

World Bank Client Satisfaction Study 2013:

PRESENTATION ON FINDINGS

Draft for feedback and finalization

Responses from survey of **200** Clients and **500** Stakeholders
across Pakistan



World Leaders in Marketing Research & Consultancy

October 4th, 2013



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COMPOSITION OF THE TARGET POPULATION & SAMPLE ACHEIEVED

	Target Population		Sample Achieved	
Province	N =1684	(%)	N =711	(%)
Sindh	283	18%	150	22%
Khyber Pakhtunkhwa	103	6%	39	6%
Balochistan	52	3%	24	3%
Punjab	1130	71%	454	65%
Azad Jammu and Kashmir (AJK)	8	1%	8	1%
Gilgit-Baltistan (GB)	4	0%	3	0%
Federally Administered Tribal Areas (FATA)	11	1%	17	2%
Sectors				
Social Services	1003	61%	317	47%
Governance	226	14%	151	22%
Infrastructure	268	16%	102	15%
Trade and regional cooperation	117	7%	66	10%
Rural Development	25	2%	27	4%
Society and Development	3	0%	5	1%
Environment and Natural Resources	14	1%	10	1%
Public VS Private				
Public	764	46%	260	37%
Private	908	54%	437	63%
Client VS Stakeholder				
Stakeholder	915	54%	523	74%
Client	769	46%	188	26%

Field Work

Survey Agency: Field work for this survey was conducted by Gallup Pakistan, the Pakistani Affiliate of Gallup International.

Timelines of Field Work: Field Work started in late *July* and was completed in last week of *October 2013*.

Methodology : Multiple modes were used including Postal Interviews, Face to Face Interviews and Online Interviews.

Sample Size & Response Rate: Around *1600 Stakeholders and Clients* were approached. The List was provided by World Bank and additions were made by Gallup Pakistan. Response rate among clients was significantly lower than among Stakeholders.

Instrument: Questionnaire was adapted from the WB CSS Study held last year. Gallup Pakistan made required changes in the questionnaire to reduce complexity. Length of Interview was around 35-30 min .

For more details on Methodology, please contact Gallup Pakistan

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SWOT Analysis

(emerging thematic hypothesis which would be fine tuned before presentation)

Strengths:

1. DOUBTS ABOUT WB DIMINISH AS STAKEHOLDERS BECOME CLIENTS. IT IS GOOD NEWS THAT IMAGE IMPROVES AFTER EXPERIENCING THE 'PRODUCT'.
2. EVEN AMONG THE DOUBTERS WB IS SEEN AS THE BEST AMONG THE GROUP IN ITS CATEGORY.

Weaknesses:

1. Clients are uncertain and apprehensive about whether WB services are 'good value for money'.
2. Both Stakeholders and clients have divided views about the effectiveness of WB and its Programs.

Continued..... SWOT Analysis

Opportunities:

1. There is considerable desire among stakeholders and clients to engage and share their 'priority areas ' with the World Bank. In this initial exercise they have identified EDUCATION and ENERGY as top two priorities for support by the WB.

At this point we can only indicate that at the time of Presentation we shall make two one page slides to initiate discussion on Strengths, Weaknesses, Threats and Opportunities (a rudimentary SWOT).

Apparently the WB will find stakeholders willing to engage with it, if it launched a meaningful process to include a wide set of stakeholders in its deliberation process.

2. The WB is seen as the best among the category of development assistance agencies. Its REPUTATION in terms of competence and trust seems better than others in the group. It has room to exercise leadership role in the group.

HIGHLIGHTS

SECTION 1

1.1 Awareness of World Bank/IFC: Clients and Stakeholders are well-acquainted with the Bank/IFC

The majority of respondents were aware of the World Bank's presence and work in Pakistan. A significant proportion of the stakeholders (84%) are somewhat-to-completely familiar about the Bank's presence and operations, while an overwhelming 97% of the Clients are cognizant of the Bank's work.

1.2 Awareness of World Bank/IFC: Differential awareness levels amongst Stakeholders and Clients

Stakeholders and Clients differed in the awareness vis-à-vis IFC. While a 56% majority of the Clients were aware of the IFC, only 25% of the Stakeholders reported being aware of the institution. The majority of the stakeholders – 71 % - lacked awareness about the IFC..

1.2.1 Overall Effectiveness: Positive Appraisal by the Clients, while Stakeholders remain uncertain

Stakeholders and Clients differed in their assessment of the World Bank's effectiveness in Pakistan. While a significant 42% of the clients rated the World Bank's performance in Pakistan as effective, only 21% of the stakeholders shared this positive sentiment. A slight majority of the stakeholders – 37% - rated the World Bank as "ineffective".

1.2.2 World Bank Performance Relative to other Donor Agencies: First Among Equals

Both Stakeholders and Clients viewed the World Bank favourably when compared with other donor agencies in Pakistan. 41% of the Stakeholders perceive the World Bank as significant when compared with other donor agencies, while a substantial 56% of the clients shared the same sentiment.

1.3 Detailed Attributes of World Bank: Mixed Scorecard

Stakeholders and Clients varied in their responses to queries regarding the detailed attributes of the World Bank's work in Pakistan. While a 49% majority of the clients felt that the Bank plays a positive role in Pakistan's development, 34% stakeholders disagreed with this assertion. However, majority of the Stakeholders (35%) and clients (56%) felt that the Bank treats its clients and relevant stakeholders with respect.

1.4.1 Significance of the World Bank's aid in Pakistan's development: Indecisive Stakeholders and Appreciative Clients

Stakeholders and Clients reported contrasting, evaluations of the World Bank's contribution to Pakistan's development agenda. 27% of the Stakeholders consider the World Bank's assistance as significant to Pakistan's development, 39% of the clients agree with this assessment. However, both sets of respondents seemed reluctant to swing decisively in one direction while giving their appraisal.

1.4.2 Desired involvement of the World Bank in Pakistan's future development agenda: Robust Demand for Continued Engagement

Stakeholders and Clients were unanimous in their demand for future assistance from the World Bank. A whopping 72% of the Stakeholders and 81% of the clients expressed the desire to have the Bank play a significant role in Pakistan's future development.

1.5.1 Reasons of Failure: Extrinsic Challenges – Governance and Political Pressures

Respondents concurred that World Bank's challenges are largely extrinsic. 33% of the Stakeholders and 40% of the Clients agree that poor governance undermines the effectiveness of the Bank's reforms. Similarly, 36% of the Stakeholders and 28% of the Clients believe that political pressures and obstacles interfere with the Bank's work.

1.5.2 Advice for Future: Improve Expertise and Reduce Complexities

The majority of the Stakeholders and Clients agreed that improving the quality of experts to match Pakistan's specific challenges (38% stakeholders and 41% clients), and reducing the complexity of obtaining World Bank financing (28% stakeholders and 31% clients) were two important strategies for making the World Bank more effective in Pakistan.

1.6 Preferred Priorities for World Bank as Described by Respondents: Energy and Education

Stakeholders and Clients reached a consensus around the issues seen as priority areas for the development agenda. Energy was identified by 36% of the stakeholders and 40% of the clients, while Education and Skills Enhancement was chosen by 68% of the stakeholders and 56% of the clients as the two sectors that must be prioritized by the World Bank as the focus of its attention and resources in Pakistan.

1.7 Delivery Mechanisms: Local Government and Academia

Significant proportions of Stakeholders and Clients concurred on the channels for delivering aid and assistance in Pakistan. Local Government was singled out by 41% of the stakeholders and 44% of the Clients as preferred mediums for transferring aid. Academia/think tanks/and research institutes were singled out by 30% of the stakeholders and 28% of the clients.

SECTION 2

2.1 Strategy Awareness: Well-acquainted clients and unfamiliar stakeholders

Stakeholders and clients differed in the familiarity with the World Bank's Country Partnership Strategy. While the majority of the clients – 78% - were somewhat-to-completely familiar with the CPS, a substantial 47% of the stakeholders were unfamiliar with the program.

2.2 Direction of the Strategy: Supportive Clients and Critical Stakeholders

Stakeholders and clients diverged in their assessments of the priorities for CPS. While a substantial 72% of the clients evaluated the CPS as having the right priorities, 61% of the stakeholders disagreed with priorities of the program.

2.3 Performance of Government: Critical Stakeholders and uncertain clients

Stakeholders and clients view the Government's performance differently. Majority of the stakeholders saw the government failing on all counts. While the majority of clients concurred in the assessment that the Government had failed to improve economic governance and security, they were uncertain-to-positive in their assessment regarding the Government's scorecard on human and infrastructure development.

2.4 World Bank Performance: Critical Stakeholders and Appreciative Clients

Stakeholders and clients viewed the World Bank's performance differently. Majority of the stakeholders rated the Bank poorly on the four tested variables. Contrarily, Clients were more appreciative and optimistic regarding the World Bank's performance across the same variables, and rated the Bank's performance between neutral and good.

2.5 Priorities for future Country Partnership Strategy: Robust Demand for Increased Assistance in all areas

Stakeholders and Clients were unanimous in their verdict on the future priority areas for the next CPS. Substantial majorities of respondents deemed all the tested variables as “significant” priority areas that must be incorporated into the next Country Partnership Strategy.

SECTION 3

3.1 Views about Cash Transfer and Social Protection: Stakeholders and Clients welcome all measures

When quizzed about their views on the proposed and adopted measures for cash transfer and social protection, stakeholders and clients responded positively. The majority of the respondents agreed with the proposed measures and their anticipated benefits.

3.2.1 Usage of Knowledge and Research: Sporadic Stakeholder usage and frequent client consultation

Stakeholders and clients differed in their usage of knowledge and research produced by the World Bank. Majority of the stakeholders (60%) rarely or never rely on the Bank’s publications during the course of their work. In contrast, 36% of the clients use this knowledge and research on a weekly-to-monthly basis, while 43% rely on this data at least a few times a year.

3.2.2 Overall Knowledge and Knowledge and Research: Appreciative clients and critical stakeholders

Assessments of the World Bank's knowledge and research circulated in Pakistan varied between clients and stakeholders. While the clients were more receptive to and appreciative of the World Bank's knowledge and its publications, stakeholders disagreed.

3.2.3 Gauging Effectiveness: Disengaged Stakeholders versus Engaged Clients

Stakeholders and clients assessed the effectiveness of the World Bank's knowledge and research differently. The majority of the stakeholders agreed that the Bank's knowledge and research are not effective. Conversely, clients were more upbeat in the assessment of these variables in different tested dimensions.

SECTION 4

4.1 Sources Of Information for Stakeholders/Clients: News and Information Media is the main medium of information for stakeholders and clients.

For Stakeholders and Clients, local newspapers are the principal source of information about development issues and narratives for stakeholders (69%) and clients (68%). As a secondary source, 50% of the stakeholders rely on Local Television Channels, while 38% of the clients rely on Internet to access information about development issues.

4.2 Access to World Bank: International and Country Websites are the main delivery mechanism for online access

When quizzed about their preferences for accessing information about the World Bank online, the majority of the stakeholders (47%) and clients (48%) utilize the Bank's country website. The World Bank's main website was the second most frequently accessed online portal.

4.2 Access to World Bank: Clients Access World Bank's websites, while stakeholders are divided

When quizzed about their preferences for accessing information about the World Bank online, the majority of the clients (48%) utilize the Bank's country and main website. While 45% of the stakeholders access the country website, a substantial 51% do not access the Bank's online portals.

4.3 Views about World Bank Website: Satisfied Clients and Fragmented Stakeholders

When asked to share their experience of accessing and using the World Bank website, and other informational interactions, clients and stakeholders differed markedly in their responses. While the clients and stakeholders concurred with the positive assessment of the navigability, usefulness, and responsiveness of the website, stakeholders remain unsure about general informational experiences with the Bank.

4.4 Preferred Way to Access World Bank: Online Engagement Preferred

Both stakeholders and clients expressed a preference for online engagement. 42% of the stakeholders and 43% of the clients would prefer engaging with the Bank through this medium. A strong 42% of the clients also prefer direct contact with the Bank.

4.5 World Bank Access to Information Policy: Stakeholders and Clients are in the dark

Stakeholders and clients are unequally unaware of the Bank's Access to Information Policy. Substantial majorities of the stakeholders (81%) and Clients (66%) expressed a lack of knowledge about the Bank's policy.

4.5 World Bank Access to Information Policy: Absence of engagement for Stakeholders and Clients

Both stakeholders and clients asserted a serious lack of engagement with the World Bank over the last year. 85% of the stakeholders and 72% of the clients have had made no informational requests from the Bank on its activities in the past year.

4.5 World Bank Access to Information Policy: Satisfied Stakeholders and Clients

For the minority of the stakeholders and clients, who did access and retrieve information from the Bank, the experience was satisfactory. Outright majorities of stakeholders (80%) and clients (94%) were able to obtain the information they sought.

4.6 Credibility of World Bank: Direct Information from the Bank preferred

Direct informational flow and engagement from the World Bank is preferred by the stakeholders and clients. Significant majority of stakeholders and clients prefer getting information directly from the World Bank. 64% of the stakeholders and 67% of the clients shared this preference.

4.7 Exposure to The World Bank: Multi-channel exposure for stakeholders and clients

Stakeholders and clients get exposed to the World Bank and its activities through multiple and different channels. A substantial 71% of the stakeholders, and a significant 35% of the clients reported “Observer” as their main source of exposure to the Bank in Pakistan. Predictably, clients had substantial exposure through multiple channels, most notably through the Use of World Bank reports/data (42%) and Collaboration as part of professional work (45%).

SECTION 5

5.1 Opinion about World Bank’s work in Pakistan: Positive Assessment of the Bank’s operations in Pakistan by the clients

Clients hold positive perceptions about the nature of the Bank’s operations in Pakistan, as well as their own experiential interactions with the Bank. A 55% majority of the clients believes that the Bank treats its clients and stakeholders with respect. and 55% of the clients believe that the Bank works efficiently by selecting and applying its strategic and comparative advantage.

5.2 World bank as an effective development partner: An effective and influential organization

Clients rate the Bank highly on its organizational practices and its influence within the development sector. Respondents saw the Bank’s collaboration with the government (68%) and other agencies (49%) as significant. As engaged partners, the clients rated the Bank’s Responsiveness (48%), Following through on commitments (50%), Openness ((49%), and Straightforwardness (49%) as significant.

5.3 Effectiveness of World Bank's work in Pakistan: Governance and Social Development seen as crucial sectors

Clients identified two major sectors where the Bank is playing a significant role: Governance and Social Development. Financial sector (stability and access to financial services) (35%), Economic Growth (32%), Public sector reforms (30%), and Public Financial Management (30%) were identified as areas of effectiveness and strength for the Bank. Gender (37%), Poverty reduction (39%) and Agricultural Development (33%) received one-third support in the Social Development sector.

5.4.1 Well preparedness of World Bank Staff: World Bank staff is highly-rated

Clients consider the World Bank's staff to be well-prepared to assist Pakistan in overcoming its development-related challenges. A substantial 57% of the clients rated the Bank's staff as "significant", when asked to assess their preparedness to successfully tackle Pakistan's development issues.

5.4.2 Procurement Policies: Clients are partially acquainted

When asked to report their level of familiarity with the World Bank's procurement policies, the majority of the clients – 39% - maintained that they were familiar with the policies.

5.4.2 Procurement Policies: Procurement Policies Receive Client Support

Clients are satisfied with the Bank's procurement policies. Of the clients who were acquainted with the Bank's procurement policies, the majority – 59% - rated these policies as effective when compared with alternative procurement methods.

5.4.2 Procurement Policies: Lack of consensus on improving the effectiveness of procurement policies

Client opinions failed to crystallize around a specific measure for improving the effectiveness of the Bank's procurement policies. While nearly one-third of the clients (30%) suggested making e-procurement a standard practice, the majority (40%) abstained from recommending a measure.

5.5 Views about World Bank Policy Instruments: Financial Resources rated as highly valuable

Clients overwhelmingly identified Financial Resources as the World Bank's Greatest Strength, and highly valuable for Pakistan. The majority of clients (45%) identified Financial resources as having the greatest value,. Technical assistance (20%) received strong support as the activity with the second greatest value in Pakistan.

5.6.1 Reducing Poverty: Fragmented Opinions

Clients held fragmented and even polarized opinions when it came to assessing the most and least effective instruments in battling poverty. The majority of the clients – 51% - abstained from identifying the most effective instrument, although "Investment Project Financing" (37%) received significant support as the most effective instrument. "Capacity Development" received 27% support as the most effective, and 26% support as the least effective instrument.

5.6.2 Environment and Social Sustainability: Safeguard Policies are mostly effective

When asked to assess whether the Bank's 'safeguard policies' help achieve environmental and social sustainability, more than one-third of the clients – 39% - rated these policies as "significant" in achieving the stated objectives.

5.6.2 Environment and Social Sustainability: Safeguard Policies deliver sustainable development

Clients view the World Bank's safeguard policies favorably. When asked to assess whether these policies assist in delivering sustainable development, a slight majority of the clients – 35% - saw them as “significant” in attaining this objective.

5.6.3 World Bank Knowledge and Research: Valuable sources of technical input

Clients view the World Bank's knowledge and research as valuable sources of technical input and advice. 52% of the clients see these resources as providing relevant information on global good practices, while 44% of the clients consider this knowledge and research as providing feasible recommendations.

5.6.3 World Bank Knowledge and Research: Source of significant contribution to national development

Clients view the World Bank's knowledge and research as valuable for Pakistan's overall development. A 48% majority of the respondents rated these resources as “significant” contributors to Pakistan's development agenda.

5.6.3 World Bank Knowledge and Research: Technically Superior Resource

Clients give high ratings to the technical quality of the knowledge and research produced by the World Bank. A substantial 69% majority of the respondents rated these resources as having “High Technical Quality”.

5.6.4 Financial Services: Meet Knowledge and Aid Needs

For most clients, the World Bank's assistance meets Pakistan's technical and financial needs. 37% of the clients believe that the Bank's financial instruments meet Pakistan's financial needs. An even higher 40% believe that the Bank meets Pakistan need for knowledge services through its technical assistance and research publications.

5.6.5 Mobilizing Outside Support: Partial Acknowledgement of the Bank's Convening Power

Clients were uncertain when quizzed about their views on the World Bank's ability to mobilize and procure external assistance for Pakistan. About one-third (37%) of the respondents rated the Bank's convening power as effective, while the remaining clients remained uncertain or unconvinced.

5.6.6 Non-Bank Expertise: Uncertain Clients

Clients were uncertain about the Bank's ability to facilitate linkages to non-Bank resources. 31% of the clients remain chose to remain non-committed, while 17% of the clients considered this ability ineffective (17%), or abstained from responding (29%).

5.6.7 Seeking Global Development agenda: Clients Demand Robust Bank Involvement

Clients were unanimous in their views on the extent to which the Bank should seek to influence the global development agenda. A substantial 67% of the clients concurred that the Bank should play an active role in shaping and influencing the global development agenda.

5.6.8 World Bank's value for money: Uncertain Clients

Clients did not provide a definitive assessment of whether Pakistan received value for its money in accessing the World Bank's services and resources. Nearly one-third (31%) asserted that the country had received significant returns, while a significant proportion (22%) abstained from responding, or remained noncommittal (28%).

SECTION 6

6.1 Overall Direction of Country: Divided Stakeholders and Uncertain Clients

Stakeholders and clients were largely divided in their opinions on whether the country is headed in the right direction. While the majority of the stakeholders (46%) think the country is headed in the wrong direction, a sizable proportion (38%) disagrees. Similarly, while 39% of the clients are optimistic about the country's future, a sizable chunk – 36% - thinks that Pakistan is headed in the wrong direction.

6.2 Direction of the country in tackling development issues: Divided Responses

Stakeholders and clients were divided in the assessment of where the country is headed given its development-related challenges. 45% of the stakeholders think the country is headed in the wrong direction, but 36% disagree and think the country is headed in the right direction. Similarly, while 42% of the clients think the country is headed in the right direction, 33% disagree with this assessment.

Section 1

Overall Attitude

Section 1

Overall Attitude :

- 1.1: Awareness of World bank/IFC
- 1.2: Effectiveness of World Bank
- 1.3: Detailed attributes of World Bank
- 1.4: Aiding Pakistan in its Development Goals
- 1.5: Reason for failure and advise for future
- 1.6: Preferred priorities for World Bank as
described by respondent
- 1.7: Delivery Mechanism

Section 1: Overall Attitude

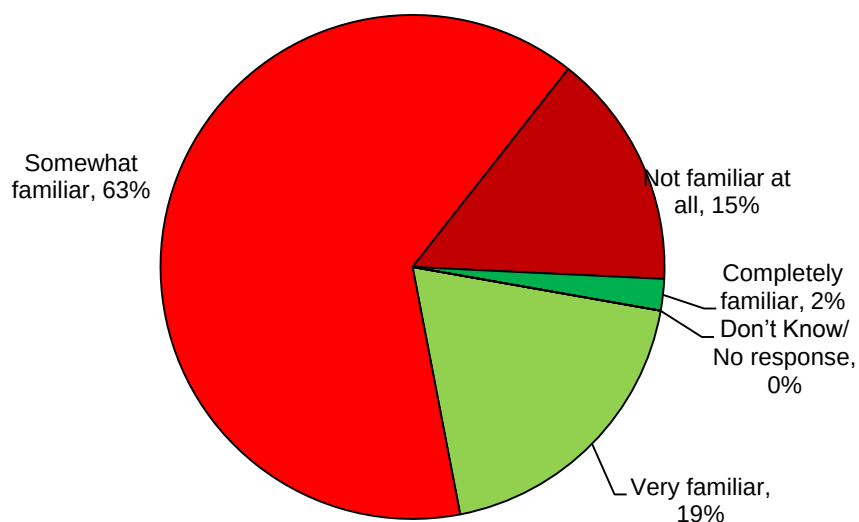
1.1 AWARENESS OF THE WORLD BANK/IFC

1.1 Awareness of World Bank/IFC: Clients and Stakeholders are well-acquainted with the Bank/IFC

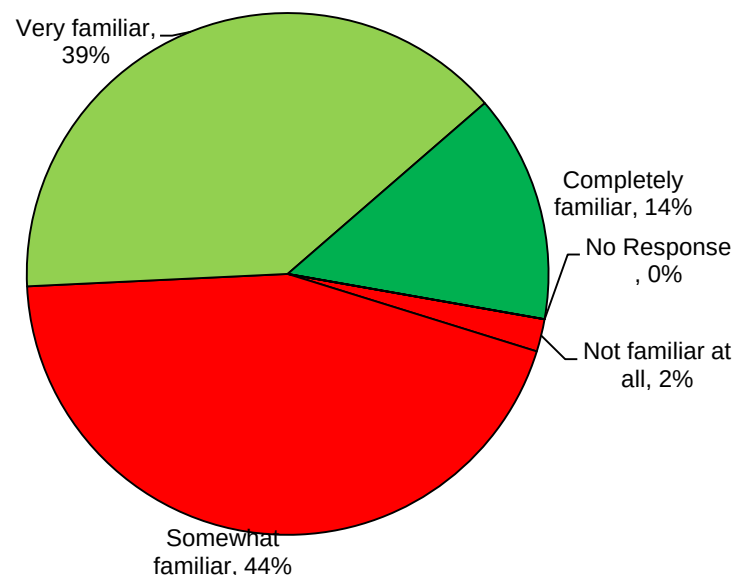
Q 7: How familiar are you with the scope of activities of World Bank in Pakistan?

The majority of respondents were aware of the World Bank's presence and work in Pakistan. A significant proportion of the stakeholders (84%) are somewhat-to-completely familiar about the Bank's presence and operations, while an overwhelming 97% of the Clients are cognizant of the Bank's work.

Stakeholders



Clients

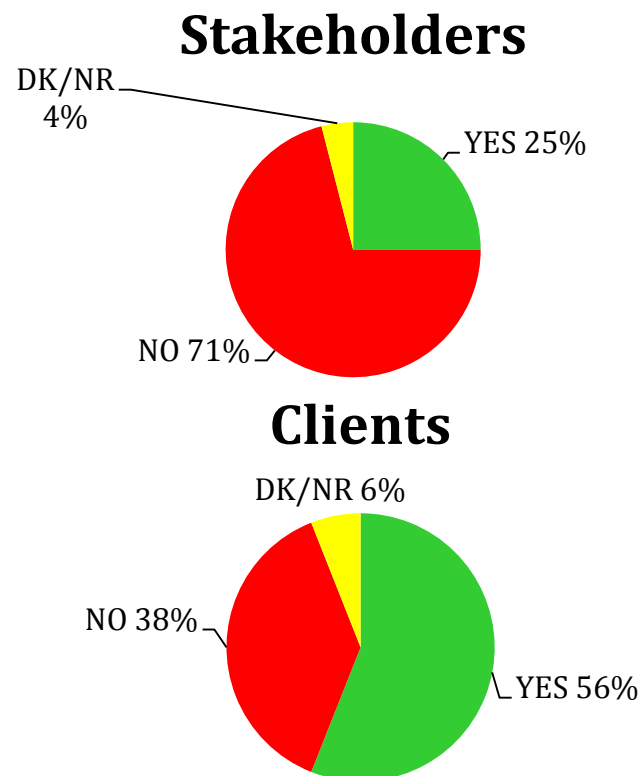


1.1 Awareness of World Bank/IFC: Differential awareness levels amongst Stakeholders and Clients

Q 14: Are you aware of the IFC, the private sector arm of the World Bank Group?

Stakeholders and Clients differed in the awareness vis-à-vis IFC. While a **56%** majority of the Clients were aware of the IFC, only **25%** of the Stakeholders reported being aware of the institution. The majority of the stakeholders – **71 %** - lacked awareness about the IFC.

Awareness of IFC		
	Stakeholder	Client
YES	25%	56%
NO	71%	38%
DK/NR	4%	6%



Section 1: **Overall Attitude**

1.2 EFFECTIVENESS OF THE WORLD BANK

1.2.1 Overall Effectiveness

1.2.2 The World Bank's Performance relative to other donor agencies

1.2 Effectiveness of World Bank

1.2.1 Overall Effectiveness: Positive Appraisal by the Clients, while Stakeholders remain uncertain

Stakeholders and Clients differed in their assessments of the World Bank's effectiveness in Pakistan. While a significant **42%** of the clients rated the World Bank's performance in Pakistan as effective, only **21%** of the stakeholders shared this positive sentiment. A slight majority of the stakeholders – **37%** - rated the World Bank as “ineffective”.

Percent of Respondents (%)

Q 8: Overall, please rate your impression of the World Bank's effectiveness in Pakistan, on a ten point scale?	Stakeholders	Client
Not effective	37%	16%
Neutral (Neither non-effective nor effective)	20%	35%
Effective	21%	42%
Don't Know/ No Response	11%	7%
Total	100%	100%

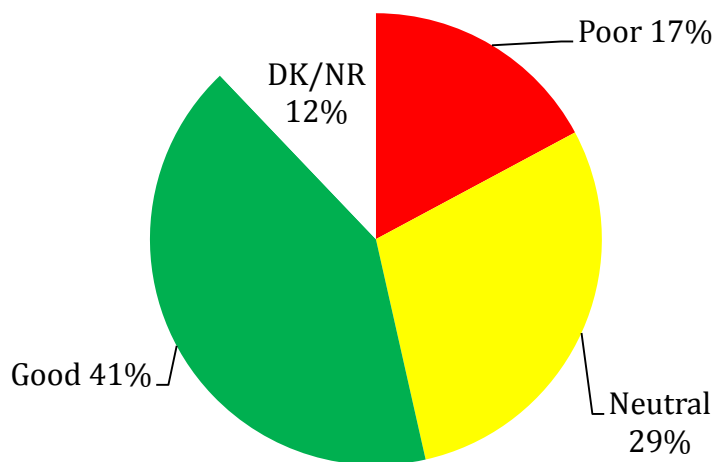
1.2 Effectiveness of World Bank

1.2.2 World Bank Performance Relative to other Donor Agencies: First Among Equals

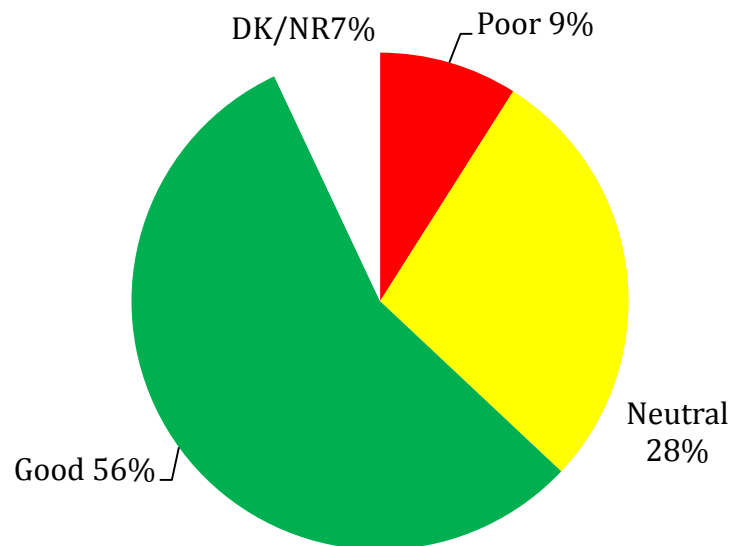
Question: How would you rate the World Bank's performance relative to other donor agencies such as ADB, USAID, DFID etc. on a ten points scale? *(Question 20 from Questionnaire)*

Both Stakeholders and Clients viewed the World Bank favourably when compared with other donor agencies in Pakistan. **41%** of the Stakeholders perceive the World Bank as good when compared with other donor agencies, while a substantial **56%** of the clients shared the same sentiment.

Stakeholders



Clients



Section 1: Overall Attitude

1.3 DETAILED ATTRIBUTES OF WORLD BANK

1.3 Detailed Attributes of World Bank: Mixed Scorecard

*Stakeholders and Clients varied in their responses to queries regarding the detailed attributes of the World Bank's work in Pakistan. While a **49%** majority of the clients felt that the Bank plays a positive role in Pakistan's development, **34%** stakeholders disagreed with this assertion. However, majority of the Stakeholders (**35%**) and clients (**56%**) felt that the Bank treats its clients and relevant stakeholders with respect.*

Percent of Respondents (%)

Q 11: To what extent do you agree with the following statements about the World Bank's work in Pakistan, on a ten point scale?		Stakeholders	Client
Overall the world Bank currently plays a relevant role in development in Pakistan	Disagree	34%	18%
	Neutral (Neither agree nor disagree)	29%	31%
	Agree	33%	49%
	Don't Know/ No response	4%	3%
	Total	100%	100%
The World Bank treats clients and stakeholders in Pakistan with respect	Disagree	29%	16%
	Neutral (Neither agree nor disagree)	28%	23%
	Agree	35%	56%
	Don't Know / No response	8%	4%
	Total	100%	100%

Section 1: Overall Attitude

1.4 AIDING PAKISTAN IN IT'S DEVELOPMENT GOALS

- 1.4.1 Significance of the World Bank's aid
in Pakistan's development
- 1.4.2 Desired involvement of the World
Bank in Pakistan's future
development agenda

1.4 Aiding Pakistan in its Development Goals

1.4.1 Significance of the World Bank's aid in Pakistan's development: *Indecisive Stakeholders and Appreciative Clients*

Stakeholders and Clients reported contrasting, evaluations of the World Bank's contribution to Pakistan's development agenda. 27% of the Stakeholders consider the World Bank's assistance as significant to Pakistan's development, 39% of the clients agree with this assessment. However, both sets of respondents seemed reluctant to swing decisively in one direction while giving their appraisal.

Percent of Respondents (%)

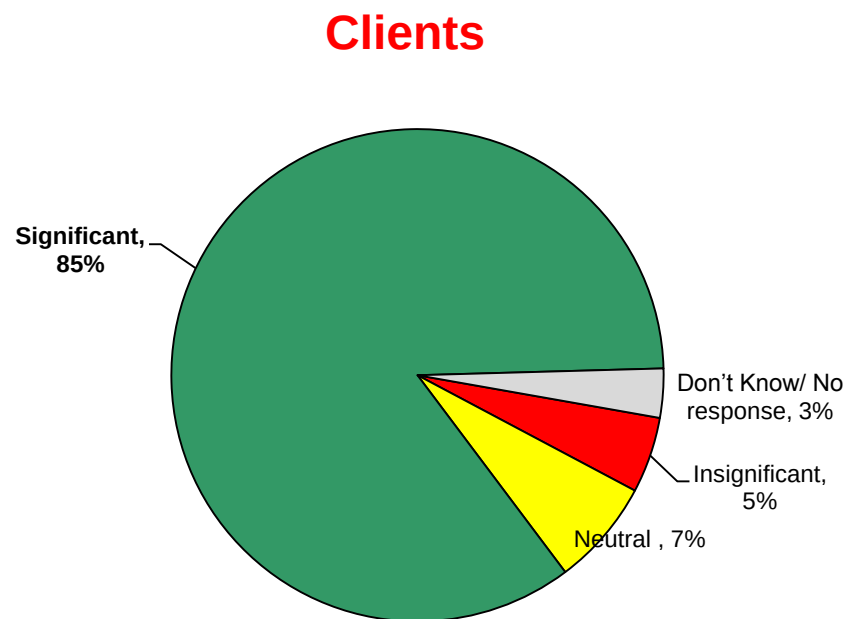
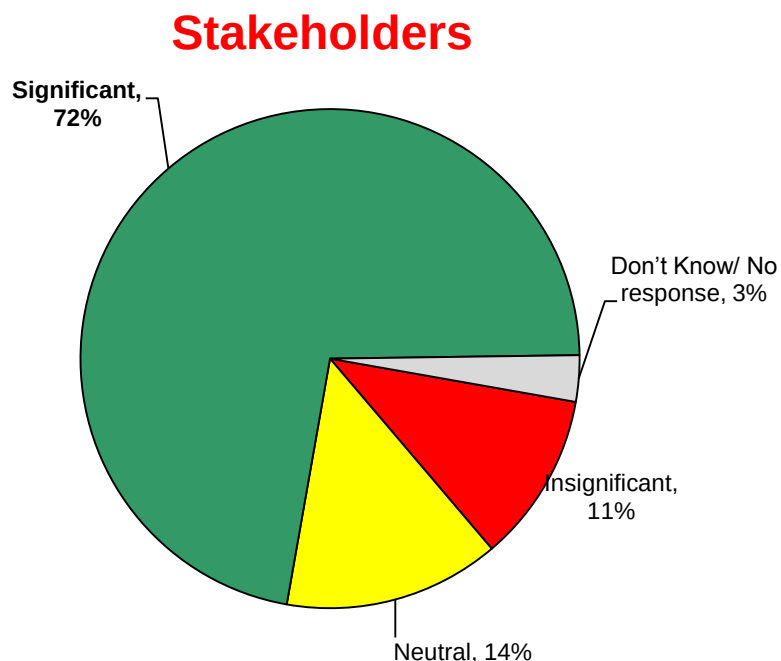
Q 13: To what extent does the World Bank's work help to achieve Pakistan's development results, on a ten point scale?	Stakeholders	Client
Insignificant	34%	15%
Neutral (Neither insignificant nor significant)	30%	38%
Significant	27%	39%
Don't know/ No Response	9%	7%
Total	100%	100%

1.4 Aiding Pakistan in its Development Goals

1.4.2 Desired involvement of the World Bank in Pakistan's future development agenda: Robust Demand for Continued Engagement

Question: How significant a role do you believe the World Bank SHOULD play in Pakistan's development in the near future, on a ten point scale? *(Question 19 from Questionnaire)*

Stakeholders and Clients were unanimous in their demand for future assistance from the World Bank. A whopping **72%** of the Stakeholders and **81%** of the clients expressed the desire to have the Bank play a significant role in Pakistan's future development.



Section 1: Overall Attitude

1.5 REASONS FOR FAILURE AND ADVISE FOR FUTURE

1.5.1 Reasons of Failure

1.5.2 Advise for future

1.5 Reason for Failure and Advise for Future

1.5.1 Reasons of Failure: Extrinsic Challenges – Governance and Political Pressures

Respondents concurred that World Bank's challenges are largely extrinsic. **33%** of the Stakeholders and **40%** of the Clients agree that poor governance undermines the effectiveness of the Bank's reforms. Similarly, **36%** of the Stakeholders and **28%** of the Clients believe that political pressures and obstacles interfere with the Bank's work.

Q 12: Which of the following TWO reasons would you cite for the failure or slow pace of World Bank's assisted reforms?	Stakeholders	Client
The World Bank works too slowly	7%	16%
Problems faced by the Government in performing efficiently	33%	40%
There is not an adequate level of citizen/civil society participation in programs	28%	26%
Poor stakeholder dialogue and coordination	14%	11%
The World Bank does not do adequate follow through/follow-up	14%	7%
Political pressures and obstacles	36%	28%
Reforms are not well thought out in light of country challenges	27%	28%
The World Bank is not sensitive enough to political/social realities on the ground	25%	24%
Strict compliance requirements with the World Bank's environment and social safeguards policies	6%	15%
Other	4%	3%
Total	100%	100%

1.5 Reason for Failure and Advise for Future

1.5.2 Advice for Future: Improve Expertise and Reduce Complexities

The majority of the Stakeholders and Clients agreed that improving the quality of experts to match Pakistan's specific challenges (**38% stakeholders and 41% clients**), and reducing the complexity of obtaining World Bank financing (**28% stakeholders and 31% clients**) were two important strategies for making the World Bank more effective in Pakistan.

Q 22: Which of the following SHOULD the World Bank do to make itself of greater value to Pakistan?	Stakeholders	Client
Improve the quality of its experts as related to Pakistan's specific challenges	38%	41%
Reduce the complexity of obtaining World Bank financing	28%	31%
Focus primarily on advocacy issues	12%	7%
Improve the competitiveness of its financing compared to markets (e.g., cost, timeliness, and other terms)	15%	14%
Increase decentralization to the provinces	21%	20%
Ensure greater selectivity in its work	18%	14%
Provide more adequate data/knowledge/statistics/figures on Pakistan's economy	15%	14%
Offer more innovative financial products	9%	19%
Offer more innovative knowledge services	15%	11%
Increase availability of Fee-Based services	5%	5%
Shift its focus from environmental and social safeguards to environmental and social sustainability	8%	11%
Work faster	4%	5%
Others	3%	2%
No response	1%	1%
Total:	100%	100%

Section 1: Overall Attitude

1.6 PERFERRED PRIORITIES FOR WORLD BANK AS DESCRIBED BY RESPONDENTS

1.6 Preferred Priorities for World Bank as Described by Respondents:

Energy and Education

Stakeholders and Clients reached a consensus around the issues seen as priority areas for the development agenda. **Energy** was identified by **36%** of the stakeholders and **40%** of the clients, while **Education and Skills Enhancement** was chosen by **68%** of the stakeholders and **56%** of the clients as the two sectors that must be prioritized by the World Bank as the focus of its attention and resources in Pakistan.

Q 6: In terms of the World Bank's stated objectives of reducing extreme poverty and promoting shared prosperity, in which sectors do you believe the Word Bank should focus most of its attention and resources in Pakistan?	Stakeholders	Client
Energy	37%	39%
Education and skill enhancement	66%	59%
Economic growth	13%	20%
Job creation/employment	20%	13%
Natural resource management (e.g., oil, gas, mining)	6%	9%
Agricultural development and irrigation	18%	18%
Law and justice (e.g., judicial system)	17%	15%
Health	17%	15%
Anti-corruption and transparency	20%	10%
Foreign direct investment	5%	4%
Domestic private sector development	6%	6%
Disaster management	3%	3%
Public financial management (e.g., public expenditure, fiscal system reform, accounting, auditing)	3%	2%
Water and domestic and industrial sanitation	3%	3%
Public sector and civil service reform	7%	10%

Continue-----

...Continue...

Sample size: Stakeholders (n= 523); Clients (n= 188)

Page 38

Percent of Respondents (%)

	Stakeholders	Client
Equality of opportunity (i.e., equity)	3%	7%
Communication network	3%	3%
Food security	4%	5%
Regulatory framework	2%	3%
Transport (e.g., roads, bridges, transportation)	3%	10%
Financial sector (stability and access to financial services)	3%	6%
Trade and exports	10%	6%
Climate change (e.g., mitigation, adaptation)	1%	1%
Urban development (such as housing and planning)	2%	3%
Gender	2%	2%
Social protection (e.g., pensions, targeted social assistance)	5%	8%
Youth development	11%	9%
Regional cooperation	1%	3%

* Multiple response question so the survey exceed 100%

Section 1: Overall Attitude

1.7 DELIVERY MECHANISM

1.7 Delivery Mechanisms: Local Government and Academia

Significant proportions of Stakeholders and Clients concurred on the channels for delivering aid and assistance in Pakistan. Local Government was singled out by **41%** of the stakeholders and **44%** of the Clients as preferred mediums for transferring aid. Academia/think tanks/and research institutes were singled out by 30% of the stakeholders and 28% of the clients.

Percent of Respondents (%)

Q 10: Which TWO of the following groups should receive more collaboration from the World Bank in order to improve results in Pakistan?	Stakeholders	Client
Private sector	19%	20%
Academia/think tanks/research institutes	30%	28%
Local Government	41%	44%
Provincial government	16%	30%
Community Based Organizations (CBOs)	17%	17%
NGOs	18%	15%
Citizens benefitting from World Bank's support/projects / programs	11%	20%
Youth Organizations	12%	5%
Donor community	3%	4%
International foundations	6%	3%
Media	6%	5%
Faith based organizations	3%	1%
Local foundations	4%	5%
Parliamentarians/major political parties	7%	1%

* Multiple response question so the sum may exceed 100%

Sample size: Stakeholders (n= 523); Clients (n= 188)

Source: Gallup Pakistan - World Bank CSS 2013 **Page 41**

Section 2

Views on Country Partnership Strategy

Section 2

Views on Country Partnership Strategy:

- 2.1: Strategy Awareness
- 2.2: Direction of the Strategy
- 2.3: Performance of Government
- 2.4: World Bank Performance
- 2.5: Priorities for future Country Partnership Strategy

Section 2: **Views on Country Partnership Strategy**

2.1 STRATEGY AWARENESS

2.1 STRATEGY AWARENESS: Well-acquainted clients and unfamiliar stakeholders

Stakeholders and clients differed in the familiarity with the World Bank's Country Partnership Strategy. While the majority of the clients – 78% – were somewhat-to-completely familiar with the CPS, a substantial 47% of the stakeholders were unfamiliar with the program.

Percent of Respondents (%)

Q 36: How familiar are you with the World Bank's Country Partnership Strategy for Pakistan?	Stakeholders	Client
Not familiar at all	47%	18%
Somewhat familiar	44%	54%
Very familiar	5%	21%
Completely familiar	0%	3%
Don't Know / No response	4%	5%

Section 2: Views on Country Partnership Strategy

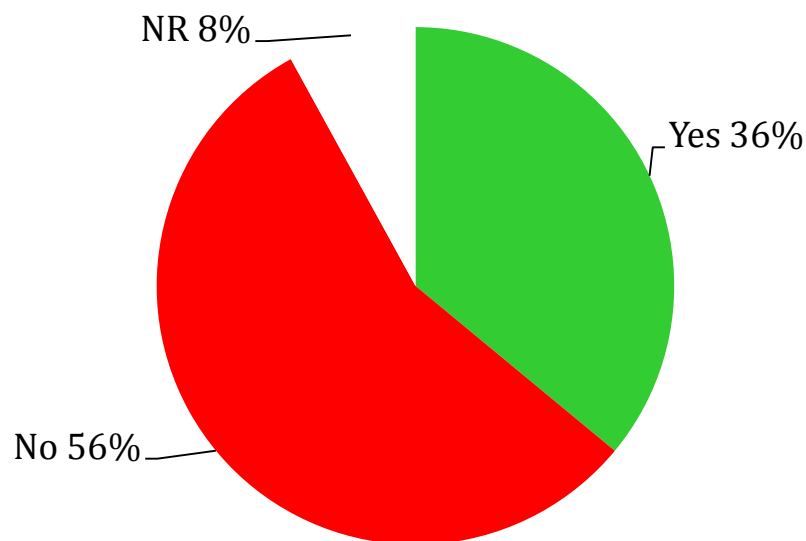
2.2 DIRECTION OF THE STRATEGY

2.2 Direction of the Strategy: Supportive Clients and Critical Stakeholders

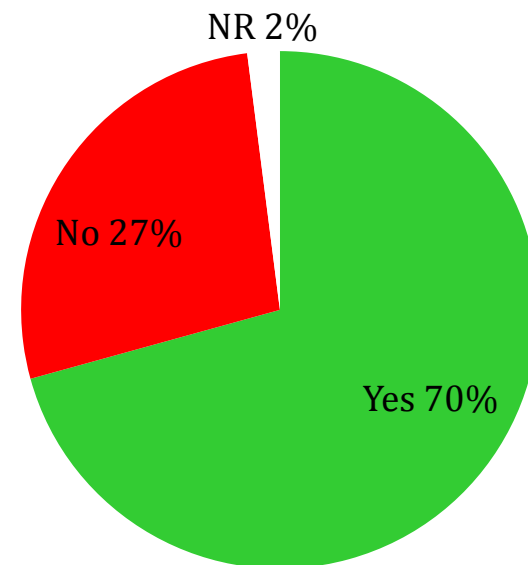
Q 37: Do you think the Country Partnership Strategy for 2010-2014 focused on the right priorities for Pakistan?

Stakeholders and clients diverged in their assessments of the priorities for CPS. While a substantial **70%** of the clients evaluated the CPS as having the right priorities, **56%** of the stakeholders **disagreed** with priorities of the program.

Stakeholders



Clients



Section 2: **Views on Country Partnership Strategy**

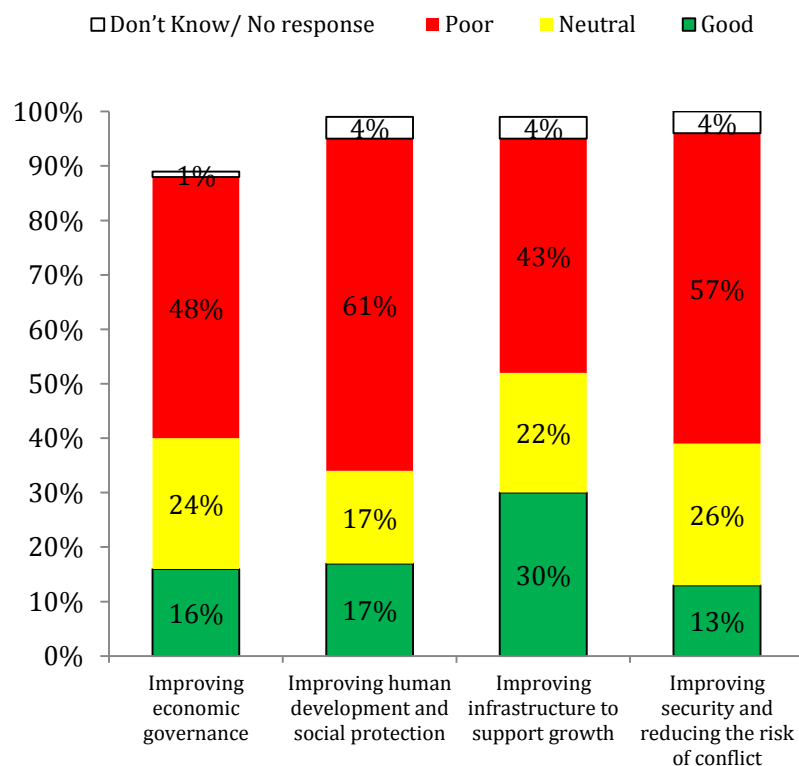
2.3 PERFORMANCE OF GOVERNMENT

2.3 Performance of Government: Critical Stakeholders and uncertain clients

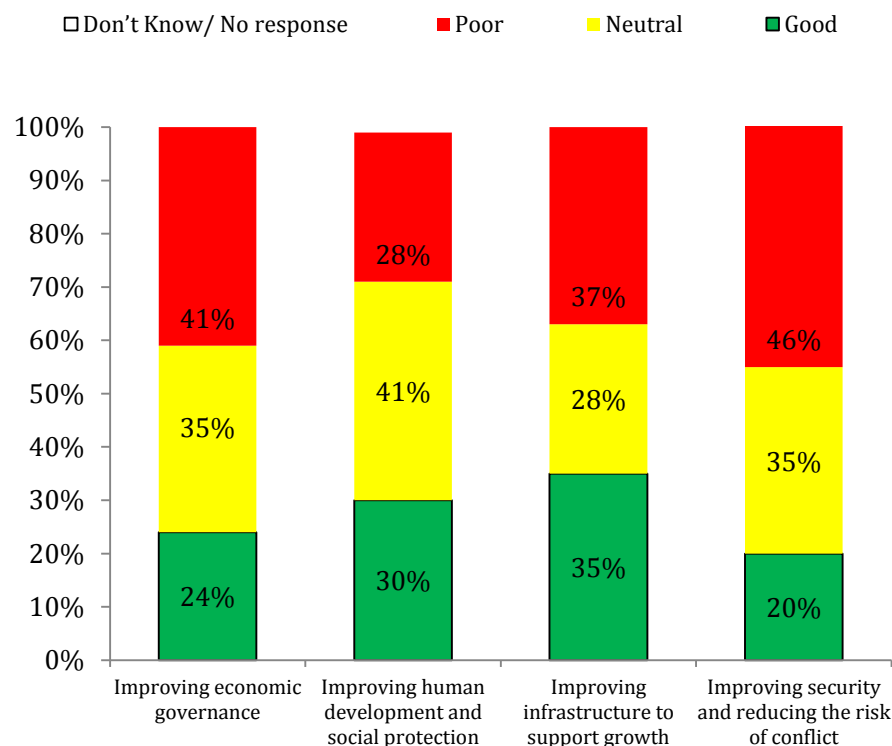
Question: Please rate the Government's performance in terms of the Country Partnership Strategy for the last five years? (Question 38 from Questionnaire)

Stakeholders and clients view the Government's performance differently. Majority of the stakeholders saw the government failing on all counts. While majority of the clients concurred in the assessment that the Government had failed to improve economic governance and security, they were uncertain-to-positive in their assessment regarding the Government's scorecard on human and infrastructure development.

Stakeholders



Clients



Section 2: Views on Country Partnership Strategy

2.4 WORLD BANK PERFORMANCE

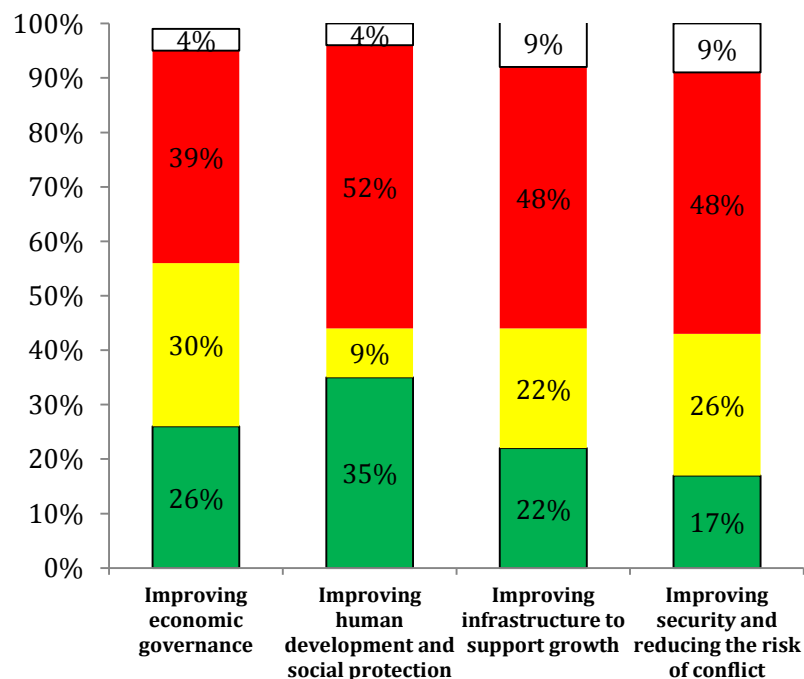
2.3 World Bank Performance: Critical Stakeholders and Appreciative Clients

Question: Please rate the World Bank's performance in terms of the Country Partnership Strategy for the last five years? (Question 39 from Questionnaire)

Stakeholders and clients viewed the World Bank's performance differently. Majority of the stakeholders rated the Bank poorly on the four tested variables. Contrarily, Clients were more appreciative and optimistic regarding the World Bank's performance across the same variables, and rated the Bank's performance between neutral and good.

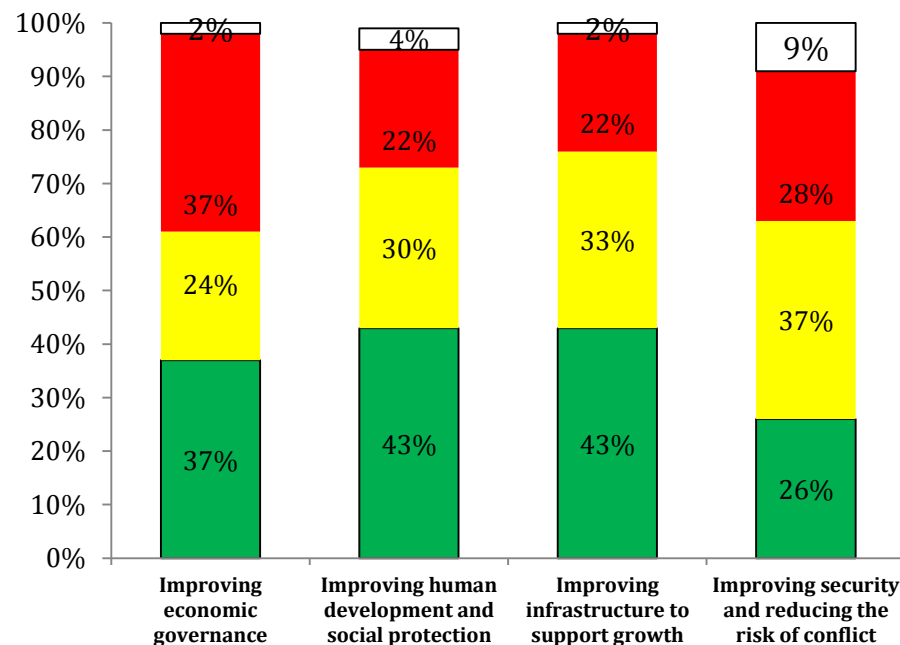
Stakeholders

□ Don't Know/ No response ■ Poor ■ Neutral ■ Good



Clients

□ Don't Know/ No response ■ Poor ■ Neutral ■ Good



Section 2: Views on Country Partnership Strategy

2.5 PRIORITIES FOR FUTURE COUNTRY PARTNERSHIP STRATEGY

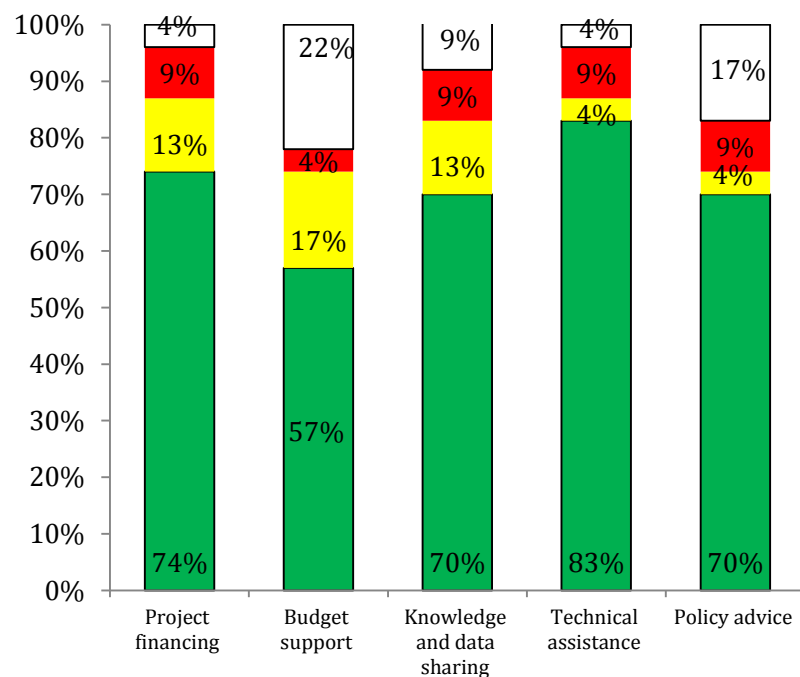
2.5 Priorities for future Country Partnership Strategy: Robust Demand for Increased Assistance in all areas

Question: For the next Country Partnership Strategy 2015-2019, please rate the following areas in terms of significance? (*Question 40 from Questionnaire*)

Stakeholders and Clients were unanimous in their verdict on the future priority areas for the next CPS. Substantial majorities of respondents deemed all the tested variables as “significant” priority areas that must be incorporated into the next Country Partnership Strategy.

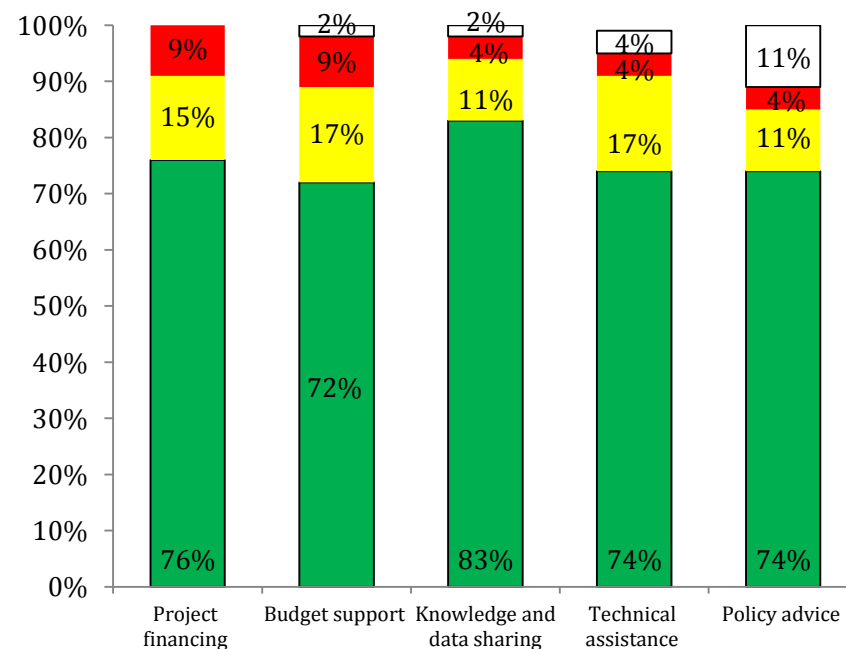
Stakeholders

□ Don't Know/ No response ■ Insignificant ■ Neutral ■ Significant



Clients

□ Don't Know/ No response ■ Insignificant ■ Neutral ■ Significant



Section 3

Views and Opinions About Services of the World Bank

Section 3

Views and Opinion About Services of World Bank:

3.1: Views about Cash Transfer and Social Protection

3.2: Views about Knowledge and Research

3.2.1 Usage of Knowledge and Research

3.2.2 Overall Opinion about Knowledge and Research

3.2.3 Gauging Effectiveness

Section 3: **Views on Country Partnership Strategy**

3.1 VIEWS ABOUT CASH TRANSFERS AND SOCIAL PROTECTION

3.1 Views about Cash Transfer and Social Protection: Stakeholders and Clients welcome all measures

When quizzed about their views on the proposed and adopted measures for cash transfers and social protection, stakeholders and clients responded positively. The majority of the respondents agreed with the proposed measures and their anticipated benefits.

		Percent of Respondents (%)	
Q 23: How strongly do you agree or disagree with the following statements regarding cash transfer and social protection programs in Pakistan?		Stakeholders	Client
Adapting a technology based payment mechanism such as the use of branchless banking and management information systems for the delivery of cash transfers to the beneficiaries, is a positive step towards transparency and accountability of safety net operations	Disagree	14%	11%
	Neutral (Neither disagree nor agree)	18%	18%
	Agree	51%	64%
	Don't know/ No Response	17%	8%
	Total	100%	100%
The introduction of a technology based targeting system for identifying the potential beneficiaries of cash transfer will help in strengthening the safety net programs in Pakistan?	Disagree	11%	10%
	Neutral (Neither disagree nor agree)	19%	14%
	Agree	54%	68%
	Don't know / No response	17%	8%
	Total	100%	100%

3.1 Views about Cash Transfer and Social Protection: Stakeholders and Clients welcome all measures

Percent of Respondents (%)

Q 23: How strongly do you agree or disagree with the following statements regarding cash transfer and social protection programs in Pakistan?		Stakeholders	Client
The addition of conditions to the cash transfer for ensuring education of primary school children, being implemented jointly with the ownership of provinces and allied departments, is a significant step towards supporting the beneficiary families to invest	Disagree	11%	10%
	Neutral (Neither disagree nor agree)	19%	13%
	Agree	52%	69%
	Don't know/ No response	18%	7%
	Total	100%	100%
The establishment and capacity enhancement of a National Safety Net platform, under the management of a joint public and private independent board of directors is a significant step in strengthening of social protection programs in Pakistan?	Disagree	12%	11%
	Neutral (Neither disagree nor agree)	20%	12%
	Agree	47%	65%
	Don't know/ No response	21%	12%
	Total	100%	100%

Section 3: **Views on Country Partnership Strategy**

3.2 VIEWS ABOUT KNOWLEDGE AND RESEARCH

- 3.2.1 Usage of Knowledge and Research
- 3.2.2 Overall knowledge and knowledge and Research
- 3.2.3 Gauging Effectiveness

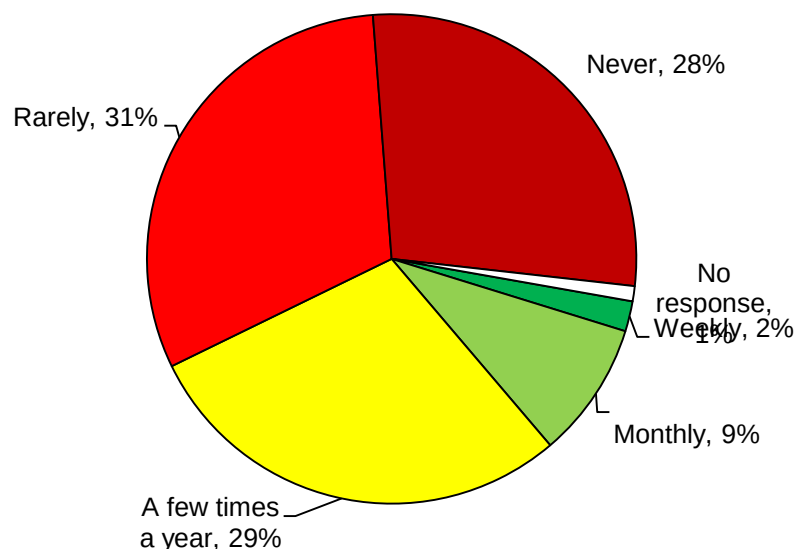
3.2 Views about Knowledge and Research

3.2.1 Usage of Knowledge and Research: Sporadic Stakeholder usage and frequent client consultation

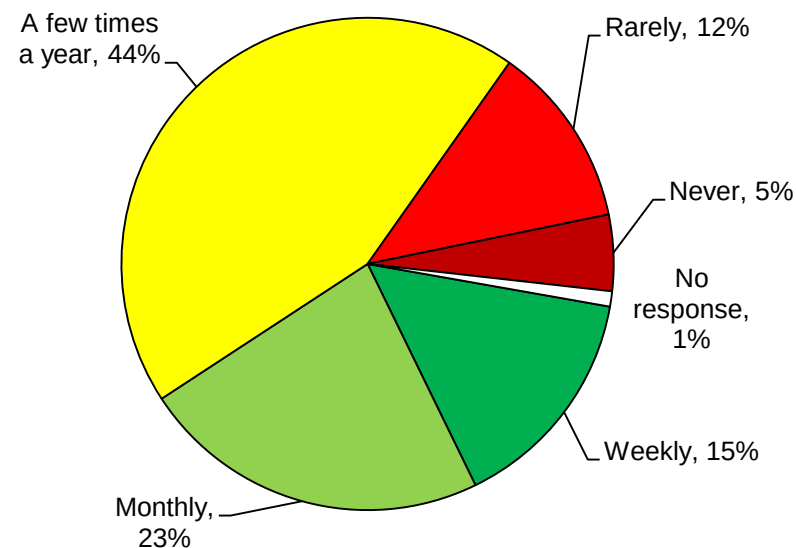
Question: How frequently do you consult World Bank knowledge and research (e.g., data, analysis, reports) in the work you do? *(Question 26 from Questionnaire)*

Stakeholders and clients differed in their usage of knowledge and research produced by the World Bank. Majority of the stakeholders (60%) 'rarely' or 'never' rely on the Bank's publications during the course of their work. In contrast, 36% of the clients use this knowledge and research on a weekly-to-monthly basis, while 43% rely on this data at least a few times a year.

Stakeholders



Clients



Section 3: **Views on Country Partnership Strategy**

3.2 VIEWS ABOUT KNOWLEDGE AND RESEARCH

3.2.2 Overall Knowledge and Knowledge and Research

3.2 Views about Knowledge and Research

3.2.2 Overall Knowledge and Knowledge and Research: Appreciative clients and critical stakeholders

Assessments of the World Bank's knowledge and research circulated in Pakistan varied between clients and stakeholders. While the clients were more receptive to and appreciative of the World Bank's knowledge and its publications in Pakistan, stakeholders disagreed with these assessments.

Percent of Respondents (%)

Q 18: To what extent do you believe that the World Bank's knowledge and research _____ in Pakistan?		Stakeholders	Client
Are relevant to Pakistan's development priorities	Insignificant	33%	14%
	Neutral (Neither insignificant nor significant)	31%	27%
	Significant	25%	49%
	Don't know/No Response	11%	9%
	Total	100%	100%
Are accessible (well written and easy to understand)	Insignificant	32%	18%
	Neutral (Neither insignificant nor significant)	27%	29%
	Significant	24%	43%
	Don't know/No Response	17%	10%
	Total	100%	100%

Continue-----

Sample size: Stakeholders (n= 523); Clients (n= 188)

3.2 Views about Knowledge and Research

3.2.2 Overall Knowledge and Knowledge and Research

Q 18: To what extent do you believe that the World Bank's knowledge and research _____ in Pakistan?		Stakeholders	Client
Are adequately disseminated	Insignificant	33%	14%
	Neutral (Neither insignificant nor significant)	31%	27%
	Significant	25%	49%
	Don't know/No Response	11%	9%
	Total	100%	100%
Are appropriately translated for Pakistan	Insignificant	33%	30%
	Neutral (Neither insignificant nor significant)	25%	23%
	Significant	21%	29%
	Don't know/No Response	21%	17%
	Total	100%	100%
Include appropriate level of stakeholder involvement during preparation	Insignificant	36%	23%
	Neutral (Neither insignificant nor significant)	26%	30%
	Significant	18%	32%
	Don't know/No Response	21%	14%
	Total	100%	100%

Section 3: **Views on Country Partnership Strategy**

3.2 VIEWS ABOUT KNOWLEDGE AND RESEARCH

3.2.3 Gauging Effectiveness

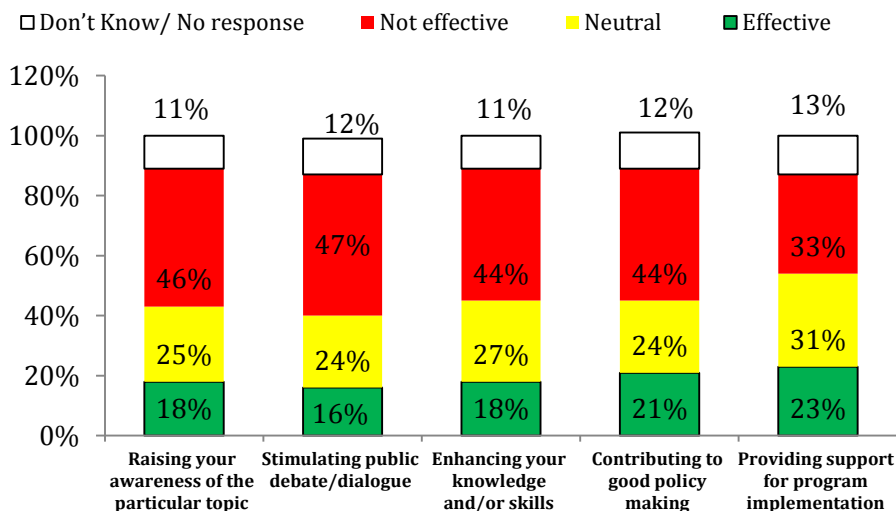
3.2 Views about Knowledge and Research

3.2.3 Gauging Effectiveness: Disengaged Stakeholders versus Engaged Clients

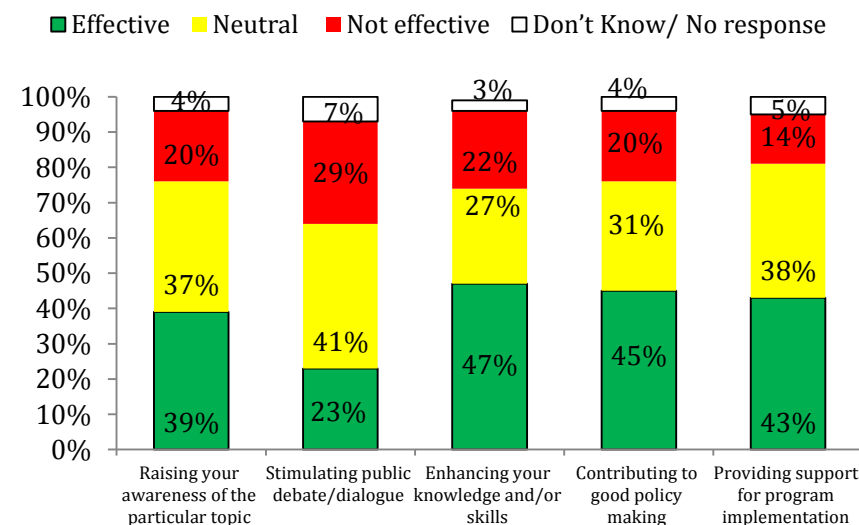
Question: How effective do you believe the World Bank has been in Pakistan in using it's knowledge and research to ---? (Question 21 from Questionnaire)

Stakeholders and clients assessed the effectiveness of the World Bank's knowledge and research differently. The majority of the stakeholders agreed that the Bank's knowledge and research are not effective. Conversely, clients were more upbeat in their assessment of the Bank's use of knowledge and research in Pakistan.

Stakeholders



Clients



Section 4

World Bank Access and Media Habits: Advisory for a Future Strategy

Section 4

World Bank Access and Media Habits: Advisory for Future Strategy

- 4.1: Sources of Information for Stakeholders/Clients
- 4.2: Access to World Bank
- 4.3: Views about World Bank Website
- 4.4: Preferred Way to Access World Bank
- 4.5: World Bank Access to Information Policy

Section 4: **World Bank Access and Media Habits**

4.1 Sources of Information for Stakeholders/ Clients

4 Access and Media Habits

4.1 Sources Of Information for Stakeholders/Clients: News and Information Media is the main conduit of information for stakeholders and clients.

For Stakeholders and Clients, **local newspapers** are the principal source of information about development issues and narratives for stakeholders (**69%**) and clients (**68%**). As a secondary source, **50%** of the stakeholders rely on Local Television Channels, while **38%** of the clients rely on Internet to access information about development issues.

Percent of Respondents (%)

Q 24: How do you get most of your information about development issues in Pakistan?	Stakeholders	Client
Local newspapers	69%	68%
International newspapers	9%	11%
Local radio	2%	3%
Local television	50%	37%
International television	10%	7%
Periodicals	5%	11%
Internet	32%	38%
Social media (Facebook, Twitter, Youtube)	11%	11%
Blogs	2%	1%
Others	3%	5%
Don't Know / No response	0%	1%

Section 4: **Access and Media Habits**

4.2 Access to World Bank

4 Access and Media Habits

4.2 Access to World Bank: Clients Access World Bank's websites, while stakeholders are divided

When quizzed about their preferences for accessing information about the World Bank online, the majority of the clients (**48%**) utilize the Bank's country and main website. While **45%** of the stakeholders access the country website, a substantial **51%** do not access the Bank's online portals.

Q 27: Which do you primarily use to get information about World Bank on the Internet?	Percent of Respondents (%)	
	Stakeholders	Client
The World Bank's country website (www.worldbank.org/pk)	45%	44%
The World Bank's main website (www.worldbank.org)	16%	37%
World Bank Pakistan's Facebook (www.facebook.com/World Bank Pakistan)	5%	3%
I don't use the internet for this purpose	51%	15%
Don't Know / No response	4%	1%

Section 4: **Access and Media Habits**

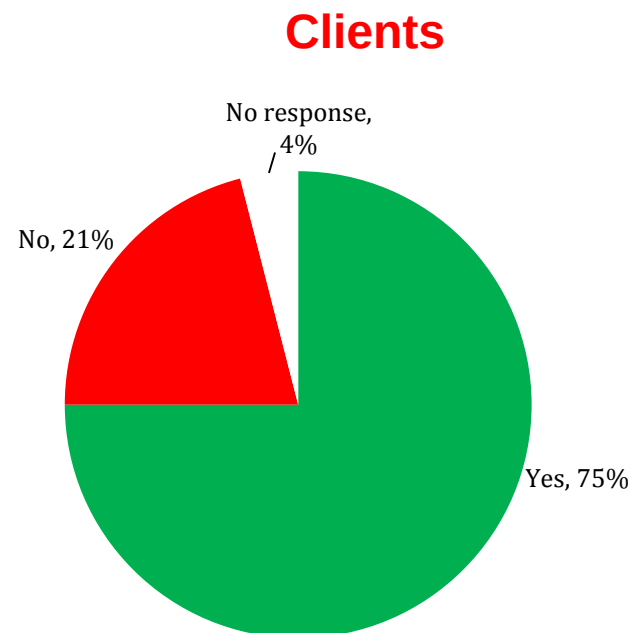
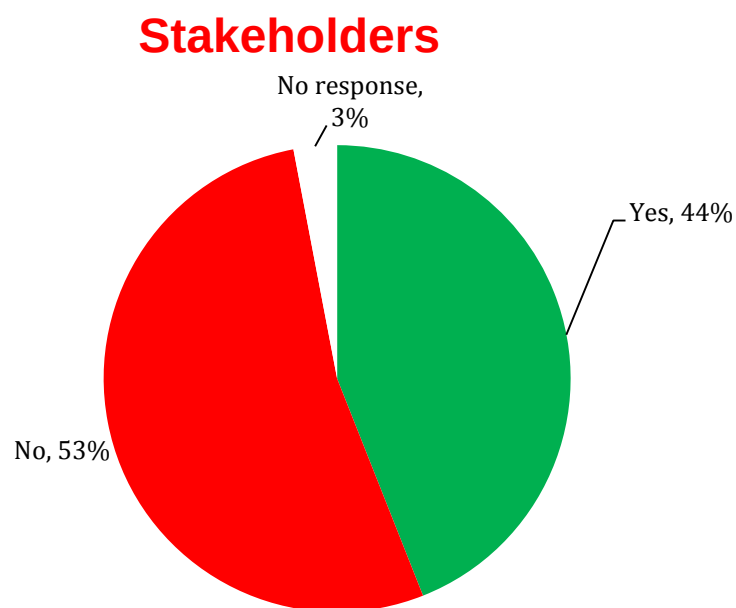
4.3 Views about World Bank Website

4 Access and Media Habits

4.3 Views about World Bank Website: Clients are frequent users

Question: Do you use/have you used the World Bank website? *(Question 35 from Questionnaire)*

75% of the Clients access and use the World Bank's website frequently. In contrast, only 44% of the stakeholders go online to access the World Bank's website.



4 Access and Media Habits

4.3 Views about World Bank Website: Satisfied Clients and Fragmented Stakeholders

When asked to share their experience of accessing and using the World Bank website, and other informational interactions, clients and stakeholders differed markedly in their responses. While the clients and stakeholders concurred with the positive assessment of the navigability, usefulness, and responsiveness of the website, stakeholders remain unsure about general informational experiences with the Bank.

Q 28: Please rate how much you agree with the following statements, on a ten point scale?		Percent of Respondents (%)	
		Stakeholders	Client
I find the World Bank websites easy to navigate. (Only answer if you have used a World Bank website)	Disagree	9%	8%
	Neutral (Neither disagree nor agree)	22%	13%
	Agree	61%	70%
	Don't know/No Response	8%	9%
	Total	100%	100%
I find the information on the World Bank's websites useful. (Only answer if you have used a World Bank website)	Disagree	8%	5%
	Neutral (Neither disagree nor agree)	17%	11%
	Agree	68%	77%
	Don't know/No Response	8%	7%
	Total	100%	100%

4 Access and Media Habits

4.3 Views about World Bank Website: Satisfied Clients and Disengaged Stakeholders

Percent of Respondents (%)

Q 28: Please rate how much you agree with the following statements, on a ten point scale?		Stakeholders	Client
When I need information from the World Bank I know how to find it (e.g., whom to call, where to reach them, etc.)	Disagree	20%	10%
	Neutral (Neither disagree nor agree)	12%	18%
	Agree	29%	52%
	Don't know/No Response	39%	19%
	Total	100%	100%
The World Bank is responsive to my information requests and inquiries	Disagree	14%	7%
	Neutral (Neither disagree nor agree)	11%	16%
	Agree	17%	37%
	Don't know/No Response	58%	39%
	Total	100%	100%

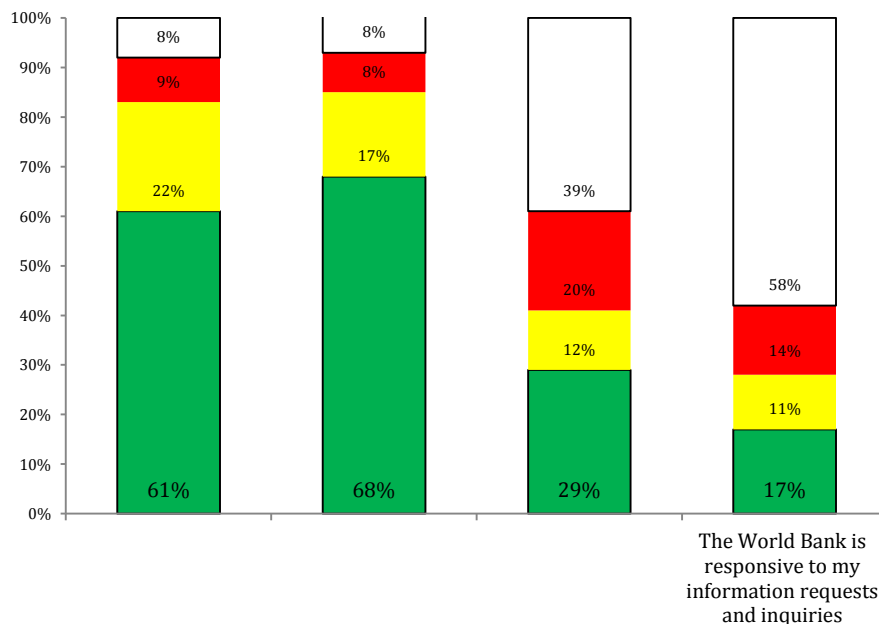
4 Access and Media Habits

4.3 Views about World Bank Website: *Satisfied Clients and Disengaged Stakeholders*

Question: Please rate how much you agree with the following statements, on a ten point scale
(Question 28 from Questionnaire)

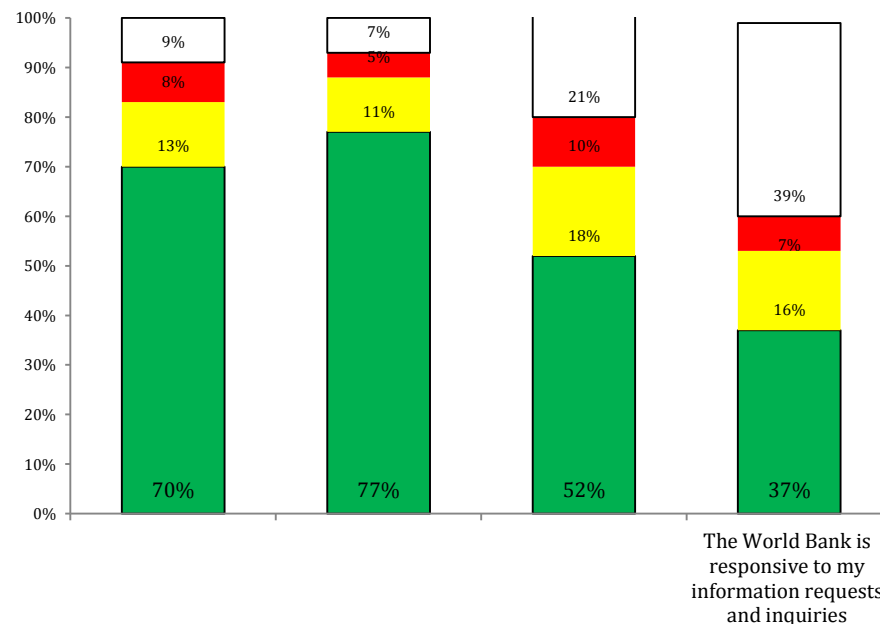
Stakeholders

Agree Neutral Disagree Don't Know/ No response



Client

Agree Neutral Disagree Don't Know/ No response



Source: Gallup Pakistan - World Bank CSS 2013

Section 4: **Access and Media Habits**

4.4 Preferred Way to Access World Bank

4 Access and Media Habits

4.4 Preferred Way to Access World Bank: Online Engagement Preferred

Both stakeholders and clients expressed a preference for online engagement. **41%** of the stakeholders and **45%** of the clients would prefer engaging with the Bank through this medium. A significant **43%** of the clients also prefer direct contact with the Bank.

Percent of Respondents (%)

Q 30: How would you prefer to receive information from the World Bank?	Stakeholders	Client
World Bank website	41%	45%
Direct contact with World Bank (i.e., face to face meetings/discussions)	20%	43%
e-newsletters	16%	21%
Instant messaging	5%	6%
World Bank seminars/workshops/conferences	24%	25%
World Bank Public Information Center	9%	7%
World Bank publications and other written materials	20%	20%
Mobile phones	8%	7%
Social media (Facebook, Twitter, Youtube)	15%	10%
Press releases; articles; programs?	17%	9%
Blogs	4%	1%
Don't Know / No response	3%	2%

Section 4: **Access and Media Habits**

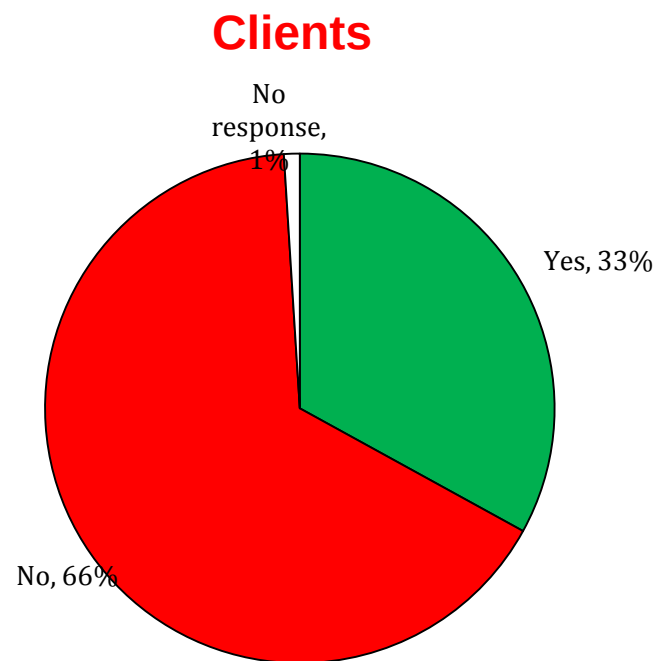
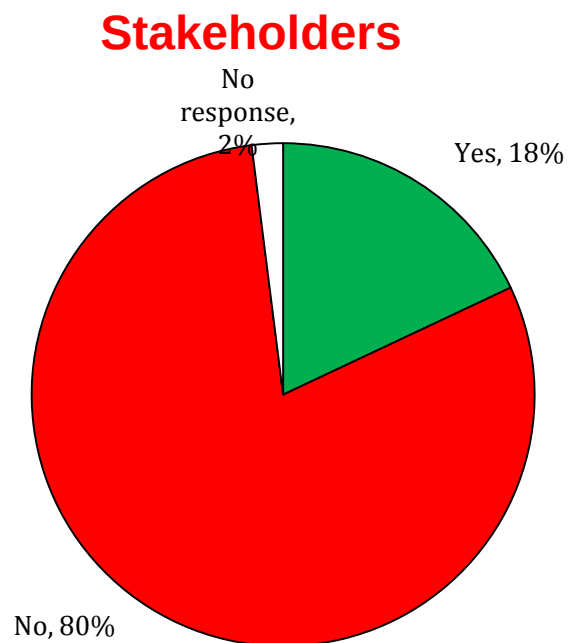
4.5 World Bank Access to Information Policy

4 Access and Media Habits

4.5 World Bank Access to Information Policy: Stakeholders and Clients are in the dark

Question: Are you aware of the World Bank's Access to Information Policy under which the Bank will now disclose any information in its possession that is not on a list of exceptions? *(Question 31 from Questionnaire)*

Stakeholders and clients are unequally unaware of the Bank's Access to Information Policy. Substantial majorities of the stakeholders (**81%**) and Clients (**66%**) expressed a lack of knowledge about the Bank's policy.



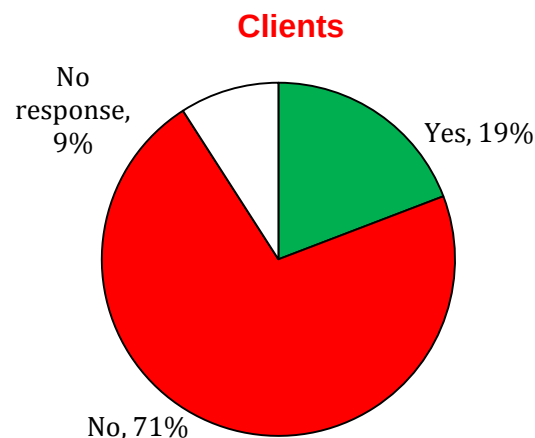
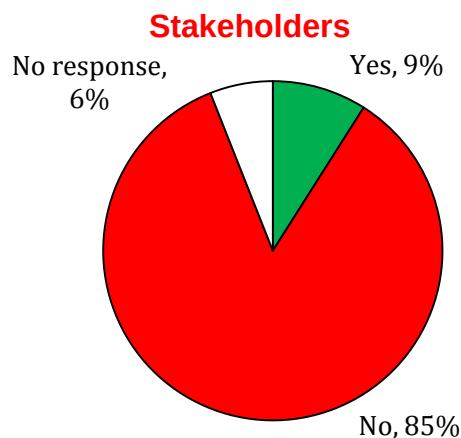
4 Access and Media Habits

4.5 World Bank Access to Information Policy: Absence of engagement for Stakeholders and Clients

Both stakeholders and clients asserted a serious lack of engagement with the World Bank over the last year. **85%** of the stakeholders and **72%** of the clients have had made no informational requests from the Bank on its activities in the past year.

Percent of Respondents (%)

Q 32: Have you requested information from the World Bank on its activities in the past year?	Stakeholders	Client
Yes	9%	19%
No	85%	72%
Don't Know / No response	6%	9%



4 Access and Media Habits

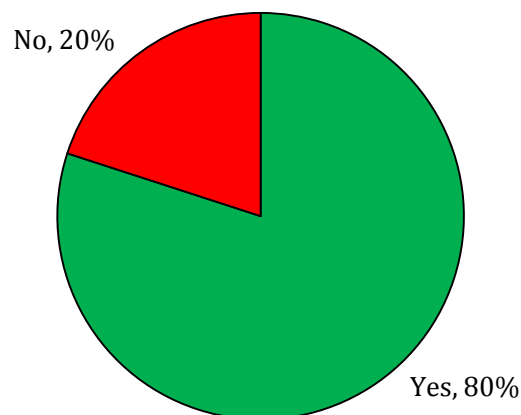
4.5 World Bank Access to Information Policy: Satisfied Stakeholders and Clients

For the minority of the stakeholders and clients, who did access and retrieve information from the Bank, the experience was satisfactory. Outright majorities of stakeholders (**80%**) and clients (**94%**) were able to obtain the information they sought.

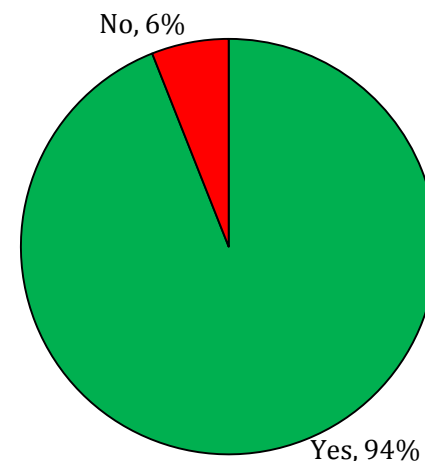
Percent of Respondents (%)

Q 33: Were you able to obtain this information?	Stakeholders	Client
Yes	80%	94%
No	20%	6%

Stakeholders



Clients



Section 4: **Access and Media Habits**

4.6 Credibility of The World Bank

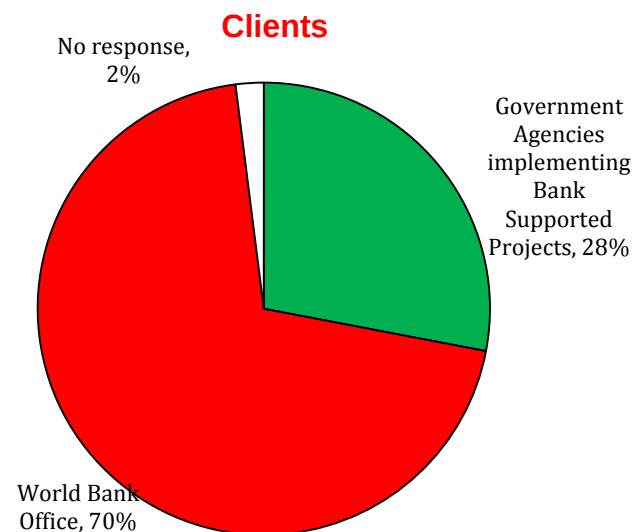
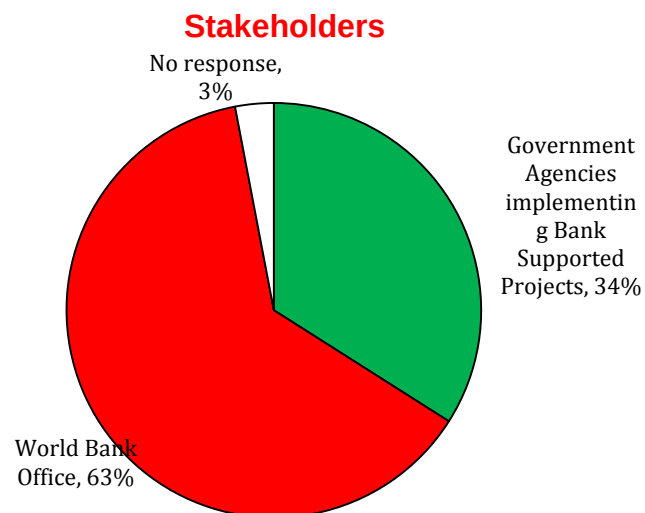
4 Access and Media Habits

4.6 Credibility of World Bank: Direct Information from the Bank preferred

Direct informational flow and engagement from the World Bank is preferred by the stakeholders and clients. Significant majority of stakeholders and clients prefer getting information directly from the World Bank. **64%** of the stakeholders and **67%** of the clients shared this preference.

Percent of Respondents (%)

Q 29: What would you prefer: to receive information from the government agencies implementing Bank supported projects, or from the World Bank office?	Stakeholders	Client
Government Agencies implementing Bank Supported Projects	34%	28%
World Bank Office	64%	70%
No response	3%	2%



Section 4: **Access and Media Habits**

4.7 Exposure to World Bank

4 Access and Media Habits

4.7 Exposure to The World Bank: Multi-channel exposure for stakeholders and clients

Stakeholders and clients get exposed to the World Bank and its activities through multiple and different channels. A substantial **71%** of the stakeholders, and a significant **35%** of the clients reported “Observer” as their main source of exposure to the Bank in Pakistan. Predictably, clients had substantial exposure through multiple channels, most notably through the Use of World Bank reports/data (**42%**) and Collaboration as part of professional work (**45%**).

Percent of Respondents (%)

Q 25: Which of the following describes most of your exposure to the World Bank in Pakistan?	Stakeholders	Client
Observer (i.e., follow in media, discuss in formal conversations, etc.)	71%	35%
Use World Bank reports/ data	38%	42%
Engage in World Bank related/ sponsored events/activities	15%	36%
Collaborate as part of my professional duties	18%	45%
Use world bank website for information, data, research, etc.	31%	30%
No response	4%	1%

Section 5

Detailed views about World Bank form Client side:

Views from N= 188 World Bank Clients ONLY

Section 5

Detailed views about World Bank form Client Side:

- 5.1: Opinion about World Bank's work in Pakistan
- 5.2: World Bank as an effective development Partner
- 5.3: Effectiveness of World Bank's Work in Pakistan
- 5.4: Views about Staff Procurement
- 5.5: Views about World Bank Policy Instruments
- 5.6: Views about World Bank Programs

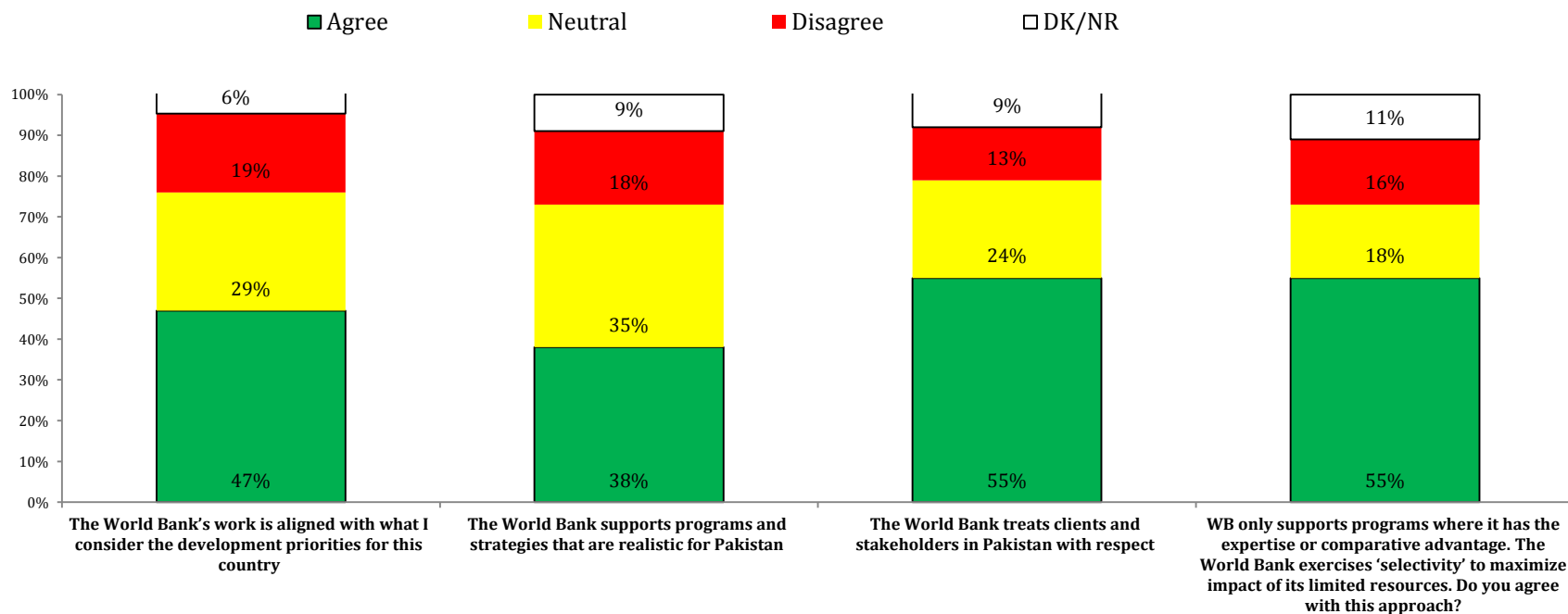
Section 5: Detailed views about world bank form client side

5.1 Opinion about World Bank's Work in Pakistan

5.1 Opinion about World bank's work in Pakistan: Positive Assessment of the Bank's operations in Pakistan by the clients

Question: To what extent do you agree with the following statements about the World Bank's work in Pakistan, on a ten point scale? (Question 55 from Questionnaire)

Clients hold positive perceptions about the nature of the Bank's operations in Pakistan, as well as their own experiential interactions with the Bank. A **55%** majority of the clients believes that the Bank treats its clients and stakeholders with respect, while **55%** of the clients believe that the Bank works efficiently by selecting and applying its strategic and comparative advantage.



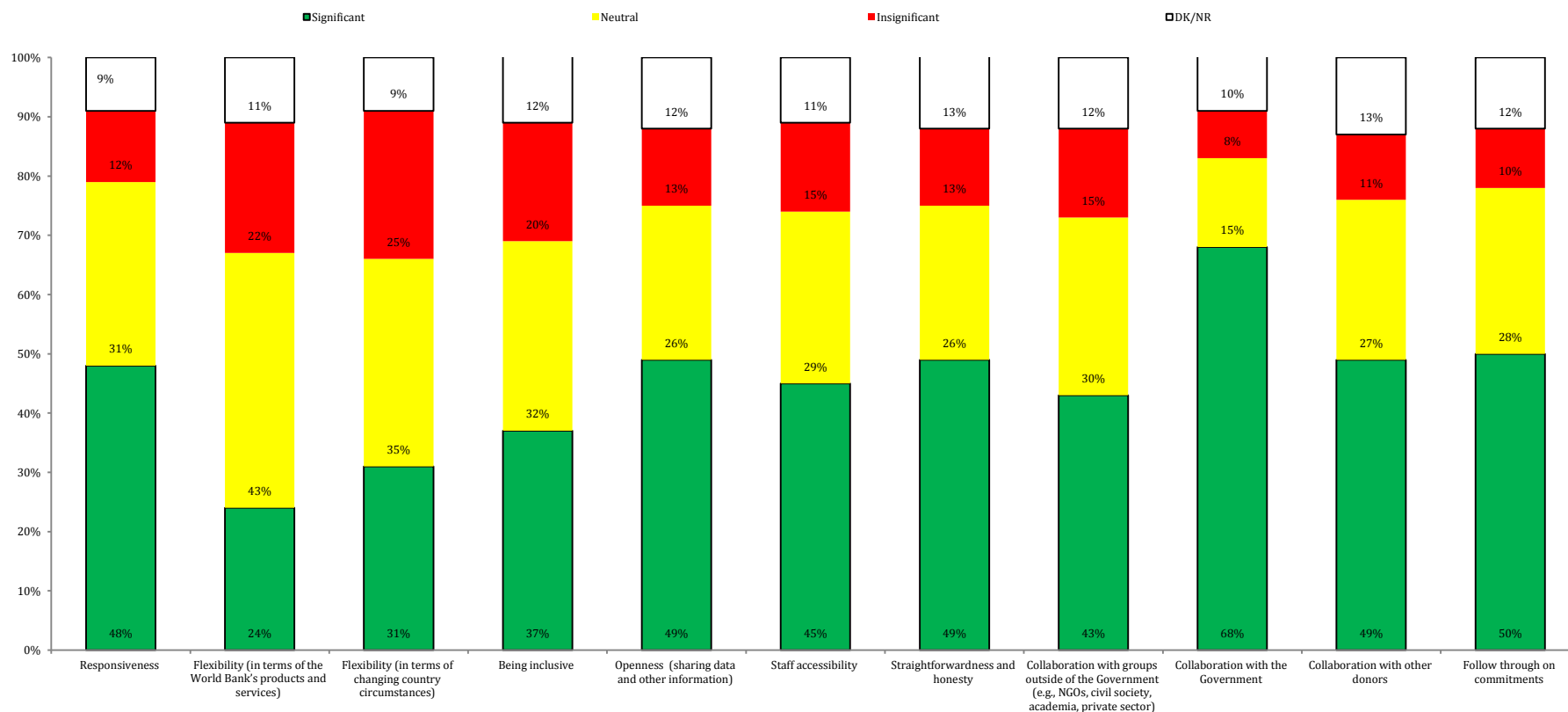
Section 5: Detailed views about world bank form client side

5.2 World Bank as an effective development partner

5.2 World bank as an effective development partner: An effective and influential organization

Question: To what extent is the World Bank an effective development partner in Pakistan, in terms of each of the following? *(Question 56 from Questionnaire)*

Clients rate the Bank highly on its organizational practices and its influence within the development sector. Respondents saw the Bank's collaboration with the government (68%) and other agencies (49%) as significant. As engaged partners, the clients rated the Bank's **Responsiveness (48%)**, **Following through on commitments (50%)**, **Openness ((49%)**, and **Straightforwardness (49%)** as significant.



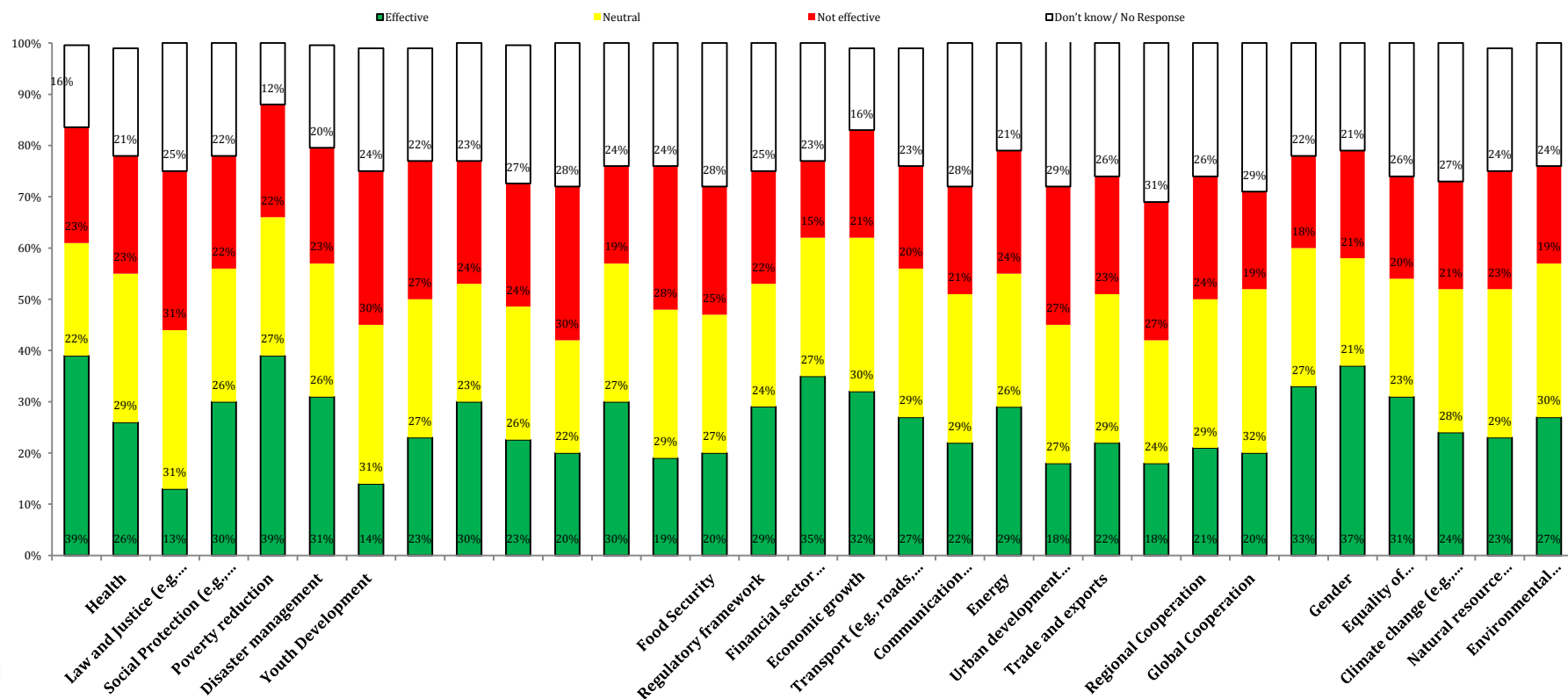
Section 5: Detailed views about world bank form client side

5.3 Effective of World's Bank work in Pakistan

5.3 Effectiveness of World Bank's work in Pakistan: Governance and Social Development seen as crucial sectors

Question: How effective do you believe the world bank in terms of the work it does in the following areas of development in Pakistan, on a ten point scale? (*Question 57 from Questionnaire*)

Clients identified two major sectors where the Bank is playing a significant role: Governance and Social Development. Financial sector (stability and access to financial services) (35%), Economic Growth (32%), Public sector reforms (30%), and Public Financial Management (30%) were identified as areas of effectiveness and strength for the Bank. Gender (37%), Poverty reduction (39%) and Agricultural Development (33%) received one-third support in the Social Development sector.



Section 5: Detailed views about world bank form client side

5.4 Views about Staff and Procurement

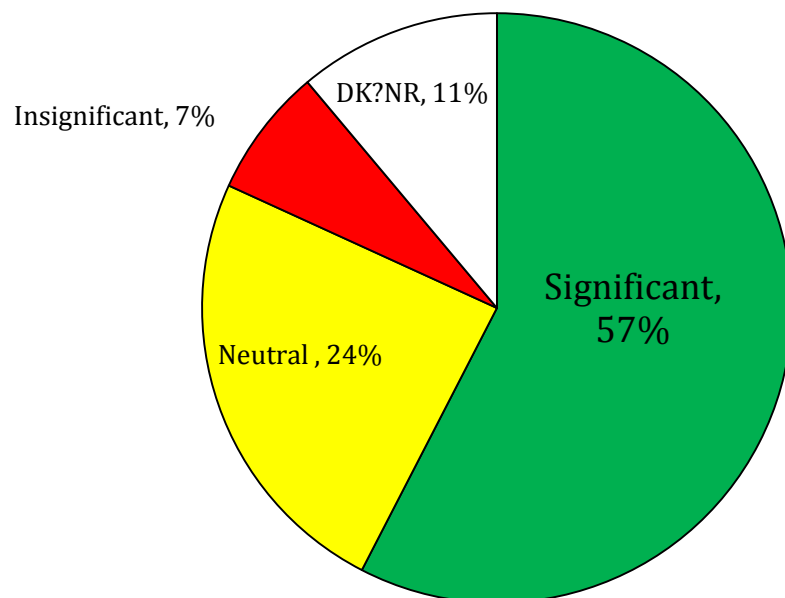
Section 5.4: **Views about Staff and Procurement**

5.4.1 Well preparedness of World Bank Staff

5.4.1 Well preparedness of World Bank Staff: World Bank staff is highly-rated

Question: To what extent do you believe the World Bank's staff is well prepared (e.g., skills and knowledge) to help Pakistan solve its most complicated development challenges, on a ten point scale? *(Question 47 from Questionnaire)*

Clients consider the World Bank's staff to be well-prepared to assist Pakistan in overcoming its development-related challenges. A substantial **57%** of the clients rated the Bank's staff as "significant", when asked to assess their preparedness to successfully tackle Pakistan's development issues.



Section 5.4: Views about Staff and Procurement

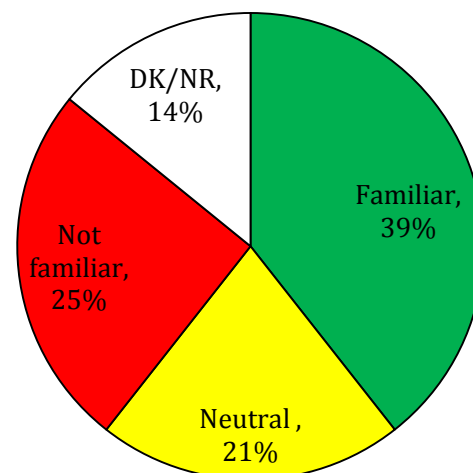
5.4.2 Procurement Policies

5.4.2 Procurement Policies: Clients are partially acquainted

When asked to report their level of familiarity with the World Bank's procurement policies, the majority of the clients – 39% - maintained that they were familiar with the policies.

Percent of Respondents (%)

Q 48: How familiar are you with World Bank's procurement policies?	Clients
Not familiar	25%
Neutral (Neither non familiar nor familiar)	21%
Familiar	39%
Don't Know/No Response	14%
Total	100%

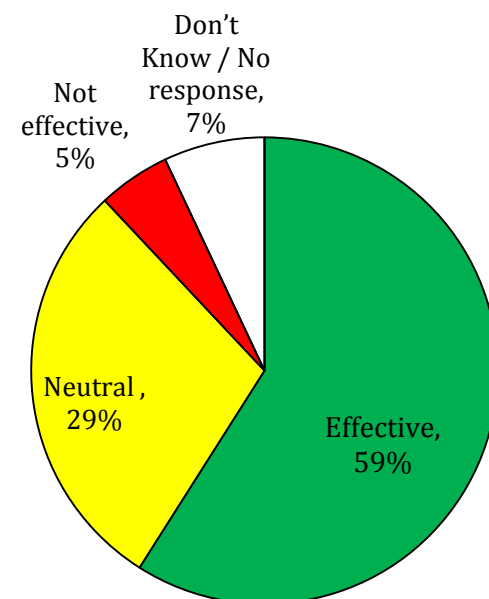


5.4.2 Procurement Policies: Procurement Policies Receive Client Support

Clients are satisfied with the Bank's procurement policies. Of the clients who were acquainted with the Bank's procurement policies, the majority – 59% - rated these policies as effective when compared with alternative procurement methods.

Percent of Respondents (%)

Q 49: How effective are the World Bank's procurement policies relative to alternative procurement methods?	Clients
Not effective	5%
Neutral (Neither non effective nor effective)	29%
Effective	59%
Don't know/No Response	7%
Total	100%



5.4.2 Procurement Policies: Lack of consensus on improving the effectiveness of procurement policies

Client opinions failed to crystallize around a specific measure for improving the effectiveness of the Bank's procurement policies. While nearly one-third of the clients (**30%**) suggested making e-procurement a standard practice, the majority (**40%**) abstained from recommending a measure.

Percent of Respondents (%)	
Q 50: To improve the effectiveness of World Bank's procurement support which of the following actions would you recommend?	Client
Use national procurement procedures rather World Bank's procurement procedures	22%
Eliminate prior reviews	8%
Engage more in contract management	24%
Carry out road shows before tendering	13%
Make e procurement a standard practice for World Bank's operation in Pakistan	30%
Assign additional staff per project	14%
Don't know/No Response	40%
Total	100%

Section 5: Detailed views about world bank form client side

5.5 Views about World Bank Policy Instruments

5.5 Views about World Bank Policy Instruments: Financial Resources rated as highly valuable

Question: When thinking about the World Bank's role, what are the greatest strengths? Which activity do you believe is of greatest VALUE and which activity is of second greatest value in Pakistan? *(Question 51 from Questionnaire)*

Clients overwhelmingly identified Financial Resources as the World Bank's Greatest Strength, and highly valuable for Pakistan. The majority of clients (**45%**) identified Financial resources as having the greatest value,. Technical assistance (**20%**) received the highest support as the activity with the second greatest value in Pakistan.

Greatest Value	Clients
Financial resources	45%
Technical assistance	11%
Data	3%
Training/capacity building	4%
Studies/analyses	4%
Regional integration	2%
Introducing innovations through projects or analytical work	6%
Bringing discipline and effective supervision including (adherence to financial management and procurement procedures	6%
Mobilization of global knowledge (including south-south knowledge sharing)	2%
Don't Know/No Response	4%
Total	100%

Second Greatest Value	Clients
Financial resources	7%
Technical assistance	20%
Data	4%
Training/capacity building	11%
Studies/analyses	4%
Regional integration	2%
Introducing innovations through projects or analytical work	3%
Bringing discipline and effective supervision including (adherence to financial management and procurement procedures	13%
Mobilization of global knowledge (including south-south knowledge sharing)	6%
Don't know/No Response	11%
Total	100%

Section 5: Detailed views about the World Bank form client side

5.6 Views about World Bank Programs

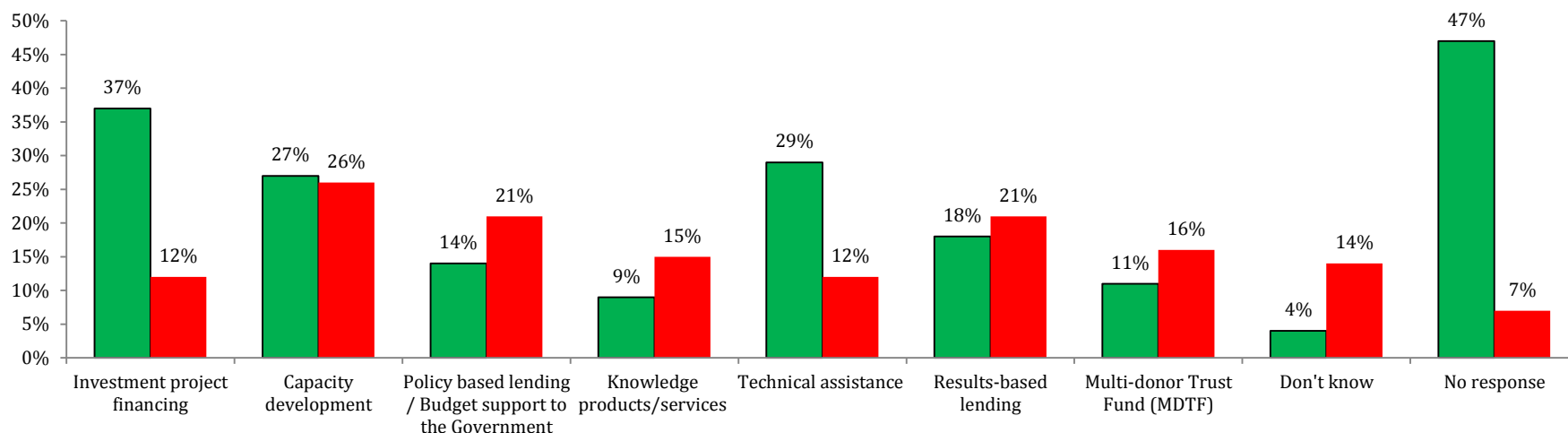
Section 5.6: **Views about World Bank Programs**

5.6.1 Reducing Poverty

5.6.1 Reducing Poverty: *Fragmented Opinions*

Question: Which World Bank Instruments do you believe are the MOST effective and LEAST effective in reducing poverty in Pakistan? (Question 53 from Questionnaire)

Clients held fragmented and even polarized opinions when it came to assessing the most and least effective instruments in battling poverty. The majority of the clients – **51%** - abstained from identifying the most effective instrument, although “Investment Project Financing” (**37%**) received significant support as the most effective instrument. “Capacity Development” received **27%** support as the most effective, and **26%** support as the least effective instrument.



Section 5: Views about World Bank Policy Institutes

5.6 VIEWS ABOUT WORLD BANK PROGRAMS

5.6.2 Environment and Social Sustainability

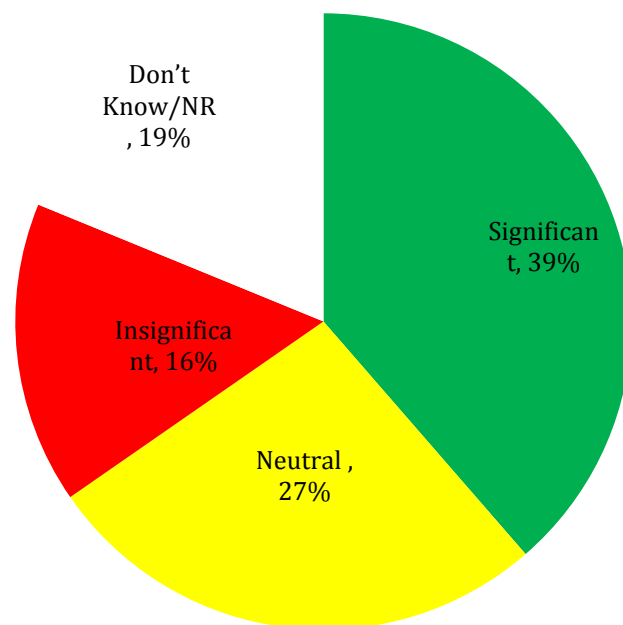
5.6 Views about World Bank Programs

5.6.2 Environment and Social Sustainability: Safeguard Policies are mostly effective

When asked to assess whether the Bank's 'safeguard policies' help achieve environmental and social sustainability, more than one-third of the clients – **39%** - rated these policies as “significant” in achieving the stated objectives.

Percent of Respondents (%)

Q 58: To what extent does the World Bank's 'safeguard policies' help achieving environment and social sustainability, on a ten point scale?	Client
Insignificant	16%
Neutral (Neither insignificant nor significant)	27%
Significant	39%
Don't know / No Response	19%



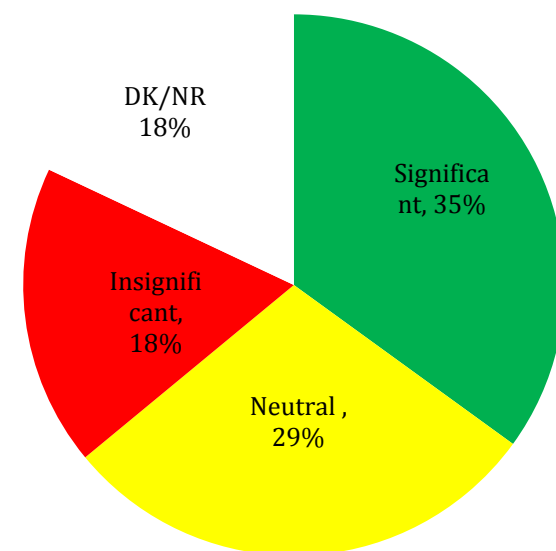
5.6 Views about World Bank Programs

5.6.2 Environment and Social Sustainability: Safeguard Policies deliver sustainable development

Clients view the World Bank's safeguard policies favorably. When asked to assess whether these policies assist in delivering sustainable development, a slight majority of the clients – **35%** - saw them as “**significant**” in attaining this objective.

Percent of Respondents (%)

Q 59: To what extent does the World Bank's implementation of its safeguard policies in Pakistan, help make development more sustainable, on a ten point scale?	Clients
Insignificant	18%
Neutral (Neither insignificant nor significant)	29%
Significant	35%
Don't know / No Response	18%



Section 5: Views about World Bank Policy Institutes

5.6 VIEWS ABOUT WORLD BANK PROGRAMS

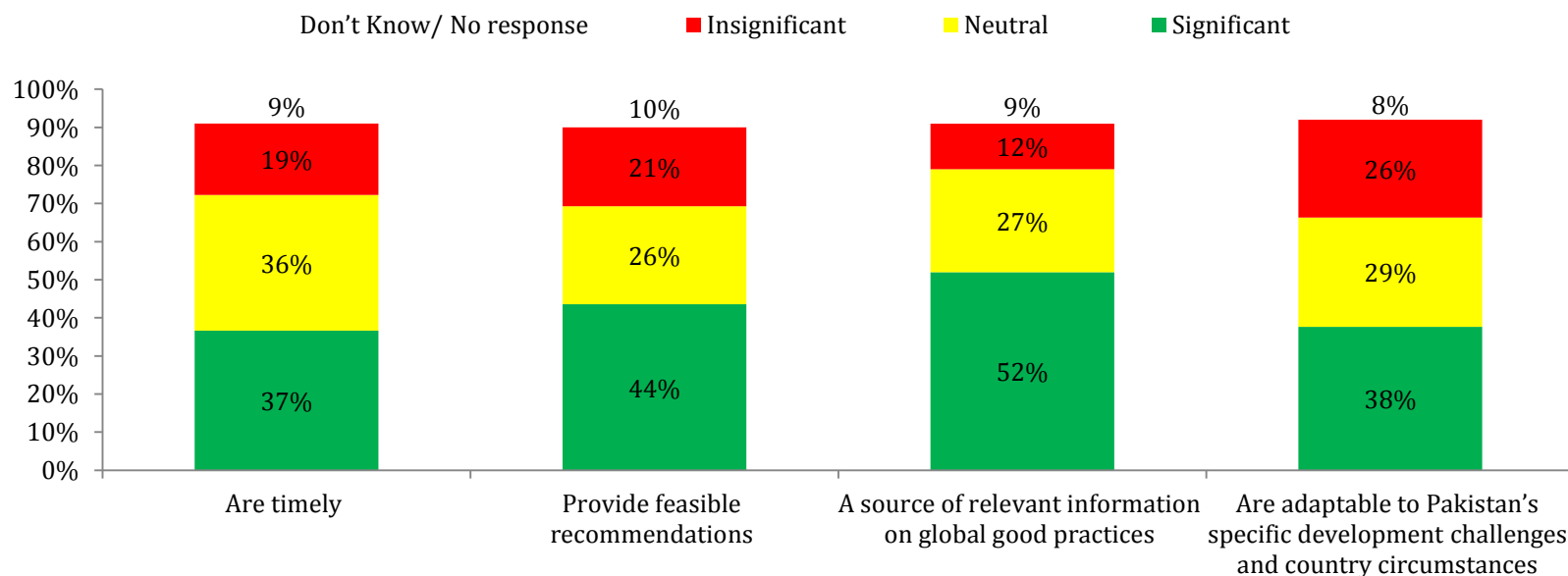
5.6.3 World Bank Knowledge and Research

5.6 Views about World Bank Programs

5.6.3 World Bank Knowledge and Research: Valuable sources of technical input

Question: To what extent do you believe that the World Bank's knowledge and research _____ in Pakistan? *(Question 61 from Questionnaire)*

Clients view the World Bank's knowledge and research as valuable sources of technical input and advice. **52%** of the clients see these resources as providing relevant information on global good practices, while **44%** of the clients consider this knowledge and research as providing feasible recommendations.



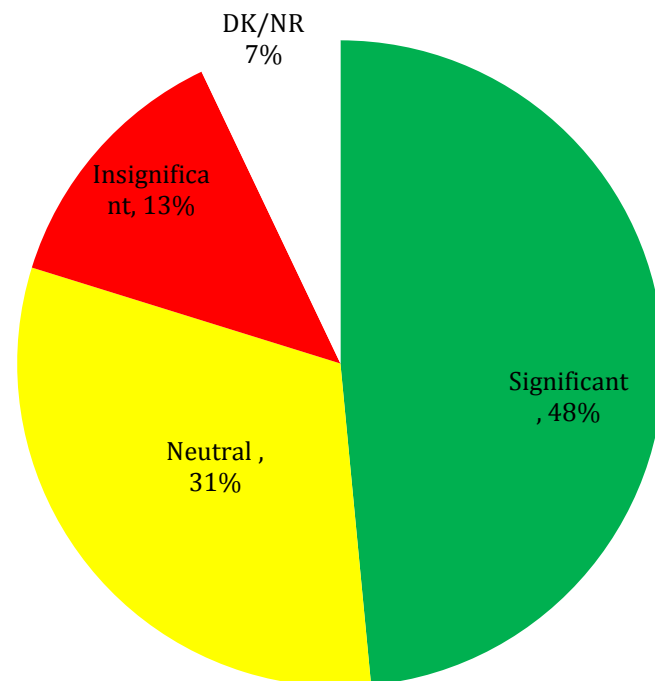
5.6 Views about World Bank Programs

5.6.3 World Bank Knowledge and Research: Source of significant contribution to national development

Clients view the World Bank's knowledge and research as valuable for Pakistan's overall development. A **48%** majority of the respondents rated these resources as "significant" contributors to Pakistan's development agenda.

Percent of Respondents (%)

Q 62: Overall, how significant a contribution do you believe the World Bank's knowledge and research make to development results in Pakistan, on a ten point scale?	Client
Insignificant	13%
Neutral (Neither insignificant nor significant)	31%
Significant	48%
Don't know/No Response	7%



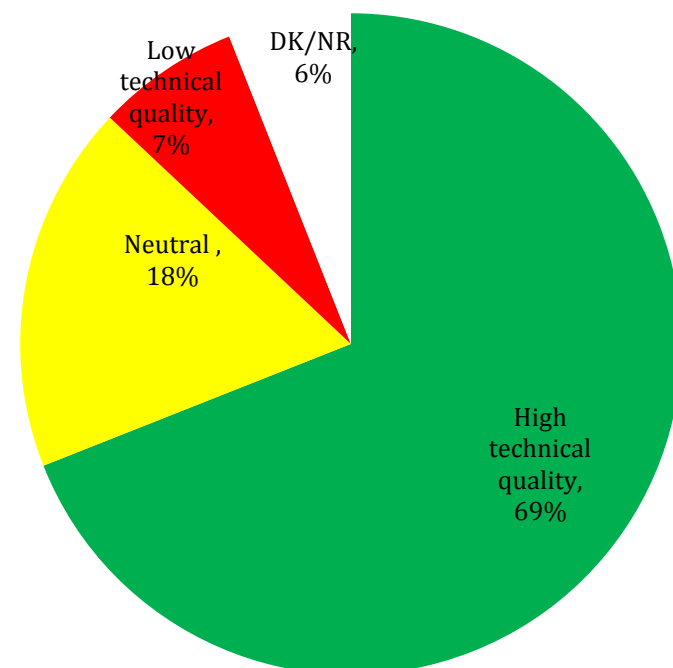
5.6 Views about World Bank Programs

5.6.3 World Bank Knowledge and Research: Technically Superior Resource

Clients give high ratings to the technical quality of the knowledge and research produced by the World Bank. A substantial **69%** majority of the respondents rated these resources as having “High Technical Quality”.

Percent of Respondents (%)

Q 63: Overall, how would you rate the technical quality of the World Bank's knowledge/research, on a ten point scale?	Client
Low technical quality	7%
Neutral (Neither Low quality nor high quality)	18%
High technical quality	69%
Don't know/No Response	6%



Section 5: **Views about World Bank Policy Institutes**

5.6 VIEWS ABOUT WORLD BANK PROGRAMS

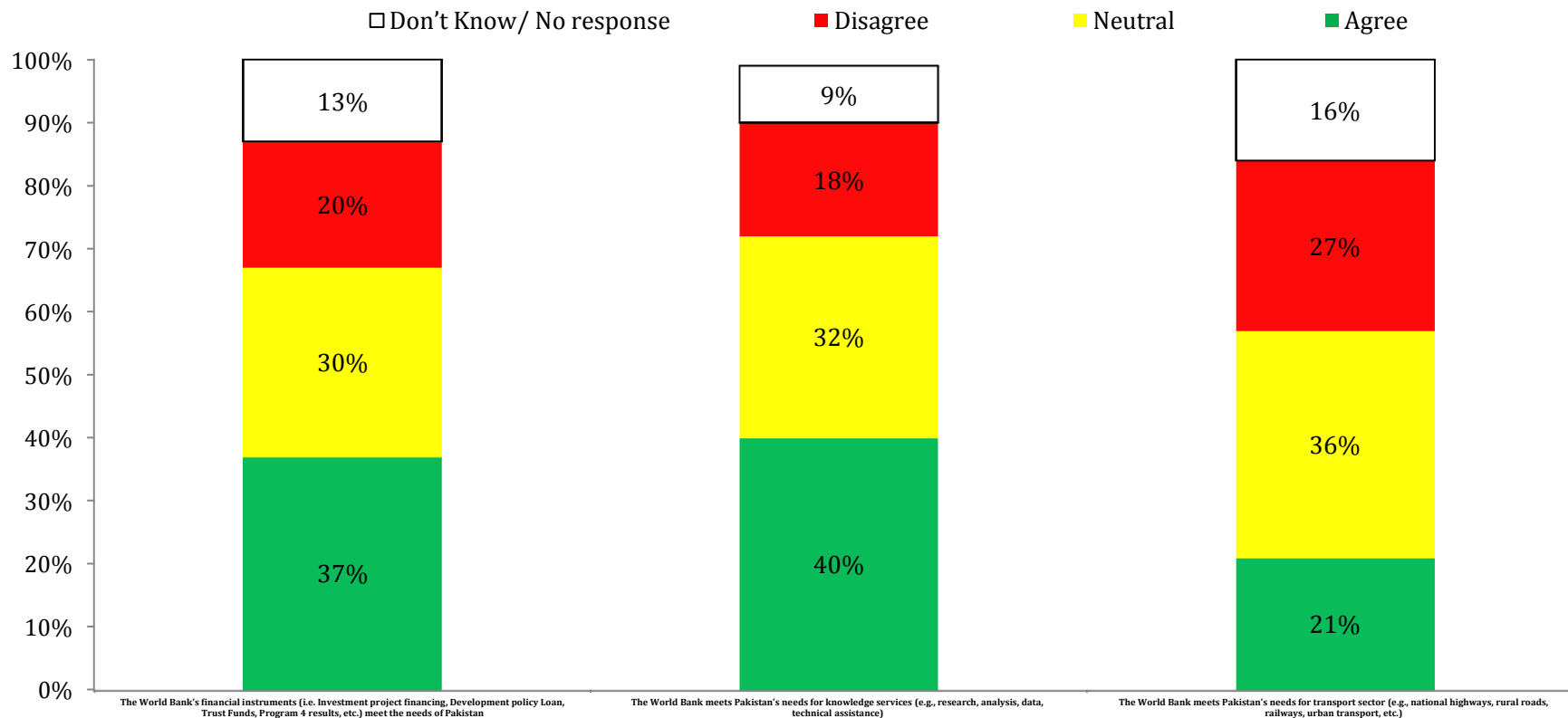
5.6.4 Financial Services

5.6 Views about World Bank Programs

5.6.4 Financial Services: Meet Knowledge and Aid Needs

Question: To what extent do you agree with the following statements about the World Bank in Pakistan, on a ten point scale? *(Question 60 from Questionnaire)*

For most clients, the World Bank's assistance meets Pakistan's technical and financial needs. **37%** of the clients believe that the Bank's financial instruments meet Pakistan's financial needs. An even higher **40%** believe that the Bank meets Pakistan need for knowledge services through its technical assistance and research publications.



Section 5: **Views about World Bank Policy Institutes**

5.6 VIEWS ABOUT WORLD BANK PROGRAMS

5.6.5 Mobilizing Outside Support

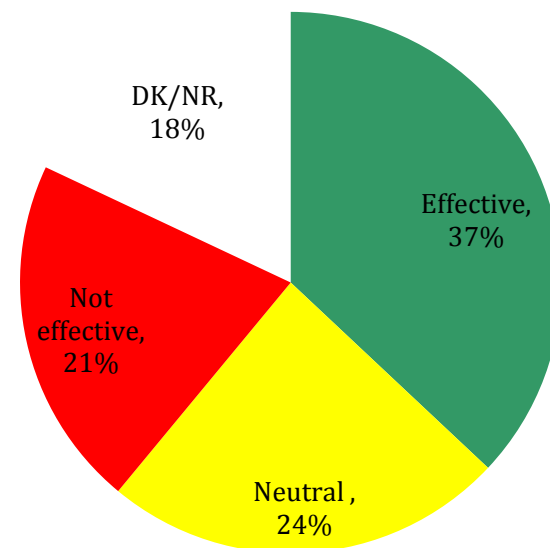
5.6 Views about World Bank Programs

5.6.5 Mobilizing Outside Support: Partial Acknowledgement of the Bank's Convening Power

Clients were uncertain when quizzed about their views on the World Bank's ability to mobilize and procure external assistance for Pakistan. About one-third (**37%**) of the respondents rated the Bank's convening power as effective, while the remaining clients remained uncertain or unconvinced.

Percent of Respondents (%)

Q 65: Overall, how effective is the World Bank at using its convening power to mobilize outside or additional support and resources for development in Pakistan?	Client
Not effective	21%
Neutral (Neither non effective nor effective)	24%
Effective	37%
No response/No Response	18%



Section 5: **Views about World Bank Policy Institutes**

5.6 VIEWS ABOUT WORLD BANK PROGRAMS

5.6.6 Non-Bank Expertise

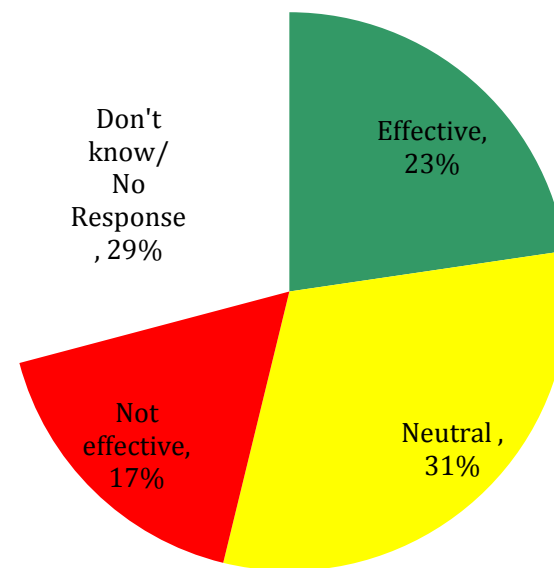
5.6 Views about World Bank Programs

5.6.6 Non-Bank Expertise: Uncertain Clients

Clients were uncertain about the Bank's ability to facilitate linkages to non-Bank resources. **31%** of the clients remain chose to remain non-committed, while 17% of the clients considered this ability ineffective (**17%**), or abstained from responding (**29%**).

Percent of Respondents (%)

Q 64: Overall, how effective is the World Bank at providing linkage to non-Bank expertise (i.e., South-South knowledge sharing, etc)?	Client
Not effective	17%
Neutral (Neither non effective nor effective)	31%
Effective	23%
Don't know/No Response	29%



Section 5: **Views about World Bank Policy Institutes**

5.6 VIEWS ABOUT WORLD BANK PROGRAMS

5.6.7 Seeking Global Development Agenda

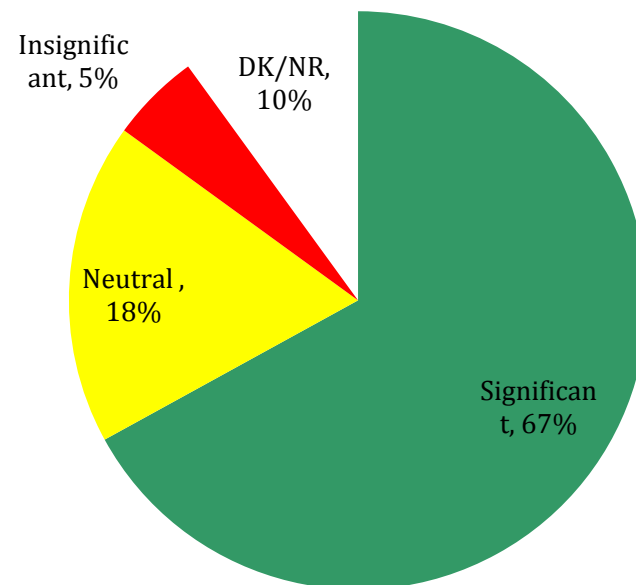
5.6 Views about World Bank Programs

5.6.7 Seeking Global Development agenda: Clients Demand Robust Bank Involvement

Clients were unanimous in their views on the extent to which the Bank should seek to influence the global development agenda. A substantial **67%** of the clients concurred that the Bank should play an active role in shaping and influencing the global development agenda.

Percent of Respondents (%)

Q 54: To what extent do you believe the World Bank should seek to influence the global development agenda as related to “global public goods” (e.g., climate change, communicable diseases, international financial systems, trade, food security etc.), on a ten points scale?	Client
Insignificant	5%
Neutral (Neither insignificant nor significant)	18%
Significant	67%
Don't know/ No response	10%



Section 5: **Views about World Bank Policy Institutes**

5.6 VIEWS ABOUT WORLD BANK PROGRAMS

5.6.8 World Bank value for money

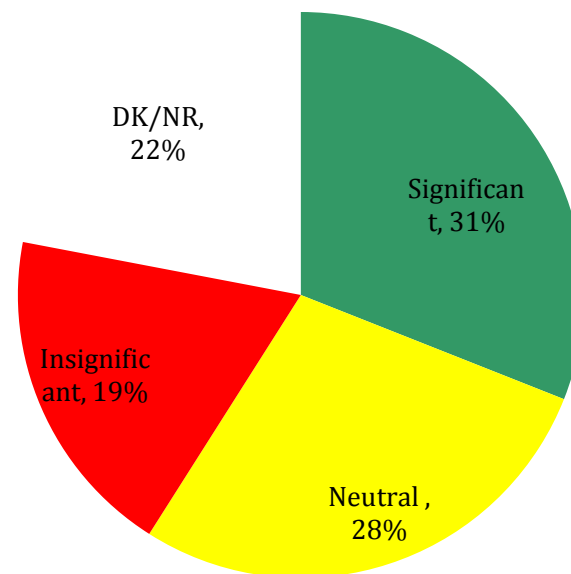
5.6 Views about World Bank Programs

5.6.8 World Bank's value for money: Uncertain Clients

Clients did not provide a definitive assessment of whether Pakistan received value for its money in accessing the World Bank's services and resources. Nearly one-third (31%) asserted that the country had received significant returns, while a significant proportion (22%) abstained from responding, or remained noncommittal (28%).

Percent of Respondents (%)

Q 66: To what extent do you believe that Pakistan received value for money from the World Bank's products/services that were paid for on a fee for service basis?	Client
Insignificant	19%
Neutral (Neither non-significant nor significant)	28%
Significant	31%
Don't know/ No response	22%



Section 6

MISCELLANEOUS:

Section 5

Miscellaneous:

6.1: Overall Direction of Country

6.2: Direction of the Country in Tackling Development
issues

Section 6: **Miscellaneous**

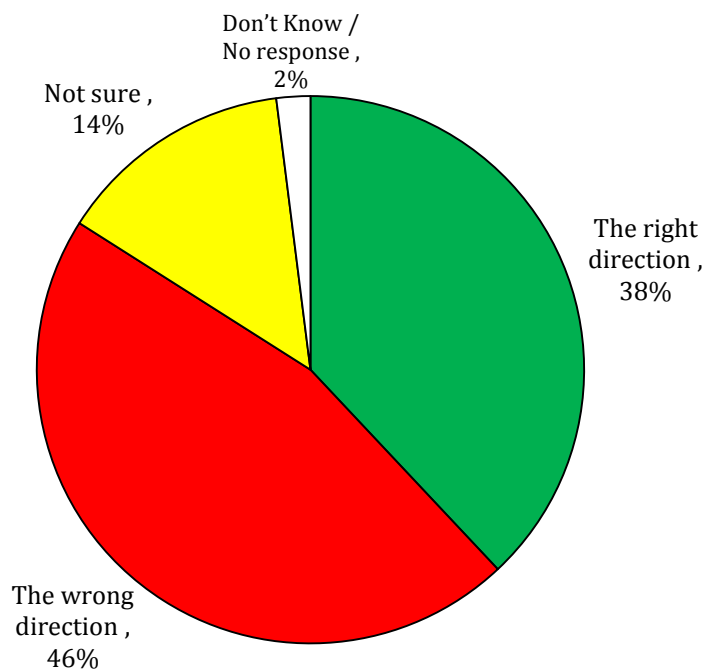
6.1 Overall Direction of Country

6.1 Overall Direction of Country: Divided Stakeholders and Uncertain Clients

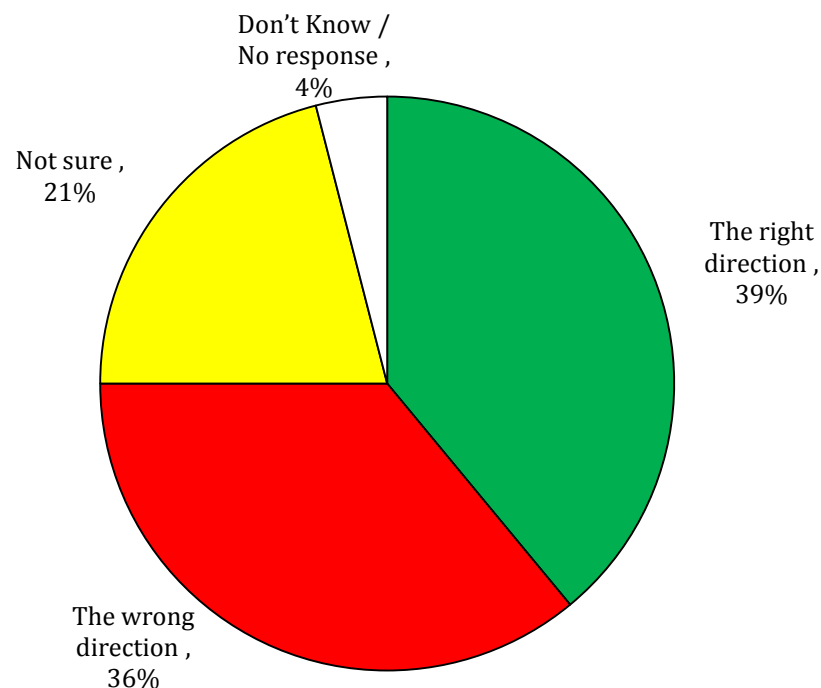
Question: In general would you say that Pakistan is headed in.....? (Question 1 from Questionnaire)

Stakeholders and clients were largely divided in their opinions on whether the country is headed in the right direction. While the majority of the stakeholders (46%) think the country is headed in the wrong direction, a sizable proportion (38%) disagrees. Similarly, while 39% of the clients are optimistic about the country's future, a sizable chunk - 36% - thinks that Pakistan is headed in the wrong direction.

Stakeholders



Clients



Section 6: **Miscellaneous**

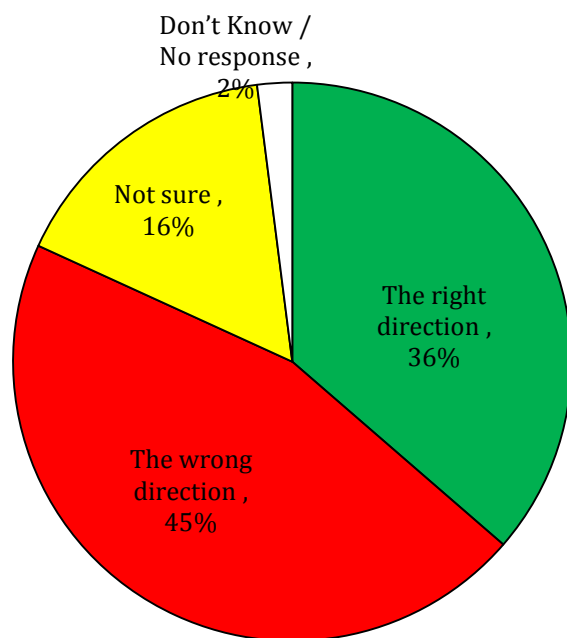
6.2 Direction of the country in tackling development issues

6.2 Direction of the country in tackling development issues: Divided Responses

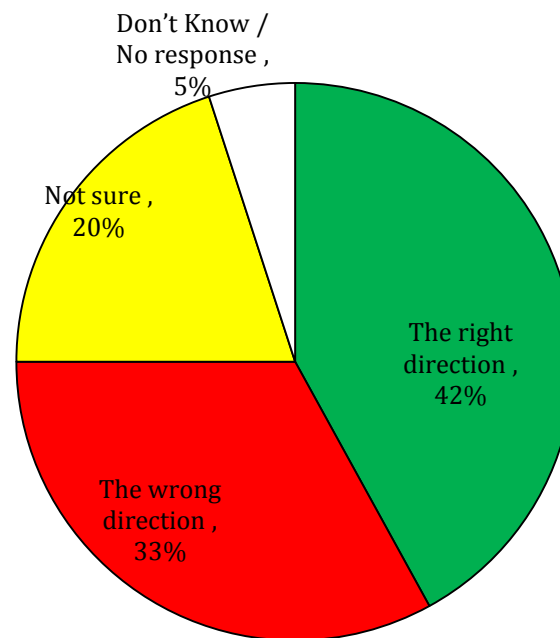
Question: Given the development issues facing Pakistan and the current level of effort to address them (by government and non-government, donors), would you say that Pakistan is headed in.....? *(Question 2 from Questionnaire)*

Stakeholders and clients were divided in the assessment of where the country is headed given its development-related challenges. 45% of the stakeholders think the country is headed in the wrong direction, but 36% disagree and think the country is headed in the right direction. Similarly, while 42% of the clients think the country is headed in the right direction, 33% disagree with this assessment.

Stakeholders



Clients





World Leaders in Marketing Research & Consultancy

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