

GALLUP

*2008 World Bank Group Global Poll  
Executive Summary*

October 2008

*Prepared for:*

The World Bank  
1818 H Street, NW  
Washington, DC 20433

*Prepared by:*

The Gallup Organization  
Government Division  
901 F Street N.W.  
Washington D.C., 20004  
(202) 715-3030

## BACKGROUND + OBJECTIVES

In spring 2008, the World Bank Group (WBG) commissioned a large study of opinion leaders around the globe to examine the views of its key stakeholders toward international development and the role the Bank should play within this context. The WBG recognizes the value in gathering opinions of this key constituency in an empirical way, tracked over time, to ensure that the work and outreach of the institution are responsive, realistic, and sustainable.

The 2008 Global Poll was conducted with additional objectives in mind:

- To institute a benchmark study that can be tracked over time;
- To gather enough data to permit regional and stakeholder comparisons and, over time, global comparisons;
- To reflect on some issues raised in an earlier study of this nature conducted 5 years ago for the Bank; and,
- To identify current areas of opportunity and risk for the World Bank Group, particularly as related to the institution's strategic direction.

This year's Global Poll interviewed more than 2,600 opinion leaders in 42 countries around the world and stakeholders within the European Union and United Nations constituencies. The respondents came from a range of constituency groups including government (national, state, local), media, private sector, NGOs, and civil society organizations (faith-based, trade, etc.). These are the groups who generally have highly informed opinions about the World Bank Group and who drive opinions within their own countries. Their voices are critically important in ensuring the Bank works in a collaborative way to lead to better results on the ground.

This research study follows a similar one conducted in 2003 for the World Bank Group. While there was an attempt to track some of the findings, the decision was made to create a relatively new instrument that could measure views of opinion leaders most effectively from this point forward.

The following report provides a summary of key results and findings from the 2008 Global Poll. It presents a picture of global attitudes towards and perceptions of the world today, development and foreign assistance, the work of the World Bank Group, and the vision for the World Bank Group as laid out in the past year.

*\*Methodological note: Respondents were randomly selected from lists provided primarily through the World Bank and supplemented by The Gallup Organization. These stakeholders are representative of, primarily World Bank audiences, rather than IMF, IFC or MIGA clients. In addition, throughout this summary, references will be made to scales and frequencies. A 10-point scale was used throughout the survey. For analysis purposes, top four responses were grouped together as most favorable/positive top 4 box (7-10), middle two responses were grouped together as*

*middle 2 box (5-6 ratings), and the lowest four were grouped together as the least favorable/positive bottom 4 box (1-4 ratings). In addition, countries are grouped two different ways: 1. Industrialized countries vs. developing countries and; 2. Industrialized vs. middle income vs. low income. Both of these classifications are designated by the WBG.*

## **STATE OF THE WORLD**

The World Bank Group is one player in a complicated global development environment, where unexpected changes take place with little warning and huge consequences. In 2008 alone, the food and fuel and global economic crises emerged. To understand how the WBG's work is perceived, it is first important to understand stakeholders' views toward the global context in which the WBG exists. For that reason, the 2008 Global Poll explored broad issues related to poverty, development, and foreign assistance.

### *The overall environment*

In general, the poll shows a range of views about the current global development environment. Large majorities of stakeholders across the globe believe that the gap between rich and poor has increased (Latin America/Caribbean was the only region where less than a majority believed this to be the case). Corruption is viewed by large majorities as having a very serious impact on growth and poverty reduction (most significantly in East Asia/Pacific), with little faith expressed in governments' ability to address corruption. Finally, the poll demonstrates overwhelming pessimism regarding whether (other than in East Asia/Pacific) the MDG related to poverty<sup>1</sup> will be achieved.

It is not surprising in the 2008 global economy that views differ strongly on the effect of globalization on stakeholders' countries. In the East Asia/Pacific and Latin America/Caribbean regions, large majorities report favorable views of the impact of globalization (63% and 60% in top 4 box, respectively). In other regions, the views are not quite so positive. In the Middle East/North Africa and Sub-Saharan Africa regions, approximately 4 in 10 opinion leaders share positive views of globalization (top 4 box). The poll's findings show that perceptions, at least, are mixed on how globalization has affected countries.

### *Greatest priorities at a challenging time*

To better determine whether the WBG's work is aligned with the priorities of its stakeholders, it is critical to examine how the organization's key constituents define the priority challenges that their countries face. The Global Poll findings demonstrate the strongly held view that poverty is the key challenge in a number of regions, even in those where there has been strong growth over the past few years.

---

<sup>1</sup> Reducing global poverty measured in 1990 in half by the year 2015.

## First and Second Greatest Challenges

*In your opinion, what is the biggest and second biggest challenge facing your country today? (open-ended, only top 11 shown below)*

	East Asia/ Pacific	Europe/ Central Asia	Latin America/ Caribbean	Middle East/ North Africa	South Asia	Sub-Saharan Africa	Industrial ized Countries
Poverty Reduction	36	21	49	26	42	46	15
Growth/Strengthening Economy	31	17	21	27	9	16	24
Improving Governance and Government	12	22	11	7	12	25	20
Infrastructure Development	14	14	13	16	15	26	9
Domestic Inflation	14	18	5	7	15	2	13
Environmental	18	4	5	5	7	2	25
Job/Employment/Labor	6	12	10	27	12	12	12
Political Stability	8	21	9	14	14	5	9
Reducing Corruption	9	23	9	11	12	20	0
Strengthening Civil Society	8	11	26	5	5	4	12
Improving Education	7	5	20	20	8	10	3

In an environment where poverty and growth are high priorities of the WBG and of its clients, the poll explored with stakeholders their views on the most effective ways to solve these challenges. In East Asia/Pacific, South Asia, and Africa regions, agriculture productivity emerged as the most important area of development to reduce poverty. In Latin America and Middle East/North Africa, education is considered the key to poverty reduction, while in Europe/Central Asia, stakeholders identified private sector growth as the most important area to reduce poverty.

When it comes to generating faster growth, the South Asia and Sub-Saharan Africa regions believe increasing agricultural productivity is essential. In Latin America and Middle East/North Africa, education emerges again, while in East Asia/Pacific and Europe/Central Asia, improving the environment for private sector growth is identified as the central key to economic growth overall.

## **THE GLOBAL DEVELOPMENT INFRASTRUCTURE AND THE WORLD BANK GROUP**

Stakeholders hold mixed views on what is the appropriate level of foreign assistance. Pluralities in Europe/Central Asia, Middle East/North Africa, and a majority in Latin America say the level of foreign assistance received by their countries is “about right.” There is also uncertainty about how effectively foreign assistance is used, approximately one-third or more of respondents in all regions except East Asia/Pacific (one-fifth) report negative views about how effectively their governments use foreign assistance.

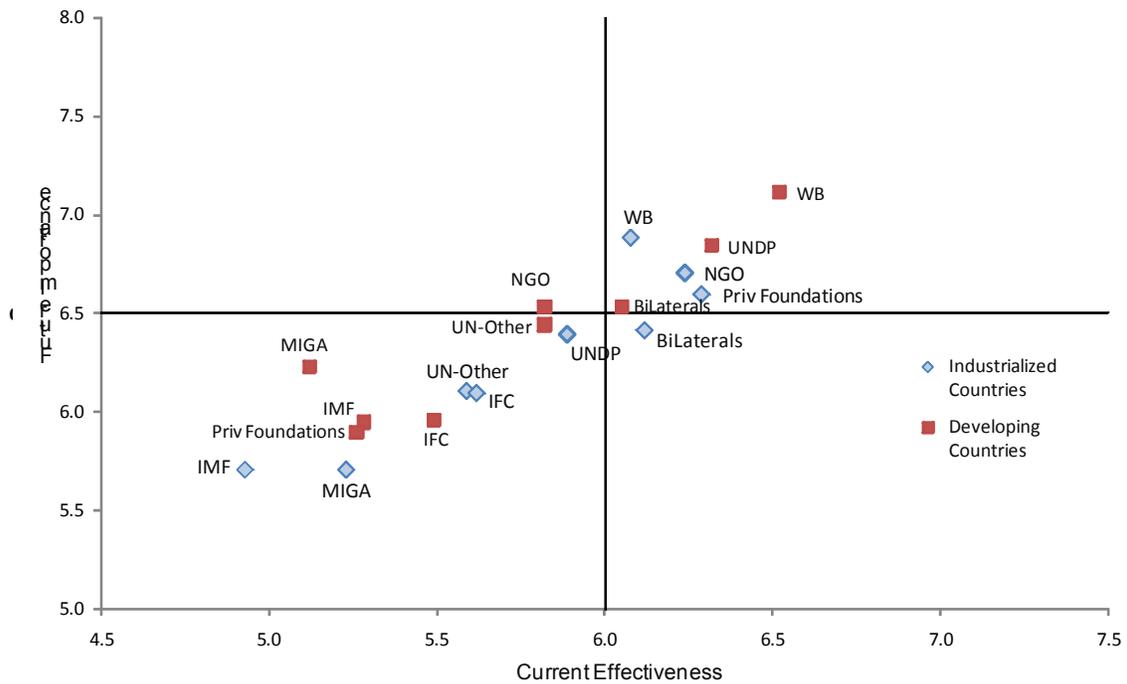
In an environment where leaders are uncertain about foreign assistance and government reliability, the World Bank (as seen in chart below) is viewed by client country respondents as the most effective organization in helping countries achieve their economic and social development goals, and as the organization that will play the most important role in the future in helping the countries achieve their development objectives. Views are similar in industrialized countries, although bilaterals, NGOs, and private foundations are considered slightly more effective than the WBG currently amongst stakeholder groups in industrialized countries.

**Effectiveness and Future Importance of Donor Institutions**

*Current Effectiveness: Please rate each of the institutions on its effectiveness in helping your country achieve its economic and social development goals.*

*10-point scale, 10 is extremely effective, 1 is extremely ineffective*

*Future Importance: Thinking about the future: How important of a role do you think each of these institutions will play in helping developing countries achieve its economic and/or social development objectives? 10-point scale, 10 is extremely important, 1 is not important at all*



## *Evaluating the World Bank Group*

When considering the effectiveness of the WBG, the Global Poll examined a number of related issues that include:

- areas where the WBG is considered most effective
- results
- how the WBG works
- relevance

The Global Poll findings show that when considering the WBG's **effectiveness**, a plurality of stakeholders in all regions identified infrastructure as the area of work in which the Bank is most effective.

The Global Poll findings demonstrated a wide range of views toward whether the WBG achieves **results** in respondents' countries. In the South Asia and Middle East/North Africa regions, approximately one-third of respondents have a somewhat negative view of the Bank's results (5.8, 5.9 mean scores on 10-point scale, respectively). In Sub-Saharan Africa and Latin America/Caribbean, views are a bit more positive (6.3 and 6.5, respectively) while views in Europe/Central Asia and East Asia/Pacific are the most positive (6.7 and 7.0, respectively). Views are less than positive in industrialized countries where respondents were asked about the WBG's results in developing countries (5.9).

When considering the WBG's ability to achieve results, it is important to understand stakeholder perceptions of how the Bank works on the ground. The Global Poll asked respondents whether they believed the WBG needed to work in **different and more innovative ways**. Large majorities across the globe agreed that the Bank needed to work differently to address poverty more effectively.

Despite this view, majorities in nearly all regions reported that they regard the WBG as **relevant** in their countries' development efforts. The view is held most strongly in the East Asia/Pacific, Sub-Saharan Africa, and Europe/Central Asia regions (7.2, 7.0, and 7.0 on 10-point scales, respectively). These are followed by the Latin America/Caribbean region (6.8), South Asia (6.3), and Middle East/North Africa (6.1). Industrialized countries are somewhere in the middle with a 6.6 rating on a 10-point scale.

## INCREASING THE WBG'S EFFECTIVENESS

When considering how the WBG can be more effective globally, it is important to reflect on where stakeholders' think the organization should focus its attention. The Global Poll asked stakeholders what they thought the WBG's top two objectives should be in their countries. The responses differed in many of the regions. About, or nearly, half of stakeholders in the East Asia/Pacific (52%), Latin America/Caribbean (47%), South Asia (46%), as well as in the industrialized countries (47%) believe that the WBG's top priority should be poverty reduction. There was a greater diversity of opinions in the regions of Europe/Central Asia, Middle East/North Africa, and Sub-Saharan Africa. Pluralities in Sub-Saharan Africa (39%) and Europe/Central Asia (26%) believe the Bank should focus efforts on infrastructure development, while in the Middle East/North Africa emphasis was placed on growth/strengthening the economy (33%).

### Two Main Objectives of the WBG's Work

*What do you think the two main objectives of the World Bank Group's work should be in your country? (open ended, top 12 listed)*

	East Asia/ Pacific	Europe/ Central Asia	Latin America/ Caribbean	Middle East/ North Africa	South Asia	Sub-Saharan Africa	Industrialized Countries*
Poverty Reduction	52	25	47	24	46	23	47
Infrastructure Development	20	26	21	18	37	39	16
Growth/Strengthening Economy	25	23	30	33	12	19	38
Improving Education	12	19	18	18	19	18	14
Improving Governance and Government	10	14	13	13	12	21	15
Environmental	23	5	8	6	7	3	10
Agriculture and Rural Development	11	7	4	9	14	18	7
Private Sector Development	8	20	6	9	4	15	9
Strengthening Civil Society	5	7	16	16	3	4	7
Health	3	7	5	5	13	7	6
Job/Employment/Labor	3	6	6	14	11	8	3
Reducing Corruption	6	6	6	6	4	10	7

*\*NOTE: Question was asked "in developing countries"*

### *Country Ownership*

In the past few years, the WBG has placed a high level of emphasis on country ownership. This emphasis drives the way the World Bank Group works with its clients now. With this in mind, it was critical to solicit opinions from stakeholders on whether they believe there is a high level of ownership of WBG supported projects/programs in their countries. This is one of the most important tracking questions in the Global Poll to measure how views within client countries change over time.

Opinion leaders in the East Asia/Pacific region are most positive about the level of ownership (6.8 mean score on a 10-point scale) while South Asia and the Europe/Central Asia regions are most negative (5.8 mean scores). Industrialized countries are quite negative as well when asked whether developing countries have a high level of ownership in projects/programs that are supported and financed by the WBG (5.0 mean score).

### *World Bank Group's Vision*

To be more relevant to the organization's client countries now and in the future, the President of the World Bank outlined a vision for the Bank that includes six strategic themes: (1) overcoming poverty and spurring growth in the world's poorest countries, (2) addressing special problems of post-conflict and fragile states, (3) offering competitive development solution for middle-income countries, (4) fostering regional and global public goods that transcend national boundaries and benefit multiple countries and citizens, (5) supporting development and opportunities in the Arab world, and (6) advancing the unique research and experience of World Bank knowledge to improve development outcomes.<sup>2</sup>

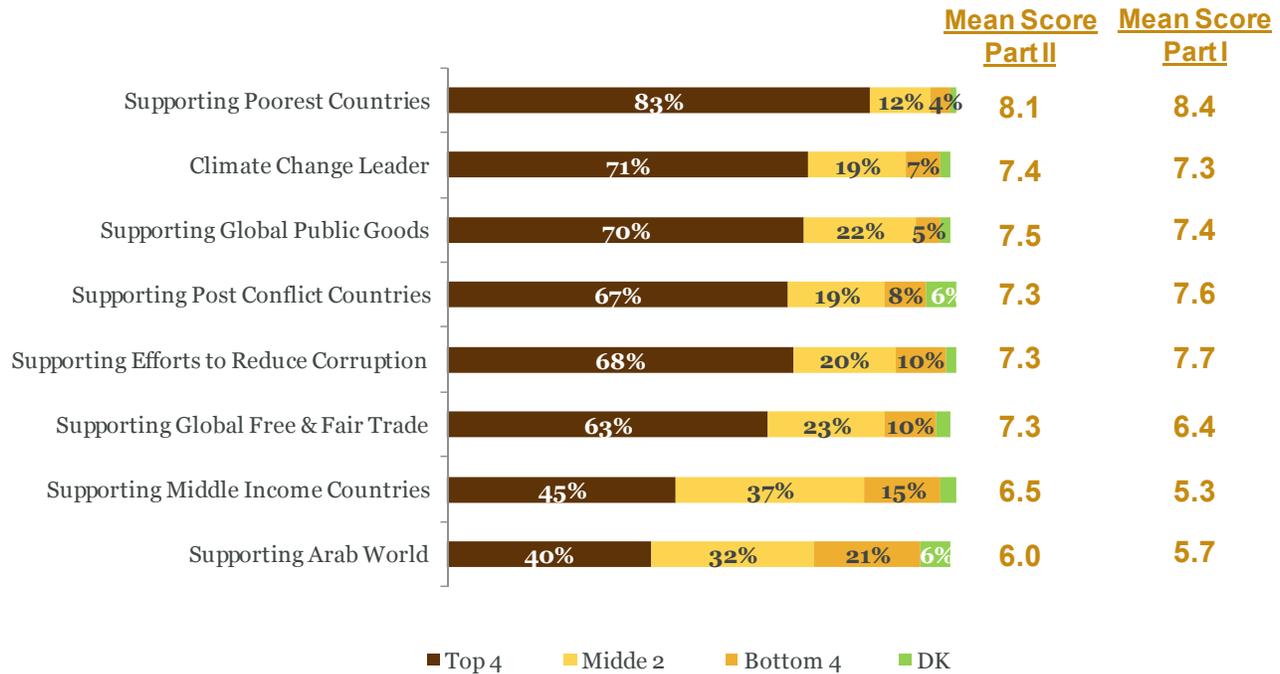
In addition to the six strategic themes, President Zoellick has articulated two additional agenda items: issues of good governance (i.e. reducing corruption), and supporting a free and fair global trading system. Opinion leaders were asked about the role the WBG should play in these areas as well.

---

<sup>2</sup> Zoellick, "An Inclusive and Sustainable Globalization," speech delivered 10 Oct. 2007.

## World Bank Group's Role in Key Areas

How much of a role do you think the WBG should play in each of the following areas?  
10-point scale, 10 is a leading role, 1 is no role at all



Research indicates that opinion leaders are most interested in seeing the WBG take a leadership role in supporting the economic and social development of the **world's poorest countries**. They also encourage the Bank to take a leadership role in supporting global public goods, reducing corruption to improve governance, and supporting post-conflict or fragile countries.

Recognition that **climate change** is a serious problem emerges clearly in the poll. Majorities in every region except Europe/Central Asia agree that it is a serious problem in their country, and that it must be taken into account when considering sustainable economic growth. With this as a backdrop, the poll findings indicate that no single institution stands out as a leader in climate change for respondents. Private sector and respondents' own governments are trusted the least to lead on climate change, while the United Nations and the World Bank Group are trusted about equally for most audiences (although respondents in industrialized countries think NGOs and the UN are more credible than the WBG to lead on climate change).

While research indicates that opinion leaders strongly support a leadership role for the WBG in **reducing corruption and improving governance** (7.0 mean score or above on a mean scale in industrialized countries and every region except Europe/Central Asia at 6.6), opinion leaders express a range of views on the WBG's role in terms of lending. A plurality (34%) of leaders in lower-income countries reported that the WBG should not provide funds to a country dealing with

corruption until the government takes serious actions to fight corruption. A plurality (48%) of leaders in industrialized countries reported that the WBG should provide funds ONLY outside of the government (for example to NGOs). Pluralities of middle-income country respondents are almost equally divided between these two strategies.

As with the institution's other initiatives, respondents support a leadership role for the Bank in **supporting free trade**, although middle-income (70%) and developing (61%) countries feel significantly stronger about this than industrialized country opinion leaders (53%). A full one-fifth of leaders in industrialized countries think the WBG should play little or no role at all in supporting free trade.

The Global Poll suggests less support for the WBG's role in taking a leading role in **the development of middle-income countries**. This area is supported most strongly by respondents in middle-income countries, least so by those in industrialized countries. Approximately 5 in 10 respondents in middle-income countries strongly support a leading role for the Bank (top 4 box) while approximately one-quarter of respondents in industrialized countries strongly support a leading role (top 4 box). In low-income countries, more than 4 in 10 support a leading role (top 4 box). In addition, data indicate that support for the WBG's **Arab World Initiative** is strongest in the Arab World but less so elsewhere. Except for respondents in the Middle East/North Africa region, this strategic priority received the smallest percentage of support from global leaders (65% of respondents in the Middle East/North Africa region have positive views toward this initiative (top 4 box) compared to less than 43% in all regions and industrialized countries — the exception being the Latin America/Caribbean region where 58% are positive about the Arab World Initiative).

#### *The WBG's knowledge and research*

In setting strategic objectives for the WBG, President Zoellick also highlighted the WBG's wealth of expertise and unique ability to produce and disseminate knowledge on economic and social development. He set an objective for the WBG to more effectively and broadly share this resource.

The majority of opinion leaders (from just over one-half to two-thirds in all regions) have positive views about the influence of WBG research on the global development agenda (top 4 box). The highest favorability ratings are in Sub-Saharan Africa (67%), Latin America/Caribbean (64%) and Middle East/North Africa (64%). Respondents in East Asia/Pacific are not quite as positive (57%), and respondents in South Asia (54%) and Europe/Central Asia (51%) are least positive about the influence of the WBG's research and knowledge.

The poll findings indicate that the research and knowledge products produced by the WBG are not reaching all world leaders — while roughly 80% say they use it frequently (31%) or occasionally (47%), nearly 20% of global opinion leaders say

they use the WBG’s knowledge products either rarely or never. This varies from one region to another; respondents in the Middle East/North Africa region were most likely to say they used the data frequently.

## WBG Behaviors

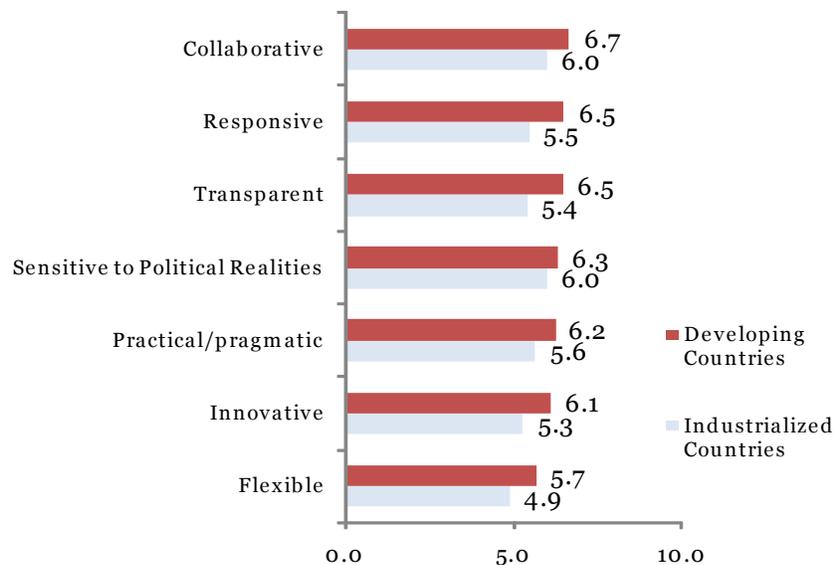
Opinion leaders were asked how much they agree or disagree with a number of descriptive statements about the WBG and its behaviors. The most positive responses (from respondents in both industrialized and developing countries) relate to how collaborative the WBG is in respondents’ countries.

Of the negative behaviors — slow and arrogant — few leaders believe these behaviors apply to the WBG, with only about one-quarter of global leaders (26% saying arrogant and 28% saying slow) agreeing. Industrialized country leaders have only a slightly more negative attitude than those in developing countries.

Respondents in industrialized countries have a much less positive attitude about WBG behaviors in their own countries than respondents in the WBG’s client countries.

### World Bank Group’s Behavior

*To what extent would you agree/disagree that the World Bank Groups is...? (mean scores listed)  
10-point scale, 10 is strongly agree, 1 is strongly disagree*



## **COMMUNICATION AND OUTREACH TO KEY CONSTITUENCIES**

There is a broad perception from all opinion leaders that the U.S. government has a great deal of influence over the WBG. More than 8 in 10 respondents globally reported that the U.S. government had strong influence (top 4 box). More than 5 in 10 respondents globally said that the EU has strong influence over the WBG (top 4 box). More than 4 in 10 said the UK government had a strong influence on the WBG (top 4 box).

In the past several years, questions have been raised about leadership of the Bretton Woods institutions, in particular the International Monetary Fund and the World Bank Group. This is not surprising at a time when new countries are emerging as economic centers of strength. In light of these issues, the Global Poll examined opinion leaders' views of leadership at the World Bank Group. The findings showed that a majority of global opinion leaders agree that it is important for the WBG's credibility that its presidential leadership selection process changes. Large majorities in every region agreed strongly with the need for change (top 4 box). In industrialized countries, the sentiment was even stronger.

The Global Poll indicates that opinion leaders globally believe that the WBG needs to increase awareness of the work it does in countries. Large majorities of respondents in every region and in industrialized countries believe that the WBG should increase awareness among the general population as well as among other opinion leaders. To most effectively reach opinion leaders, it is not surprising that the Internet and WBG Web sites are primary sources of information about the institution and its work. This will grow in all likelihood as the infrastructure improves around the world.