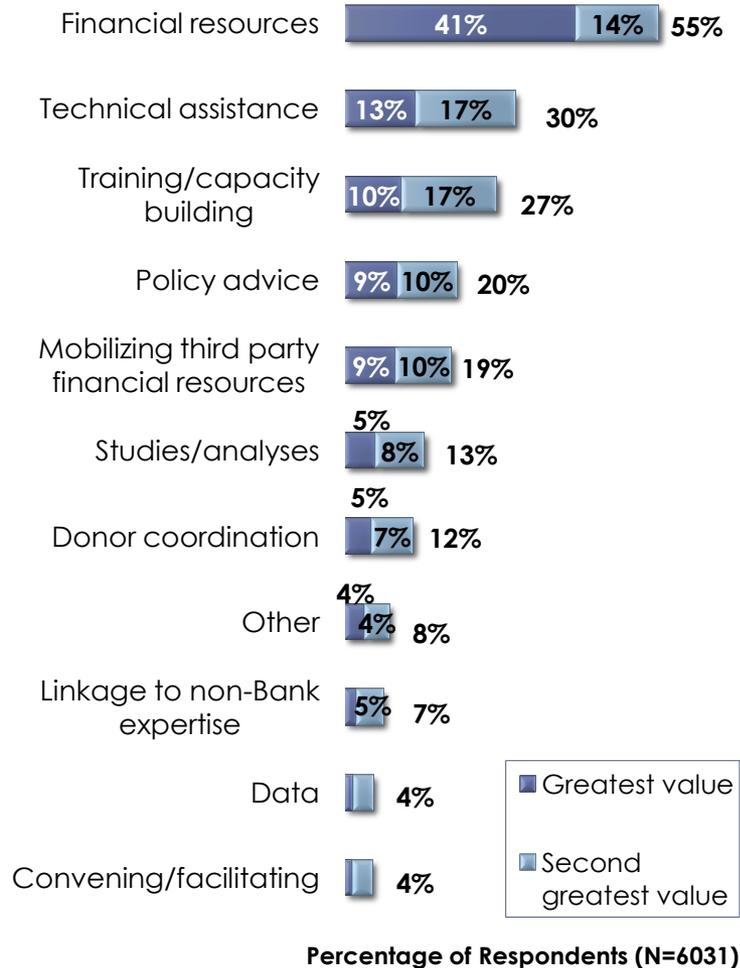


A Snapshot across Income Levels

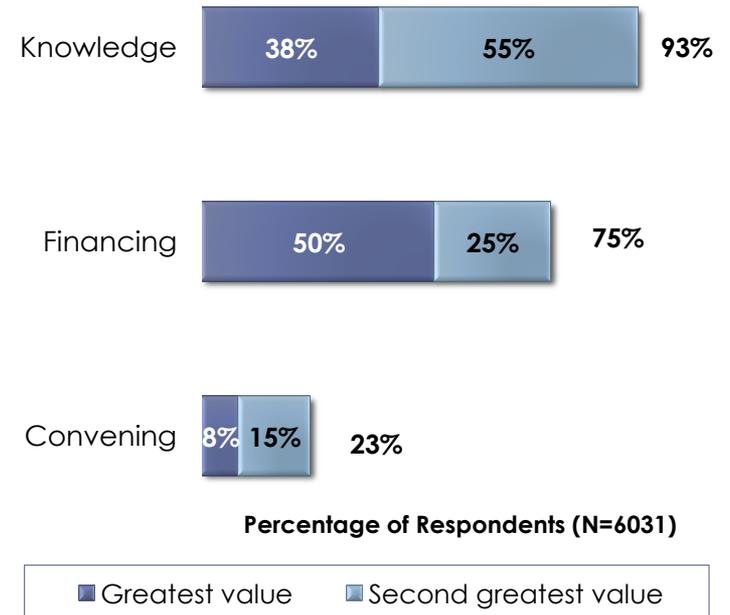


KNOWLEDGE +
FINANCIAL RESOURCES =
SOLUTIONS

The World Bank's greatest value



Aggregation of Services



When thinking about the World Bank's role, which activity do you believe is of greatest VALUE and which activity is of second greatest value in ____? (Respondents chose from a list.)

The Bank's most valued instruments

Instrument (N=5951)	ALL	LIC	LMIC	UMIC	FCS
Investment lending	52%	62%	44%	57%	60%
Capacity development	37%	30%	40%	42%	31%
Technical assistance	30%	21%	33%	45%	25%
Policy based lending/ budget support to the Government	27%	26%	28%	26%	22%
Co-financing arrangements*	16%	16%	16%	--	16%
Emergency recovery lending*	15%	16%	14%	--	17%
Sector wide approaches*	15%	17%	9%	--	11%
Knowledge products/services	13%	10%	12%	24%	13%
Trust Fund management	8%	7%	10%	4%	8%

Top 3 instruments

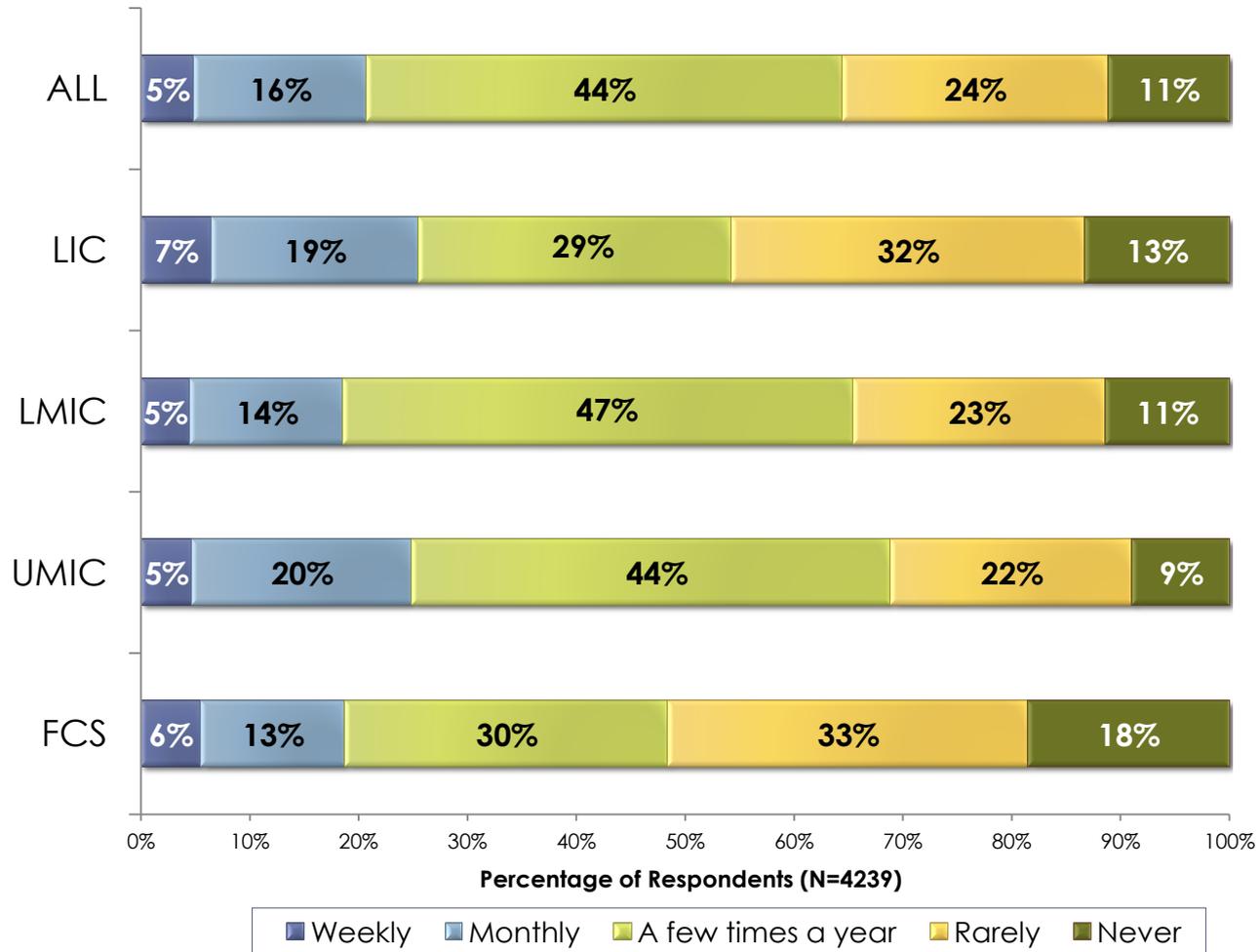
* Only asked in a subset of countries

Which World Bank instruments do you believe are the MOST effective in reducing poverty in ____?

(Choose no more than TWO) (Respondents chose from a list. Responses combined.)

Knowledge usage

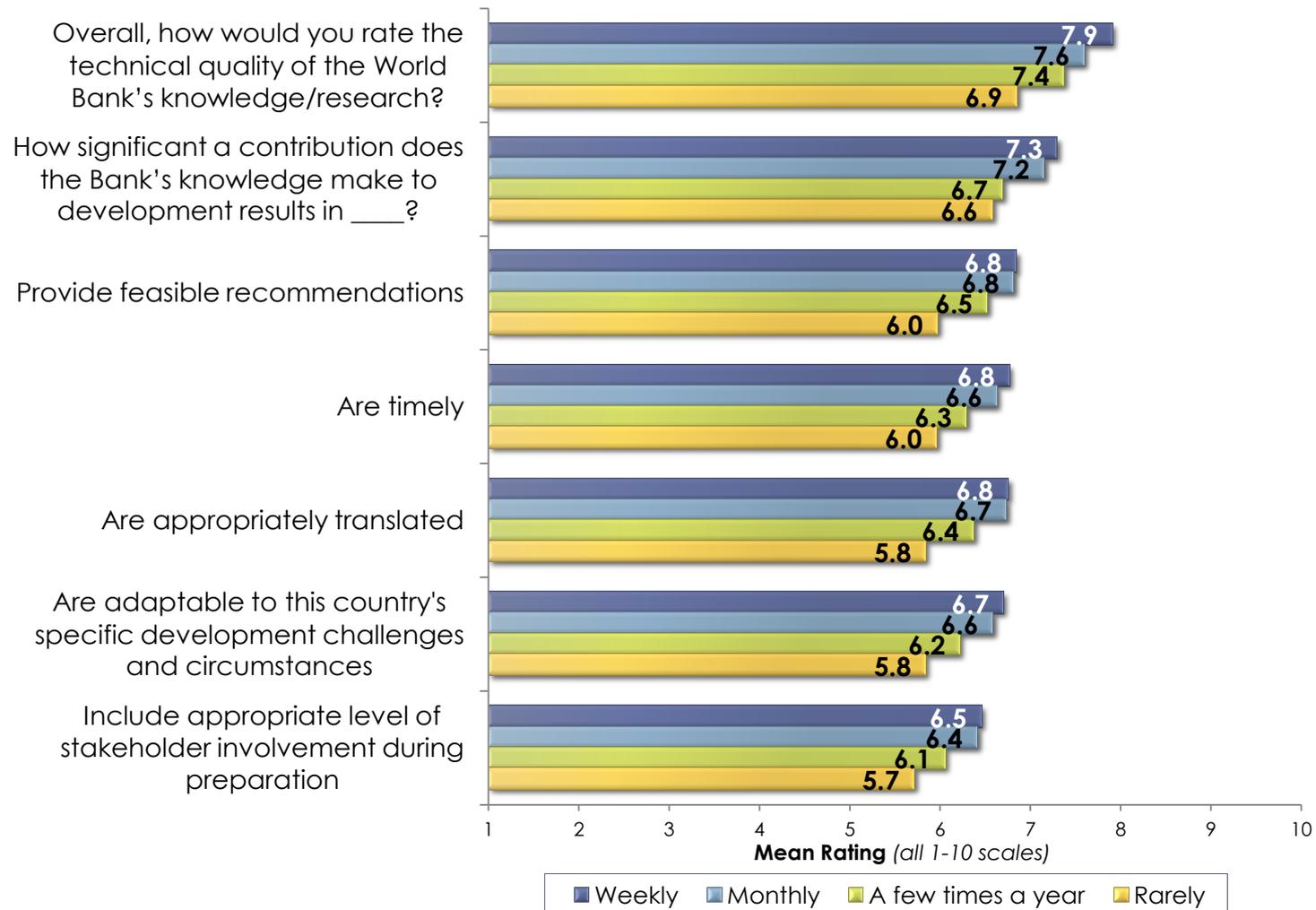
(Analysis, studies, research, data, reports, conferences)



"How frequently do you consult World Bank knowledge and research in the work you do?" (Respondents chose from a list.)

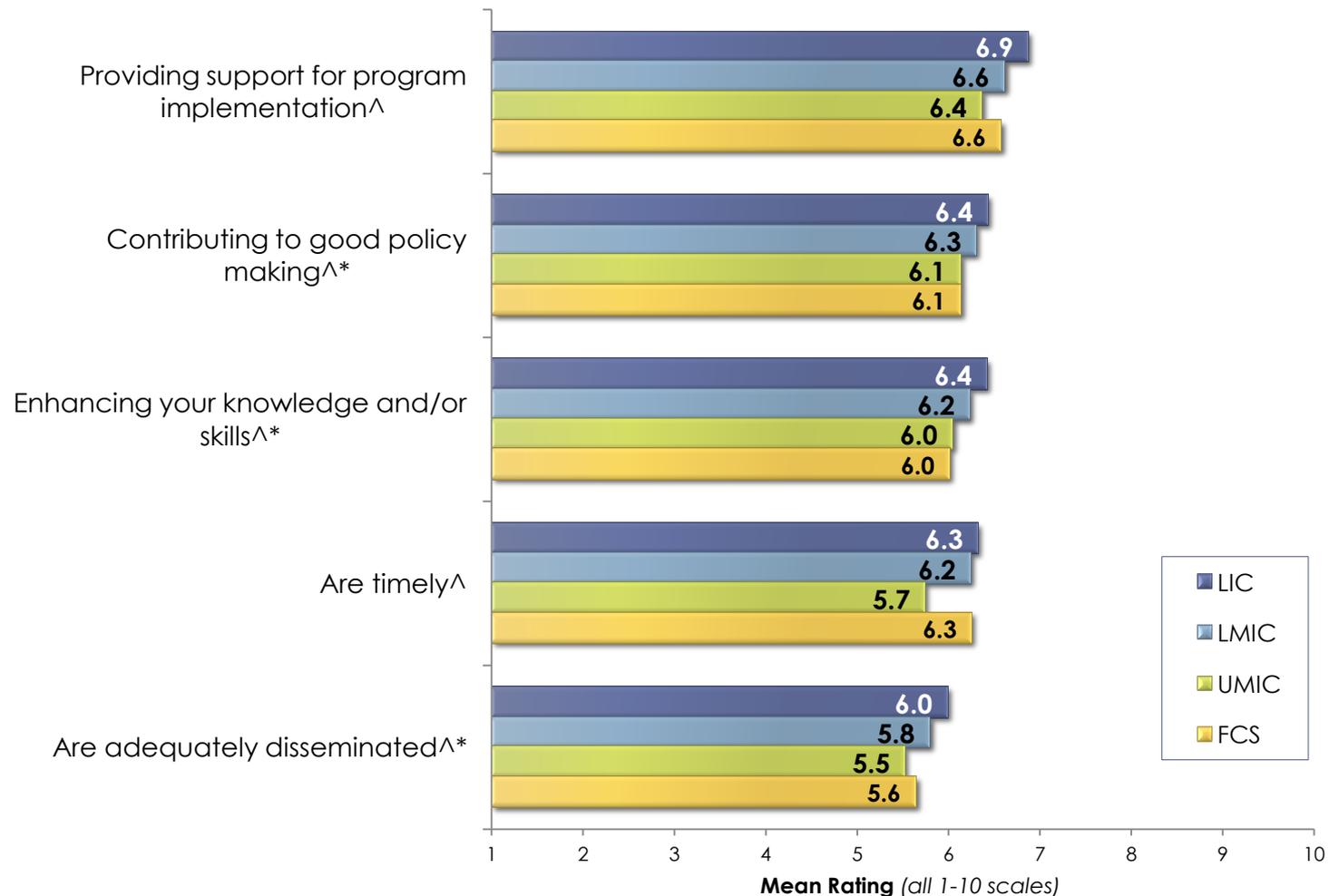
Usage of Bank knowledge seems to drive perceptions

(Analysis, studies, research, data, reports, conferences)



Impact of World Bank knowledge

(Analysis, studies, research, data, reports, conferences)



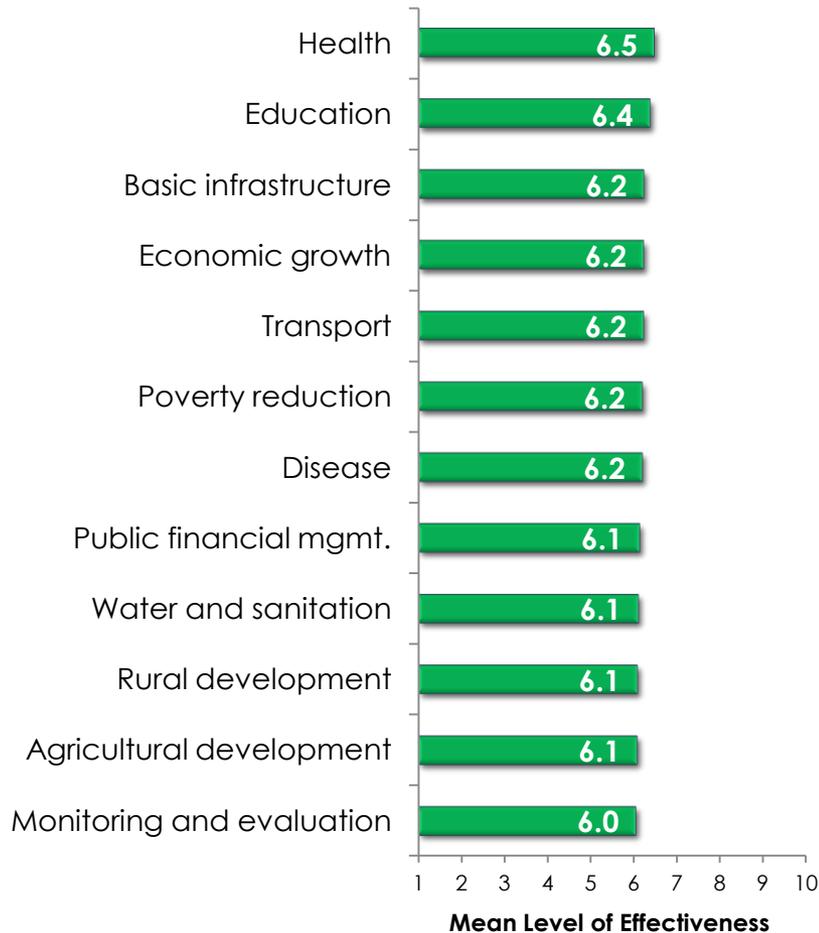
[^]Significantly different between income levels

^{*}FCS significantly different from Non-FCS

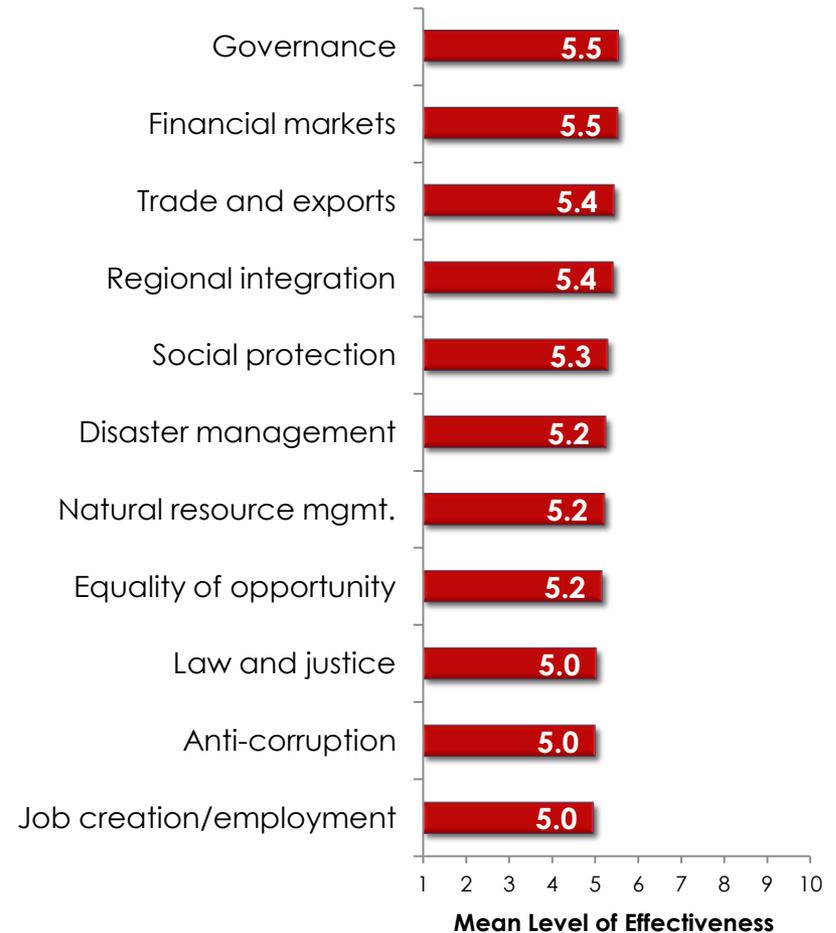
PERCEIVED EFFECTIVENESS ON THE GROUND

Bank effectiveness in sectoral areas

Highest Effectiveness Ratings



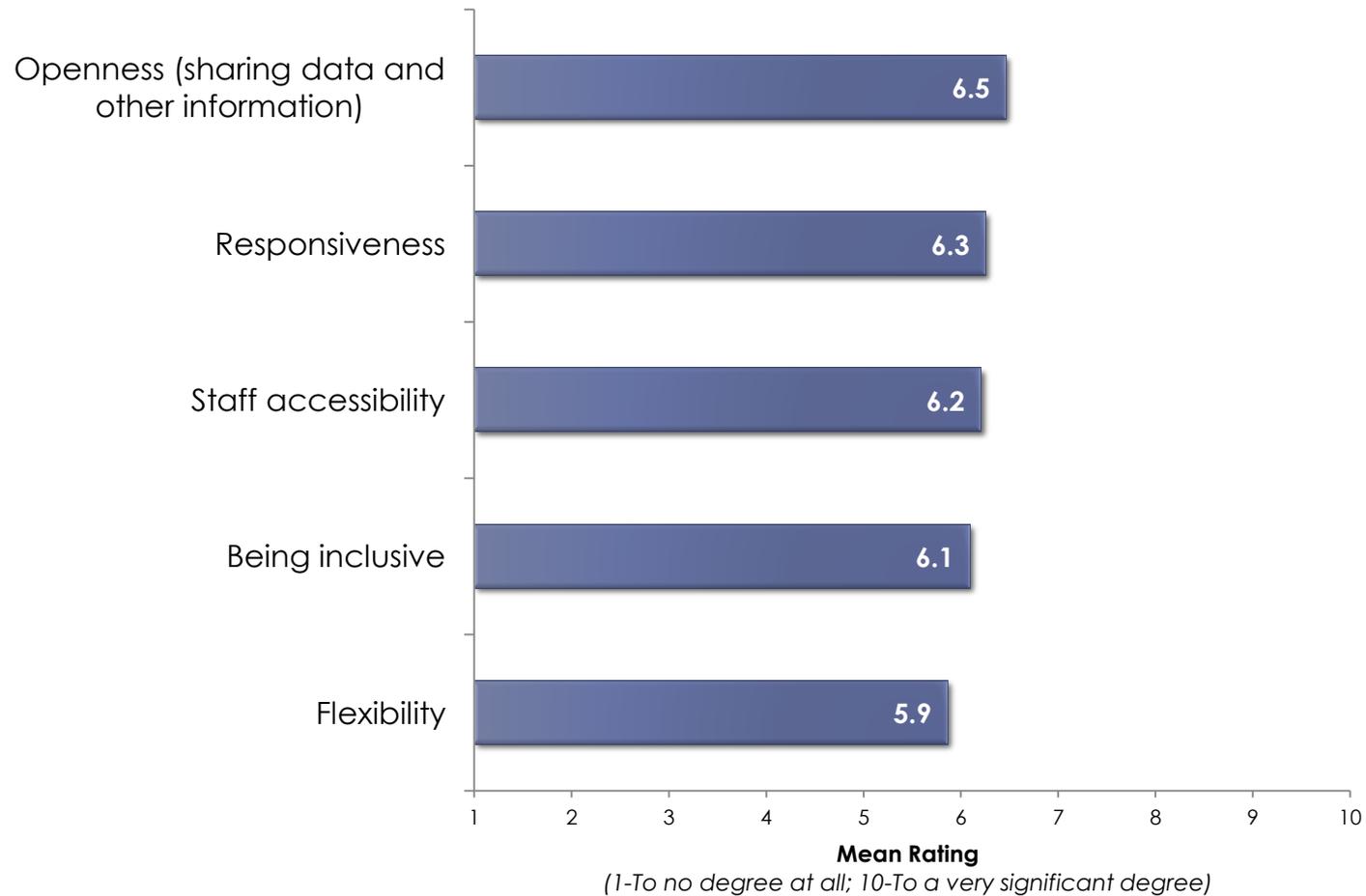
Lowest Effectiveness Ratings



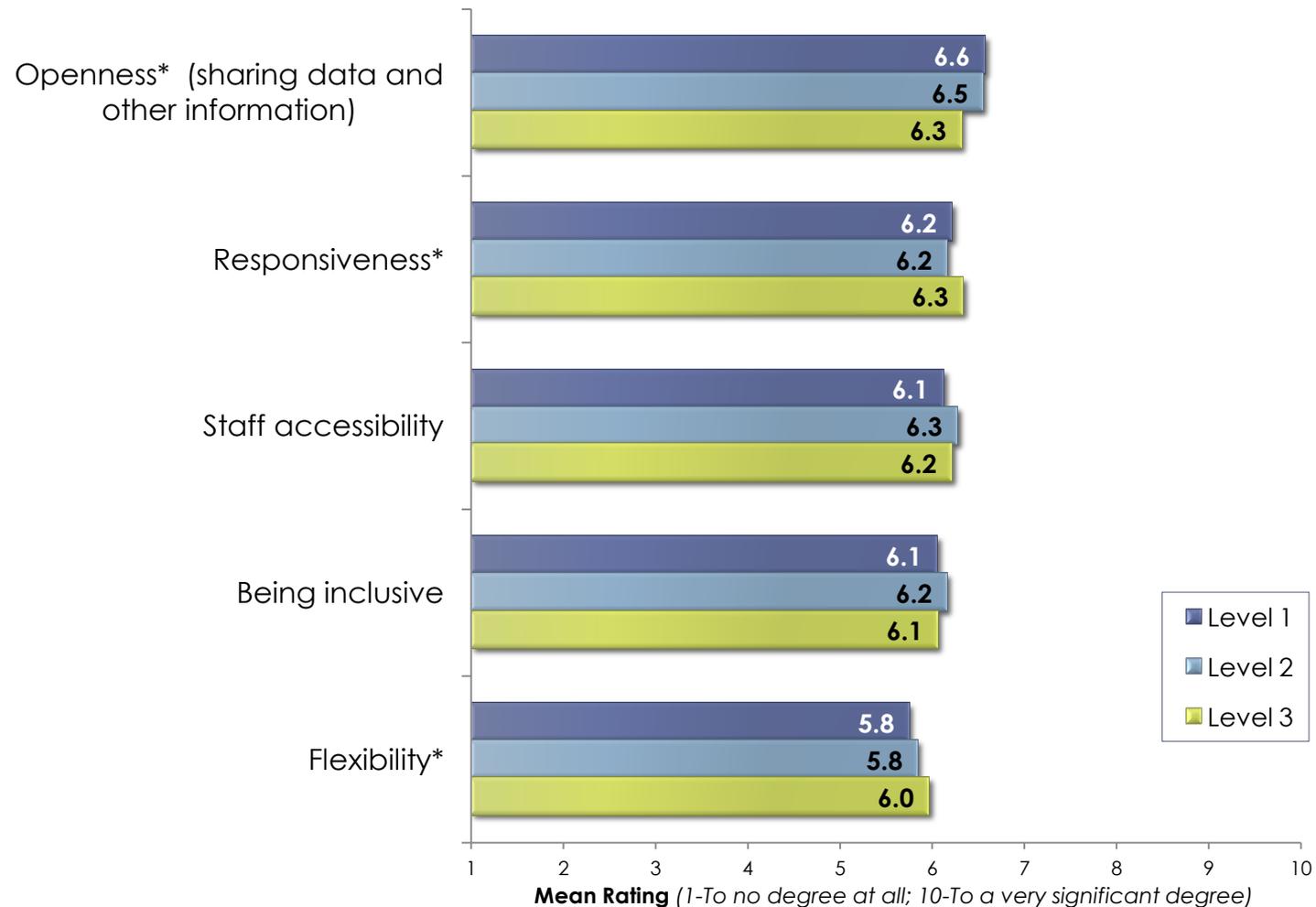
How effective do you believe the World Bank is in terms of the work it does in the following areas of development in ____, on a ten point scale? (1-Not effective at all; 10-Very effective)

CORE BEHAVIORS MATTER

Perceptions of core behaviors



Perceptions of core behaviors: level of decentralization



*Significantly different between levels of decentralization

Core behaviors as possible predictors

As ratings in “Responsiveness” increase by 1 point, ratings of overall effectiveness and the extent to which the Bank achieves development results increase by nearly a quarter point...

Core Behavior	Overall Effectiveness	Achieve Development Results
Responsiveness	0.24	0.24
Flexibility	0.18	0.18
Being inclusive	0.16	0.17
Openness	0.09	0.11

Numbers represent unstandardized regression coefficients (B). All are significant predictors.

REAL, MEANINGFUL
INTERACTION MATTERS

Impact of Collaboration

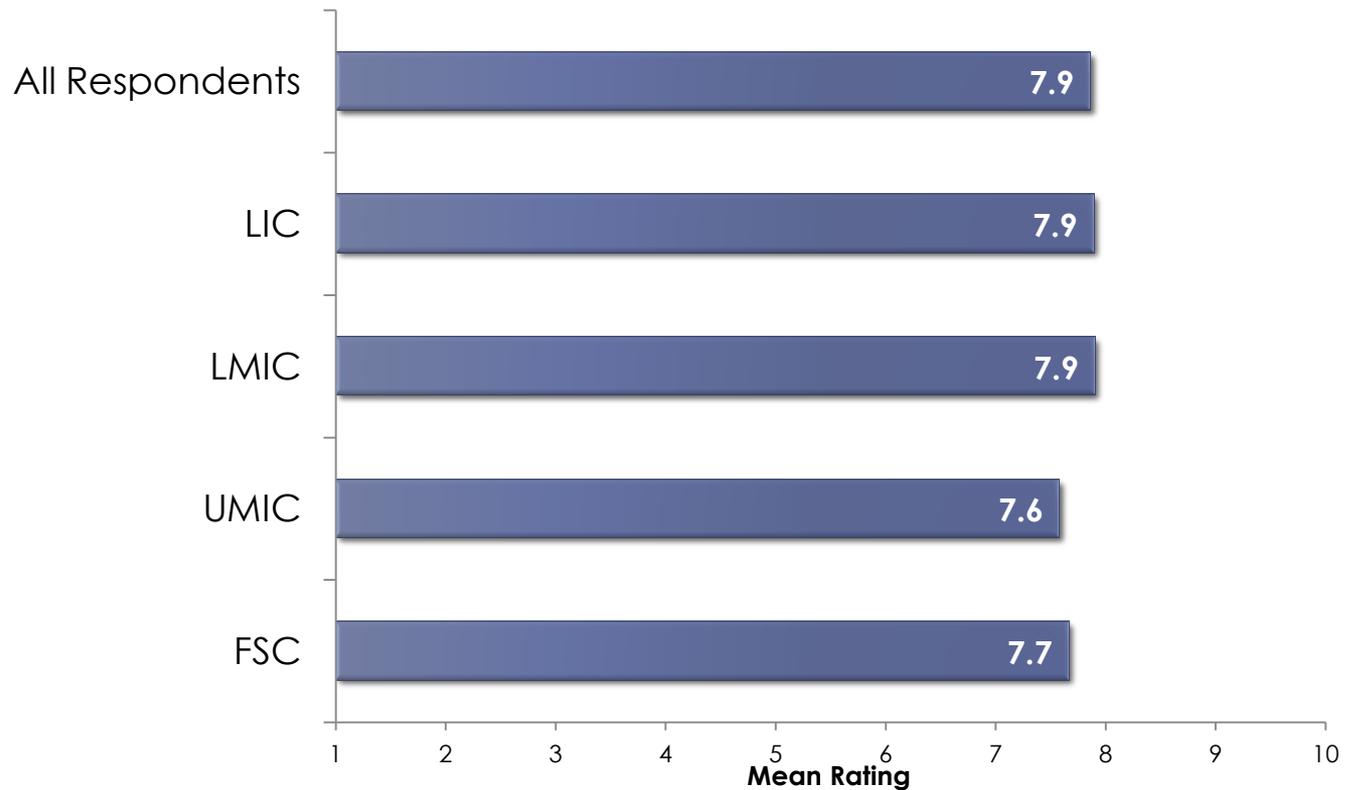
Indicator Question (all 1-10 scales)	Currently, do you professionally collaborate/ work with the World Bank?	
	No Mean	Yes Mean
Overall, please rate your impression of the World Bank's effectiveness in your country.	6.0	6.7
The World Bank's financial instruments meet the needs of this country	5.7	6.4
The World Bank meets this country's needs for knowledge services	5.8	6.4
Overall the World Bank currently plays a relevant role in development in this country	6.3	7.0
The World Bank's work is aligned with what I consider the development priorities for this country	5.8	6.7
Responsiveness	5.5	6.0
Openness (sharing data and other information)	5.5	6.7
Collaboration with groups outside of the Government	7.2	7.8
Collaboration with the Government	6.8	7.3
Collaboration with other donors	6.4	7.1
To what extent does the World Bank's work help to achieve development results in your country?	6.1	6.7
Are adaptable to this country's specific development challenges and circumstances	5.9	6.5
Overall, how significant a contribution do you believe the World Bank's knowledge and research make to development results in your country?	6.5	7.0
Overall, how would you rate the technical quality of the World Bank's knowledge/research?	6.9	7.4
Where country systems are adequate, the World Bank makes appropriate use of them	6.7	7.2



= Significantly more positive

A MORE EFFECTIVE & RESPONSIVE WORLD BANK

A more significant role



How significant a role do you believe the Bank SHOULD play in ____'s development in the near future, on a ten point scale? (1-Not a significant role at all, 10-Very significant role)

Preferred World Bank emphasis

Sectoral Area (N=5429)	ALL	LIC*	LMIC	UMIC	FSC
Education	41%	39%	44%	34%	37%
Agriculture and rural development	39%	46%	40%	21%	46%
Poverty reduction	21%	14%	27%	21%	18%
Energy	17%	21%	17%	10%	17%
Health	15%	18%	14%	13%	14%
Governance	14%	12%	14%	19%	14%
Economic growth	14%	13%	12%	20%	12%
Transport	14%	17%	10%	17%	12%
Job creation/employment	12%	11%	12%	16%	11%
Domestic private sector development	12%	11%	10%	17%	11%

Top 3 sectoral areas

*The 3rd most important area in LIC was "Security/stabilization/reconstruction" (23%) asked only in FCS countries.

When thinking about how the World Bank can have the most impact on development results in ____, in which sectoral areas (no more than 3) do you believe the World Bank should focus most of its attention and resources in ____? (Respondents chose from a list. Responses combined. Top 10 shown.)

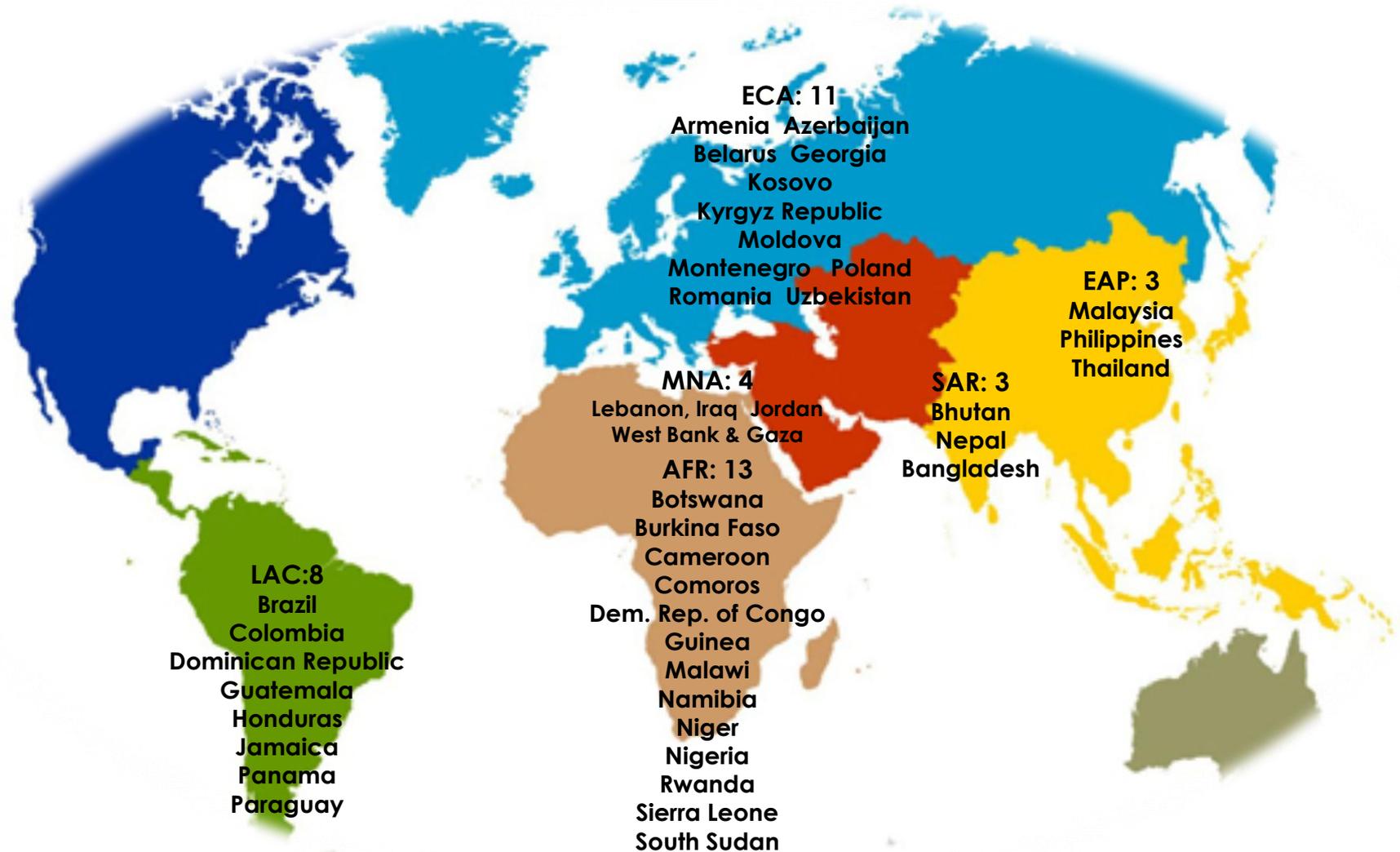
Doing better on the ground

The Bank should... (N=6760)	ALL	LIC	LMIC	UMIC	FCS
Reduce the complexity of obtaining World Bank financing	38%	37%	40%	34%	38%
Improve the quality of its experts as related to this country's specific challenges	32%	27%	36%	31%	31%
Other	18%	16%	21%	4%	28%
Offer more innovative financial products	16%	19%	14%	15%	15%
Improve the competitiveness of its financing compared to markets	16%	21%	15%	14%	15%
Provide more adequate data/knowledge/statistics/figures on this country's economy	15%	12%	17%	21%	13%
Offer more innovative knowledge services	14%	10%	14%	28%	11%
Work faster	13%	17%	12%	11%	17%
Ensure greater selectivity in its work	12%	16%	12%	9%	12%
Focus primarily on advocacy issues	12%	10%	12%	15%	10%

Top 3 ways to make the Bank of greater value

Which of the following SHOULD the World Bank do to make itself of greater value in ____? (Choose no more than TWO) (Respondents chose from a list. Responses combined.)

FY13 Country Opinion Survey Program: 42 countries identified for FY 13



Thank you