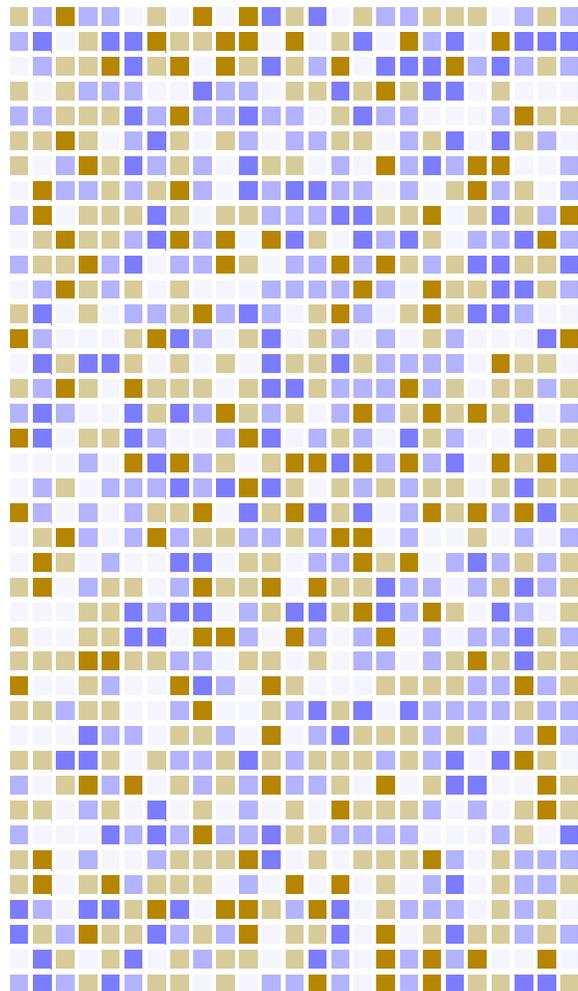


# The Global Poll

## Multinational Survey of Opinion Leaders 2002

Full Report  
May 2003

Prepared by Princeton Survey Research Associates  
for the World Bank



# The Global Poll Multinational Survey of Opinion Leaders 2002

Full Report  
May 2003

Prepared by Princeton Survey Research Associates  
for the World Bank

## Contents

Survey countries	3
Introduction	4
Key findings	6
Context and background	9
Globalization	14
Foreign assistance	18
Influence of the World Bank	29
Development priorities and Bank objectives	37
Bank performance	41
Bank organizational culture	60
Bank communications and outreach	68
Methodology	76

Princeton Survey Research staff for  
The World Bank Global Survey

Mary McIntosh  
Anni Poikolainen  
Kimberly Hewitt  
Tara Lubin  
Kathleen Knoll  
Elizabeth McGaha  
Jean D'Amico

For further information contact:

Mary McIntosh  
Anni Poikolainen  
Princeton Survey Research Associates  
Washington Office  
1211 Connecticut Avenue NW  
Suite 305  
Washington, DC 20036  
202 293 4710

## Survey countries

	<b>East Asia</b> Cambodia China Indonesia Philippines Thailand Vietnam	<b>Europe/Central Asia</b> Armenia Bosnia and Herzegovina Kyrgyzstan Poland Russia Turkey
<b>Latin America/Caribbean</b> Brazil Chile Colombia Honduras Jamaica Mexico Peru	<b>Middle East/North Africa</b> Algeria Egypt Jordan Lebanon Morocco Saudi Arabia Yemen	<b>South Asia</b> Bangladesh Pakistan India* (*plus Andhra Pradesh, Uttar Pradesh and Karnataka)
<b>Sub-Saharan Africa</b> Ethiopia Kenya Mali Nigeria Senegal South Africa	<b>Industrial countries</b> Australia Canada France Germany Italy Japan Netherlands New Zealand Singapore Sweden Switzerland UK US	<b>Multilateral institutions</b> EU Brussels UN Geneva UN New York

## Introduction

In spring 2002 the World Bank commissioned a large multinational survey of opinion leaders around the world to better understand attitudes toward a wide range of international development issues. Interviewers spoke with opinion leaders in 48 developing and industrial countries and two multilateral organizations to probe their views on current international development issues, the impact of globalization, and the Bank's role within this dynamic environment. The responses not only document attitudes and perceptions, but illuminate the various economic and political factors that help shape opinion. With interviews of more than 2,600 opinion leaders worldwide, this study is one of the largest and most comprehensive surveys ever conducted on international development issues.

Two earlier studies commissioned by the World Bank—in 1994 and 1998—focused primarily on opinion leaders in industrial countries and on issues related to international development. The current study greatly expands on this previous research by including leaders in 35 developing countries and a broader set of 13 industrial countries. This study also looks more closely at the Bank's primary mission areas and principal criticisms of the Bank.

For the current survey we interviewed individuals who hold high-level positions in government, media, civil society organizations, academia, the private sector and labor unions. We interviewed opinion leaders who have at least some knowledge of the World Bank's activities. These individuals were selected from industrial countries and the six World Bank geographic regions—East Asia and the Pacific, Europe and Central Asia, Latin America and the Caribbean, the Middle East and North Africa, South Asia, and Sub-Saharan Africa.

Names of potential respondents were compiled from two sources. The individual survey research firms in each country used publicly available material for each of the sectors mentioned above to compile a list of opinion leaders. The World Bank provided a separate list of opinion leaders. The two lists were combined, duplicate names removed, and where possible half the names were drawn from the World Bank list and half from the individual survey research firm's list. Opinion leaders were randomly chosen from this combined list for each country or organization and interviewed by telephone or in person between October 2002 and March 2003. In most countries between 50 and 60 opinion leaders were interviewed for a total of 2,662 opinion leader interviews around the world. Regionally, 364 interviews were conducted in East Asia, 372 in Europe and Central Asia, 400 in Latin America, 254 in South Asia, 360 in Sub-Saharan Africa, 292 in the Middle East and North Africa and 620 in industrial countries and multilateral organizations. For the full regional samples, the margin of error is  $\pm 7$  for South Asia,  $\pm 6$  for the Middle East and North Africa,  $\pm 4$  for the industrial countries and  $\pm 5$  for the other regions. The margin of error for individual country results is  $\pm 14\%$  for samples of 50 and  $\pm 13\%$  for samples of 60.

About a third of the interviews were with opinion leaders in government, roughly 15 percent each from civil society organizations, the private sector and the media, and about 10 percent each from academia and trade unions.<sup>1</sup> Fewer than 50 leaders were interviewed in nine countries—Algeria, Australia, Cambodia, Canada, Egypt, Jordan, New Zealand, Saudi Arabia

<sup>1</sup> In Saudi Arabia government officials were not interviewed. Samples in Algeria and Morocco did not include trade union officials.

and Singapore—and the two organizations—the EU in Brussels and the UN in Geneva and New York. (See the methodological section of the report for more details about the sample design.)

This section of the report starts with a short set of key findings. The full report follows.

**Methodological note**

Numbers presented in the tables and charts are percentages. The “don’t know” and refused rates are relatively low in this survey. However, in cases where 20 percent or more of the opinion leaders interviewed did not express an opinion, the findings are presented in two ways. First, the percentages presented include the “don’t know” and refused category. Next, the percentages are presented for only those opinion leaders who expressed an opinion.

## Key findings

The Global Poll covered a wide range of issues related to international development. The opinion leaders interviewed in this survey were asked about the state of the world and their country, the impact of globalization, the importance of poverty reduction and the goals of development assistance. Opinion leaders were also asked whether foreign assistance is being used effectively, how corruption is impacting the assistance process, whether debt relief is effective and whether the World Bank is a positive or negative influence on developing countries. Key findings of this research follow.

### **Poverty reduction key to peace and stability**

Overwhelming majorities of the opinion leaders interviewed in rich and poor countries alike agree that reducing poverty is key to achieving global peace and stability. However, strong majorities of these opinion leaders are pessimistic about the prospects for attaining the international community's goal of cutting poverty by one half by 2015. Opinion leaders in the poorest and most indebted countries are the most optimistic about achieving this Millennium Development Goal.

### **Rich/poor gap widening**

One reason for opinion leaders' pessimism is their concern that the gap between rich and poor people in their country has increased over the past few years. This view is strongly held in rich and poor countries alike. When asked about the gap between rich and poor countries, opinion leaders give similar responses, saying that this gap is also growing.

### **Pessimistic about world situation but majorities optimistic about their countries' future**

Opinion leaders say they are deeply pessimistic about the state of the world and that they face a formidable list of domestic problems that range from economic slowdown to poverty to governance. These worries are tempered, however, with the hope of many opinion leaders that their country is moving in the right direction.

### **World Bank has a good influence**

A solid majority of opinion leaders around the world believe the World Bank has a good influence on the way things are going in their country. But there are dissenters from this positive view. Roughly one in four opinion leaders in South Asia, Sub-Saharan Africa and Latin America are critical of the World Bank's influence on their country.

More broadly, opinion leaders credit foreign assistance organizations with allocating aid resources more wisely—not less wisely—over the last few years. Many opinion leaders also say that their own governments are using the foreign assistance they receive more wisely and that their governments take responsibility and support development efforts in their country.

### **Economy the top development priority; Bank identified with poverty reduction**

Overall, growth and the economy is the top development priority named by the opinion leaders surveyed in developing countries. At the same time, the World Bank is clearly identified with

poverty reduction. When asked what the Bank's main objective should be, opinion leaders most often say poverty reduction. Europe and Central Asia is the only region where significantly more opinion leaders say growth and improving the countries' economies should be the Bank's top objective rather than poverty reduction.

### **Corruption has corrosive influence on foreign assistance**

Although many opinion leaders believe that their governments and foreign assistance organizations are handling foreign assistance more wisely than a few years ago, the corrosive effects of corruption on foreign assistance trouble opinion leaders worldwide. Large majorities of those interviewed in every region believe that most foreign assistance is wasted due to corruption. This concern shapes views on foreign assistance spending. Those who most strongly worry about the corrosive effects of corruption on foreign assistance also tend to believe that enough money is spent, just not judiciously, on foreign aid.

### **Debt relief more effective than traditional assistance**

A solid majority of the opinion leaders interviewed say that debt relief is a more effective way of helping poor countries than are traditional forms of assistance. Debt relief has particularly strong support among poor countries struggling with massive debt, but it also has majority support among opinion leaders in most of the world's wealthy, industrial countries.

### **Divide over foreign assistance spending**

Although opinion leaders share a virtually unanimous belief in the importance of poverty reduction, they disagree about how to achieve this common goal. There is a close divide on the question of whether enough money is devoted to foreign assistance. A sizable number of respondents say more money is needed. However, a large number also say enough money is allocated but much of it is wasted. Few say enough money is already allocated to foreign assistance and that this money is spent wisely.

### **Most welcome globalization**

While portrayed by some as a means for the wealthy to increase their domination over impoverished people and regions, the trend toward globalization has solid support among the opinion leaders surveyed. These opinion leaders see the process as bringing new ideas and new products to their countries. They also see it as a means for opening new markets, trade and business.

When opinion leaders do criticize globalization they are most concerned with the economic aspects, particularly open markets and foreign businesses, and not the exchange of ideas and popular culture. The Middle East and North Africa is an exception. Concern about foreign popular culture plays a slightly bigger role in shaping opposition to globalization in the Middle East than the opening of markets and foreign businesses.

### **Industrial countries should open markets**

Globalization is a two-way street and industrial countries need to open their markets more to trade from developing countries, according to the opinion leaders interviewed. Opinion leaders in rich and poor countries alike strongly believe that one way to help developing countries grow is to open industrial country markets much more to products from developing countries.

## Context and background

This report begins by examining opinion leaders' assessment of the world situation and their own situation at home. Opinion leaders' attitudes toward globalization and its different aspects are also addressed. We then look at opinion leaders' views of the foreign assistance process, including the importance of poverty reduction, debt relief and the fight against corruption as well as the role of foreign assistance organizations and recipient governments. After examining opinion leaders' views of foreign assistance organizations in general, we turn to opinion leaders' views of the World Bank. The questions in this section address several criticisms of the Bank, specifically that the Bank is detrimental and a hindrance to development. The report then turns to opinion leaders' assessment of the Bank's performance across eight primary mission areas—(1) reducing poverty, (2) strengthening governance, (3) fostering environmental sustainability, (4) improving infrastructure, (5) improving education, (6) improving health, (7) building a climate for investment, jobs and growth, and (8) reducing corruption. Finally, we assess the Bank's organizational culture and its communication and outreach programs.

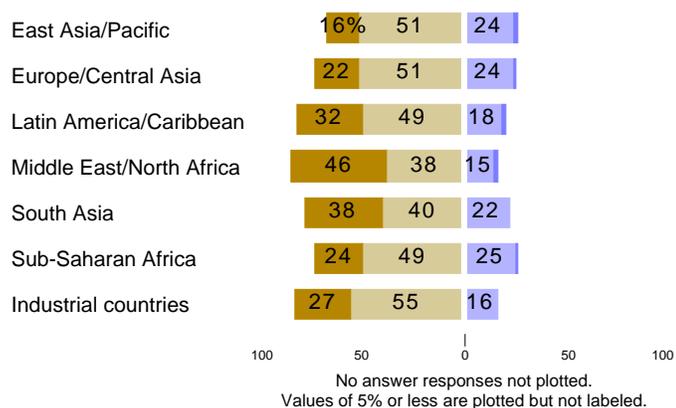
### World situation gloomy

Opinion leaders assess international development issues against a backdrop of pessimism. Large majorities in every region, including industrial countries, say they are dissatisfied with the world situation.<sup>2</sup> Relatively few, a quarter or less, say they are satisfied. Opinion leaders are not alone in their pessimism about the world. According to the *Pew Global Attitudes Project*,<sup>3</sup> a survey of publics in 44 countries, large majorities of publics around the world are also dissatisfied with the world situation.

Opinion leaders in predominately Muslim countries and in industrial countries are among the most dissatisfied. Overwhelming majorities in 10 of the 16 Muslim countries surveyed say they are dissatisfied with the world situation. Likewise, in nine of the 13 industrial countries included in the project, majorities of eight in 10 or more are dissatisfied with the world situation. Four other countries—Brazil, Chile

Chart 1  
**Dissatisfaction with world situation**

Turning to the situation in the world overall, would you say that you are [↑] very satisfied, [↓] somewhat satisfied, [↔] somewhat dissatisfied or [↓] very dissatisfied with the way things are going in the world right now?



Throughout, plotted and tabulated values represent percentages of respondents.

<sup>2</sup> Unless specified in this report, industrial countries do *not* include opinions of representatives from the multilateral organizations, which are the EU in Brussels and the UN in Geneva and New York.

<sup>3</sup> "What the World Thinks in 2002," *Pew Global Attitudes Project*, December 2002.

and Mexico in Latin America and Bosnia and Herzegovina in Europe and Central Asia—register equally high levels of dissatisfaction with the world situation.

### Country's economic status bad

Opinion leaders are also gloomy about their country's economic situation, although not as negative as they are about world affairs. A majority of opinion leaders in each region say their country's economic situation is bad, except in East Asia where a modest majority say it is good. In South Asia and the industrial countries opinion is divided. Europe and Central Asia stands alone as the most negative. Publics around the world also share a deep concern about the economic conditions in their country, according to the *Pew Global Attitudes Project*.

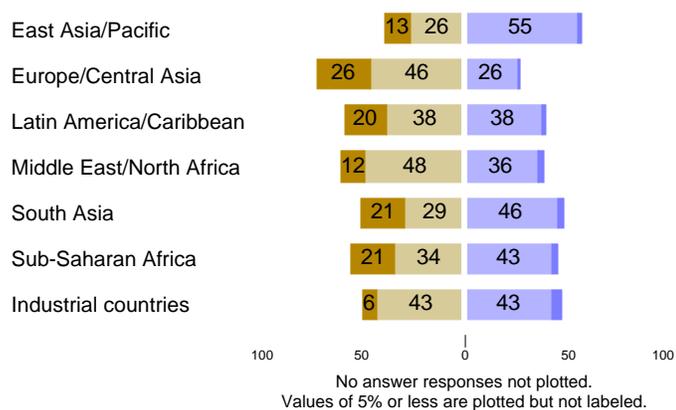
In East Asia a slim majority of opinion leaders are positive about their economy, although this is primarily due to positive economic assessments in China, Thailand and Vietnam.

Among opinion leaders in Sub-Saharan Africa, opinion on the economy also varies by country. In South Africa and Mali, solid majorities say their country's economic situation is somewhat good. By contrast, large majorities in Ethiopia, Kenya,<sup>4</sup> Nigeria and Senegal say their country's economic situation is bad.

In South Asia, majorities in Bangladesh and Pakistan say their economic situation is bad, while two-thirds among Indian opinion leaders say it is good. Most opinion leaders in Latin America are concerned about their country's economic situation with the exception of Chile and Peru, where majorities say their country's economic situation is good. In the Middle East and North Africa, solid majorities in Egypt, Algeria, Lebanon and Morocco say the economic situation is bad, but in Saudi Arabia and Jordan majorities describe the economy as good. Opinion leaders in Yemen are divided. In Europe and Central Asia, majorities in all countries surveyed, including fully nine in 10 in Bosnia and Herzegovina, report that the economic situation in their country is bad.

Chart 2  
**Country's economic situation**

How would you describe the current economic situation in our country: Is it [↑] very good, [↔] somewhat good, [↓] somewhat bad or [↓↓] very bad?



<sup>4</sup> In the case of Kenya, the recent elections played a large role in shaping these views. Those interviewed after the December 27, 2002, presidential election were more likely to say the economic situation is somewhat good than those interviewed before Kenya's first free and fair presidential election.

### Most countries going in right direction

Despite the bad economic situation, many opinion leaders say their country is going in the right direction.<sup>5</sup> A majority of opinion leaders interviewed say their country is going in the right direction or at least staying the same. Three in 10 or fewer opinion leaders interviewed say their country is going in the wrong direction, except in South Asia where nearly four in 10 see their country as going down the wrong path.

Perceptions that a country is going in the right direction reflect both political and economic evaluations. Opinion leaders in developing countries who say that their government supports and takes responsibility for the development efforts in their country are more likely to say their country is going in the right direction. Likewise, opinion leaders in developing countries who say their country's current economic situation is good are also more likely to say their country is going in the right direction.

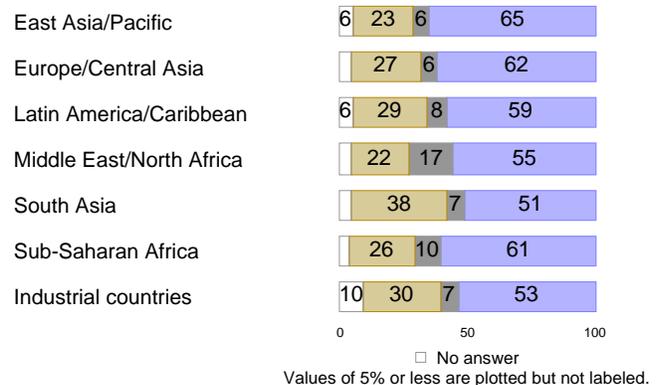
Sizable minorities of four in 10 or more in Cambodia, Turkey, Mexico, Pakistan and Kenya<sup>6</sup> say their country is going in the wrong direction. But in nine developing countries, large majorities of seven in 10 or more say their country is going in the right direction—Brazil, Ethiopia, Jordan, Mali, Morocco, Poland, South Africa, Thailand and Vietnam.

Although many opinion leaders say their country is moving in the right direction, they still report a formidable list of domestic problems. The top concerns facing developing countries are economic problems, social problems, such as poverty and education, and concerns about governance, such as democratization and corruption. Economic issues top the list of concerns in East Asia, Europe and Central Asia, the Middle East and North Africa and the industrial countries. In Latin America and Sub-Saharan Africa, economic and social problems vie for top place and in South Asia more opinion leaders mention social problems than economic concerns.

Chart 3

### Country going right/wrong direction

<sup>v</sup> Overall, would you say our country is going in the [▲] right direction or [▼] wrong direction? (Volunteered: [▲] Staying the same)



<sup>5</sup> This question was not permitted in China and Saudi Arabia.

<sup>6</sup> In Kenya the mood among opinion leaders changed after the December 27, 2002, election. Opinion leaders interviewed after the elections were more likely to say their country is going in the right direction than those interviewed before the election.

Table 1  
**Biggest problem facing our country today<sup>7</sup>**

v What is the biggest problem facing our country today?<sup>8</sup>

	East Asia/Pacific	Europe/Central Asia	Latin America/Caribbean	Middle East/North Africa	South Asia	Sub-Saharan Africa	Industrial countries
Economic problems	42	53	40	54	33	41	48
Social problems	28	17	44	22	47	41	20
Poverty	13	9	20	13	28	26	2
Education	5	4	6	5	9	5	4
Health	1	0	1	2	1	5	4
Other social problems such as crime, violence, inequality	9	4	17	2	9	5	10
Government and governance	25	19	13	16	11	11	10
Infrastructure	1	1	1	3	2	*	0
Environment	2	1	*	1	0	0	2
Foreign policy, terrorism, relations with other countries	*	2	*	0	1	1	9
Other	1	6	3	3	7	6	8
No answer	1	1	0	1	0	0	3

\* represents a value of less than 0.5%.

<sup>7</sup> This open-ended question had a number of “pre-coded” answers specified, such as economic problems, poverty, education, health, infrastructure and government and governance, which interviewers marked if the answers fit one of these categories. If it did not the interviewer recorded the answer and it was coded at PSRA. To accurately compare the relative importance respondents placed on these different types of problems, we combined all the social problems—poverty, education, health and other social ills such as crime, violence and inequality into an overall category that we label social problems. This allows us to compare problems of similar levels of magnitude.

### Rich/poor gap widening

Another problem opinion leaders identify is a growing gap between rich and poor people in their country. Opinion leaders around the world generally agree that the gap between rich and poor people has widened over the last few years. This view is shared by opinion leaders in rich and poor countries alike. Relatively few opinion leaders say the rich/poor gap has decreased in the last few years.

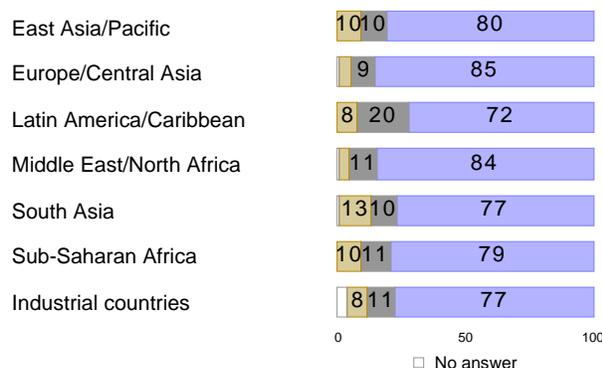
In developing countries, opinion leaders who are generally pessimistic about their country's situation (country going in the wrong direction or bad economic situation) are even more likely than others to think the wealth gap has increased.

Opinion leaders also believe that the gap between rich and poor *countries* is increasing with virtually all opinion leaders in developing and industrial countries in agreement. Opinion about the wealth gap between countries is intense with solid majorities *strongly* agreeing that the gap between rich and poor countries is growing. Only in East Asia and the industrial countries do minorities of roughly a third temper this strongly held view by saying they only somewhat believe the gap between rich and poor countries is growing. But similar to opinion leaders elsewhere, only a handful in these two regions dispute that the wealth gap between countries is growing wider.

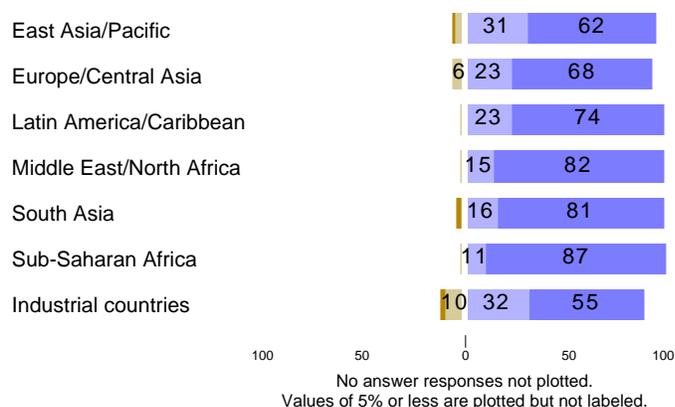
Chart 4

### Gap between rich and poor

v In general, do you think the gap between rich and poor people in our country<sup>a</sup> has [↑] increased in the last few years, [↓] decreased or [↔] stayed the same in the last few years?



v Do you [↑] strongly agree, [↔] somewhat agree, [↓] somewhat disagree or [↓] strongly disagree: There is a growing gap between rich and poor countries?



(a) In industrial countries we asked about developing countries, not own country.

# Globalization

## Globalization embraced as good for country

The globalization process is the larger context within which concerns about the rich/poor gap find a vocal forum. Yet, the opinion leaders surveyed largely assert that globalization is good for their country. Solid majorities in every region say globalization is good for their country, although many temper this view by saying that globalization is *somewhat* good rather than *very* good. In a few developing countries very large majorities of eight in 10 or more opinion leaders favor globalization—China, Vietnam, Chile, Mexico, Kenya and Nigeria.

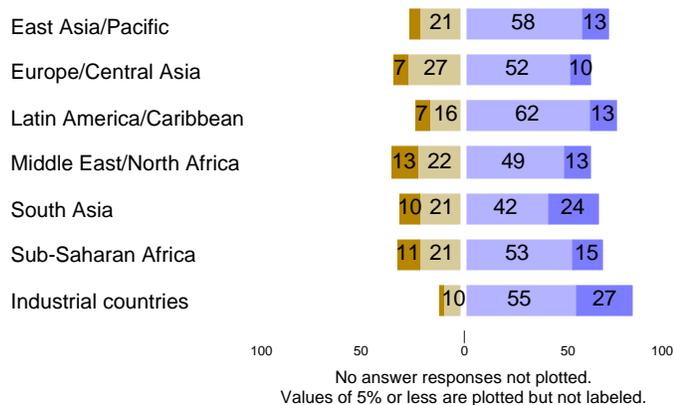
Only one in 10 opinion leaders in the industrial countries say globalization has a negative impact compared to nearly three times as many in developing countries. There is even greater opposition to globalization in a few countries. Majorities oppose globalization in Indonesia, Mali, Russia and Yemen. Opinion leaders in predominately Muslim countries are somewhat less supportive of globalization than opinion leaders in non-Muslim countries.

In general, globalization foes tend to be pessimistic about their country's economic situation and the world situation, and to see the US as a bad influence on their country.

In developing countries, attitudes toward globalization do not appear to vary by the degree of a country's globalization, at least not when compared to the 2003 Foreign Policy Globalization Index of 62 countries.<sup>9</sup> By contrast, in industrial countries the degree of a country's globalization is more closely related to opinion of globalization. Opinion leaders in industrial countries with more globalized economies are more favorable toward globalization.

Chart 5  
**Views on globalization**

Do you think that globalization is [↑] very good, [↕] somewhat good, [↓] somewhat bad or [↓↓] very bad for our country?



<sup>9</sup> The A.T. Kearney/Foreign Policy Magazine Globalization Index 2003. Thirteen countries included in the current survey—Cambodia, Vietnam, Armenia, Bosnia and Herzegovina, Kyrgyzstan, Honduras, Jamaica, Algeria, Jordan, Lebanon, Yemen, Ethiopia and Mali—are not included in the index.

Globalization can mean a variety of things. We asked about five of the most prominent aspects of globalization:

- the exchange of ideas and information between people of different countries;
- the opening of markets and trade with other countries;
- the greater availability of popular culture from different parts of the world;
- the greater availability of goods from different parts of the world; and
- the establishment of foreign businesses that sell products in a country.

In each case leaders were asked whether these aspects of globalization were good or bad for their country. A solid majority of opinion leaders in each region say that each is positive, although respondents in some individual countries take the opposite view.

Overwhelmingly large majorities in each of the 48 countries surveyed describe the increased exchange of ideas and information that globalization produces as a significant plus for their country. These opinion leaders generally feel strongly about this aspect of globalization, with half or more of those surveyed in each region saying the increased exchange of ideas and information is *very* good.

Opinion leaders are almost as positive about the greater opening of their markets, trade and business to other countries as they are about the increased exchange of ideas, just not as intensely positive. Large majorities of opinion leaders in both developing and industrial countries see the opening of their

Chart 6

**Globalization: information, business, media**

Is this change [↑] very good for our country, [↔] somewhat good, [↓] somewhat bad or [↓↓] very bad for our country: The increased exchange of ideas and information between people of our country and people in other countries?



... The greater opening of our markets, trade and business with other countries?



... The greater availability of movies, TV and music from different parts of the world here in our country?



No answer responses not plotted.  
Values of 5% or less are plotted but not labeled.

markets and greater trade and business as beneficial.<sup>10</sup>

Opinion leaders also generally welcome the greater availability of foreign movies, TV and music. Majorities of more than six in 10 in each region say their country is better off—thanks to globalization—with the greater availability of foreign popular culture.<sup>11</sup>

Most opinion leaders also like having foreign products available. Two in three or more in all regions say their country benefits from the greater availability of products and goods from different countries. This is especially true in Europe and Central Asia, Latin America and the industrial countries. At the same time, minorities in most regions object to foreign products and goods becoming available in their country.<sup>12</sup>

The establishment of foreign businesses that sell goods in the respondent's country also wins support of a sizable majority of opinion leaders in all regions. South Asians are somewhat less enthusiastic about the benefits of foreign businesses in their economy, particularly Indian opinion leaders.<sup>13</sup>

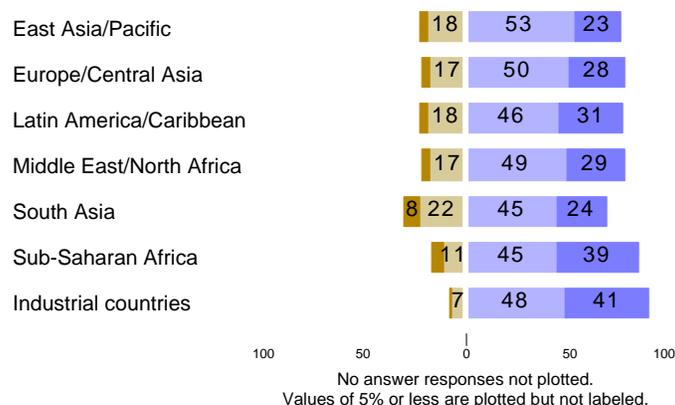
In-depth analysis shows that when opinion leaders say globalization is bad for their country they are most often referring to two economic aspects of it—the opening of markets and trade with other countries and the introduction of foreign businesses that sell products in their country. To a lesser degree, the importation of popular culture such as movies, TV and music is also closely associated with opposition to globalization. Europe and Central Asia, Latin America and the Middle East and North Africa differ slightly from this pattern. In Europe and Central Asia, the availability of foreign products and the importation of foreign culture play the largest role in explaining opposition to globalization. In Latin America, opposition to globalization is based on the two economic aspects mentioned above but not foreign popular culture. And in the Middle East and North Africa, concern about foreign popular culture plays a slightly bigger

Chart 7  
**Globalization: products, companies**

u Is this change [↑] very good for our country, [↑] somewhat good, [↓] somewhat bad or [↓] very bad for our country: The greater availability of products and goods from different parts of the world in our country?



v ... The establishment of foreign businesses and manufacturing companies that sell products in our country?



<sup>10</sup> In Bangladesh, Columbia, Indonesia and the Philippines, minorities of three in 10 or more say that the greater opening of their markets, trade and business with other countries is bad for their country.

<sup>11</sup> In Algeria, Armenia, Cambodia, India, Mali, Nigeria, Russia, Senegal and Yemen, majorities or sizable minorities of the opinion leaders surveyed say that foreign entertainment is bad for their country.

<sup>12</sup> In Algeria, Cambodia, Ethiopia, Indonesia, Mali, Nigeria, Pakistan, Senegal, Thailand and Yemen, a third or more of opinion leaders surveyed say that greater availability of foreign products and goods is bad for their country.

<sup>13</sup> Indonesia is another country where many opinion leaders say the establishment of foreign businesses is bad for their country. These concerns are shared by three in 10 opinion leaders in other countries too—Armenia, Cambodia, Mexico, Peru, Thailand and Yemen.

role in shaping opposition to globalization than the opening of markets and trade or foreign businesses that sell products in their country. Trade unionists surveyed in developing countries are more likely to have a negative view of globalization than opinion leaders working in other professional sectors.

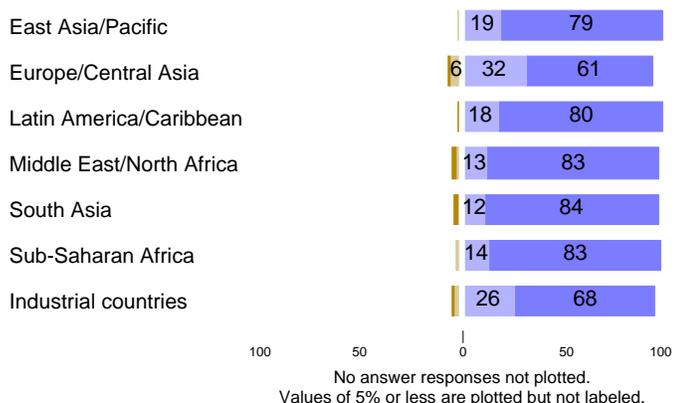
### Industrial countries must open markets

Globalization is a two-way street and industrial countries need to open their markets more to trade from developing countries, according to the opinion leaders interviewed. Asked specifically about trade between industrial and developing countries, most opinion leaders believe that industrial countries must open their markets much more to products from developing countries.

Opinion leaders in developing and industrial countries alike *strongly* believe that better market access for products from developing countries is necessary. Large majorities of opinion leaders in South Asia, Sub-Saharan Africa, the Middle East and North Africa, Latin America and East Asia along with smaller majorities in Europe and Central Asia strongly agree that industrial countries should open their markets more. Two in three opinion leaders in industrial countries also feel strongly about the issue. Only a handful of opinion leaders disagree about the importance of opening markets in industrial countries to products from developing countries.

Chart 8  
**Opening markets for developing country products**

Do you [↑] strongly agree, [↔] somewhat agree, [↓] somewhat disagree or [↓] strongly disagree: In order to help developing countries grow, industrial countries must open their markets much more to products from developing countries.



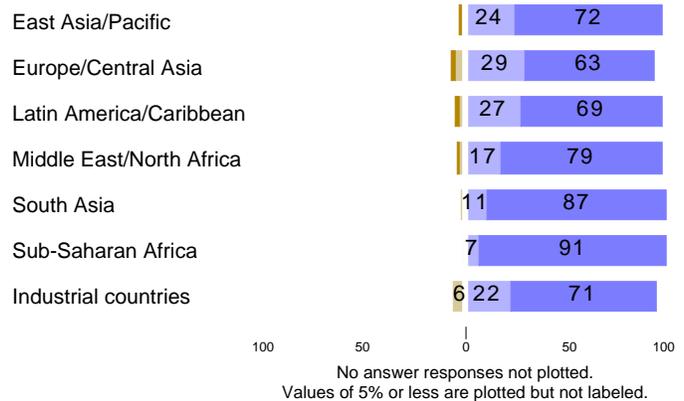
# Foreign assistance

## Poverty reduction key to global peace and stability ...

Opinion leaders share the goal of reducing poverty worldwide. Confronted with the reality that nearly half the world's population subsists on less than \$2 a day, opinion leaders from around the world are in very strong agreement that poverty reduction is key to achieving global peace and stability. Overwhelming majorities in developing and industrial countries alike believe that a major effort to decrease poverty around the world is essential for reducing global tensions. Opinion leaders in low income countries are even more likely to be in *strong* agreement than opinion leaders in middle or high income countries. Consequently, this sentiment is strongest in Sub-Saharan Africa, South Asia and the Middle East and North Africa, where very large majorities of opinion leaders *strongly* agree that global peace and stability are dependent on poverty reduction. More than six in 10 in other developing country regions surveyed also *strongly* agree. Virtually no one in any of the regions surveyed disagrees.

Chart 9  
**Reducing poverty worldwide**

Do you [strongly agree], [somewhat agree], [somewhat disagree] or [strongly disagree]: Unless a major effort is made to reduce poverty around the world, global peace and stability will not be achieved?



**... but majorities pessimistic about reducing poverty by half by 2015**

Despite widespread agreement on the importance of poverty reduction, opinion leaders are pessimistic about the chances of achieving this goal. Solid majorities of the opinion leaders surveyed say the likelihood of cutting poverty by half by 2015 is slim.

That pessimism pervades responses from the richest and the poorest nations, although opinion leaders in poor countries and in more indebted countries are slightly less pessimistic about achieving this Millennium Development Goal. Government leaders in developing countries are also somewhat less pessimistic than those working in other professional sectors.

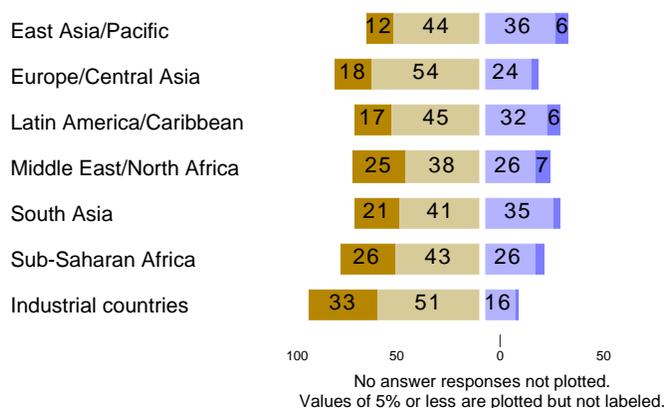
In East Asia, Latin America and South Asia sizable minorities think it is at least somewhat likely that poverty will be reduced by half by 2015. Cambodia, Indonesia and Vietnam stand alone in East Asia with roughly half or more somewhat optimistic about achieving this goal. In Latin America, more than four in 10 opinion leaders in Honduras and Peru share this cautious optimism, as do similar percentages of South Asian opinion leaders in Pakistan and India.

Somewhat fewer in Sub-Saharan Africa, the Middle East and Europe and Central Asia think this goal is likely to be reached. Nigeria is the only country in Sub-Saharan Africa where a minority of four in 10 think the goal may be met. In the Middle East, more than half the leaders in Yemen and Saudi Arabia are optimistic that poverty can be cut by half by 2015.

Opinion leaders in industrial countries are most pessimistic. In 10 of the 13 industrial countries surveyed, eight in 10 or more say achievement of this Millennium Development Goal is not too likely or not likely at all. Fully nine in 10 opinion leaders in France, Japan, Switzerland and the US share this pessimistic view.

Chart 9 continued  
**Reducing poverty worldwide**

As you probably know, one of the international community's development goals is to reduce poverty by half by the year 2015. Do you think this goal is [↑] very likely to be achieved, [↔] somewhat likely, [↓] not too likely or [↓↓] not likely at all?

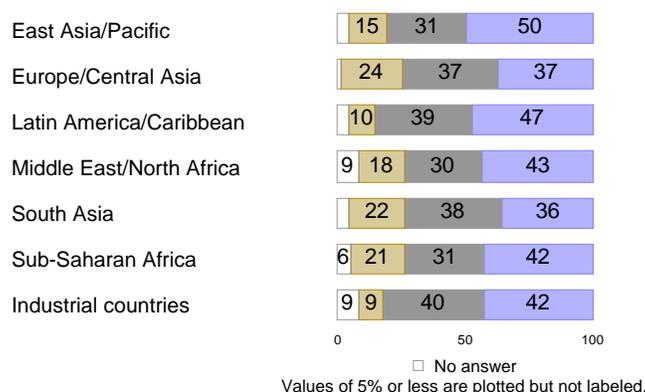


### Positive views outweigh the negative on handling of foreign assistance

The wise handling of foreign assistance funds by both recipient governments and by foreign assistance agencies themselves is central to successful poverty reduction. Pluralities or sizable minorities of the opinion leaders interviewed in developing countries say their government is handling foreign assistance more wisely now than it did a few years ago. Substantially fewer—a quarter or less—say their government is less wise in its handling of foreign assistance. And roughly a third of opinion leaders in all regions say there has been no change in the way developing country governments handle foreign assistance.

Chart 10  
**Government handling of assistance**

Compared to a few years ago, is our government<sup>a</sup> using the foreign assistance it receives [↑] more wisely, [↓] less wisely, or has there been [↔] no change in how our government is using the foreign assistance it receives?

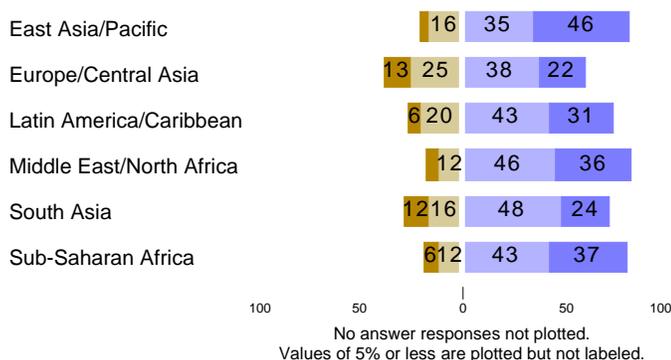


(a) In industrial countries we asked about developing countries, not own country.

Opinion leaders who say officials are handling foreign assistance more wisely also credit their governments with supporting and taking responsibility for development efforts in their country.<sup>14</sup> Eight in 10 respondents in Sub-Saharan Africa, the Middle East and North Africa and East Asia and almost as many in South Asia and Latin America agree that their governments play a strong and encouraging role in development efforts. Fewer, although still a majority, agree in Europe and Central Asia.

Chart 10 continued  
**Government handling of assistance**

Do you [↑] strongly agree, [↔] somewhat agree, [↓] somewhat disagree or [↓] strongly disagree: Our government supports and takes responsibility for development efforts in our country?



With the exception of South Asia, generally positive views also prevail about the way foreign assistance organizations have allocated their

<sup>14</sup> This question was not permitted in China.

resources over the last few years.<sup>15</sup> Opinion is moderately positive in Sub-Saharan Africa, East Asia and industrial countries where half say that foreign assistance organizations have shown greater wisdom in their handling of resources over the last few years. Substantially fewer, two in 10 or less, say that foreign assistance organizations are less wise in how they allocate their foreign assistance resources.

Opinion leaders in Latin America, the Middle East and Europe and Central Asia are somewhat less complimentary, with less than half saying that foreign assistance organizations allocate their resources more wisely. But fewer say foreign assistance organizations are less wise in how they allocate their resources. A sizable minority of opinion leaders interviewed in Latin America, the Middle East and Europe and Central Asia say there has been no change in how foreign assistance organizations are allocating resources.

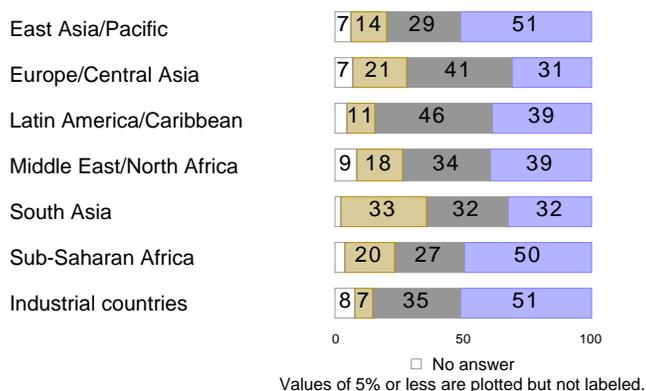
Opinion in South Asia is the most critical, with equal numbers praising and criticizing the way foreign assistance organizations are allocating resources. Roughly three in 10 opinion leaders in India, Pakistan, and Bangladesh say funds are now allocated more wisely than before. And roughly as many say funds are allocated less wisely than they were a few years ago.

### Corruption has corrosive influence on foreign assistance

The corrosive effects of corruption trouble opinion leaders worldwide. Large majorities in all developing countries surveyed believe that most foreign assistance funds are wasted due to corruption.<sup>16</sup> This is the case even though many opinion leaders say that developing country governments and foreign assistance organizations are doing a better job handling assistance.<sup>17</sup>

Chart 11  
**Foreign assistance organizations' handling of assistance**

Compared to a few years ago, are foreign assistance organizations allocating aid resources to our country<sup>a</sup> [↑] more wisely, [↓] less wisely, or has there been [↔] no change in how foreign assistance organizations are allocating resources?



(a) In industrial countries we asked about developing countries, not own country.

<sup>15</sup> Among the professional sectors, government officials in developing countries are more likely than other opinion leaders to say assistance organizations have gotten wiser.

<sup>16</sup> This question was not permitted in China and Vietnam.

<sup>17</sup> Among the opinion leaders interviewed, government officials in developing countries are less likely to believe corruption is wasting away assistance funds, but even among this group, nearly eight in 10 opinion leaders say funds in developing countries are wasted because of corruption.

Opinion leaders in developing countries tend to express stronger views about the negative impact of corruption than do opinion leaders in industrial countries where opinion leaders are most removed from the corrupt practices but closest to the funding sources for much foreign assistance. Half the opinion leaders in developing countries *strongly* believe that *most* foreign assistance is wasted, compared to slightly more than one in 10 of those surveyed in industrial countries. The more indebted and impoverished a country is, the more likely its opinion leaders are to strongly agree that assistance funds are squandered through corruption.

It is important to note that this question asks whether foreign assistance to *developing* countries is being wasted due to corruption not whether foreign assistance in the respondent's country is wasted because of corruption. As such, this question taps a general concern about the corrosive effects of corruption in developing countries rather than a specific measure of whether corruption wastes foreign assistance resources in individual countries.

Pluralities or majorities in East Asia, South Asia, Sub-Saharan Africa, the Middle East and North Africa and Europe and Central Asia believe *strongly* that assistance is wasted due to corruption. In Latin America, opinion leaders are more likely to *somewhat* rather than *strongly* agree that assistance is wasted due to corruption. A quarter of those interviewed in Latin America disagree that assistance is wasted due to corruption.

In industrial countries, majorities believe foreign assistance is largely wasted due to corruption, but a sizable minority of four in 10 disagree. This contrary view is particularly prevalent in Canada, Germany, Switzerland and the US where majorities do not think foreign assistance is wasted due to corruption.

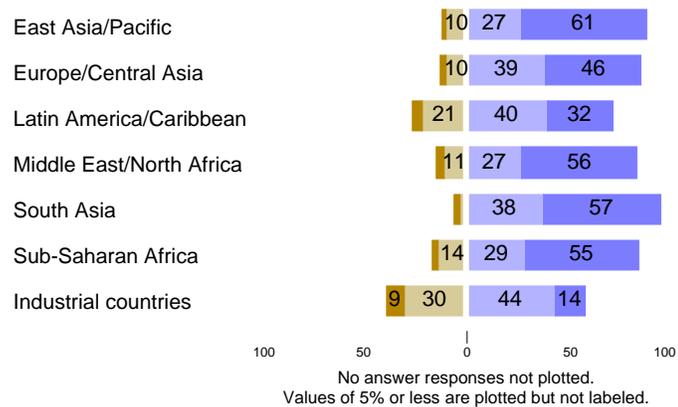
Concerns about foreign assistance being wasted help explain some of the pessimism opinion leaders feel about the odds of cutting poverty in half by 2015. Opinion leaders in developing countries who feel foreign assistance is being wasted are somewhat more likely to say poverty will not be reduced by 2015. This is not true among leaders in industrial countries—their opinions toward corruption do not affect their already pessimistic view about whether poverty can be cut.

Concerns about wasted foreign assistance also explain opinion leaders' assessments of whether developing governments and foreign assistance organizations are handling assistance resources more wisely. Opinion leaders who say foreign assistance is being wasted are less likely to say foreign assistance is being used more wisely in the past few years, both by their government and by foreign assistance organizations.

Chart 12

**Is foreign assistance wasted due to corruption?**

Do you [👍] strongly agree, [👎] somewhat agree, [👎] somewhat disagree or [👍] strongly disagree: Because of corruption, foreign assistance to developing countries is mostly wasted?



### Is enough being spent?

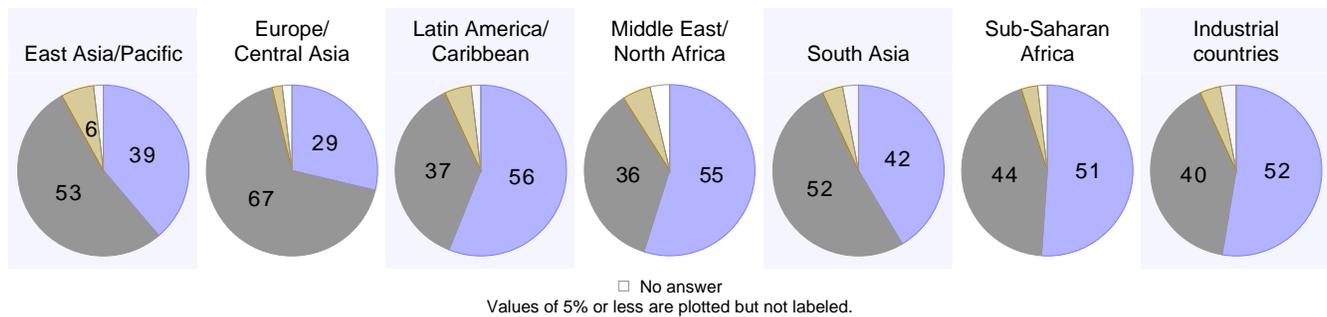
Opinion leaders hold divergent views about whether enough money is being spent on foreign assistance and whether the money is being spent wisely. Many say that not enough money is being spent on foreign assistance. At the same time, sizable numbers reject that argument and say that enough money is spent, but that it is not used wisely. Only a handful of opinion leaders support the current level of funding and how the money is spent.

Opinion on the amount of money allocated for foreign assistance is directly linked to views about corruption. Across most regions, opinion leaders who strongly believe that foreign assistance is mostly wasted because of corruption are also most likely to believe enough is being spent—just not wisely.

Chart 13

#### Amount of foreign assistance

Some people say that not enough money is spent on foreign assistance to developing countries. Others say that enough money is spent, but that it is not spent wisely. Still others say that enough is being spent and that it is being spent wisely. Which view is closest to yours? [↓] Not enough spent, [↑] enough spent but not wisely, [↕] enough spent wisely.



Opinion leaders in Europe and Central Asia, East Asia and South Asia are more likely to say enough money is allocated but spent unwisely. By contrast, in Latin America, the Middle East and North Africa, Sub-Saharan Africa and industrial countries, half or more say that not enough money is being spent. In all regions, sizable minorities hold the opposite view.<sup>18</sup>

Opinion leaders working in the private sector are more likely than government officials or people working in non-governmental organizations to say that enough money is spent, but is not spent wisely. Conversely, professionals working in civil society organizations in industrial countries are more likely than others to say not enough money is spent on foreign assistance. Only two in 10 among these opinion leaders say enough money is spent, just not wisely. Opinion leaders from other sectors in society, including government, are fairly evenly split between those who say not enough is being spent and those who say enough is being spent, just not wisely.

<sup>18</sup> In most regions, there are one or two countries that differ from the others. For example, a majority of opinion leaders in Turkey believe not enough money is spent, while solid majorities in other countries surveyed in Europe and Central Asia say enough is spent, but not wisely. Similarly, majorities in China and Vietnam stand apart from the rest of East Asia by saying not enough money is spent on foreign assistance. In South Asia, a slim majority of Pakistani opinion leaders say that not enough money is being spent, while half or more in Bangladesh and India say that enough money is being spent, just not judiciously. And even though the general feeling among opinion leaders in Latin America is that not enough money is spent, a slim majority of opinion leaders in Peru say enough is spent—just not wisely. In most Sub-Saharan countries opinion is fairly evenly divided, but opinion leaders in Senegal differ in their strong belief that not enough money is spent on foreign assistance. In the Middle East opinion is divided in Algeria and Saudi Arabia while majorities in Yemen, Morocco, Jordan and Lebanon think that not enough money is being spent. Egypt stands apart with a slim majority saying that enough is being spent but not wisely. Opinion in industrial countries is also mixed. In Sweden, Switzerland, the US, Canada, France, and Britain those who believe not enough is spent are in the majority, but in Japan and Singapore majorities say enough is spent—just not wisely.

### Debt relief more effective than traditional types of assistance

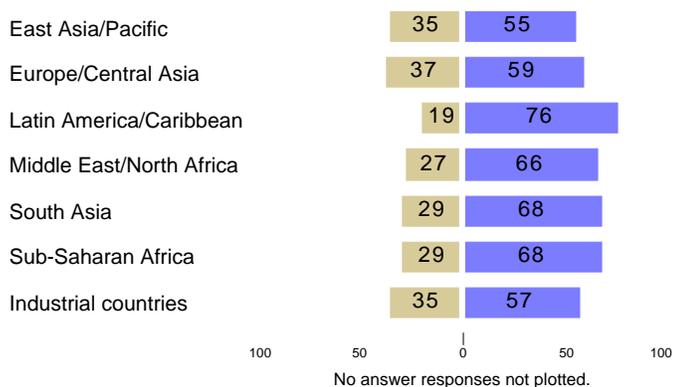
Support for debt relief is a cause shared by a majority of the opinion leaders surveyed. Majorities in most developing and industrial countries believe that debt relief is more effective than traditional types of foreign assistance, although notable minorities in most regions disagree. Opinion leaders in Latin America, the Middle East and North Africa, Sub-Saharan Africa and South Asia are most likely to say debt relief is more effective than other forms of foreign assistance. Smaller majorities of opinion leaders agree in East Asia, Europe and Central Asia and industrial countries.<sup>19</sup> Opinion leaders from countries that are severely indebted are more likely to believe in the benefits of debt relief than opinion leaders who live in less indebted countries.

In the Middle East, South Asia, Sub-Saharan Africa and industrial countries opinion leaders who say that not enough money is spent on foreign assistance are more likely to think that debt relief is more effective than other forms of foreign assistance. This pattern does not prevail in the other regions. Attitudes on globalization are also often related to opinions on debt relief. Those who oppose globalization are more likely to favor debt relief in East Asia, Latin America, Middle East and North Africa and industrial countries.

In general, opinions about the effectiveness of debt relief are unrelated to concerns about foreign assistance being wasted because of corruption. Opinion leaders who are most concerned about the caustic effects of corruption on foreign assistance are no more likely to say debt relief is more effective than traditional forms of assistance.

Chart 14  
**Debt relief more effective**

Thinking about debt relief and traditional types of foreign assistance, do you personally believe that debt relief is a [↑] more effective or [↓] less effective way to help developing countries than traditional types of foreign assistance?



<sup>19</sup> Cambodia, Poland and Lebanon are the only developing countries where half or more of the opinion leaders interviewed believe debt relief is less effective than traditional forms of foreign assistance. Among industrial countries, a majority of Japanese opinion leaders also believe that debt relief is less effective than traditional forms of foreign assistance.

### Influence of UN, IMF and World Bank largely positive

Within the context of foreign assistance organizations, how do opinion leaders evaluate the overall influence of the United Nations, the World Bank and the IMF on the way things are going in their country?

The United Nations is held in high regard in each region. Seven in 10 or more opinion leaders in each region say the UN is a good influence on their country. In most regions, only one in 10 or so think the UN is a bad influence on their country, but the UN has a higher percentage of opponents in South Asia and even higher in the Middle East and North Africa. In a few developing countries outside the Middle East, two in 10 or more say the UN is a bad influence—Bosnia and Herzegovina, Indonesia, Pakistan, Turkey, Mexico and Nigeria.<sup>20</sup> In the Middle East and North Africa, most countries—Algeria, Yemen and Saudi Arabia in particular—have notable minorities who believe the UN has a bad influence.

The IMF fares less well than the UN but even so a majority in each region see the IMF as having a good influence on the way things are going in their country. This is particularly true in Europe and Central Asia with two thirds positive toward the IMF. Likewise, majorities in the other regions share this positive feeling about the IMF. However, more than four in 10 Latin American leaders say the IMF has a bad influence. A quarter or more in other regions agree.<sup>21</sup>

Chart 15

### Influence of UN, IMF and World Bank

Is the United Nations having a [↑] very good, [↔] somewhat good, [↓] somewhat bad or [⬇] very bad influence on the way things are going in our country?



... IMF?



... World Bank?



100 50 0 50 100  
No answer responses not plotted.  
Values of 5% or less are plotted but not labeled.

<sup>20</sup> Interestingly, in four of these countries the UN has peacekeeping efforts in operation—Bosnia and Herzegovina, Indonesia, Pakistan and Turkey (Cyprus).

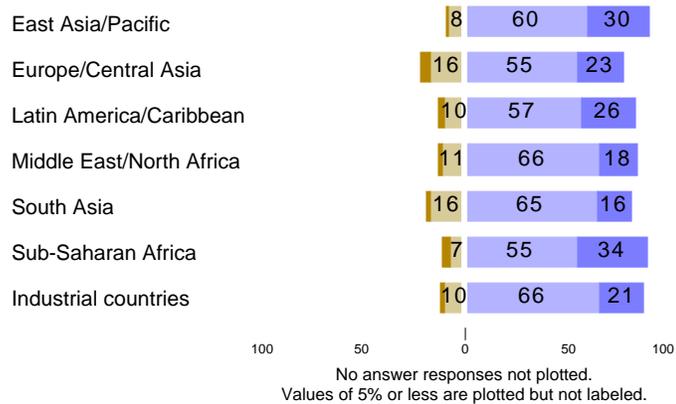
<sup>21</sup> Majorities in Brazil, Indonesia, Jordan, Mexico and Nigeria say the IMF's influence on their country is bad.

As discussed in detail in the next section of the report, large majorities of opinion leaders say the World Bank has an overall positive influence on the way things are going in their country. Roughly two in 10 opinion leaders say the Bank has a bad influence on their country.

Moreover, large majorities in each region say the Bank performs a useful role in their countries' development efforts. As might be expected those who think the Bank is useful also tend to say the Bank has a good influence.

Chart 16  
**Usefulness of the World Bank**

u To what extent, if at all, does the World Bank perform a useful role in our country's<sup>a</sup> development efforts: Is the Bank [👍] very useful, [👎] somewhat useful, [👎] not too useful or [👎] not useful at all?



(a) In industrial countries we asked about developing countries, not own country.

### Bank and IMF seen as working together

Most of the opinion leaders surveyed say the Bank and IMF work closely together but they differ on the details of that close working relationship. When asked which of four statements best describes the relationship between the IMF and the World Bank, most respondents said either that the Bank is much more focused than the IMF on poverty reduction, or that the Bank and the IMF have similar approaches. Smaller percentages of opinion leaders say the IMF determines the Bank's approach or that the two organizations work totally independent of each other.

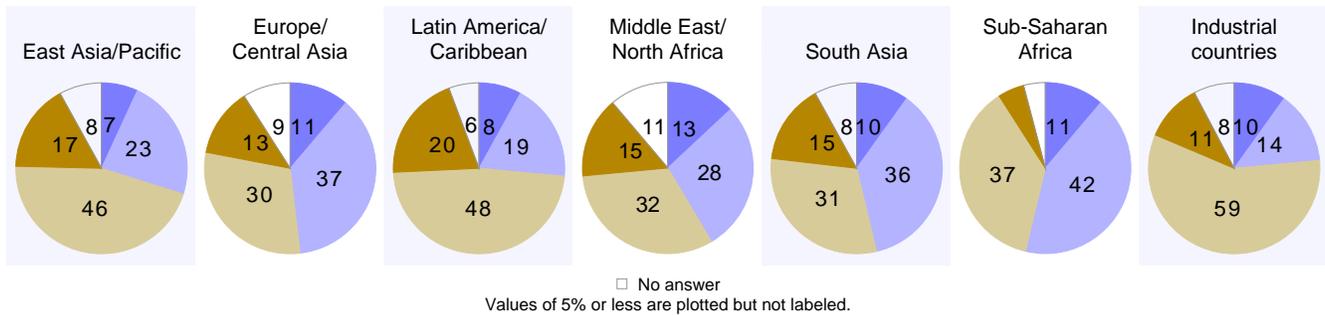
Opinion leaders who think the Bank's approach to assistance is more focused on poverty reduction are more likely to say the Bank has good influence on their country than those who think the Bank and IMF have similar approaches.

Trade union leaders in developing countries are more likely than others to say the Bank and the IMF have similar approaches and are less likely than other opinion leaders to say the Bank is more focused on poverty reduction. And opinion leaders in more prosperous countries are more likely to see the Bank as focused on poverty reduction than opinion leaders in poor, indebted countries.

Chart 17

### Relationship between Bank and IMF

Which best describes the relationship between the World Bank and the IMF: [↑] The IMF determines the Bank's approach, [↕] the IMF and Bank are similar, [↓] the Bank is more focused on poverty reduction, [⊞] the Bank and IMF are independent?



# Influence of the World Bank

## Bank's influence good

As discussed earlier in this report, large majorities of opinion leaders in every region say the Bank has a positive influence on the way things are going in their country. Opinion is particularly positive in Europe and Central Asia and East Asia where eight in 10 opinion leaders say the Bank has a very or somewhat good influence. And more than seven in 10 respondents in Latin America, South Asia, the Middle East and North Africa and Sub-Saharan Africa agree. At the same time, a majority of those questioned temper their positive evaluations of the Bank by saying its influence is *somewhat* good rather than *very* good.

Views about the Bank's influence tap a wide range of opinions about the Bank from its role in international development to its performance and organizational culture. Opinion leaders who say the Bank has a good influence on their country are more likely to credit the Bank with reducing the gap between rich and poor people, with being less bureaucratic and arrogant and more collaborative as an organization, and with doing a better job in key mission areas, such as poverty reduction and building a climate for investment, growth and jobs.

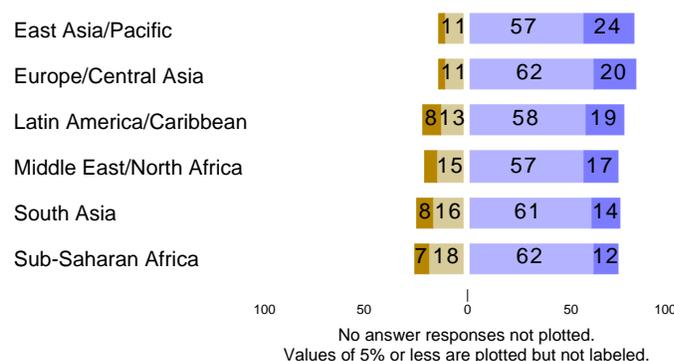
There are dissenters from this positive view. Almost two in 10 opinion leaders worldwide say the Bank has a bad influence on the way things are going in their country. This is particularly the case in Sub-Saharan Africa and South Asia, the two regions where opinion leaders are also most likely to say that the Bank's policies and programs have increased the gap between rich and poor. Three in 10 or more in Nigeria and Senegal say the Bank has a bad influence and nearly as many in Pakistan concur. Mexico is another example of a country where more than three in 10 opinion leaders say the Bank has a bad influence on their country. Fewer in East Asia, the Middle East and Europe and Central Asia share this negative assessment. In part, East Asia's positive assessment is due to opinion in China and Vietnam. Five percent or less of the opinion leaders in China and Vietnam are negative about the Bank's influence in their country.

## World Bank not to blame for rich/poor gap

Although opinion leaders tend to believe that there is a widening gap between rich and poor people in their country, they generally do not blame World Bank policies and programs for this gap. In each of the six regions and industrial countries a majority of opinion leaders say the Bank has either had no effect on the gap between rich and poor in their country or has lessened it. In all regions, the view that the Bank has had no effect on the gap is more common than the view that it has lessened the gap.

Chart 18  
**Influence of World Bank**

Is the World Bank having a [↑] very good, [↔] somewhat good, [↓] somewhat bad or [↓] very bad influence on the way things are going in our country?



Sizable minorities in East Asia and about a quarter in the industrial countries and South Asia credit the Bank with lessening the gap between rich and poor people in their country over the last few years. In East Asia, more than half the opinion leaders in China and nearly as many in Vietnam credit the work of the Bank for lessening the gap between the rich and poor. Substantially fewer in the other East Asian countries surveyed share this positive assessment.

At the same time, a minority of opinion leaders say the Bank's actions have increased the gap between rich and poor people in their country. This is particularly true in South Asia and Sub-Saharan Africa where sizable minorities think the Bank's policies and programs are contributing to the growing wealth gap.<sup>22</sup>

There is a clear relationship between perception of the World Bank's effect on the rich/poor gap and overall opinion of the Bank. Opinion leaders who think the Bank's work has lessened the gap between rich and poor people are more likely to say that the Bank has a good influence on how things are going in their country. Similarly, those who say the Bank has increased the gap between rich and poor are more likely to believe the Bank has a bad influence on the way things are going in their country.

Trade union leaders in developing countries are much more likely to believe the World Bank's work has increased the gap between rich and poor people than labor leaders in industrial countries or opinion leaders working in other professional sectors. Almost six in 10 trade unionists in developing countries say the Bank has increased the gap between rich and poor people, compared to less than a third of those from industrial countries.

We also found that opinion leaders from poorer and more indebted countries are more likely than those from better off countries to say the Bank has increased the gap between rich and poor people.

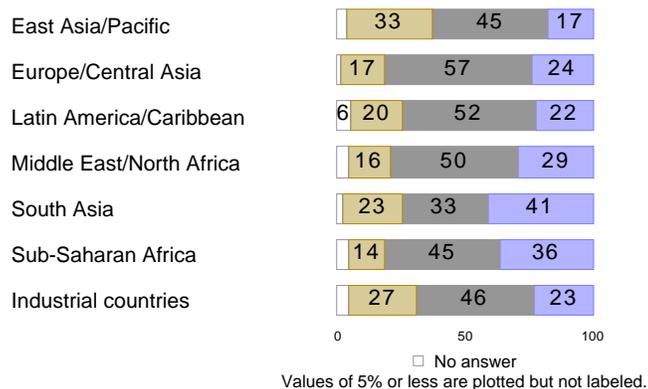
### Bank's development efforts not irresponsible

In every region except South Asia, opinion leaders refuted the sometimes heard charge that the Bank acts irresponsibly in its development efforts. Majorities disagree with the idea that the Bank acts irresponsibly in its development efforts, with the strongest endorsement of the Bank

<sup>22</sup> Half of the Pakistani leaders, four in 10 in India, and three in 10 in Bangladesh believe the Bank has increased the gap. And in Sub-Saharan Africa, six in 10 in Kenya and roughly four in 10 in Mali and Ethiopia say the Bank's policies and practices contribute to the growing rich/poor gap in their country. In the Middle East and North Africa, almost half in Yemen say the Bank has increased the gap.

Chart 19  
**World Bank and gap between rich and poor**

Over the last few years has the work of the World Bank in our country<sup>a</sup> [↑] increased the gap between rich and poor people, [↓] lessened the gap between rich and poor people, or have World Bank policies and programs had [↔] no effect on the gap between rich and poor people in our country?



(a) In industrial countries we asked about developing countries, not own country.

coming from Latin America, where a third of opinion leaders *strongly* disagree that the Bank acts irresponsibly in its development efforts.<sup>23</sup>

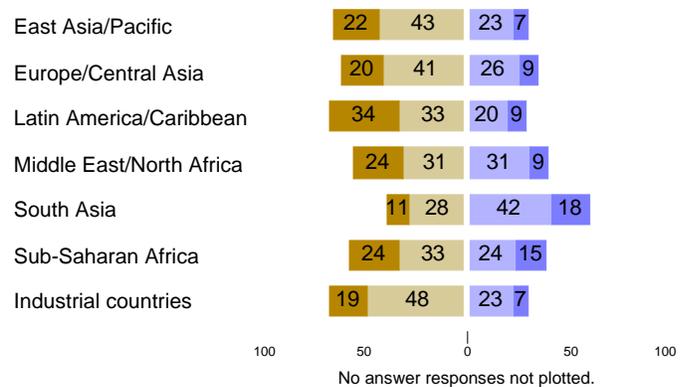
South Asia stands alone with a solid majority saying the Bank is often irresponsible. In all three South Asian countries surveyed—Bangladesh, India and Pakistan—more than half of opinion leaders say the Bank often acts irresponsibly in its development efforts. South Asian opinion leaders who think the Bank acts irresponsibly also voice concerns that the Bank’s recommended economic reforms hurt more people than they help and that the Bank’s policies and practices contribute to the rich/poor gap in their country. This same set of concerns generally prevails among opinion leaders in other regions who think the Bank is irresponsible in its development efforts.

Apart from South Asia, the criticism that the Bank is irresponsible resonates with a notable minority of opinion leaders in the other regions. Four in 10 opinion leaders in the Middle East and Sub-Saharan Africa say the Bank often acts irresponsibly. This includes nearly half of opinion leaders in Kenya, Mali, Algeria and Yemen, along with a solid majority in Saudi Arabia. Nearly as many in Europe and Central Asia, East Asia, Latin America and the industrial countries agree.

Professional experience with the Bank makes a difference when it comes to perceptions of Bank irresponsibility. The more professional experience an opinion leader has with the Bank, the more likely he or she is to disagree that the Bank often acts irresponsibly. Among those with a great deal of Bank experience, two-thirds disagree with this charge, compared to roughly half among those with no professional experience working with the Bank. The same pattern prevails when it comes to opinion leaders’ knowledge of the Bank and its activities. Those who describe themselves as very knowledgeable are more likely to disagree with this charge than those who are just somewhat or not too knowledgeable.

Chart 20  
**Bank often acts irresponsibly?**

Do you [↑] strongly agree, [↓] somewhat agree, [↑] somewhat disagree or [↓] strongly disagree: The World Bank often acts irresponsibly in its development efforts in our country?<sup>a</sup>



(a) In industrial countries we asked about developing countries, not own country.

<sup>23</sup> In Latin America, fully eight in 10 opinion leaders in Brazil say the Bank is not irresponsible, as do roughly seven in 10 opinion leaders in Peru, Mexico and Jamaica.

### Opinion mixed on whether Bank's economic reforms hurt more than help

Opinion is somewhat less positive on whether economic reforms recommended by the Bank are beneficial or not. When asked their opinion of the statement that “Although the World Bank says its goal is to increase growth and reduce poverty, its recommended economic reforms hurt more people than they help,” solid majorities in most industrial countries and all countries surveyed in Europe and Central Asia disagree, as do majorities in three East Asian countries—China, Vietnam, and Cambodia. But the rest of East Asia is more mixed. Half of opinion leaders in Indonesia and Thailand along with six in 10 opinion leaders in the Philippines say the Bank's reforms hurt more people than they help.

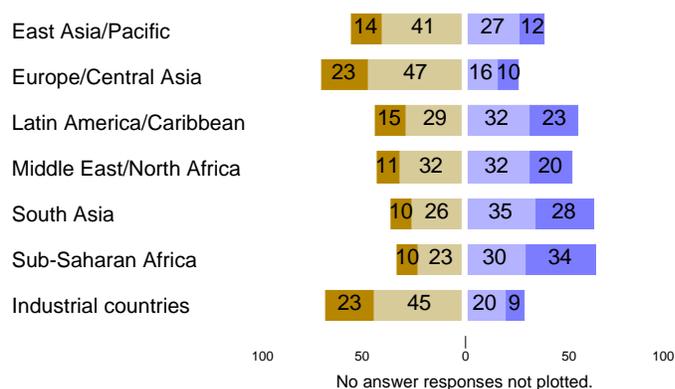
Opinion is more negative in Latin America and the Middle East and North Africa with slim majorities saying the Bank's economic reforms are more of a minus than a plus. In South Asia and Sub-Saharan Africa a six in 10 majority sides with the negative impact of the Bank's economic reforms. That negative assessment is shared by majorities of opinion leaders in every country surveyed in these two regions except South Africa. In the Middle East and North Africa, majorities in Jordan, Saudi Arabia, and Yemen and about half in Morocco say the Bank's reforms hurt more than then help. Sizable minorities in Egypt and in Lebanon agree.<sup>24</sup>

These criticisms of the Bank—that it acts irresponsibly or that its reforms hurt more people than they help—do not necessarily contradict the assessment that the Bank's overall influence is positive. It would be a mistake to assume that these criticisms tip the balance of opinion against the Bank overall. They do not. Roughly one in 10 opinion leaders are deeply critical of the Bank and say it both acts irresponsibly and has a bad influence on their country. Most opinion leaders who say the Bank acts irresponsibly also acknowledge that the Bank has a good influence—although only somewhat good—on the way things are going in their country. The same holds for those who say the Bank's economic reforms hurt more people than they help. Opinion leaders are clearly evaluating the Bank on a wider array of issues than these two negative charges when they assess the Bank's overall influence on their country. These harsh critics of the Bank are described in much greater detail in the following typology of opinion leader's attitudes toward the Bank.

Chart 21

### Bank's economic reforms hurt or help?

Do you [↑] strongly agree, [↓] somewhat agree, [↑] somewhat disagree or [↓] strongly disagree: Although the World Bank says its goal is to increase growth and reduce poverty, its recommended economic reforms hurt more people than they help?



<sup>24</sup> It is important to note that this question asks about the Bank's recommended economic reforms generally and does not ask specifically about the effect of economic reforms in a respondent's country. As such, this question taps a broad sense of the consequences of the Bank's reforms, not a specific measure of the effect of reforms on a particular country.

### Bank typology: enthusiasts and critics

Opinion leaders can be classified into four groups based on their attitudes toward the Bank – Enthusiasts, Moderates, Conflicted and Critics.

**Enthusiasts** The Enthusiasts say the Bank has a very good overall influence on their country and reject the accusation that the Bank often acts irresponsibly. Two in 10 in East Asia, 17 percent in Europe and Central Asia, 14 percent in Latin America and roughly one in 10 in other regions fall into this group.

**Moderates** The largest group, accounting for a plurality of nearly four in 10 among those interviewed, includes opinion leaders who are moderately positive about the Bank. The Moderates disagree that the Bank often acts irresponsibly. Instead they say the Bank’s overall influence is somewhat good. About a quarter in South Asia, 35 percent in the Middle East and North Africa and roughly four in 10 in other regions belong in this group. Overall, a slim majority of those interviewed are either Enthusiasts or Moderates.

**Conflicted** The third group, those who have somewhat conflicted views of the Bank, accounts for nearly a quarter of those surveyed. The Conflicted believe the Bank often acts irresponsibly, but they also say the Bank has an overall good influence in their country. Nearly four in 10 South Asians, roughly a quarter in Europe and Central Asia, Sub-Saharan Africa, and the Middle East and North Africa, and less than two in 10 among opinion leaders in East Asia and Latin America fall in this group.

**Critics** Only about one in 10 opinion leaders are harsh critics of the Bank. These Critics, who think both that the Bank often acts irresponsibly and that it has an overall bad influence, amount to two in 10 in South Asia, 15 percent in Sub-Saharan Africa, and roughly one in 10 in the other regions.

Roughly one in 10 of the opinion leaders interviewed did not fit into one of these four groups.

Table 2  
**Typology of attitudes toward the World Bank**

	East Asia/Pacific	Europe/Central Asia	Latin America/Caribbean	Middle East/North Africa	South Asia	Sub-Saharan Africa
<b>Enthusiasts:</b> Bank has very good influence and does not often act irresponsibly	20	17	14	11	10	9
<b>Moderates:</b> Bank has somewhat good influence and does not often act irresponsibly	40	38	44	35	27	37
<b>Conflicted:</b> Bank has good influence, but often acts irresponsibly	18	24	17	28	38	24
<b>Critics:</b> Bank has bad influence and often acts irresponsibly	10	10	13	10	21	15
Unclassifiable	12	11	12	16	4	15

## Enthusiasts

The Enthusiasts are not only positive about the Bank but other things as well. Three quarters among the Enthusiasts say their country is going in the right direction, and more than half describe the economic situation in their country as good. A majority say their government has gotten wiser at handling assistance funds and supports and takes responsibility for development efforts. Most Enthusiasts say that globalization is good for their country.

Virtually all Enthusiasts believe the Bank is useful and solid majorities credit it for becoming more relevant, transparent, responsive and collaborative. Many also compliment the Bank for being less arrogant and less bureaucratic. Four in 10 credit the Bank for lessening the gap between rich and poor people, while a similar proportion say the Bank has had no effect on the gap. Three-quarters disagree with the accusation that the Bank's recommended reforms harm more people than they help. And with the exception of corruption reduction, between four in 10 and five in 10 Enthusiasts give the Bank a good performance rating in the mission areas addressed. But even among the Bank Enthusiasts, only a third say the Bank is performing well in reducing corruption.

The Bank Enthusiasts tend to be positive about other assistance organizations and foreign assistance in general. A solid majority of them believe foreign assistance organizations have become wiser at allocating assistance funds. Bank Enthusiasts like the US. More than eight in 10 Enthusiasts believe the US has a good influence on their country.

Roughly two in 10 of the government officials interviewed are Bank Enthusiasts. A solid majority of the Bank Enthusiasts get most of their information about Bank activities from Bank sources, such as the Bank web site or Bank publications. A majority of Enthusiasts have at least a fair amount of professional experience with the Bank.

## Moderates

Similar to the Bank Enthusiasts, most opinion leaders in this more moderate group believe the Bank is at least somewhat useful in development efforts, although they are much less likely to say the Bank is very useful. A solid majority of Moderates say the Bank is now more relevant than it was a few years ago. And a majority of them say the Bank has had no effect on the gap between rich and the poor; almost a quarter believe the Bank has lessened the gap. A solid majority disagree with the accusation that the Bank hurts more people than it helps. With the exception of corruption, a solid majority of opinion leaders in this group give the Bank good or average performance ratings in all mission areas addressed.

The Moderates are slightly less positive about foreign assistance organizations in general than the more Enthusiastic Bank supporters. Nevertheless, nearly half of them say foreign assistance

Table 3  
**Bank enthusiasts by country (percent)**

Bosnia and Herzegovina	35
China	33
Vietnam	27
Peru	25
Colombia	22
Ethiopia	22
Jordan	21
Cambodia	20
Poland	20
Indonesia	19
Egypt	16
Lebanon	16
Jamaica	14
Brazil	13
Thailand	13
Turkey	13
Armenia	12
Honduras	12
India	12
Kyrgyzstan	12
Pakistan	12
Russia	12
Kenya	10
Yemen	10
Mali	8
Mexico	8
Philippines	8
South Africa	7
Bangladesh	6
Morocco	6
Algeria	5
Chile	5
Nigeria	5
Senegal	5
Saudi Arabia	2

organizations have gotten wiser at allocating funds. And although significantly fewer than among the Enthusiasts, a solid majority of Moderates say US influence on their country is good.

Similar to Enthusiasts, a majority of the Moderates get most of their Bank information from Bank sources. A quarter get their information from newspapers and three percent from TV or radio.

### **The Conflicted**

Despite the fact that Conflicted opinion leaders accuse the Bank of often acting irresponsibly, most of them believe the Bank is at least somewhat useful, and half of them say the Bank is now more relevant than it was a few years ago. But a third in this group say the Bank's policies and actions have increased the gap between rich and poor, while nearly half say the Bank has not had an effect on the gap. And a majority say the Bank's recommended economic reforms hurt more people than they help. Many also accuse the Bank of having become more bureaucratic and arrogant over the last few years. But with the exception of corruption, solid majorities in this group give the Bank a good or average performance rating in the mission areas addressed, with generally more saying average than good.

The Conflicted opinion leaders are less positive about foreign assistance organizations. Fewer than four in 10 among this group say foreign assistance organizations are allocating funds more wisely. About two in three in this group say the US has a good influence on their country.

Roughly half among the Conflicted get information about Bank activities from Bank sources; a third get most of their information from newspapers and six percent from radio or TV.

## The Critics

The Bank Critics—those who think the Bank often acts irresponsibly and say it has an overall bad influence—are not only unhappy with the Bank, but they have many additional complaints as well. A majority of them see their country going in the wrong direction and describe the economic situation in their country as bad, with an increasing gap between rich and poor people. Although a slim majority believe their governments support and take responsibility for development efforts, only two in 10 say their government is handling development assistance more wisely. Nearly all of the Critics think the gap between rich and poor countries, like the rich/poor gap between people within their country, is increasing. Only a third believe globalization has a positive impact on their country.

As might be expected, these opinion leaders find fault with the Bank in many respects. A third of the Critics say the relevance of the Bank has decreased. A majority say the Bank is not useful and that its work has increased the gap between rich and poor people in their country. Most also accuse the Bank of forcing its agenda on developing countries and say that the recommended economic reforms of the Bank hurt more people than they help. Four in 10 say the Bank has become more bureaucratic and half accuse it of increased arrogance. Half or more in this group also believe the Bank has been doing a poor job in every mission area addressed. For example, seven in 10 Critics say the Bank is doing a poor job reducing poverty.

The Bank Critics tend to be unhappy with other organizations as well. Just two in 10 among them say assistance organizations in general have gotten wiser at allocating assistance funds and most of them have negative opinions not only of the World Bank, but of the IMF as well. The Bank Critics also have unfavorable views toward the US. Fully eight in 10 among this group say the US has a bad influence on the way things are going in their country and more than two-thirds believe the Bank has become more US-driven over the past few years.

Trade union leaders and professionals working for civil society organizations are somewhat more likely to be Bank Critics than opinion leaders working in other sectors. Less than one in 10 of the government officials interviewed belong in this group. Less than half of Bank Critics get their information from Bank sources. Four in 10 go to newspapers and five percent get their information from TV or radio.

Table 4

### Bank critics by country (percent)

India	22
Pakistan	22
Colombia	20
Bangladesh	19
Chile	18
Mali	18
Mexico	18
Philippines	18
Indonesia	17
Russia	17
Ethiopia	15
Nigeria	15
Senegal	15
Turkey	15
Armenia	13
Kenya	13
South Africa	13
Thailand	13
Saudi Arabia	13
Egypt	11
Brazil	10
Cambodia	10
Jordan	10
Lebanon	10
Morocco	10
Yemen	10
Algeria	9
Kyrgyzstan	7
Peru	7
Honduras	6
Jamaica	6
Bosnia and Herzegovina	5
Poland	3
Vietnam	3
China	0

## Development priorities and Bank objectives

### Growth and the economy top development priority

Opinion leaders have a generally positive view of the Bank. In part, this is because many opinion leaders say the Bank has become more relevant over the last few years. Maintaining that relevance requires the Bank to be aware of what opinion leaders see as their development needs and how they would like the Bank to focus its resources.

When asked to name the most important development priority facing their country opinion leaders named a wide range of concerns with particular emphasis on economic issues such as jobs and strengthening the economy, poverty reduction and improving education. Roughly one in 10 mention infrastructure development, reducing corruption and improving governance. Relatively few mention health issues, environmental sustainability or strengthening civil society as the top development priority in their country.

In all regions, issues related to growth and the economy top the list of development priorities, with the exception of South Asia, where poverty reduction and improving education rank equally high. Poverty reduction is named by at least one in 10 opinion leaders in each region and is named by roughly twice as many in Sub-Saharan Africa, South Asia and Latin America. Likewise, improving education is cited as a top priority by at least one in 10 in each region with nearly twice as many opinion leaders saying improving education is their country's top development priority in East Asia, South Asia, the Middle East and Sub-Saharan Africa. Reducing corruption and improving governance also is mentioned by roughly one in 10 opinion leaders as the top development priority facing their country. Roughly two in 10 in the Middle East say this is a top development priority. In most regions, fewer mention infrastructure development as the top development priority.

Just because a particular development priority is not on the top of the list does not mean it is unimportant to opinion leaders. It simply means it is not the *single most* important development priority. Opinion leaders were asked to name the single most important development priority facing their country today. As such, mentions of development priorities by even a relatively small percentage of opinion leaders are noteworthy.

Development priorities vary substantially by country. For example, a majority among South African opinion leaders say growth and the economy is the top development priority, but opinion leaders in Kenya are much more concerned about poverty reduction. Poverty reduction is also brought up by a quarter of opinion leaders in Kyrgyzstan, but very few opinion leaders mention poverty reduction in Poland or Turkey. Similarly, relatively few in China say poverty reduction is a development priority, but many more think it is in the Philippines. Also in East Asia, Cambodian opinion leaders mention corruption and governance much more often than others in the region. And in the Middle East and North Africa, a third of opinion leaders in Algeria and a quarter in Lebanon say governance and corruption are the top priority, compared to just a handful of leaders in Morocco. There are also differences in Latin America. Honduras and Jamaica stand out with three in 10 opinion leaders saying that improving education is the top priority, but virtually no one mentions education in Colombia or Peru.

Some of the country variations can be traced to differences in country income. Opinion leaders in upper-middle income countries mention issues related to growth and the economy more often than opinion leaders in lower-middle or low income countries. At the same time, poverty reduction is brought up more often in low income countries than in countries that are faring

better economically. But even in low income countries, growth and the economy are mentioned somewhat more often than poverty reduction.

Table 5

**Most important development priority**

u What is the single most important development priority facing our country today?

	East Asia/Pacific	Europe/Central Asia	Latin America/Caribbean	Middle East/North Africa	South Asia	Sub-Saharan Africa
Growth, the economy (total %)	29	47	39	39	24	32
Jobs, employment	10	27	32	21	14	16
Strengthening the economy	13	7	3	3	3	2
Strengthening the private sector, industry, agriculture	5	9	3	12	6	12
Strengthening the financial sector	1	3	1	3	1	2
Other economic problems	0	1	*	0	0	*
Poverty reduction	16	10	18	12	19	25
Improving education	21	11	14	17	19	17
Reducing corruption, improving governance	12	12	8	18	16	7
Infrastructure development	10	4	4	5	13	13
General social issues	4	2	12	3	6	1
Strengthening civil society	2	6	0	2	1	1
Ensuring environmental stability, protection	4	1	0	0	1	1
Health	0	1	2	0	1	1
Other	1	3	2	3	3	1
No answer	*	1	1	1	0	1

\* represents a value of less than 0.5%.

### Poverty reduction should be top Bank objective

Opinion leaders clearly identify the Bank with the mission of poverty reduction. Even though many opinion leaders say their country's development priority is economic, poverty reduction is named the top Bank objective everywhere but Europe and Central Asia. When opinion leaders are asked what the two main objectives of the World Bank *should* be, poverty reduction tops the list followed by growth and the economy. Infrastructure development, improving education and being a "knowledge bank" are mentioned less often, but still by a significant minority of respondents. Europe and Central Asia stands alone here with more saying the Bank's main objective should be growth and the economy rather than poverty reduction. In the Middle East and North Africa as many opinion leaders say the Bank's main objective should be growth and the economy as say poverty reduction.

There are wide variations in the objectives different countries want the Bank to focus on. For example, in East Asia, more than a third in Cambodia say improving education should be the Bank's main objective, but virtually no one in China mentions education. Similarly, a third in Vietnam say the Bank should focus on infrastructure development, but only a handful of those interviewed in Thailand agree. Likewise in South Asia, just one in 10 in Pakistan say infrastructure building should be the Bank's top priority, compared to more than four in 10 in India, where the government has strongly emphasized the importance of infrastructure in boosting economic growth. Brazil stands out in Latin America with a quarter of opinion leaders saying the Bank's objective should be to share knowledge and give advice, whereas just a few opinion leaders mention the "knowledge Bank" in Mexico. And more than in other regions, opinion leaders in Europe and Central Asia, where governments are struggling to build new market economies, want the Bank to focus on growth and the economy. Nine in 10 opinion leaders in Bosnia and Herzegovina and seven in 10 in Armenia say the Bank should concentrate on growth and the economy.

Again some of the country differences can be explained by variation in income levels. Opinion leaders in low income countries mention poverty reduction and infrastructure more often than opinion leaders in middle-income countries. Opinion leaders clearly expect the Bank to match its extensive skill set to the specific needs of each country. These data reaffirm the obvious importance of tailoring programs to the particular priorities of a country.

Table 6

**What Bank's main two objectives should be**

v What do you think the main objective of the World Bank's work should be in our country<sup>a</sup>?

	East Asia/Pacific	Europe/ Central Asia	Latin America/ Caribbean	Middle East/ North Africa	South Asia	Sub-Saharan Africa	Industrial countries
Poverty reduction	50	30	38	36	45	51	39
Growth, the economy (total %)	37	64	26	38	28	34	34
Strengthening the economy	14	3	2	7	3	4	8
Increasing income generation opportunities, building climate for investment, growth and jobs	11	45	17	23	19	19	16
Developing private sector, creating capitalist markets	9	22	7	8	6	11	7
Improving the financial situation, financial reform	5	*	0	*	1	0	1
Other assistance with economy	1	4	2	1	1	3	3
Infrastructure development	16	13	6	18	22	18	14
Improving education	14	9	9	13	15	14	8
Knowledge Bank	10	10	12	10	6	11	9
Improving governance	9	8	9	9	9	13	10
Environmentally sustainable development	8	6	5	6	8	7	4
General social issues	8	10	11	12	11	4	5
Reducing corruption	6	7	1	6	1	7	3
Strengthening civil society	3	5	5	4	4	1	2
Provide loans, aid, debt alleviation	3	2	2	0	1	2	3
Health	1	2	3	6	6	6	2
Improve Bank outreach and operations	1	2	1	*	2	1	3
Other	7	7	5	3	8	6	13
No answer	1	2	2	*	0	*	1

Columns total more than 100% because respondents were prompted to give two answers.

Net totals are the percentage of people who gave a particular answer and percents that make up these nets do not add to the total net.

\* represents a value of less than 0.5%.

(a) In industrial countries we asked about developing countries, not own country.

# Bank performance

## Mixed review on Bank performance

Opinion leaders largely agree that the Bank's top objectives should be poverty reduction and growth and the economy followed by infrastructure development and improving education. How do these same opinion leaders assess the Bank's performance in these areas? We address this question below. We also examine Bank performance in four other key mission areas—strengthening governance, fostering environmental sustainability, reducing corruption and improving health.

We gauge opinion leaders' assessment of these key mission areas in three ways. First, leaders were asked if the World Bank is doing a better or worse job in each area compared to a few years ago. Second, opinion leaders were asked to rate the job the Bank is currently doing in each area on a scale from one to 10. The scale was divided into ratings of poor (1-4), average (5-6) and good (7-10) performance. Third, leaders were asked to rate from one to 10 how much of a priority the Bank gives each mission area, with the scale described as low (1-4), medium (5-6) and high (7-10).<sup>25</sup>

In general, more opinion leaders say the Bank has been doing a better—not worse—job over the last few years in these eight key mission areas. And in all but one of these key areas, majorities say the Bank is *currently* doing an average or good job, with more opinion leaders saying the Bank is doing an average job than a good job. Reducing corruption stands alone as the one area where substantial minorities or majorities say the Bank is doing a poor job.

Opinion leaders' evaluation of the Bank's performance in the mission areas shapes their overall assessment of the Bank. Opinion leaders who say the Bank's performance is good in the mission areas are more likely to say the Bank is having a good influence on the way things are going in their country. And those who say the Bank's performance is poor are more likely to say the Bank is having a bad influence on the way things are going in their country.

Opinion leaders who have more knowledge of and experience with the Bank tend to give higher performance and priority ratings and to credit the Bank with improvement in the mission areas more often than leaders with less experience and knowledge.

Apparently, opinion leaders in Sub-Saharan Africa have seen more improvements than opinion leaders in any other region. A majority of Sub-Saharan opinion leaders say the Bank has done a better job in all eight mission areas addressed. Fostering environmental sustainability is the only mission area where as many opinion leaders in other regions say the Bank is doing better. Opinion leaders from Europe and Central Asia are often among those least likely to report having seen improvements.

Below we detail findings for the eight key mission areas surveyed. The order in which they are presented reflects the priority opinion leaders say the Bank should be giving to these mission areas.

<sup>25</sup> Mean scores were calculated for both the performance and priority ratings and are part of the statistical analysis used to interpret the findings.

## Poverty reduction

**Improved or not?** The Bank's work in poverty reduction, the mission area opinion leaders think should be the Bank's top objective, has improved over the last few years according to roughly half or more of those interviewed. This is particularly true in Sub-Saharan Africa and in the industrial countries where six in 10 or more respondents say that the Bank is doing a better job reducing poverty. Slight majorities or large pluralities in the other regions share this positive assessment.

In every region, fewer than two in 10 opinion leaders say the Bank has been doing a worse job over the past few years.<sup>26</sup> Slightly more opinion leaders say there has been no change in the Bank's performance in reducing poverty. Most of the opinion leaders who say there has been "no change" in the Bank's job performance say the Bank is currently doing an average or poor job reducing poverty in their country.

**Current performance.** Opinion leaders in developing countries have mixed views about the job the World Bank is *currently* doing to help their country reduce poverty. Majorities in all regions say the Bank is currently doing an average or good job helping their country reduce poverty, although many more say the Bank is doing an average job than a good one.

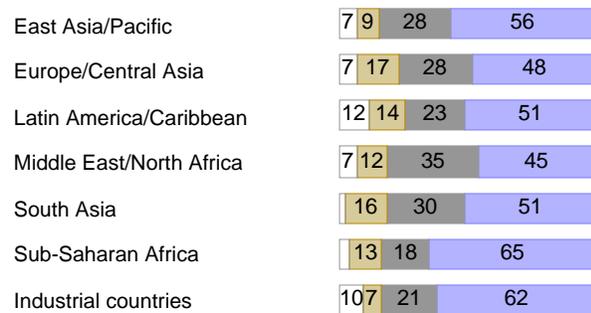
In three regions—Europe and Central Asia, the Middle East and South Asia—four in 10 or more say the Bank is currently doing a poor job helping their country reduce poverty while fewer in the other

<sup>26</sup> In Cambodia, Vietnam, Bosnia and Herzegovina, Brazil, Ethiopia and Senegal seven in 10 or more say the Bank has been doing a better job reducing poverty. In Kyrgyzstan, Turkey, Colombia, Morocco, Yemen, Bangladesh and Kenya two in 10 or more say the Bank has been doing a worse job.

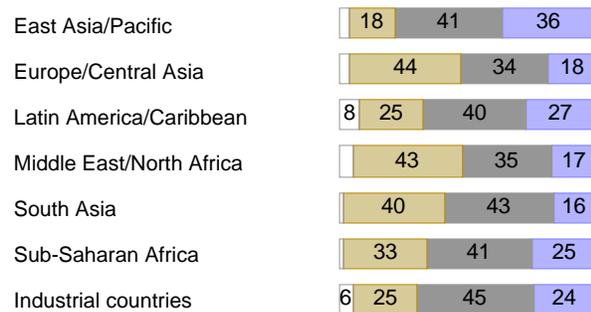
Chart 22

### Bank helps reduce poverty?

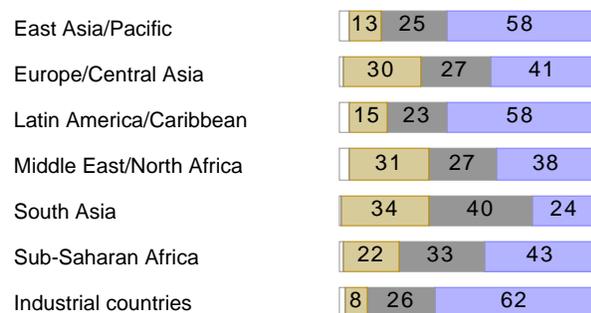
⌵ Compared to a few years ago, is the Bank doing a [⬆] better job or a [⬇] worse job helping our country<sup>a</sup> reduce poverty? (Volunteered: [↔] No change)



⌵ How good a job does the Bank do helping our country<sup>a</sup> reduce poverty? [⬆] Good job, [↔] average, [⬇] poor.



⌵ How much of a priority does the Bank currently give to helping our country<sup>a</sup> reduce poverty? [⬆] High priority, [↔] medium, [⬇] low.



0 50 100  
□ No answer  
Values of 5% or less are plotted but not labeled.

(a) In industrial countries we asked about developing countries, not own country.

regions fault the Bank for doing a poor job.<sup>27</sup>

In 1998 opinion leaders in many of the industrial countries<sup>28</sup> included in the current study were asked to evaluate the Bank's performance in poverty reduction. A quarter of the opinion leaders in 1998 said the Bank was doing a good job and a third said the Bank was doing a poor job helping developing countries reduce poverty. A comparison of the 1998 and 2002 findings shows that the opinion on the Bank's performance in this area is slightly better now than in 1998. (Note that the current study includes 13 industrial countries, compared to nine countries in 1998.)

Table 7

**Does the Bank do a good job reducing poverty?**

	1998	2002
Good job	24	22
Average job	36	46
Poor job	32	28
No answer	8	4

Priority of poverty reduction. Poverty reduction heads the list of what opinion leaders think the Bank's top objective should be, yet opinion leaders are divided over whether the Bank gives high priority to helping their country reduce poverty. Majorities in East Asia, Latin America, and the industrial countries say that the Bank gives a high priority to helping reduce poverty.<sup>29</sup> This is consistent with the large majorities in these regions who say the Bank is currently doing an average or good job reducing poverty.

By contrast, less than half of the opinion leaders in Sub-Saharan Africa, Europe and Central Asia and the Middle East and North Africa say the Bank places a high priority on poverty reduction in their country. Just a quarter of the opinion leaders in South Asia, where many say the Bank is doing a poor job helping their country reduce poverty, think the Bank is giving poverty reduction a high priority. More, but still less than half, in Sub-Saharan Africa, Europe and Central Asia and the Middle East say that the Bank currently gives high priority to helping their country with poverty reduction.<sup>30</sup>

Among opinion leaders who say poverty reduction should be one of the Bank's top objectives, solid majorities already think the Bank gives this area high priority in East Asia, Europe and Central Asia, Latin America, and industrial countries. But majorities of those who want poverty reduction to be at the top of the Bank's priority list in the Middle East, South Asia and Sub-Saharan Africa say the Bank currently gives poverty reduction low or moderate priority status. Among these same opinion leaders, only four in 10 in East Asia, a third in Latin America and Sub-Saharan Africa and even fewer in Europe and Central Asia, the Middle East, South Asia and

<sup>27</sup> Opinion leaders in Poland and Russia are particularly critical of the Bank's current efforts to help their countries reduce poverty. Likewise, half of the opinion leaders in India fault the Bank for doing a poor job of poverty reduction. Sentiment is also particularly critical in Yemen, with about six in 10 saying the Bank is doing a poor job.

<sup>28</sup> Canada, France, Germany, Italy, Japan, the Netherlands, the UK and the US, as well as the UN in New York and Geneva and the EU in Brussels. In 1998 Finland was included in the survey but was not in 2003.

<sup>29</sup> In East Asia, at least six in 10 in every country report that the Bank gives poverty reduction high priority, except in China, where just a third agree. Opinions are not as consistent in Latin America. More than eight in 10 in Honduras, nearly as many in Mexico and two in three in Peru see poverty reduction as a high Bank priority, but roughly half or less agree in other Latin American countries.

<sup>30</sup> In Sub-Saharan Africa, slim majorities say the Bank gives poverty reduction high priority in Ethiopia, Mali and Senegal, but fewer than half in the other counties surveyed agree. Similarly in Europe and Central Asia, majorities in Armenia and Kyrgyzstan say the Bank gives poverty reduction high priority, but less than half in the rest of the region agree. Finally, in the Middle East, majorities in Jordan and Saudi Arabia see high priority being given to poverty reduction, but fully half in Algeria and Yemen say poverty reduction in their country ranks low on the Bank's priority list.

industrial countries give the Bank a good rating for current performance. This suggests that for some opinion leaders the Bank is not fully meeting their expectations in both how the Bank allocates its resources and how the Bank performs in this critical area.

In 1998 slightly more opinion leaders in industrial countries than in the current survey thought the Bank gave poverty reduction a high priority. Nonetheless, in both the current survey and in 1998, solid majorities say the Bank gives poverty reduction a high priority. Slightly fewer now than in 1998 say the Bank gives poverty reduction low priority.

Table 8

**How much priority does the Bank place on poverty reduction?**

	1998	2002
High priority	68	63
Medium priority	16	26
Low priority	14	9
No answer	2	2

### Building a climate for investment, growth and jobs

**Improved or not?** The Bank gets slightly lower evaluations from opinion leaders for its efforts to build a climate for investment, growth and jobs than for its efforts in poverty reduction. Recall that building a climate for investment, growth and jobs is mentioned second by opinion leaders as the objective the Bank should be focused on. Slightly less than half in every region, except Sub-Saharan Africa which is slightly higher, say the Bank has been doing a better job over the last few years helping their country build a climate for investment, growth and job creation.

The other half are more likely to say there has been no change than to say the Bank is doing worse. Opinion leaders who say there has been no change in the job the Bank is doing in this area are as likely to say the Bank is doing an average job as a poor job in building a climate for investment, growth and jobs.

Two in 10 or fewer opinion leaders in each region say the Bank has done a worse job in this area over the last few years. This group of opinion leaders may have concerns about some aspects of building a climate for investment, jobs and growth, as many say globalization is bad for their country and specifically see the opening of more markets and trade with other countries as a bad thing.<sup>31</sup>

**Current Performance.** Majorities of opinion leaders in all regions report that the Bank is doing an average or good job currently in building a climate for investment, growth and jobs. At the same time, a third or more in Europe and Central Asia, South Asia, the Middle East and Sub-Saharan Africa say the Bank is

<sup>31</sup> More than six in 10 opinion leaders say the Bank has done a better job in Vietnam, Jordan, Morocco, Nigeria and South Africa. A quarter or more say the Bank has done a worse job in Indonesia, the Philippines, Turkey, Saudi Arabia, Bangladesh and Mali.

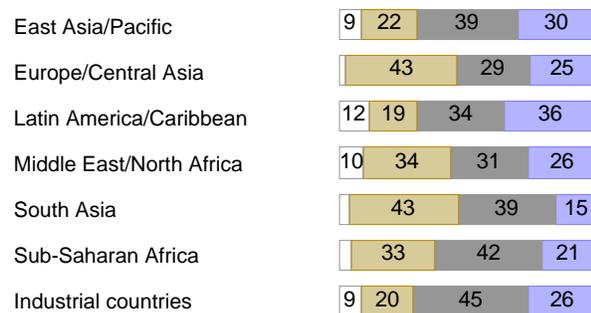
Chart 23

### Bank helps build climate for investment?

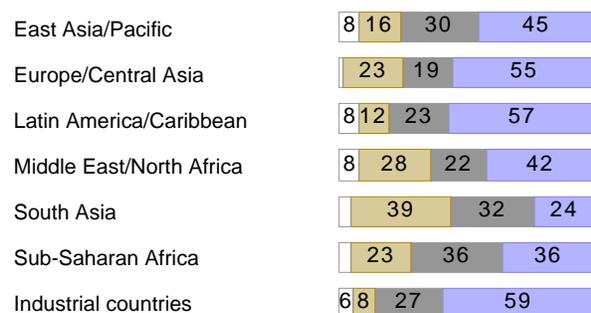
v Compared to a few years ago, is the Bank doing a [↑] better job or a [↓] worse job helping our country<sup>a</sup> build the climate for investment, growth and jobs? (Volunteered: [↔] No change)



v How good a job does the Bank do helping our country<sup>a</sup> build the climate for investment, growth and jobs? [↑] Good job, [↔] average, [↓] poor.



v How much of a priority does the Bank currently give to helping our country<sup>a</sup> build the climate for investment, growth and jobs? [↑] High priority, [↔] medium, [↓] low.



0 50 100  
 □ No answer  
 Values of 5% or less are plotted but not labeled.

(a) In industrial countries we asked about developing countries, not own country.

doing a poor job and in each of these regions fewer say the Bank is doing a good job than a poor job building a climate for investment, growth and jobs. For example, in Europe and Central Asia four in 10 say the Bank is currently doing a poor job helping their country build the climate for investment, growth and jobs whereas a quarter say the Bank is doing a good job. And this is the area that opinion leaders in Europe and Central Asia think should be the Bank's top objective. On the positive side, four in 10 leaders in Bosnia and Herzegovina say the Bank is doing a good job. But Russian opinion leaders are particularly negative with six in 10 saying the Bank is doing a poor job in this area.<sup>32</sup>

Priority of building a climate for investment, growth and jobs. Slim majorities in Latin America, Europe and Central Asia and the industrial countries, and somewhat less than half in East Asia say the Bank gives high priority to building the climate for investment, growth and jobs. In Europe and Central Asia, where the Bank has a clear mandate to focus on growth and the economy, a sizable minority of four in 10 do not think this is a high priority for the Bank. Nearly a quarter think the Bank gives creating an investment climate a low priority and just under two in 10 say it is a medium priority for the Bank.

Less than half in South Asia, the Middle East and North Africa and Sub-Saharan Africa think the Bank gives high priority to helping their country build a climate of investment. Roughly four in 10 opinion leaders in Sub-Saharan Africa and the Middle East, and a quarter in South Asia, say the Bank gives high priority to building the economic climate for investment, growth and jobs. In South Asia, more say the Bank gives a low priority than a high priority to building a climate for investment, growth and jobs.

When looking at those who think issues related to growth and the economy should be one of the Bank's top objectives, majorities think the Bank is already giving this mission area high priority in Europe and Central Asia, Latin America and industrial countries. Almost half of opinion leaders in East Asia and the Middle East and North Africa agree. But three-quarters of the opinion leaders who want building an investment climate to become the major objective in South Asia and six in 10 in Sub-Saharan Africa do not yet see the Bank giving high priority to this area. When looking at performance ratings among this same group of opinion leaders, most think the Bank could be doing better. Between a quarter and a third of the opinion leaders give the Bank a good rating for current performance in East Asia, Latin America, the industrial countries, Europe and Central Asia, the Middle East and Sub-Saharan Africa. The lowest judgment comes from South Asia, where less than one in 10 say the Bank already does a good job building a climate for investment, growth and jobs.

<sup>32</sup> Four in 10 leaders in Bosnia and Herzegovina say the Bank is doing a good job. But Russian opinion leaders are particularly negative with six in 10 saying the Bank is doing a poor job in this area.

### Improving infrastructure

**Improved or not?** Strong majorities of opinion leaders in Sub-Saharan Africa and, to a lesser extent, in South Asia say the Bank has been doing a better job helping their country improve its infrastructure—improving the water supply, sanitation, transport and electricity. Roughly half of the opinion leaders in the other regions agree the Bank has been doing better in this area.<sup>33</sup>

Less than two in 10 say the Bank has been doing a worse job helping their country improve its infrastructure. Between two and three in 10 say there has been no change in the Bank's performance and a large majority of these opinion leaders say the Bank is currently doing either an average or poor job helping improve the country's infrastructure.

**Current performance.** More than six in 10 opinion leaders say the Bank is doing an average or good job helping their country improve its infrastructure, although in many regions, more say the Bank is doing an average rather than good job. In East Asia and Latin America, more say the Bank is doing a good job than an average job. Nearly as many or more say the Bank is doing a poor job as a good job improving the infrastructure in Europe and Central Asia, the Middle East, South Asia and Sub-Saharan Africa.

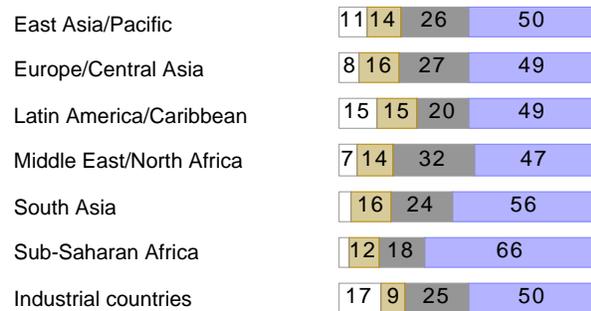
Roughly three in 10 or less in any region say the Bank is doing a poor job helping their country improve its infrastructure. In Europe and Central Asia, Russian opinion leaders are more likely to give the Bank poor marks than opinion leaders in most other countries. Fully seven in 10 Russian opinion leaders say the Bank is doing a poor job helping their country

<sup>33</sup> In Cambodia, Vietnam, Brazil, Jordan, India, Ethiopia, Mali, Senegal and South Africa six in 10 or more say the Bank has improved. In Indonesia, Mexico, Morocco and Bangladesh a quarter or more say the Bank's work in this area has worsened.

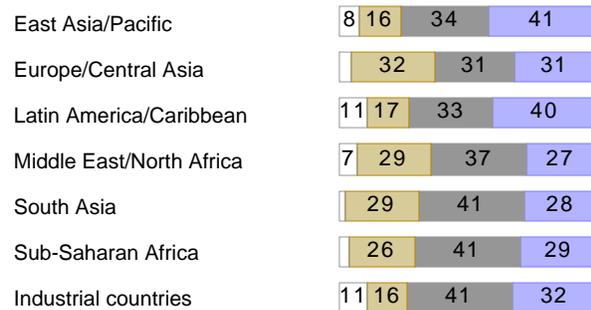
Chart 24

### Bank helps improve infrastructure?

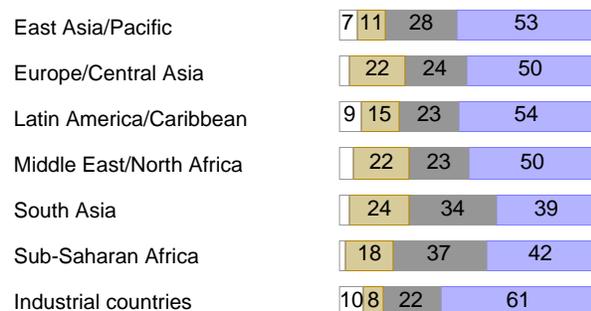
<sup>v</sup> Compared to a few years ago, is the Bank doing a [▲] better job or a [▼] worse job helping our country<sup>a</sup> improve its infrastructure? (Volunteered: [■] No change)



<sup>v</sup> How good a job does the Bank do helping our country<sup>a</sup> improve its infrastructure? [▲] Good job, [■] average, [▼] poor.



<sup>v</sup> How much of a priority does the Bank currently give to helping our country<sup>a</sup> improve its infrastructure? [▲] High priority, [■] medium, [▼] low.



0 50 100  
 □ No answer  
 Values of 5% or less are plotted but not labeled.

(a) In industrial countries we asked about developing countries, not own country.

improve its infrastructure and nearly half say the Bank gives infrastructure development a low priority in Russia.

Priority of infrastructure development. Half or more of the opinion leaders in five of the seven regions surveyed—East Asia, Europe and Central Asia, Latin America, the Middle East and in the industrial countries—say that improving the country’s infrastructure is a high priority of the Bank. Four in 10 in Sub-Saharan Africa and South Asia concur.

Perhaps because of the Bank’s long-standing commitment to infrastructure development, this is one area relatively few think the Bank gives low priority. On average, less than one in five opinion leaders say the Bank gives low priority to improving the infrastructure.<sup>34</sup>

Among those opinion leaders who say the Bank should make infrastructure development one of its main objectives, majorities say the Bank is already giving high priority to this area in East Asia, Europe and Central Asia, Latin America and industrial countries. But fewer than half think this is the case in the Middle East, South Asia, and Sub-Saharan Africa. When looking at performance ratings, majorities say the Bank is already doing a good job in East Asia and Latin America. But only a third agree in Europe and Central Asia, South Asia, Sub-Saharan Africa and industrial countries and only a quarter agree in the Middle East and North Africa.

<sup>34</sup> More than four in 10 opinion leaders in Russia, Yemen and Nigeria say the Bank gives infrastructure development a low priority in their country.

## Improving education

Improved or not? A relatively slim majority of opinion leaders in every region except Europe and Central Asia and the Middle East say the Bank has been doing a better job helping their country improve the education of the people in their country.<sup>35</sup> In Europe and Central Asia and the Middle East a large minority of four in 10 say the Bank has improved in this area.

Across all regions relatively few opinion leaders say the Bank has done a worse job. About three in 10 or fewer say there has been no change in the job the Bank has been doing to improve the education of people in developing countries. Of those who say there has been no change in the Bank's performance, more than four in 10 say the Bank is currently doing a poor job in improving education and a similar percentage say the Bank is doing an average job.

Current performance. Opinion is mixed about how good a job the Bank is currently doing to help developing countries improve the education of their people. Solid majorities in Latin America, East Asia, Sub-Saharan Africa and the industrial countries say the Bank is doing an average or good job helping their country improve the education of their people. In Latin America more say the Bank is doing a good job than say it is doing an average job and in East Asia and Sub-Saharan Africa as many say the Bank is doing a good job as an average job in improving education. In the industrial countries, more opinion leaders say the Bank is doing an average job improving education than a good job. Three in 10 or less say the Bank is doing a bad job in this area.

Large minorities of opinion leaders in Europe and Central Asia, the Middle East

<sup>35</sup> In Vietnam, Brazil, Jordan, Yemen, Ethiopia, Nigeria and South Africa six in 10 or more opinion leaders say the Bank has improved. Mali, Algeria and Morocco stand out with roughly a third saying the Bank is doing worse.

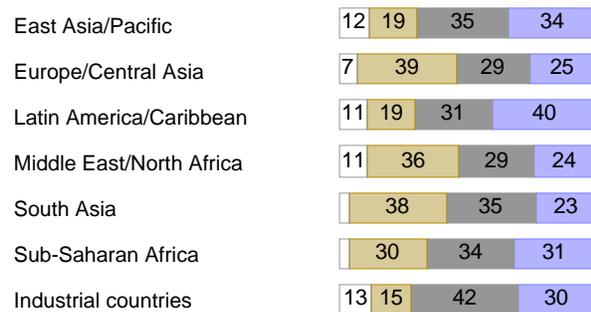
Chart 25

### Bank helps improve education?

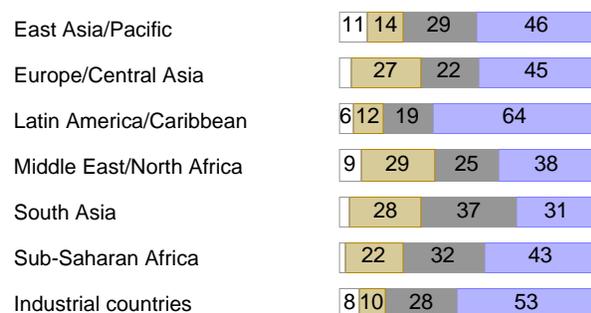
∪ Compared to a few years ago, is the Bank doing a [↑] better job or a [↓] worse job helping our country<sup>a</sup> improve the education of our people? (Volunteered: [↔] No change)



∪ How good a job does the Bank do helping our country<sup>a</sup> improve the education of our people? [↑] Good job, [↔] average, [↓] poor.



∪ How much of a priority does the Bank currently give to helping our country<sup>a</sup> improve the education of our people? [↑] High priority, [↔] medium, [↓] low.



0 50 100  
 □ No answer  
 Values of 5% or less are plotted but not labeled.

(a) In industrial countries we asked about developing countries, not own country.

and North Africa and South Asia say the Bank is doing a poor job helping their country improve their educational system, including more than half of the opinion leaders interviewed in India.<sup>36</sup> In these three regions, opinion leaders are more likely to say the Bank is doing a poor rather than good job.

Priority of improving education. Improving education is seen as a high Bank priority by a majority of opinion leaders in Latin America and slightly more than half in industrial countries. Somewhat less than half think improving education is a high Bank priority in East Asia, Europe and Central Asia, Sub-Saharan Africa and the Middle East and North Africa.<sup>37</sup> In the Middle East and North Africa and Europe, South Asia, and Central Asia about three in 10 say the Bank places a low priority on improving education.<sup>38</sup> South Asia stands alone with just three in 10 opinion leaders saying the Bank places high priority on education. Roughly as many say the Bank gives education a low priority. In India, nearly half say the Bank gives education low priority.

When looking at opinion leaders who believe education should be one of the Bank's top objectives, majorities think the Bank is already giving high priority to education in Europe and Central Asia, Latin America and the industrial countries. But less than half of these opinion leaders believe education is already receiving high priority in East Asia, the Middle East and North Africa, South Asia and Sub-Saharan Africa. When it comes to performance, most opinion leaders who want the Bank to emphasize education do not think the Bank has so far done as well as it could. Latin America is the only region where half say the Bank is doing a good job. Four in 10 give the Bank a high performance rating in the industrial countries, but only a third agree in East Asia, Europe and Central Asia, the Middle East and South Asia. And in Sub-Saharan Africa, just a quarter say the Bank is already doing a good job.

<sup>36</sup> Bosnia and Herzegovina differs from the rest of Europe and Central Asia with roughly half of its opinion leaders giving the Bank a high performance rating. Similarly in the Middle East, a majority of Jordanian leaders say the Bank is doing a good job.

<sup>37</sup> In Armenia, Chile, Colombia, Honduras, Mexico and Jordan six in 10 or more say the Bank gives education high priority.

<sup>38</sup> Yemen and Algeria differ with between four and five in 10 saying the Bank places low priority on education in their country.

## Strengthening governance

Improved or not? Strengthening governance—helping countries strengthen the rule of law, have free and fair elections, strengthen civil society, and promote transparent procedures and administrative policies—is another mission area where improvements outweigh setbacks.<sup>39</sup> This is particularly true in Sub-Saharan Africa where seven in 10 say the Bank has done a better job over the last few years. Majorities of opinion leaders in East Asia, the industrial countries and Latin America concur with this positive assessment.

One in 10 or fewer in East Asia, Latin America and Sub-Saharan Africa say the Bank has done a worse job over the last few years helping their country strengthen governance. It should be noted that two in 10 Latin American opinion leaders either do not know how or do not want to answer the question. When solely looking at Latin American opinion leaders who give an answer to the question, a solid majority say the Bank has done better; roughly one in 10 say the Bank has gotten worse.

In the other regions, fewer, but still pluralities, in South Asia, the Middle East and Europe and Central Asia say the Bank has been doing a better job helping their country strengthen governance.<sup>40</sup> In these three regions, two in 10 or fewer say the Bank is doing a worse job in this area.

Current performance. Opinion leaders in Sub-Saharan Africa, Latin America, East Asia and industrial countries are most likely to say the Bank is currently doing an average or good job helping their country strengthen governance. Six in 10

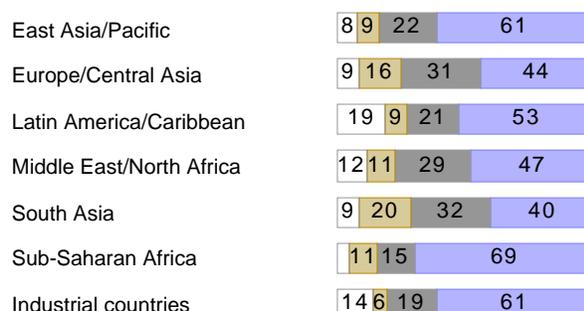
<sup>39</sup> Questions about governance were not permitted in China and Saudi Arabia.

<sup>40</sup> In Europe and Central Asia, Armenia, Bosnia and Herzegovina and Turkey differ with majorities complimenting the Bank for a better job. In the Middle East, majorities are positive in Jordan, Morocco and Yemen. Finally, in South Asia, six in 10 opinion leaders in Bangladesh say the Bank has improved.

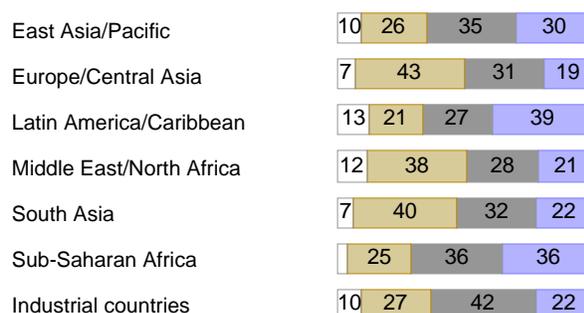
Chart 26

### Bank helps strengthen governance?

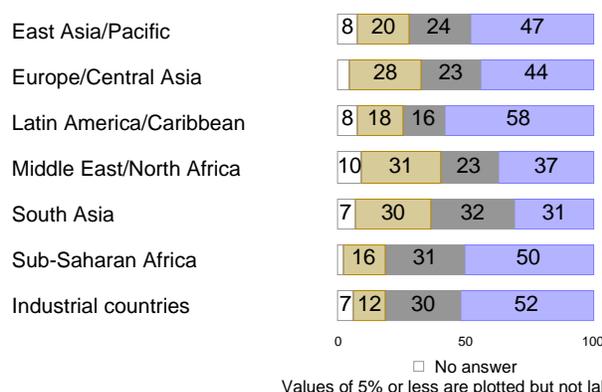
<sup>v</sup> Compared to a few years ago, is the Bank doing a [↑] better job or a [↓] worse job helping our country<sup>a</sup> strengthen governance<sup>b</sup>? (Volunteered: [↔] No change)



<sup>v</sup> How good a job does the Bank do helping our country<sup>a</sup> strengthen governance<sup>b</sup>? [↑] Good job, [↔] average, [↓] poor.



<sup>v</sup> How much of a priority does the Bank currently give to helping our country<sup>a</sup> strengthen governance<sup>b</sup>? [↑] High priority, [↔] medium, [↓] low.



(a) In industrial countries we asked about developing countries, not own country.  
(b) Strengthen the rule of law, have free and fair elections, strengthen civil society and promote transparent procedures and administrative policies.

or more in these regions agree. More say the Bank is doing a good job than a poor one in Latin America and Sub-Saharan Africa.

Europe and Central Asia, South Asia and the Middle East and North Africa are the regions with sizable minorities of roughly four in 10 who say the Bank is doing a poor job, which is more than those who say the Bank is doing a good job.<sup>41</sup>

Opinion in industrial countries about the job the Bank is doing to strengthen governance is now slightly more positive than it was in 1998.<sup>42</sup> More than six in 10 opinion leaders now rate the Bank's performance as good or average, up from roughly half in 1998. But consistent with the 1998 findings, about three in 10 opinion leaders continue to rate the Bank's performance as poor.

Table 9  
**Does the Bank do a good job strengthening governance?**

	1998	2002
Good job	19	23
Average job	34	40
Poor job	31	29
No answer	17	8

Priority of strengthening governance. Opinion is split on the priority the Bank gives to strengthening governance. Half or more of the opinion leaders in Latin America, Sub-Saharan Africa and in the industrial countries say the Bank gives high priority to strengthening governance. Nearly as many in East Asia share this view. Two in 10 or fewer in these regions say it is a low priority to the Bank.

By contrast, roughly four in 10 or fewer of the opinion leaders interviewed in the Europe and Central Asia, Middle East and North Africa, and South Asia think strengthening governance is a high priority of the Bank. Three in 10 in South Asia and the Middle East, and slightly fewer in Europe and Central Asia, say strengthening governance is a low priority to the Bank.<sup>43</sup>

In industrial countries, opinion leaders in 2002 are more likely to say the Bank places high priority on governance than they were in 1998.<sup>44</sup> In countries that were surveyed in 1998, a slim majority of opinion leaders now say the Bank gives high priority to governance issues.

Table 10  
**How much priority does the Bank place on strengthening governance?**

	1998	2002
High priority	41	54
Medium priority	30	29
Low priority	19	13
No answer	11	4

<sup>41</sup> In Europe and Central Asia, opinion leaders in Poland and Russia are particularly likely to say the Bank is doing a poor job trying to improve governance. Nearly six in 10 opinion leaders in India also think the Bank is doing a poor job helping them strengthen governance in their country.

<sup>42</sup> Modified trend: 1998—How good a job does the World Bank do of responding to the issues of promoting an open, law-based system of government in developing countries?

<sup>43</sup> Majorities in Jordan and Bosnia and Herzegovina say the Bank gives governance high priority.

<sup>44</sup> A modified trend: 1998—How important a priority to the World Bank is promoting an open, law-based system of government in developing countries?

### Fostering environmental sustainability

**Improved or not?** Majorities or near majorities in six of the seven regions say the Bank has done a better job helping foster environmental sustainability over the last few years. Opinion in the Middle East is slightly less positive with four in 10 saying the Bank has done a better job fostering environmental sustainability.

Fewer than two in 10 opinion leaders say the Bank has been doing a worse job over the last few years. Three in 10 or less say the Bank's performance has not changed in fostering environmental sustainability. Among these opinion leaders, half say the Bank is doing a poor job fostering environmental sustainability and four in 10 say the Bank is doing an average job in this area.

**Current performance.** In each region a majority say the Bank is currently doing an average or good job fostering environmental sustainability. This is particularly true in East Asia where nearly three-quarters agree. Twice as many in East Asia say the Bank is doing a good job as say it is doing a poor job fostering environmental sustainability.

In the Middle East, South Asia and Europe and Central Asia, although majorities say the Bank is doing a good or average job, sizable minorities say the Bank is doing a poor job fostering environmental sustainability. In all three of these regions, more say the Bank is doing a poor job than a good job.

Opinion in industrial countries is mixed. A third say the Bank is doing a poor job fostering environmental sustainability in developing countries but over half say the Bank is doing a good or average job, although substantially more say average rather than good job.

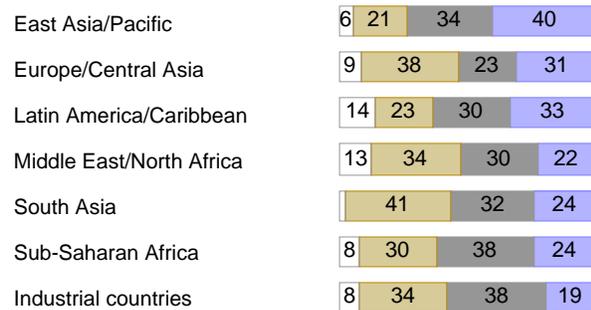
Chart 27

### Bank helps foster environmental sustainability?

Compared to a few years ago, is the Bank doing a [▲] better job or a [▼] worse job helping our country<sup>a</sup> foster environmental sustainability? (Volunteered: [▲] No change)



How good a job does the Bank do helping our country<sup>a</sup> foster environmental sustainability? [▲] Good job, [▲] average, [▲] poor.



How much of a priority does the Bank currently give to helping our country<sup>a</sup> foster environmental sustainability? [▲] High priority, [▲] medium, [▲] low.



0 50 100  
 □ No answer  
 Values of 5% or less are plotted but not labeled.

(a) In industrial countries we asked about developing countries, not own country.

Slightly more opinion leaders in 1998 thought the Bank was doing a good job fostering environmental sustainability than make that assessment today. Nonetheless, both in 1998 and currently, solid majorities say the Bank does an average or good job.

Table 11  
**Does the Bank do a good job fostering environmental sustainability?**

	1998	2002
Good job	27	21
Average job	35	38
Poor job	29	34
No answer	9	6

Priority of fostering environmental sustainability. Half or more in Latin America, East Asia and Europe and Central Asia say the Bank gives high priority to ensuring that development occurs in an environmentally sound manner. Notably fewer in South Asia, Sub-Saharan Africa, the Middle East and the industrial countries say environmental considerations are a high priority for the Bank. In South Asia, Sub-Saharan Africa and the Middle East, roughly a quarter say the Bank gives low priority to fostering sustainable development in their country.<sup>45</sup>

In the eyes of industrial country opinion leaders, the priority status given to environmental sustainability has declined since 1998. In 1998, a solid majority of opinion leaders said the Bank gave high priority to environmental sustainability, but fewer than half in the same countries agree in 2002. Roughly a quarter of opinion leaders in industrial countries now say the Bank gives low priority to environmental sustainability.

Table 12  
**How much priority does the Bank place on fostering environmental sustainability?**

	1998	2002
High priority	63	44
Medium priority	20	31
Low priority	14	23
No answer	4	3

<sup>45</sup> In Yemen a solid majority say environmental sustainability is low on the Bank's priority list.

## Reducing corruption

**Improved or not?** The Bank's efforts to reduce corruption get somewhat poor reviews. Only in Sub-Saharan Africa do a majority of opinion leaders say the Bank has been doing a better job helping countries reduce corruption. Half of the respondents in industrial countries concur. But in all other regions fewer than half credit the Bank with doing a better job fighting corruption.<sup>46</sup> This is the only mission area where so few say the Bank has improved its performance over the last few years. Nevertheless in a few developing countries outside of Sub-Saharan Africa—Bosnia and Herzegovina, Turkey, Honduras, Mexico and Peru—half or more say the Bank has gotten better.

Opinion leaders are not saying that the Bank is doing a worse job, but that there has been no change. However, among those who say there has been no change, a large majority of seven in 10 say the Bank is currently doing a poor job helping their country reduce corruption.

Two in 10 or fewer say the Bank has done a worse job in this area over the last few years. Notably, a quarter of Latin American leaders do not know how to or do not want to answer the question. Among those who give an answer, a majority say the Bank has done a better job fighting corruption, while less than two in 10 say the Bank has gotten worse.

**Current Performance.** Corruption reduction gets the lowest performance ratings of the eight mission areas studied. Less than half of the opinion leaders in Europe and Central Asia, South Asia, the Middle East and the industrial countries think the Bank is currently doing an average or good job helping their country reduce corruption. Only in Sub-Saharan Africa, East Asia and Latin America do a modest majority of opinion leaders say the Bank is doing an average or good job in this area. And in none of the regions do more say the Bank is doing

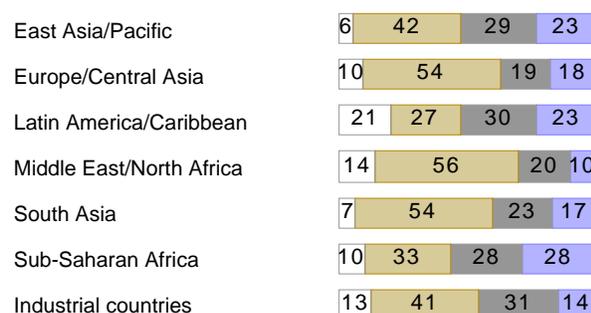
Chart 28

### Bank helps reduce corruption?

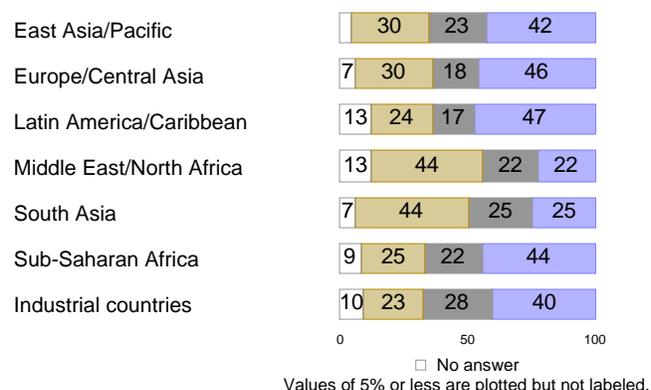
⌋ Compared to a few years ago, is the Bank doing a [⬆] better job or a [⬇] worse job helping our country<sup>a</sup> reduce corruption? (Volunteered: [⬆] No change)



⌋ How good a job does the Bank do helping our country<sup>a</sup> reduce corruption? [⬆] Good job, [⬇] average, [⬆] poor.



⌋ How much of a priority does the Bank currently give to helping our country<sup>a</sup> reduce corruption? [⬆] High priority, [⬇] medium, [⬆] low.



(a) In industrial countries we asked about developing countries, not own country.

<sup>46</sup> Questions on corruption were not permitted in China, Vietnam and Saudi Arabia.

a good job than a poor job. Overall, the Bank is seen as doing a barely average job in helping developing countries reduce corruption.<sup>47</sup> A sizable minority of two in 10 Latin American opinion leaders say they don't know how or refuse to judge the Bank's performance in reducing corruption. Among those Latin American leaders with an opinion, 29 percent say the Bank is doing a good job, 38 percent say the Bank is doing an average job and 34 percent say the Bank is doing a poor job.

More than half of the opinion leaders in the Middle East and North Africa, South Asia and Europe and Central Asia say the Bank is doing a poor job and a sizable minority in East Asia and the industrial countries agree.<sup>48</sup>

In both 1998 and 2002 relatively few opinion leaders say the Bank is doing a good job reducing corruption and three in 10 give the Bank an average rating. Four in 10 currently say the Bank is doing poorly, up from 35 percent in 1998.

**Priority of reducing corruption.** Many opinion leaders think reducing corruption is not a high priority for the Bank. Less than half in any region say the Bank places a high priority on reducing corruption. But solid majorities, except in South Asia and the Middle East, do say that the Bank gives high or medium priority to reducing corruption.

In the Middle East, South Asia, East Asia and Europe and Central Asia, three in 10 or more say the Bank places low priority on corruption reduction in their country.<sup>49</sup> On the positive side, majorities in a few countries—Bosnia and Herzegovina, Honduras, Mexico, Peru, Kenya and Mali say the Bank gives high priority to fighting corruption.

When it comes to the priority the Bank places on corruption, the views in industrial countries have not changed since 1998. In both 1998 and 2002, two in 10 say the Bank gives low priority to corruption, roughly a quarter say moderate priority, and over four in 10 say the Bank gives high priority to corruption.

Table 13  
**Does the Bank do a good job reducing corruption?**

	1998	2002
Good job	17	16
Average job	29	29
Poor job	35	41
No answer	20	14

Table 14  
**How much priority does the Bank place on reducing corruption?**

	1998	2002
High priority	44	42
Medium priority	26	28
Low priority	19	20
No answer	10	10

<sup>47</sup> Kenya is the only country where a majority say the Bank does well in this area and in only three countries—Bosnia and Herzegovina, Honduras and Mexico—do four in 10 or more opinion leaders credit the Bank for performing well.

<sup>48</sup> Seven in 10 opinion leaders in India and Kyrgyzstan along with majorities in several other countries, including Russia and Indonesia, give the Bank a poor performance rating for fighting corruption.

<sup>49</sup> Almost seven in 10 Indian opinion leaders and nearly six in 10 in Yemen say the Bank gives corruption low priority.

## Improving health

**Improved or not?** Nearly seven in 10 opinion leaders in Sub-Saharan Africa say the Bank has been doing a better job helping their country improve the health of its people. Roughly half or more in other regions concur. One notable exception is Europe and Central Asia. Just a third in Europe and Central Asia say the Bank has done a better job improving health, a third say there has been no change, and somewhat fewer say the Bank is doing a worse job. A minority of two in 10 Latin American opinion leaders do not know how to answer or refused to answer the question. Among those who give an answer, nearly six in 10 say the Bank's work in this mission area has improved, while 15 percent say the Bank is doing a worse job.

A third or fewer in each region say that there has been no change in the job the Bank is doing to help improve the health of people in their country. Of those who say there has been no change in the Bank's performance in health improvement, four in 10 say the Bank is doing a poor job and as many say the Bank is doing an average job in this area.

**Current performance.** Seven in 10 in Sub-Saharan Africa and half or more in other regions say the Bank is currently doing an average or good job helping their country improve the health of its people. In Sub-Saharan Africa more say the Bank is doing a good job than an average job. In most of the other regions this pattern is reversed with more saying the Bank is doing an average job.

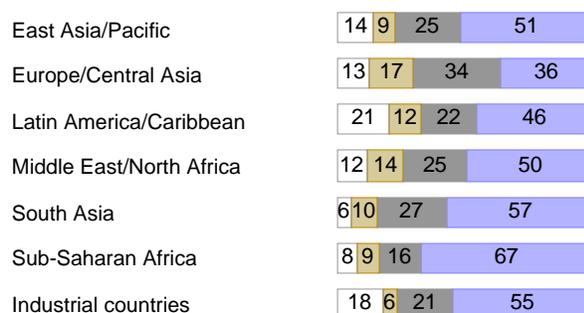
Sizable minorities in Europe and Central Asia, South Asia and the Middle East say the Bank is currently doing a poor job improving the health of their people. Fewer say the Bank is doing a good job.<sup>50</sup>

**Priority of improving health.** Improving health is seen as a Bank priority by

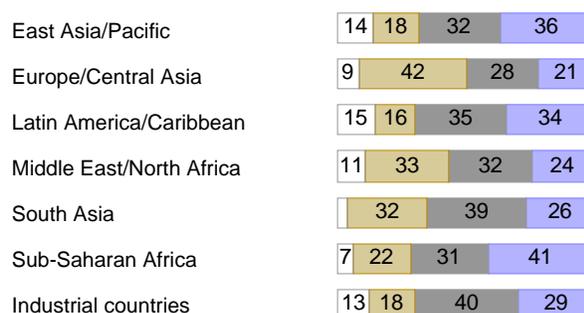
Chart 29

### Bank helps improve health?

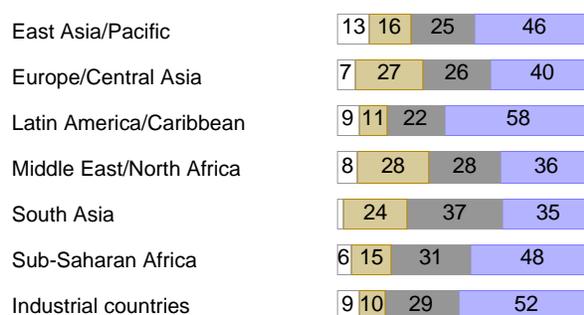
∪ Compared to a few years ago, is the Bank doing a [▲] better job or a [▼] worse job helping our country<sup>a</sup> improve the health of our people? (Volunteered: [▲] No change)



∪ How good a job does the Bank do helping our country<sup>a</sup> improve the health of our people? [▲] Good job, [▼] average, [▲] poor.



∪ How much of a priority does the Bank currently give to helping our country<sup>a</sup> improve the health of our people? [▲] High priority, [▼] medium, [▲] low.



0 50 100  
 □ No answer  
 Values of 5% or less are plotted but not labeled.

(a) In industrial countries we asked about developing countries, not own country.

<sup>50</sup> Six in 10 opinion leaders in Poland and Russia say the Bank is doing a poor job in this area. Similarly in India, Algeria and Yemen, four in 10 opinion leaders give the Bank poor marks for improving health.

slightly more than half in Latin America and the industrial countries and by nearly as many in Sub-Saharan Africa and East Asia. Four in 10 or fewer say the Bank gives high priority to health improvement in Europe and Central Asia, South Asia and the Middle East. And in each of these three regions roughly a quarter think the Bank places a low priority on improving the health of people in their country.

### Bank's strengths

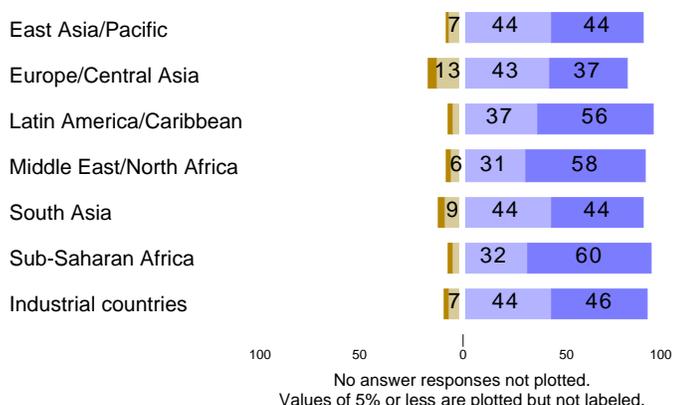
Not surprisingly, when asked about the World Bank's greatest strength the most frequent answer is the assistance it provides. In East Asia, Sub-Saharan Africa and South Asia roughly half of the opinion leaders say the Bank's assistance capacity is its greatest strength. Four in 10 opinion leaders agree in Latin America, the Middle East and North Africa and Europe and Central Asia. In industrial countries too, a third of opinion leaders point to the Bank's assistance capacity.

In all regions, the Bank's knowledge, vision and research ranks second as its greatest strength. In response to another question that asked specifically about the Bank's performance in this area, nearly all opinion leaders say that the Bank is an excellent source of research, analysis, and knowledge. Large majorities in all regions agree with this sentiment, many of them strongly.

Two other areas are mentioned as the Bank's greatest strength by a small but notable number of opinion leaders. The Bank's size, power and influence is seen as its major strength by one in 10 in Latin America, Europe and Central Asia and industrial countries. The Bank's organizational culture, such as its collaborative and supportive aspects, or its transparency, are mentioned by one in 10 or fewer opinion leaders in all regions as the Bank's greatest strength. Finally, the Bank's economic policies and beliefs, such as its support for free trade or its role in maintaining economic stability are also mentioned by one in 10 opinion leaders or fewer. Virtually no one says the Bank does not have any strengths.

Chart 30  
**Excellent source of research, analysis and knowledge**

Do you [strongly agree], [somewhat agree], [somewhat disagree] or [strongly disagree]: The World Bank is an excellent source of research, analysis and knowledge (including data and statistics) about a range of development issues that are important to our country?



(a) In industrial countries we asked about developing countries, not own country.

Table 15

**Greatest strength of World Bank**

v In one word or phrase, what is the greatest strength of the World Bank?

	East Asia/Pacific	Europe/ Central Asia	Latin America/ Caribbean	Middle East/ North Africa	South Asia	Sub-Saharan Africa	Industrial countries
Assistance	57	44	38	43	52	53	32
General	25	22	17	17	22	27	15
Monetary	28	15	14	15	27	20	14
Other	4	7	7	11	3	6	3
Knowledge, vision, research	17	16	22	24	17	24	19
Bank size, power, influence	6	10	13	8	6	4	12
Organizational culture	7	9	8	6	8	4	10
Bank's economic policies, beliefs	5	10	8	8	4	9	9
None	1	1	3	*	4	*	1
Other	5	5	5	5	8	4	11
No answer	1	6	3	6	2	2	7

\* represents a value of less than 0.5%.

## Bank's organizational culture

Opinion leaders are in general agreement that the World Bank's manner and approach to recipient countries have improved over the last few years. Many say the Bank is more collaborative and is more willing to work in partnerships with civil society and that it is more transparent and open in its operations. Likewise, opinion leaders often agree that the Bank has become more relevant over the last few years.

At the same time, criticisms remain. Many opinion leaders complain that the Bank remains too bureaucratic and arrogant. Another often heard concern is that the Bank is too heavily influenced by US economic and political policies and some say the Bank has become more US-driven over the last few years.

### Improvements: relevance, collaboration, partnerships and transparency

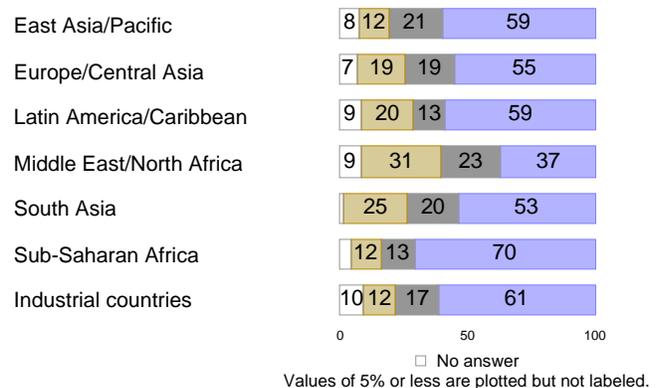
A key to the success of any organization is arguably its relevance to its stakeholders. The World Bank fares well in this regard, according to the opinion leaders surveyed. Majorities in all but one region say the Bank has become more relevant. This positive assessment is strongest in Sub-Saharan Africa and prevails in all regions except the Middle East.

In the Middle East and North Africa roughly as many say the Bank is less relevant as say it is more relevant. Jordan is the only country where a majority of opinion leaders say the Bank is more relevant.

Opinions about the Bank's relevance and influence are closely related. Opinion leaders who say the Bank is more relevant than a few years ago are more likely to say the Bank has a good influence on the way things are going in their country.

Chart 31  
**Bank more relevant**

Is the World Bank [↑] more relevant or [↓] less relevant than it was a few years ago? (Volunteered: [↔] No change)



Many opinion leaders agree that the Bank has become more collaborative and has been working more in partnership with civil society over the last few years. Majorities in all regions share this view.

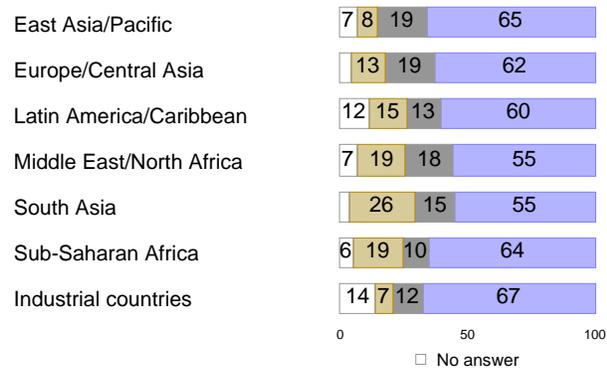
Overall, less than two in 10 opinion leaders think the Bank has become less collaborative except in South Asia where a quarter say the Bank is less collaborative. Four in 10 in Bangladesh, in particular, say the Bank is less collaborative.

An example of the Bank's greater collaborative efforts over the last few years is establishing partnerships with civil society. A solid majority of opinion leaders in each region say the Bank is working in partnership with civil society more than ever before.<sup>51</sup> Opinion leaders who say the Bank is more collaborative are more likely to say the Bank is more relevant.

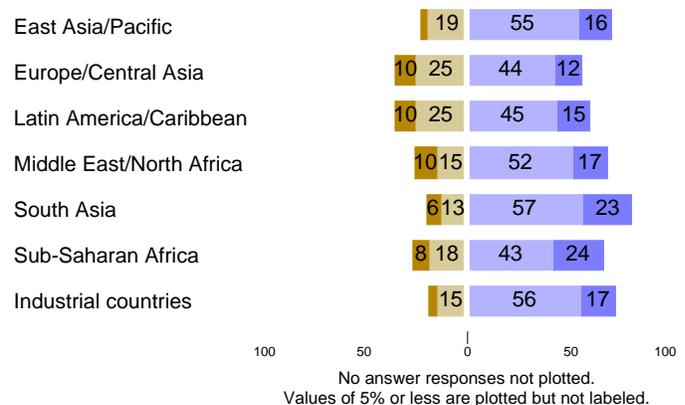
Chart 32

### Collaboration and partnership

Is the World Bank [↑] more collaborative or [↓] less collaborative than it was a few years ago? (Volunteered: [↔] No change)



Do you [↑] strongly agree, [↓] somewhat agree, [↔] somewhat disagree or [↓] strongly disagree: The World Bank works in partnerships with civil society<sup>a</sup> more than ever before?



(a) In industrial countries we asked about civil society in developing countries, not own country.

<sup>51</sup> Russia and Mexico are the only two survey countries where half or more do not think the Bank is working more in partnership with civil society than ever before.

Transparency is another critical component of a successful organization, particularly one as large and complex as the World Bank. Many opinion leaders say the Bank has become more transparent over the last few years.

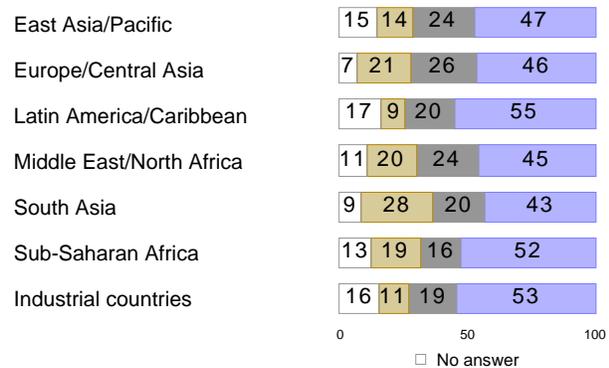
Slim majorities of opinion leaders in Latin America, the industrial countries and Sub-Saharan Africa, and four in 10 or more in East Asia, Europe and Central Asia, the Middle East and North Africa and South Asia say the Bank is more transparent than it was a few years ago. In general, roughly a quarter or less say the Bank is less transparent.<sup>52</sup>

Perceptions of the Bank’s transparency and relevance are linked. Opinion leaders who say the Bank has become more transparent and more collaborative also tend to think the Bank is more relevant. Greater transparency may be key to furthering Bank collaborations and partnerships, which in turn encourages opinion leaders to view the Bank as more relevant in their countries.

Research shows that the majority of opinion in most regions is positive about President James Wolfensohn's leadership of the World Bank. In East Asia, Latin America, South Asia, Sub-Saharan Africa, and Industrialized countries, more than a majority of respondents say the Bank is doing a much better or somewhat better job under the guidance of President Wolfensohn. No more than 6% of respondents in any region say the Bank is doing worse under the current leadership of President Wolfensohn. Between 15-25% of respondents in every region say there is no change under his leadership.

Chart 33  
**Bank transparency**

Is the World Bank [↑] more transparent or [↓] less transparent than it was a few years ago? (Volunteered: [↔] No change)



<sup>52</sup> Three in 10 or more opinion leaders in Bangladesh, Yemen, Indonesia, Kyrgyzstan, Turkey and Ethiopia say the Bank is less transparent.

### Criticisms: mixed reviews on Bank arrogance and bureaucracy

The Bank gets mixed reviews on whether it has become more or less arrogant over the last few years. A third of opinion leaders in South Asia and sizable minorities in other regions say the Bank has become more arrogant over the last few years. Slightly more, on average, say the Bank is less arrogant than it was a few years ago, but the extent of this improvement varies greatly by region. About two in 10 say the Bank’s level of arrogance remains unchanged over the last few years.

Half or more of the opinion leaders surveyed in Sub-Saharan Africa and in the industrial countries say the Bank is less arrogant. In Latin America, a plurality of four in 10 opinion leaders, including sizable majorities in Brazil and Peru say the Bank is less arrogant. Similarly, a plurality of four in 10 East Asian opinion leaders say the Bank has become less arrogant. In South Asia, Europe and Central Asia and the Middle East opinion is more divided between those who say the Bank is now more arrogant and those who say the Bank is less arrogant.

The Bank has made less progress changing its image as a bureaucracy-laden organization. East Asia is the only region where notably more opinion leaders say the Bank is less bureaucratic than more bureaucratic. This is in part due to a majority of opinion leaders in Vietnam saying that the Bank is less bureaucratic and only one in 10 saying it is more bureaucratic. Opinion is divided in other regions, except in South Asia, where more opinion leaders say the Bank is more bureaucratic than less bureaucratic.<sup>53</sup>

Roughly a quarter of opinion leaders in Latin America and industrial countries do not know how to answer the question or refuse to do so. When focusing on those opinion leaders who give an answer in Latin America, nearly four in 10 say the Bank is more bureaucratic, while a similar number say it is less bureaucratic. Over a quarter say there has been no change. In the industrial countries, a quarter say the Bank is more bureaucratic, while a third credit the Bank with less bureaucracy. Four in 10 say there has been no change.

Perceptions of Bank arrogance and bureaucracy are related. Opinion leaders who believe the Bank has become more bureaucratic also tend to think it has become more arrogant.

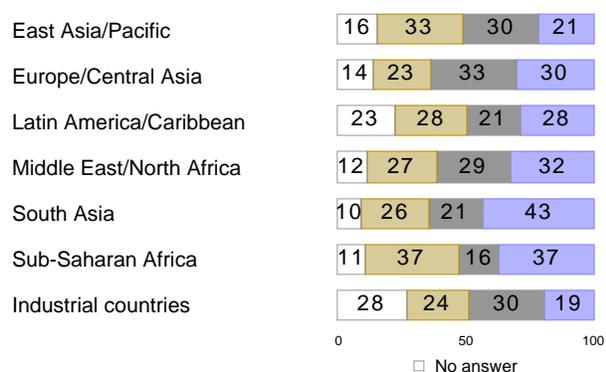
Chart 34

#### Views on arrogance and bureaucracy

Is the World Bank [↑] more arrogant or [↓] less arrogant than it was a few years ago? (Volunteered: [↔] No change)



Is the World Bank [↑] more bureaucratic or [↓] less bureaucratic than it was a few years ago? (Volunteered: [↔] No change)



<sup>53</sup> In Sub-Saharan Africa, Kenya is an exception with seven in 10 opinion leaders saying the Bank has become more bureaucratic. And in South Asia, opinion leaders in Bangladesh are much more likely than those in Pakistan and India to think the Bank has become more bureaucratic over the last few years.

Furthermore, those who see the Bank as more arrogant or more bureaucratic are also more likely to think the Bank is less collaborative and less relevant. And those opinion leaders who say the Bank has become more arrogant also tend to think the Bank is more US-driven.

While opinion leaders complain about the Bank's perceived arrogance and bureaucracy, statistical analysis shows that those factors have less influence in the overall assessment of the Bank than complaints about the Bank's irresponsibility, whether its reforms hurt more people than they help and opinion of the US. However, the charges of greater arrogance and bureaucracy are reason for concern. If unchecked these perceptions could impede greater collaboration and dampen perceptions of the Bank's relevance, which could have a negative effect on the overall assessment of the Bank.

### **World Bank forces agenda on developing countries**

Most opinion leaders think the World Bank forces its agenda on developing countries. This finding is consistent and overwhelming in all regions and in virtually all countries. Large majorities of eight in 10 or more in countries as diverse as Thailand, Mexico, Pakistan, Nigeria and Britain all think the Bank forces its agenda on developing countries.

This view taps two perceptions of the Bank. The first is that the Bank, like any other bank, forces its agenda by setting the terms for its loans and legitimately requiring recipients to follow its rules as a condition for assistance. The second perception is more negative, that the Bank's actions go beyond the standard rules of doing business and may actually be potentially irresponsible or harmful.

A plurality of opinion leaders share the first view—that the Bank forces its agenda on developing countries but that the Bank is not irresponsible in its development efforts. But for one in three opinion leaders, “forcing the Bank's agenda” is a clear criticism of the Bank's development efforts. These opinion leaders believe that the Bank forces its agenda on developing countries in a way that irresponsibly affects development efforts in their country.

It is important to note that this is a general question that asks about Bank activities in *developing* countries overall. As such, this question taps a general impression about Bank activities rather than a specific measure of Bank actions in a particular country.

Opinion leaders in South Asia are particularly likely to think the Bank forces its agenda on developing countries in a way that is irresponsible. One in two opinion leaders in South Asia say the Bank forces its agenda and that the Bank is often irresponsible in its development efforts in their country. Opinion leaders in Bangladesh are particularly likely to express this negative view.

### **US influence on Bank mixed**

Opinion leaders see the Bank as closely tied to the US and their evaluation of the US colors their opinion of the Bank. Many opinion leaders say the US has a good influence on the way things are going in their country, although sizable minorities in a number of countries, and majorities in the Middle East and North Africa, say the US has a bad influence on their country. At the same time, many opinion leaders say the World Bank is more “US-driven” today than it was several years ago and even more say the Bank is influenced by US political and economic policies.

Opinions about the US, whether it is the US's influence on the way things are going in a country or the US's role in Bank affairs are significant factors in shaping views of the Bank. Opinion leaders who think the Bank is more US-driven are more likely to say the Bank has a bad influence on their country and that the Bank is irresponsible in its development efforts.

Moreover, those who think the Bank is more US-driven tend to give the Bank a lower performance evaluation in the key mission areas of reducing poverty, building a climate for investment, jobs and growth, and improving education. General assessment of the US's influence on the way things are going in a country is an even more consistent and powerful predictor of opinion toward the Bank. Opinion leaders who hold a negative view of the US's influence on their country are much more likely to say that the World Bank has a bad influence on the way things are going in their country.

**US influence on Bank.** Opinion leaders in Sub-Saharan Africa, the Middle East and South Asia are especially likely to see the Bank as influenced by the US. Solid majorities in Sub-Saharan Africa and South Asia say the Bank's activities are influenced by US political and economic policies to a *great* extent and nearly as many in both regions say the Bank is more US-driven.<sup>54</sup> In the Middle East, majorities in each country say the Bank's activities are influenced by US policies to a great extent, and majorities in most countries say the Bank is now more US-driven than a few years ago.

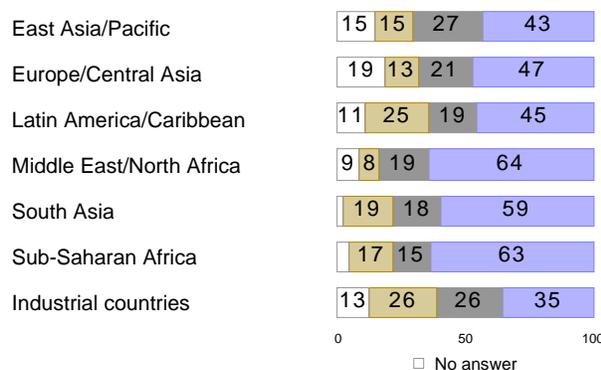
In Latin America, four in 10 or more opinion leaders say the Bank is influenced a *great* deal by the US and four in 10 or more say the Bank is more US-driven. In Europe and Central Asia and East Asia, somewhat fewer, although still sizable numbers of opinion leaders say the US political and economic policies influence the Bank to a *great* extent and that the Bank is more US-driven.

Even in the industrial countries, one in two opinion leaders in many of the countries surveyed say the Bank is influenced to a great extent by US policies and large majorities in all industrial countries surveyed say the US has a great deal or moderate influence on World Bank activities. On average, a third say the Bank is more US-driven and a quarter say it is less US-driven.

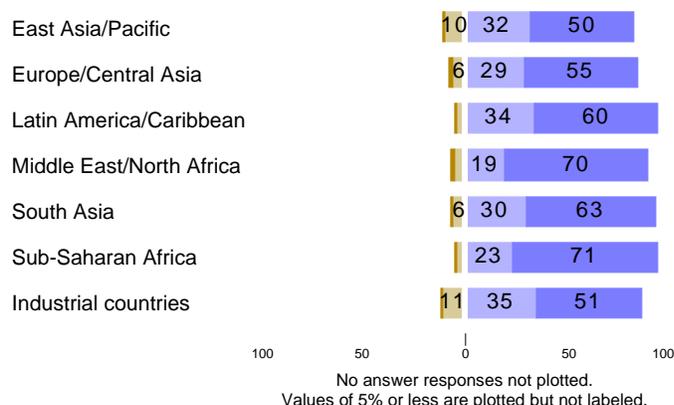
**US influence on survey country.** More generally, the United States elicits positive opinions in many parts of the world, with the notable exception of the Middle East and North Africa. Majorities in 27 of the 47 countries where the question was asked say the US has a good influence on how things are going in their country. At the same time, sizable minorities and

Chart 35  
**US influence on the Bank**

Is the World Bank [↑] more US-driven or [↓] less US-driven than it was a few years ago? (Volunteered: [↔] No change)



To what extent, if at all, are World Bank activities influenced by US political and economic policies: [↑] A great extent, [↔] a moderate extent, [↓] a small extent or [↔] not at all?



<sup>54</sup> Solid majorities in India and Bangladesh in South Asia and Ethiopia, Kenya and Nigeria in Sub-Saharan Africa say the Bank has become more US-driven.

even majorities in many countries have a negative view of the US. This is particularly true in the Middle East and to a lesser extent South Asia and the industrial countries.

Majorities of six in 10 or more opinion leaders in Sub-Saharan Africa, Europe and Central Asia and Latin America say the US has a good influence on the way things are going in their country. And half or slightly more in East Asia, South Asia and the industrial countries share this generally positive view.<sup>55</sup> By contrast, the Middle East and North Africa stands out with more opinion leaders saying the US has a bad influence on their country than a positive influence.<sup>56</sup>

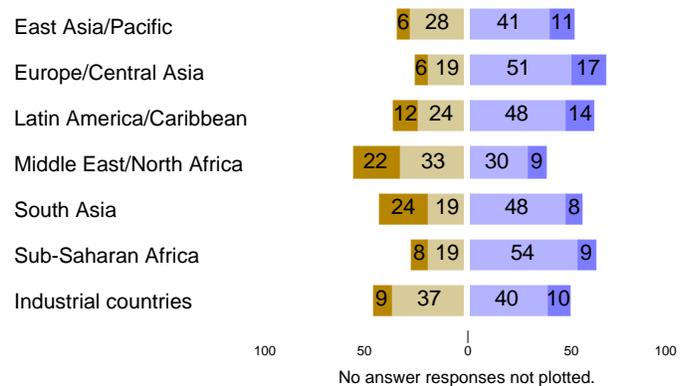
Sizable minorities in other regions share a negative view of the US's influence. More than four in 10 in South Asia and the industrial countries and roughly three in 10 in East Asia and Latin America say the US has a bad influence on the way things are going in their country.

According to the *Pew Global Attitudes Project*, publics share with opinion leaders generally positive views of the US. At the same time, publics in the Middle East and North Africa are particularly unfavorable toward the US, as are roughly half or more of the publics in two South Asian countries—Pakistan and Bangladesh—and in Turkey. Public opinion toward the US is generally more favorable in Sub-Saharan Africa, Europe and Central Asia and Latin America.

The US-led war on terror may help explain why many opinion leaders in the Middle East and North Africa and in other largely Muslim countries, such as Pakistan, say the US has a bad influence on their country. In the *Pew Global Attitudes Project* publics were asked directly about their views toward the US-led war on terror and publics in the largely Muslim countries of Jordan, Lebanon, Egypt, Turkey, Pakistan and Bangladesh expressed much less support for the US-led war on terror than publics in non-Muslim countries.

Chart 36  
**Influence of US**

Is the United States having a [↑] very good, [↔] somewhat good, [↓] somewhat bad or [↓] very bad influence on the way things are going in our country?



<sup>55</sup> A few countries in these regions are notable exceptions—Brazil, Indonesia, Mexico, Pakistan and Russia—with half or more saying the US has a bad influence on the way things are going in their country.

<sup>56</sup> This is particularly true in Lebanon, Saudi Arabia and Yemen. In Jordan and Algeria opinion is split with roughly as many saying the US has a bad influence on their country as a good influence. Majorities in Egypt and Morocco say that the US has a good influence on the way things are going in their country.

### Bank's greatest weakness: organizational culture

When opinion leaders were asked in an open-ended question about the Bank's greatest weakness, they most often cite the Bank's organizational culture—its slow and inefficient bureaucracy, its perceived arrogance and its lack of transparency and collaboration. This broad category of organizational culture tops the list of criticisms cited in every region of the world, with the Bank's bureaucracy and perceived arrogance often heading the list. Opinion leaders also criticize the Bank for its economic policies, such as its traditional approach to development and simplified solutions, for not taking into account local conditions, for not doing enough to help developing countries and for being too heavily influenced by the US and the West. Opinion leaders in South Asia, especially India, are particularly likely to complain about the US or Western influence on the Bank.

Table 16

#### Greatest weakness of World Bank

u In one word or phrase, what is the greatest weakness of the World Bank?

	East Asia/Pacific	Europe/Central Asia	Latin America/Caribbean	Middle East/North Africa	South Asia	Sub-Saharan Africa	Industrial countries
Bank organizational culture	30	29	36	23	34	28	35
Bureaucratic	13	15	14	7	9	9	17
Arrogant	9	4	9	2	13	4	7
Lack of transparency	4	5	7	7	6	2	5
Lack of collaboration	1	3	5	6	3	10	3
Other	3	2	1	1	3	3	3
Bank economic policies, beliefs	17	15	10	13	16	16	14
Bank does not take local conditions into account or interferes with country's affairs	9	12	14	11	8	6	7
Too much Western, US influence	6	4	4	10	17	9	11
Bank does not do enough	8	9	13	14	4	12	4
Loan conditions, aid criteria	2	1	1	6	3	16	1
Inadequate research, knowledge	3	4	5	2	5	3	2
None	2	1	3	1	4	*	*
Other	16	16	9	16	9	8	18
No answer	6	10	5	5	1	2	8

\* represents a value of less than 0.5%.

## Bank communications and outreach

Bank communications are valued by opinion leaders and most say they have become more effective. Many opinion leaders report increased communications over the past few years, and consider the Bank to be more responsive and visible than before.

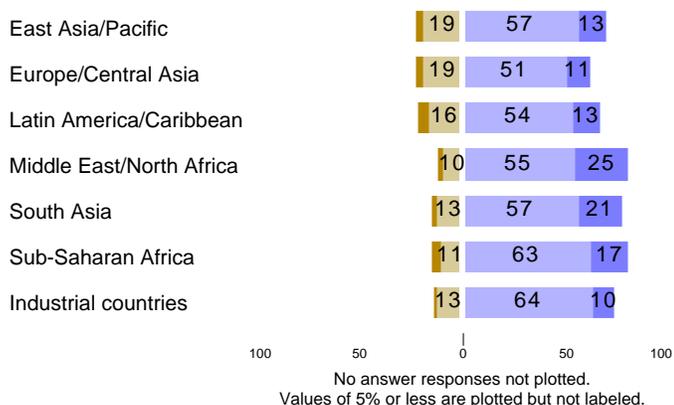
### Communications more effective across all regions

Opinion leaders around the world say that World Bank communications have become more effective over the past few years. In the Middle East and North Africa, South Asia and Sub-Saharan Africa roughly eight in 10 opinion leaders say Bank communications are more effective now than a few years ago. Slightly fewer opinion leaders in the other regions—East Asia, Latin America and Europe and Central Asia agree. About three-quarters of leaders in industrial countries say the Bank's communications have become more effective.

Opinion leaders' assessment of the Bank's communications effectiveness is related to the amount of information opinion leaders receive about the Bank. Opinion leaders who were exposed to more information about the Bank over the past year are more likely to say Bank communications are more effective than opinion leaders who received less information. And opinion leaders who get their information about the Bank primarily from Bank sources rather than the mass media are more likely to say that Bank communications have become more effective. The Middle East and Sub-Saharan Africa are exceptions.

Chart 37  
**Effectiveness of communications**

Over the past few years, would you say that Bank communications have become [↑] much more effective, [↔] somewhat more effective, [↓] somewhat less effective or [↓↓] much less effective?



### Bank responsiveness increased

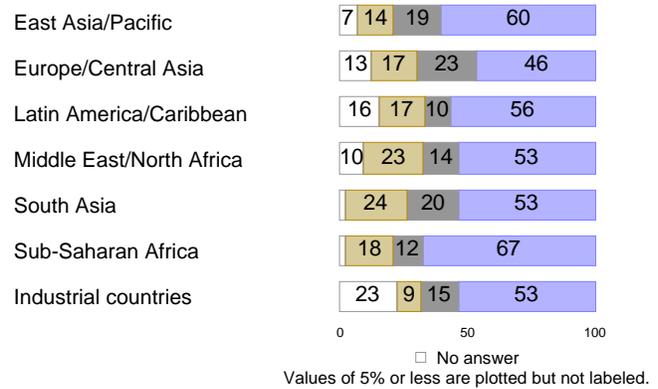
Opinion leaders also see the World Bank as more responsive than it was a few years ago. Opinion leaders in Sub-Saharan Africa are more positive than leaders in most other regions. In Sub-Saharan Africa two in three say the Bank is more responsive now than it was a few years ago, and in East Asia six in 10 agree. More than half of the opinion leaders surveyed in industrial countries, South Asia, the Middle East and Latin America give similarly positive responses. Nearly half in Europe and Central Asia say that the Bank's responsiveness has improved. A quarter or fewer say the Bank has been less responsive.<sup>57</sup>

Roughly a quarter of opinion leaders in industrial countries declined to answer the question. Among those who actually answered the question, two-thirds credit the Bank for increasing responsiveness. Two in 10 say there has been no change and only one in 10 say the Bank is less responsive.

Chart 38

### World Bank responsiveness

Is the World Bank [↑] more responsive or [↓] less responsive than it was a few years ago? (Volunteered: [↔] No change)



<sup>57</sup> In Bangladesh and Kenya four in 10 opinion leaders view the Bank as less responsive. In Kenya, a majority of opinion leaders interviewed after the December 27 election say the Bank has become more responsive.

### Bank more visible than ever

The World Bank is highly visible in the minds of opinion leaders. In six of the seven regions, half or more say they have read, seen or heard more information about the Bank than in the past few years and nearly that many in Europe and Central Asia say they have been exposed to more information about the Bank than previously. Relatively few in each region say the Bank is less visible than in previous years. Between a quarter and 40 percent in each region say they get about the same amount of information about the Bank.

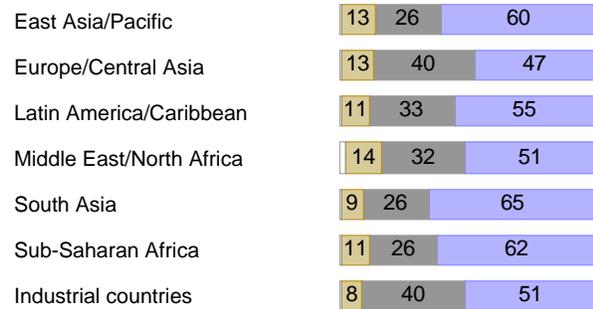
When opinion leaders say they received more or less information about the Bank over the past year, what exactly do they mean? More than half of those who say they are receiving less information read, hear or see about the Bank once a month or less frequently. Most of the rest read, hear or see about the Bank once a week or every other week. Among those who read, hear or see about the Bank more now than previously, a majority are exposed to Bank information at least weekly.

### Many hear about the Bank daily or weekly

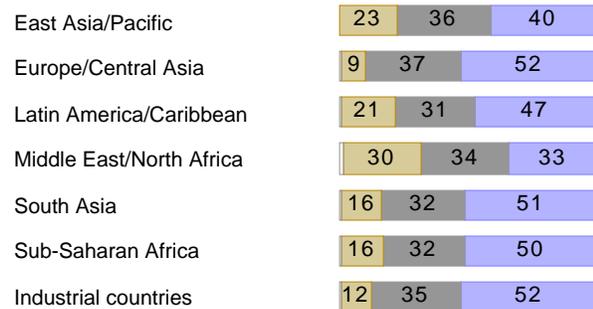
Currently, opinion leaders get information about the Bank on a fairly regular basis in both developing and industrial countries. Half or more in industrial countries report currently seeing, hearing or reading about the Bank daily or weekly. In Latin America just less than half get information daily or weekly, and four in 10 or fewer in East Asia and the Middle East do the same. Across regions, roughly a third of opinion leaders see, hear or read about the Bank once or twice a month. As might be expected, opinion leaders who are very knowledgeable about the Bank or who have had professional experience working with the Bank are more likely to report frequent exposure to Bank information than opinion leaders with less knowledge and experience.

Chart 39  
Information on the World Bank

Over the past year have you read, heard and seen [▲] more, [●] less or [■] about the same amount of information on the World Bank as you had in the previous few years?



How often do you see, hear or read about the Bank? [▲] At least weekly [●] once or twice monthly, [■] less often.



0 50 100  
 ■ No answer  
 Values of 5% or less are plotted but not labeled.

### **Newspapers and Bank web site important sources of Bank information**

Opinion leaders interviewed in developing and industrial countries tend to cite the same top sources for information about Bank activities in their country. Newspapers are the most frequently cited source, followed by World Bank web sites and Bank publications and reports. Very few opinion leaders say that they receive most of their information from face-to-face meetings with World Bank staff or from TV and radio. Overall, opinion leaders in every region cite Bank sources more frequently than mass media.

Roughly a third of opinion leaders in most regions get most of their information from newspapers and about a quarter get their information from World Bank web sites. In the Middle East and North Africa, this is reversed, with a third going to Bank web sites and a quarter getting their information from newspapers. Opinion leaders in South Asia and Sub-Saharan Africa stand apart in their use of Bank publications and reports. Roughly three in 10 in South Asia and Sub-Saharan Africa get most of their information from World Bank publications and reports, while fewer in other regions get information from this source.

As might be expected, opinion leaders' knowledge of and experience with the Bank and its activities have a lot to do with where they get their information. Opinion leaders with a great deal or a fair amount of experience working with the Bank are most likely to go to the Bank web site or to use Bank publications or reports. Those with less experience are more likely to use newspapers and to a lesser extent other public media as a primary information source. A similar pattern prevails when it comes to differences in knowledge levels.

How opinion leaders get information about the Bank is related to their overall opinion about the Bank. Opinion leaders who think the Bank is irresponsible are more likely to get their information from newspapers in four regions—East Asia, Europe and Central Asia, Sub-Saharan Africa and Latin America. In industrial countries the relationship is reversed, and those who think the Bank is irresponsible are *less* likely to use newspapers for Bank information. In industrial countries, many opinion leaders who say the Bank is irresponsible are more likely to use the Bank's web site and publications.

Table 17

**Sources of information about Bank**

v From where are you getting most of your information about World Bank activities in our country<sup>a</sup>?

	East Asia/Pacific	Europe/ Central Asia	Latin America/ Caribbean	Middle East/ North Africa	South Asia	Sub-Saharan Africa	Industrial countries
Total Mass Media	34	40	32	28	36	33	34
Newspapers	30	31	30	25	35	28	31
TV, Radio	4	9	2	3	1	5	3
Total Bank Sources	52	47	44	60	59	58	42
Bank web sites	26	20	25	33	23	22	20
Bank publications or reports	15	14	11	16	28	27	14
Face-to-face meetings with Bank staff or officials	5	5	3	3	3	3	4
Bank letters, memos or other official correspondence	6	8	5	8	5	6	4
Other	13	12	23	11	6	9	22

(a) In industrial countries we asked about developing countries, not own country.

## Bank publications used and influential

More than six in 10 of the opinion leaders interviewed in every region say they have used a Bank publication in the past two years. Among opinion leaders who have personally used Bank publications many say these publications have influenced their thinking about international development issues. At least two thirds in all regions say the Bank publications have influenced them a great deal or a fair amount.

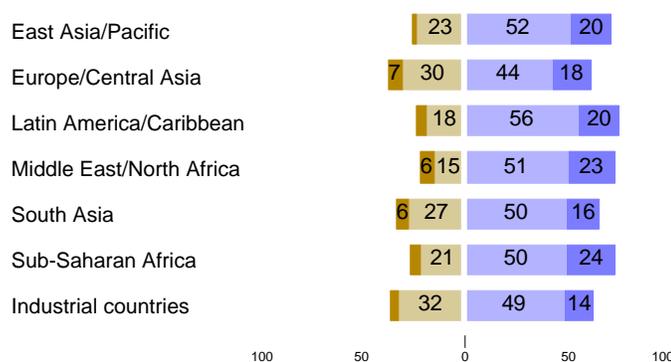
Again, opinion leaders' knowledge of and experience with the World Bank influence the way they respond. Opinion leaders who are very or somewhat knowledgeable about the Bank and its activities and those who have had a great deal or a fair amount of experience with the Bank are more likely to say the Bank's publications have had at least a fair amount of influence on their thinking than opinion leaders with less knowledge and experience.

Chart 40  
**Bank publications**

Over the past two years have you personally used any publications from the World Bank? [▲] Yes, [▼] no.



Overall, how much influence have the World Bank's publications had on your thinking about international development issues: [▲] A great deal, [▼] a fair amount, [▲] not too much or [▼] no influence at all?<sup>a</sup>



No answer responses not plotted.  
Values of 5% or less are plotted but not labeled.

(a) Based on those who have used publications<sup>58</sup>

<sup>58</sup> East Asia n=238; Europe and Central Asia n=234; Latin America n=254; Middle East and North Africa n=199; South Asia n=128; Sub-Saharan Africa n=232; Industrial countries n=352

### Web site use moderate and easy

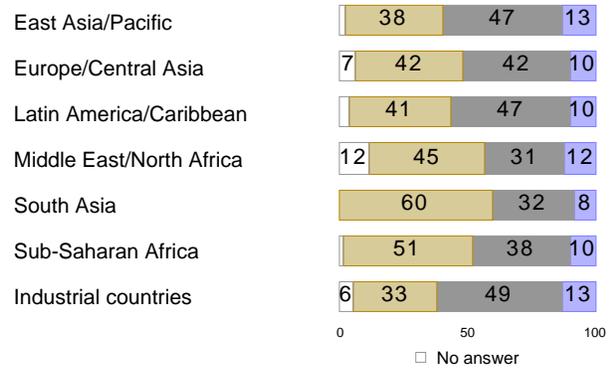
The World Bank web site is an important communications vehicle used by many opinion leaders worldwide. Quite a few of the opinion leaders interviewed in both developing and industrial countries use the web site somewhat regularly to stay abreast of Bank issues and activities.

Roughly one in 10 opinion leaders in developing countries are frequent users of the Bank web site, accessing it weekly or daily. Between three in 10 and five in 10 are occasional users, who access the site a few times a month or less. The rest of opinion leaders in developing countries say they never use the site. More opinion leaders in South Asia and Sub-Saharan Africa report never using the web site than their colleagues in other regions. In industrial countries, a majority report using the site at least occasionally, while a third say they never use the site.

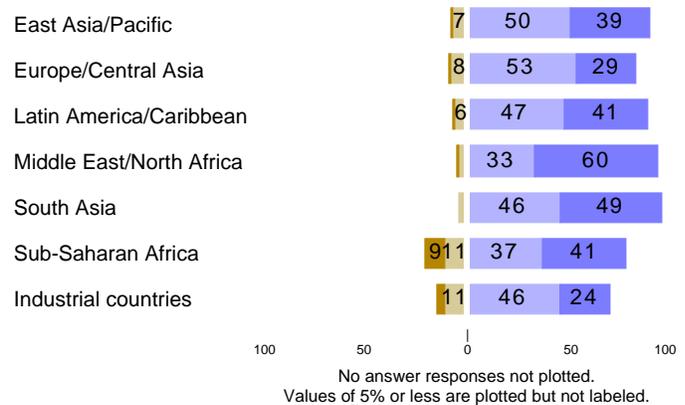
Most opinion leaders in both industrial and developing countries who access the web site consider it easy to use. Opinion leaders in developing countries are slightly more positive about ease of use than opinion leaders in industrial countries. Only in Sub-Saharan Africa do a notable minority say the Bank web site is not easy to use.

Chart 41  
**Bank web site**

v How often do you use the World Bank web site? [▲] At least weekly, [■] less often, [●] never.



v Do you [▲] strongly agree, [■] somewhat agree, [●] somewhat disagree or [●] strongly disagree: The World Bank web site is easy to use?<sup>a</sup>



(a) Based on those who have used web site<sup>59</sup>

<sup>59</sup> East Asia n=219; Europe and Central Asia n=192; Latin America n=225; Middle East and North Africa n=126; South Asia n=76; Sub-Saharan Africa n=171; Industrial countries n=328

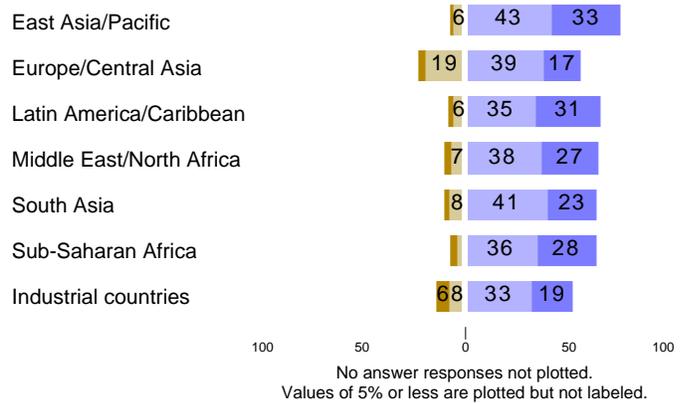
### Public Information Centers useful

Opinion leaders find value in Public Information Centers. In nearly every country, majorities or pluralities agree that Public Information Centers are a valuable source of information related to development issues in their country. Like attitudes about the ease of web site use, attitudes about the PICs are more positive in developing countries than they are in industrial countries. Views are very positive in East Asia and the Pacific, where nearly eight in 10 agree that PICs are valuable. Two thirds of opinion leaders in Latin America and the Caribbean, the Middle East and Sub-Saharan Africa say the same. Opinion leaders in Europe and Central Asia express more moderate views, followed by industrial countries. A sizable minority of opinion leaders do not know enough about the PICs to have an opinion. When focusing on those opinion leaders who actually answer the question, at least seven in 10 opinion leaders in every region agree that the PICs are valuable. In a few regions—East Asia, Latin America, the Middle East and Sub-Saharan Africa—about nine in 10 opinion leaders agree.

Chart 42

### Public Information Center valuable or not?

Do you [strongly agree], [somewhat agree], [somewhat disagree] or [strongly disagree]: The Bank's Public Information Center is a valuable source of information related to development in our country<sup>a</sup>?



(a) In industrial countries we asked about information related to international development, not development in own country.

# Methodology

	Number of interviews conducted	Margin of error (+/-)	Interviewing dates	Languages	Interviewing mode	Local company that conducted the interviews
<b>East Asia</b>	<b>364</b>	<b>5</b>				
Cambodia	30	18	Oct 22-Nov 29 2002	Khmer	Face-to-face	TNS Vietnam
China	60	13	Oct 10-Nov 15 2002	Chinese	Both	TNS China
Indonesia	90	10	Nov 4-Dec 28 2002	Bahasa	Face-to-face	TNS Indonesia
Philippines	60	13	Nov 11-Dec 5 2002	Tagalog	Both	TNS Philippines
Thailand	60	13	Nov 1-Nov 25 2002	Thai	Face-to-face	TNS Thailand
Vietnam	64	12	Oct 31 2002 – Jan 23 2003	Vietnamese	Face-to-face	TNS Vietnam
<b>Europe/Central Asia</b>	<b>372</b>	<b>5</b>				
Armenia	60	13	Oct 17–Nov 15 2002	Armenian, Russian	Face-to-face	Georgian Opinion Research Business International (GORBI)
Bosnia and Herzegovina	60	13	Oct 23-Dec 27 2002	Bosnian, Croatian, Serbian	Both	Prism Research
Kyrgyzstan	60	13	Oct 14-Nov 15 2002	Russian	Face-to-face	Russian Public Opinion and Market Research (ROMIR)
Poland	70	12	Nov 5-Nov 28 2002	Polish	Both	Ipsos-Demoskop
Russia	60	13	Oct 15-Nov 11 2002	Russian	Face-to-face	Russian Public Opinion and Market Research (ROMIR)
Turkey	62	13	Oct 25-Dec 13 2002	Turkish	Face-to-face	TNS Piar
<b>Latin America/Caribbean</b>	<b>400</b>	<b>5</b>				
Brazil	60	13	Oct 25-Dec 1 2002	Portuguese	Telephone	Research International Brazil
Chile	60	13	Oct 16-Nov 29 2002	Spanish	Face-to-face	MORI Chile
Colombia	60	13	Oct 29 2002 – Jan 23 2003	Spanish	Face-to-face	Centro Nacional de Consultoria (CNC)
Honduras	50	14	Oct 24 2002 – Jan 23 2003	Spanish	Face-to-face	Mercaplan Central America
Jamaica	50	14	Oct 23-Nov 13 2002	English	Face-to-face	Dichter-Neira Panama
Mexico	60	13	Oct 15-Nov 20 2002	Spanish	Face-to-face	Ipsos-BIMSA
Peru	60	13	Oct 14-Nov 22 2002	Spanish	Telephone	Apoyo Opinion y Mercado

	Number of interviews conducted	Margin of error (+/-)	Interviewing dates	Languages	Interviewing mode	Local company that conducted the interviews
<b>Middle East/North Africa</b>	<b>292</b>	<b>6</b>				
Algeria	21	22	Dec 30 2002 - Feb 18 2003	French	Face-to-face	SEMMA/MEMRB Morocco
Egypt	38	16	Dec 26 2002 – Mar 13 2003	Arabic	Face-to-face	NFO Egypt
Jordan	48	14	Dec 10 2002 – Mar 4 2003	Arabic	Face-to-face	MRO Jordan
Lebanon	50	14	Dec 12 2002 – Feb 9 2003	Arabic	Face-to-face	MRO Lebanon
Morocco	51	14	Nov 31 2002 – Feb 4 2003	French	Face-to-face	SEMMA/MEMRB Morocco
Saudi Arabia	33	17	Dec 18 2002 – Mar 1 2003	Arabic	Face-to-face	MEMRB Saudi Arabia
Yemen	51	14	Jan 11-Jan 26 2003	Arabic	Face-to-face	MEMRB Yemen
<b>South Asia</b>	<b>192<sup>60</sup></b>	<b>7</b>				
Bangladesh	64	12	Nov 10-Dec 24 2002	Bangla	Face-to-face	Survey Research Group of Bangladesh (SRGB)
Pakistan	68	12	Nov 1-Nov 23 2002	Urdu	Both	ACNielsen AFTAB
India (Federal)	60	13	Oct 18 2002 – Feb 26 2003	English, Hindi	Face-to-face	TNS Mode
Andhra Pradesh	20	22	Oct 19 2002 – Feb 13 2003	English, Telegu	Face-to-face	TNS Mode
Karnataka	20	22	Oct 19-Nov 29 2002	English, Kannada	Face-to-face	TNS Mode
Uttar Pradesh	22	22	Oct 23 2002 – Feb 26 2003	English, Hindi	Face-to-face	TNS Mode
<b>Sub-Saharan Africa</b>	<b>360</b>	<b>5</b>				
Ethiopia	60	13	Dec 3 2002 – Jan 30 2003	Amharic, English	Face-to-face	Research International East Africa
Kenya	60	13	Nov 18 2002 – Jan 22 2003	Kiswahili	Face-to-face	Research International East Africa
Mali	60	13	Nov 12-Nov 25 2002	French	Face-to-face	Research International Cote d'Ivoire
Nigeria	60	13	Oct 30 2002 – Jan 23 2003	English	Face-to-face	Market Trends Research International
Senegal	60	13	Nov 11-Nov 25 2002	French	Face-to-face	Research International Cote d'Ivoire
South Africa	60	13	Nov 6-Nov 22 2002	English	Telephone	Markinor South Africa

<sup>60</sup> The total does not include the three Indian states.

	Number of interviews conducted	Margin of error (+/-)	Interviewing dates	Languages	Interviewing mode	Local company that conducted the interviews
<b>Industrial countries</b>	<b>556</b>	<b>4</b>				
Australia	15	26	Oct 1-Oct 24 2002	English	Telephone	TNS Australia
Britain	50	14	Oct 10-Nov 11 2002	English	Telephone	NOP
Canada	35	17	Oct 17-Dec 11 2002	English, French	Telephone	Environics Research Group
France	51	14	Nov 14 2002 – Jan 31 2003	French	Telephone	TNS France
Germany	54	13	Oct 9-Nov 8 2002	German	Telephone	TNS EMNID
Italy	52	14	Oct 9-Nov 20 2002	Italian	Both	Pragma
Japan	50	14	Nov 27 2002 – Jan 22 2003	Japanese	Face-to-face	Research International Japan
Netherlands	50	14	Oct 16-Nov 20 2002	Dutch	Telephone	NIPO
New Zealand	10	33	Oct 4-Oct 23 2002	English	Telephone	TNS Australia
Singapore	25	20	Oct 23-Nov 26 2002	English	Both	NFO Singapore
Sweden	50	14	Oct 16-Nov 8 2002	Swedish	Telephone	Gallup Sweden
Switzerland	55	13	Oct 9-Nov 19 2002	French, German	Telephone	Isopublic Swiss Institute of Public Opinion
US	59	13	Oct 24 2002 – Jan 24 2003	English	Telephone	Princeton Data Source
<b>Multilateral institutions</b>	<b>64</b>	<b>12</b>				
EU and other international organizations in Brussels	20	22	Oct 22-Nov 21 2002	French, German, English	Telephone	Ipsos-Brussels
UN and other international organizations in Geneva	9	35	Oct 11-Nov 13 2002	French, German, English	Telephone	Isopublic Swiss Institute of Public Opinion
UN and other international organizations in New York	35	17	Oct 23-Nov 25 2002	English	Telephone	Princeton Data Source