



ADB Perceptions Survey

**Multinational Survey of
Stakeholders 2009**

May 2010

Asian Development Bank

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MAY 2010

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SURVEY COUNTRIES

	CENTRAL AND WEST ASIA AZERBAIJAN PAKISTAN UZBEKISTAN	
PACIFIC FEDERATED STATES OF MICRONESIA PAPUA NEW GUINEA SAMOA SOLOMON ISLANDS TIMOR-LESTE	SOUTH ASIA BANGLADESH BHUTAN INDIA NEPAL SRI LANKA	EAST ASIA PEOPLE'S REPUBLIC OF CHINA MONGOLIA
REGIONAL NON-BORROWING AUSTRALIA JAPAN MALAYSIA SINGAPORE REPUBLIC OF KOREA	SOUTHEAST ASIA CAMBODIA INDONESIA PHILIPPINES THAILAND VIET NAM	NON-REGIONAL NON-BORROWING CANADA FRANCE GERMANY SWEDEN UNITED KINGDOM UNITED STATES OF AMERICA

INTRODUCTION

In 2009, the Asian Development Bank (ADB) commissioned GlobeScan, a stakeholder research consultancy, to conduct a second multinational perceptions survey of its stakeholders in both borrowing countries—also referred to as developing member countries (DMCs)—in the Asia and Pacific region, and in developed non-borrowing countries within and outside the region. A similar exercise was carried out in 2006 by Princeton Survey Research Associates International. Dalberg Global Development Advisors, a strategic advisory firm specializing in international development, also played a role in the 2009 stakeholder research, specifically in helping with the interpretation of the survey results and in facilitating internal discussions at ADB on next steps.

The development context in the Asia/Pacific region is dynamic and the needs of DMCs are constantly changing. A perceptions survey enables ADB to understand stakeholders' views on current and emerging regional issues and to understand how well ADB's activities align with the expectations and perceptions of stakeholders. Specifically, for the 2009 perceptions survey, ADB identified a number of key objectives, including:

- To measure stakeholders' views about critical regional issues related to ADB's mission and international development in Asia/Pacific;
- To gather stakeholders' views on how ADB can best fit into the context of international development in Asia/Pacific now and in the future;
- To measure perceptions about ADB's relevance, responsiveness, and results, including perceived strengths and weaknesses and areas for improvement;
- To identify ways ADB can effectively communicate with stakeholders;
- To provide a second series of trends in stakeholders' perceptions about ADB (using 2006 as a baseline).

With the formal launch of Strategy 2020 in 2008, which defines ADB's long-term strategic framework for 2008–2020, ADB has redirected itself in light of both rapid economic growth in the Asia and Pacific region and significant shifts in the development, aid, and financial landscape.

Therefore, 2009 was an ideal time for ADB to revisit the research to obtain an updated and expanded view of what key stakeholders are thinking vis-à-vis its efforts to date across key operational areas.

To accomplish the research objectives, GlobeScan interviewed 900 stakeholders in 31 countries, both within and outside the Asia/Pacific region. In most of the 31 countries, between 20 and 60 stakeholders were interviewed. Figure 1 shows the total number of interviews conducted in each of the regions. In total, 69 percent of respondents work in borrowing countries and the remainder (31%) work in non-borrowing countries either within the region (14%) or outside the region (16%).

Sample Size by Region

	Number of interviews
Overall	900
Central and West Asia	109
East Asia	78
South Asia	208
Southeast Asia	179
Pacific†	50
Regional non-borrowing	130
Non-regional non-borrowing	146

Fig. 1

†Pacific refers to ADB Pacific Development Member Countries, which in this survey includes the Federated States of Micronesia, Papua New Guinea, Samoa, Solomon Islands, and Timor-Leste. We refer to ADB Pacific Development Member Countries as "Pacific" in all charts that show results by region.

INTRODUCTION

Names of potential respondents in each country were compiled from both ADB and GlobeScan sources. These two lists were combined and duplicate names were removed. In the final list of prospective respondents, around 70 percent of the names were from ADB and the remainder from GlobeScan. Before fieldwork began, ADB reviewed and affirmed the final list of potential respondents. However, at no point after the fieldwork began was ADB made aware of who participated, ensuring that all participating stakeholders remained anonymous.

As in 2006, the survey sample consists of individuals working in government, multi/bilateral organizations, civil society organizations (CSOs), media, the private sector, and academia. The number of interviews conducted in each stakeholder group, as well as the distribution of interviews across the stakeholder groups is summarized in Figure 2 and Figure 3. Note that the distribution of interviews across stakeholder groups matches what was achieved in the 2006 research.[†]

Sample Size by Stakeholder Group

	Number of interviews
Government	295
Private sector	174
Civil society organization (CSO)	151
Media	102
Multi/bilateral	97
Academia	81

Fig. 2

Similar to the 2006 research, to qualify for the survey respondents had to be at least somewhat knowledgeable about ADB and its activities. Those contacts who did not qualify were thanked for their time and given a courteous explanation as to why they did not qualify for participation.

Around one-quarter of respondents (26%) described themselves as “very” knowledgeable about ADB, with the remainder “somewhat” knowledgeable, similar to 2006. Respondents are experienced in development issues, with almost one-half (48%) saying they have been working on international development issues for more than 10 years. They also have direct experience working with ADB: 50 percent say they have been involved in an ADB project, program, or research study in the past three years (identified as “clients” in the report). Three-quarters of respondents interviewed were male, a similar proportion to 2006. Respondents were asked if they had participated in the 2006 survey; four percent said they had, 13 percent could not remember, and the rest (83%) said they had not.

To accommodate respondents’ busy schedules, multiple modes of interviewing were offered: Online, telephone, and face-to-face. In total, 72 percent of respondents took the survey online while 21 percent were interviewed over the telephone and 6 percent opted for a face-to-face interview. The interviews were conducted between October and December 2009.

Proportion of Interviews by Stakeholder Group

	Overall (%)	Borrowing countries (%)	Non-borrowing countries (%)
Government	33	34	30
Private sector	19	20	19
Civil society organization (CSO)	17	13	24
Media	11	10	13
Multi/bilateral	11	16	0
Academia	9	7	13

Fig. 3

[†]The numbers and percentages shown in Figure 2 and Figure 3, as well as in all tables and graphs throughout the report, have been weighted to account for both non-response and the fact that extra interviews were conducted in some survey countries. A similar approach was followed in 2006.

Report Outline

The report begins with a summary of the key findings of the research, followed by five sections presenting the results of the 2009 survey in detail.

The first section presents stakeholders' overall impressions of ADB, looking at perceptions of its impact on development; how helpful it has been in assisting countries to fulfill their development goals and objectives; and its overall impact on poverty reduction. Perceptions of ADB's main strengths and weaknesses are also presented, as well as the characteristics that stakeholders believe most closely describe ADB, ranging from trustworthy and transparent to innovative and collaborative.

The second section begins by examining what stakeholders believe are the most serious threats to economic and social development in the region. It then reports on what stakeholders believe are key priorities at ADB. This section concludes with a review of what stakeholders think should be ADB's main priorities to best help developing countries in the region achieve their development objectives. Given the relatively recent launch of Strategy 2020, in which ADB highlights its funding and operational priorities for the coming decade, results in this section provide useful insight into internally stated priorities versus what external stakeholders think are priorities at ADB.

In the third section, stakeholder perceptions of ADB's performance across a number of operational areas is presented, each of which are related to Strategy 2020. This section also provides feedback from clients on ADB's operational performance across a number of different areas, from the technical skills and abilities of staff to perceptions of ADB's ability to work effectively with other development partners.

The fourth section provides insight into ADB's current communications context. Specifically, it reports on the extent to which stakeholders use various information and communication channels (including ADB's website and publications) and highlights their candid feedback on how useful and user-friendly these channels are.

In the fifth and final section we present stakeholders' general perceptions of foreign development assistance, including views on how effectively foreign development assistance organizations allocate aid and how effectively governments use this aid.

Notes to Readers

All figures in the charts and tables in this report are expressed as percentages, unless otherwise stated. Total percentages may not add up to 100 because of rounding. Likewise, because of rounding, results expressed as aggregates (e.g., excellent + good) may differ slightly from a simple addition of data points shown in charts. In case of stacked bar charts, white space typically represents the proportion of respondents who either answered "do not know" or did not answer at all (i.e., "DK/NA").

Where data are available, we report on how stakeholder opinion has changed since 2006. Comments tend to be made where differences between the 2006 and 2009 results are statistically significant. However, for clarity, where there is no real change, we also detail this.

We also comment on statistically significant differences between different parts of the sample (e.g., regions and stakeholders groups). Significance of difference in perceptions across different subsamples is a function of the sample and population size and population variance. Caution should be taken when viewing the charts and tables in the report, as not every apparent difference between stakeholder groups or regions will be statistically significant. Since 2006, ADB's regional definitions have changed; to allow for valid regional comparisons between the 2006 and 2009 results, the 2006 survey countries were re-grouped to match ADB's current regional definitions.

Throughout this report we refer to "borrowing" and "non-borrowing" countries. Borrowing countries are developing countries within the Asia and Pacific region and are sometimes also referred to as "developing member countries" or "DMCs." Non-borrowing countries are developed countries situated both within and outside of the region, and are referred to respectively as "regional non-borrowing" and "non-regional non-borrowing countries."

Key Findings

OVERALL IMPRESSIONS OF ADB

Perceptions of ADB's impact on development continue to be strong

A strong majority of stakeholders (90%) continues to think ADB is having a good impact on the overall development of developing countries in the Asia/Pacific region. These very positive views of ADB remain relatively unchanged since 2006. A strong proportion of respondents also think ADB is helping developing member countries meet their development goals (87% feel this way, no change since 2006). While results are positive, there are still opportunities for improvement: In most regions and stakeholder groups, respondents are more likely to say ADB's performance is somewhat good or somewhat helpful as opposed to very good or very helpful.

A majority of stakeholders now thinks ADB's performance in helping reduce poverty is either excellent or good

One in two stakeholders now think ADB is doing an excellent or good job in helping reduce poverty in developing countries in the Asia/Pacific region, compared to 45 percent who felt this way in 2006. While few stakeholders give ADB a poor rating (8% overall), a large proportion (40%) continue to rate its performance as average. As poverty persists in the region, stakeholders will likely continue to offer a cautious assessment of ADB's performance in this regard.

A trusted, reliable, and competent organization

ADB has clearly earned the trust of its external stakeholders: Strong majorities (80% or more) think that "competent," "trustworthy," and "reliable" describe ADB either to a great or moderate extent. Even among respondents working for civil society organizations (CSOs), who tend to be the most critical stakeholders on most aspects of ADB's performance, a relatively strong majority (i.e., 70% or more) thinks these characteristics describe ADB.

ADB's key strengths: Its specific focus on Asia and knowledge of the region

According to stakeholders (based on open-ended responses), ADB's greatest strength is its knowledge of the Asia/Pacific region and its specific focus on Asia. As one stakeholder said, "Its local presence and membership gives it a closer, more nuanced view of the development needs and priorities of the region than other international agencies." Other key strengths, though mentioned much less frequently, include its focus on developing and improving infrastructure, its effectiveness and quality control in projects, and its financial resources and provision of loans.

Areas to improve: Bureaucracy, speed, and project execution/monitoring

Stakeholders think ADB's key weaknesses (based on open-ended responses) are a function of its organizational structure—that it is too bureaucratic, and as a result, has a tendency to be slow in decision-making. It follows then that when asked to indicate the extent to which several "personality" attributes describe ADB, relatively high proportions of stakeholders (i.e., more than 60%) think "bureaucratic" and "slow" describe ADB either to a great or moderate extent. Respondents also think ADB can get better at implementing projects, and monitoring and measuring project results and outcomes.

DEVELOPMENT CHALLENGES AND PERCEIVED PRIORITIES AT ADB

Stakeholders see corruption as a very serious threat to development

From a list of nine possible threats, stakeholders in borrowing countries are most likely to say corruption is a serious threat to development in their country. Other perceived serious threats include environmental degradation, a widening rich-poor gap, poor governance, poor infrastructure, and limited educational opportunities and inadequate health services. As ADB's Strategy 2020 puts a priority on many of these areas, results suggest there is alignment between ADB's stated core operational areas and what stakeholders believe are the key threats to development.

Stakeholders most likely to think ADB puts a high priority on improving infrastructure

Stakeholders were asked to rate how much of a priority they think ADB places on 14 areas related to Strategy 2020, which include "drivers of change," "core operational areas," and "other areas of operations." There is little doubt in stakeholders' minds that improving infrastructure (a core operational area) is a top priority at ADB: 90 percent of respondents think ADB puts a high or moderate priority on this, more than any other area. These perceptions are aligned with Strategy 2020 and consistent with results from the 2006 survey, when improving infrastructure similarly topped the list of perceived priorities at ADB.

Significantly fewer stakeholders think gender equality is a high priority at ADB

A majority of stakeholders thinks ADB puts a high or moderate priority on promoting gender equality (a driver of change in Strategy 2020). However, along with disaster and emergency assistance, gender equality is the area on which respondents are least likely to think ADB puts a priority. And compared to 2006, stakeholders in non-borrowing countries are now less likely to think ADB puts a priority on gender equality.

Growing perception that ADB puts a priority on resource mobilization for private sector development

Stakeholders are somewhat more likely than they were three years ago to think ADB puts a priority on mobilizing resources for the development of the private sector (69% think it is a priority in 2009, compared to 61% in 2006). While academic stakeholders and those working for CSOs increasingly see this as a priority at ADB, it is notable that private sector stakeholders' views remain unchanged; in fact, they are among the least likely to think ADB makes this a priority.

Perceived attention paid to poverty reduction continues to be strong

A strong majority of stakeholders (80%) continues to think ADB puts a priority on poverty reduction. However, since 2006, there has been a modest downward change in perceptions overall (from 85% to 80% saying ADB puts a high or moderate priority on this area) and a significant decline among stakeholders working for CSOs and in Central and West Asia.

Key Findings

PERCEPTIONS OF ADB'S PERFORMANCE

Top marks on improving infrastructure

It is perhaps not surprising that ADB gets its highest performance ratings on improving infrastructure: It is perceived as the top priority at ADB, accounting for the highest percentage of financing activity at ADB in 2009, and it is the area that stakeholders say they want ADB to prioritize to help reduce poverty. Infrastructure was similarly the highest rated area in 2006. Notably, stakeholders working in non-borrowing countries outside the Asia/Pacific region have a more favourable view of ADB's performance on improving infrastructure than those working in non-borrowing countries within the region.

Positive feedback from clients on ADB staff's technical skills and understanding of country

A relatively strong majority of ADB clients[†] (i.e., 66% or more) commends the performance of ADB staff across a number of areas, including their ability to provide useful information, their understanding of the countries in which they work, and for their technical skills and abilities.

More favourable ratings from government stakeholders in borrowing countries

On nearly all operational areas and drivers of change, government stakeholders working in borrowing countries are much more likely than all other stakeholders, and especially government respondents in non-borrowing countries, to rate ADB's performance favourably.

More critical performance ratings from CSO stakeholders

Consistently, CSO respondents are among the least likely to give ADB a favourable rating on most operational areas and drivers of change.

Mixed opinion on ADB's performance in helping improve governance

Stakeholders in borrowing countries identify corruption and poor governance as among the most serious threats to development in their country (from a list of 9 possible threats). However, opinion about ADB's performance in improving governance is divided, with respondents as likely

to rate ADB's performance as good or excellent as they are to rate it as average. Borrowing government stakeholders are the most favourable (60% think ADB is doing a good or excellent job in this area). In all other stakeholder groups, less than a majority thinks ADB is doing a good job in improving governance.

A majority of stakeholders thinks ADB takes sufficient steps to reduce corruption in its projects

One of the commitments ADB makes in Strategy 2020 is to reduce the harm that corruption inflicts on development. To this end, ADB sought feedback from stakeholders on the perceived sufficiency of steps ADB has taken to reduce corruption in its projects. A majority of stakeholders (60%) agrees that ADB is doing enough in this regard, while a strong majority (72%) of clients in developing countries (i.e., those who have had on-the-ground experience with ADB projects) feels this way. A strong majority (76%) of borrowing government stakeholders also agrees that ADB is taking sufficient steps to reduce corruption, whereas their non-borrowing counterparts are less likely to think this way (61%).

Uncertainty about ADB's performance on promoting gender equality

Gender equality is one of five drivers of change in Strategy 2020, that is, an area that will be particularly emphasized across all of ADB's operations in the coming decade. Despite ADB's ongoing efforts and initiatives in this area, stakeholders are more likely to rate ADB's performance as average rather than good or excellent. And since 2006, perceptions of ADB's performance in promoting gender equality have declined, reflecting a growing belief among stakeholders that gender equality is a lower priority at ADB than other areas. Results suggest stakeholders see room for improvement in this area.

[†]Clients are respondents with some involvement in an ADB program, project, or research study in the past three years.

PERCEPTIONS OF ADB'S COMMUNICATIONS

A majority of stakeholders continues to think ADB communicates its mission and activities well

More than six in ten respondents (62%) think ADB communicates its mission and activities very or somewhat well. However, overall views have not changed since 2006, and a substantial proportion of respondents (37%) continue to feel that ADB does not express its mission well. Interestingly, respondents in non-regional non-borrowing countries (i.e., in countries outside of the Asia/Pacific region) are more likely than those working in non-borrowing countries within the region to think ADB communicates its mission and activities well.

Responsiveness to information requests

A key part of stakeholder communications and engagement is being responsive to inquiries and requests for information. Overall, stakeholders think ADB is doing a good job in this regard, with a relatively strong majority of respondents (66%) saying ADB is responsive to them either always or most of the time. CSO, private sector, and academic stakeholders are less certain than others that ADB gets back to them. Conversely, government stakeholders think ADB is particularly attentive to their requests, with three-quarters of these stakeholders saying the bank is responsive to their requests for information either most or all of the time.

Readership is up, along with the perceived influence of ADB publications

Since 2006, stakeholders are increasingly likely to say they have read ADB publications in the past three years. Reported readership is highest among CSO stakeholders, clients, and respondents working in Southeast Asia. And importantly, stakeholders who have read ADB publications are now more likely than they were three years ago to say these have an impact on their thinking about development issues. However, there is still room for ADB to grow in this regard, as nearly one-third of respondents overall feel that ADB publications have a small or no impact at all on their thinking, with CSO stakeholders the most likely to think this way.

Modest rise in website visits

Most stakeholders continue to be occasional visitors to the ADB website, with two-thirds saying they visit the site either a few times a month or less. However, significantly fewer stakeholders compared to 2006 now say they never visit the website, reflecting a modest rise in overall visits over the past three years. Most stakeholders say the primary reason for visiting the site is to learn about ADB projects. And while a strong majority (85%) says ADB's website is either very or somewhat easy to use, significantly fewer stakeholders (64%) feel the site provides the information they need or want most of the time. CSO and academic respondents are the least likely to say they can find what they need.

The table on the next page provides a summary of key questions asked in both the 2006 and 2009 survey, noting any changes (at an aggregate level). Overall, while there have not been significant changes in opinion on several of the questions at this aggregate level, there have been changes on a regional basis and within some stakeholder groups. These changes are elaborated in subsequent sections of this report.

Key Findings

Change in Stakeholder Perceptions

2006 vs 2009, on Selected Questions

Overall Perceptions of ADB		2006	2009	Change*
Q14. ADB is very or somewhat helpful in assisting [name of country / developing countries in Asia and the Pacific] to meet its development goals and objectives		87%	87%	↔
Q17. ADB is doing an excellent or good job in helping [name of country / developing countries in Asia and the Pacific] reduce poverty		45%	50%	↑
Q7. ADB is having a very or somewhat good impact on developing countries' development in Asia/Pacific		90%	90%	↔
Perceived Priorities at ADB		2006	2009	Change*
Q10/11. ADB puts a high or moderate priority on [...] in [name of country / developing countries in Asia and the Pacific]	Improving the infrastructure	92%	90%	↔
	Reducing poverty	85%	80%	↓
	Supporting regional cooperation and economic integration	77%	74%	↔
	Improving governance	67%	70%	↔
	Promoting environmental sustainability	71%	69%	↔
	Mobilizing resources to develop the private sector	61%	69%	↑
	Promoting gender equality	63%	57%	↓
Perceptions of ADB's Performance		2006	2009	Change*
Q20. ADB's performance is excellent or good when it comes to [...] in [name of country / developing countries in Asia and the Pacific]	Improving the infrastructure	71%	69%	↔
	Supporting regional cooperation and economic integration	53%	55%	↔
	Promoting environmental sustainability	45%	47%	↔
	Mobilizing resources to develop the private sector	41%	40%	↔
	Improving governance	41%	38%	↔
	Promoting gender equality	35%	32%	↔
Q23b. Strongly or somewhat agree that ADB plays a useful role in enhancing private sector development in [name of country / developing countries in Asia and the Pacific]		74%	73%	↔
Perceptions of ADB's Communications		2006	2009	Change*
Q24. ADB communicates its mission and activities to people like you very or somewhat well		63%	62%	↔
Q32. ADB's publications have a great deal or a moderate amount of impact on thinking about development issues **		64%	71%	↑

Fig.4

* The arrows indicate statistically significant changes in the results between 2006 and 2009. The green arrows pointing up indicate a statistically significant increase, the red arrows pointing down indicate a statistically significant decrease, and the amber arrow pointing both left and right indicates that there has not been a statistically significant change.

** Asked only to those who say they have read ADB publications in the past three years.

Section 1: Overall Impressions of ADB

ADB continues to be very well regarded by respondents within and outside the Asia and Pacific region. The vast majority (90%) believes that ADB has a positive impact on development, and a similarly strong majority (87%) thinks ADB helps developing countries in the region achieve their development goals. However, when it comes to perceptions of its performance in helping to reduce poverty, views are comparatively less positive (only 50% think ADB is doing a good job in this regard). While there is some uncertainty among stakeholders about ADB's innovation, as well as concerns about its bureaucracy and flexibility, ADB has clearly earned the trust and confidence of its most important stakeholders.

Overall Impact on Development

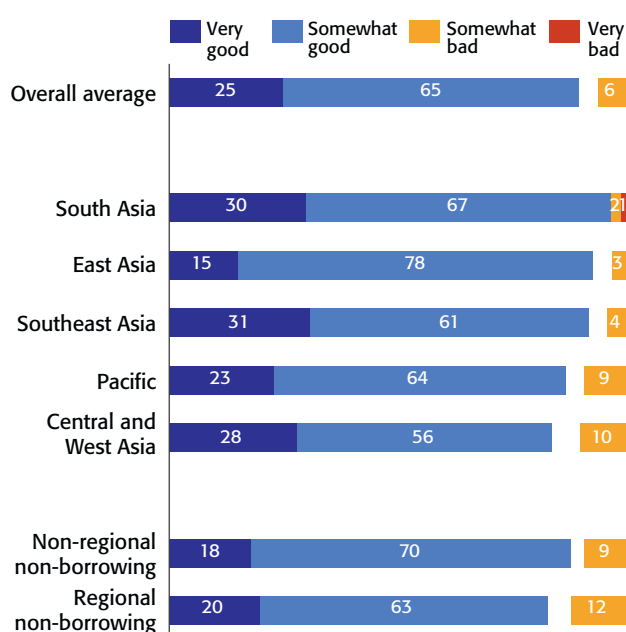
As in 2006, nine in ten respondents say ADB's impact on development is either very good (25%) or somewhat good (65%). Few respondents in any region say ADB's performance is "bad," as shown in Figure 5. Independently of where they work or in what sector, stakeholders clearly believe that ADB is having a positive impact on development in the Asia and Pacific region.[†] Overall, since 2006, there has been no significant change in opinion about ADB's impact on development.

Stakeholders in each of the seven regions overwhelmingly believe that ADB's impact on development is very or somewhat good. Although the combined "good" ratings in Southeast Asia (93%) remain the same as in 2006, there has been a significant increase in the proportion indicating that ADB's impact is very good, from 16 percent in 2006 to 31 percent in 2009.

The view of ADB's impact on development is positive across all stakeholder groups; it is only among those working for civil society organizations (CSOs) that fewer than nine in ten offer a positive assessment of ADB (79% of CSO respondents say ADB's impact is very or somewhat good). Among government stakeholders there has been an increase since 2006 in the proportion indicating that ADB has a very good impact on development (from 20% to 34%).

ADB's Impact on Developing Countries' Development in Asia/Pacific

By Region, 2009



The white space in this chart represents "Refused" and "DK/NA."^{††}

Fig. 5, Q. 7

[†]These very positive overall views of ADB's impact on development need to be contextualized in the fact that nearly three-quarters of survey respondents are ADB contacts and one-half of stakeholders are ADB clients (i.e., involved in an ADB project, program, or research study in the past three years).

^{††}"DK/NA" refers to respondents who either answered "do not know" or did not answer at all.

Overall Impressions of ADB

ADB's Helpfulness in Meeting Development Goals and Objectives

Consistent with stakeholders' very positive views of ADB's impact on the overall development of countries in Asia and the Pacific, a strong majority (87%, the same proportion as in 2006) also believes that ADB has been helpful in assisting countries to meet their development goals and objectives.

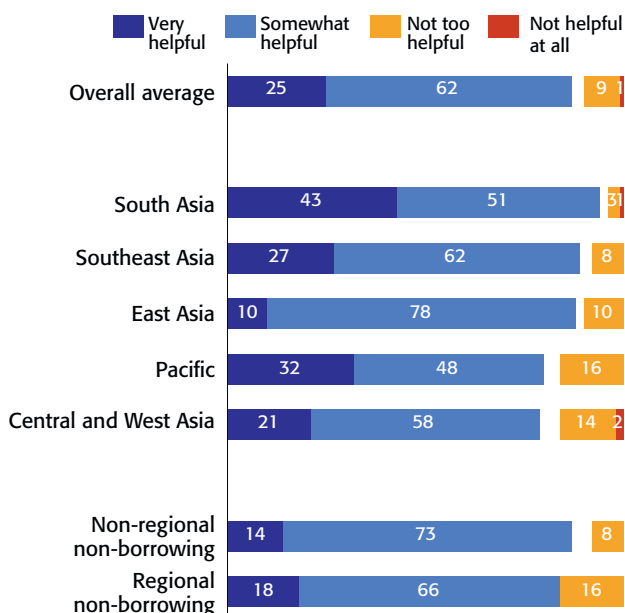
Stakeholders in South Asia are the most positive about ADB in this regard. Not only do more than nine in ten respondents (94%, an increase from 86% in 2006) in this region feel that ADB has been helpful, nearly half (43%, up from 26%) feel it has been "very" helpful. Compare this to East Asia, where only 10 percent of stakeholders feel that ADB has been "very" helpful. Despite this, since 2006 the total proportion of respondents in this region that feels ADB is very or somewhat helpful has increased (from 73% to 88%). In comparison, in Central and West Asia, this proportion has declined over the past three years (from 89% to 78%).

Client status does not have any impact on perceptions of ADB's overall helpfulness—strong majorities of both clients and non-clients are equally likely to think ADB has played a positive role in this regard (89% and 85%, respectively).

Across stakeholder groups, those working in media (95%), academia (92%), and government (91%) have the most favourable views of ADB, especially when compared to CSO stakeholders (77%). Moreover, as was the case in 2006, government respondents in borrowing countries are again the most likely to give ADB the highest praise, with 38% saying ADB has been "very" helpful (compared to only 17% of CSO stakeholders who feel the same way). There has been no significant change in perceptions among stakeholder groups for this question since 2006.

ADB's Helpfulness in Assisting DMCs to Meet Development Goals and Objectives

By Region, 2009

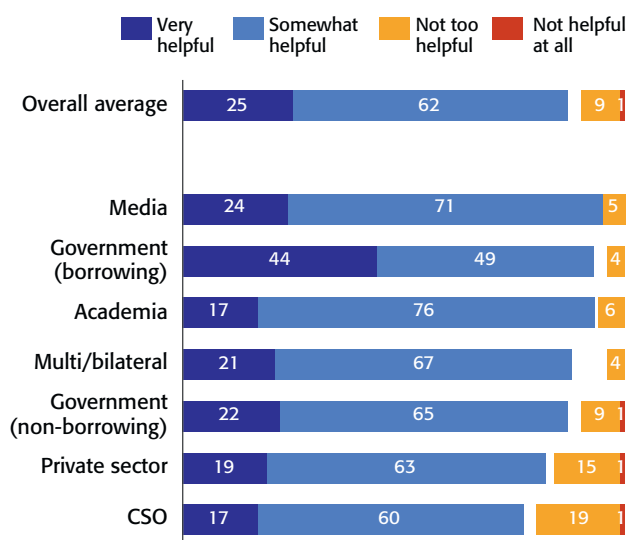


The white space in this chart represents "Refused" and "DK/NA."

Fig. 6, Q. 14

ADB's Helpfulness in Assisting DMCs to Meet Development Goals and Objectives

By Stakeholder Group, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig.7, Q. 14

Overall Impressions of ADB

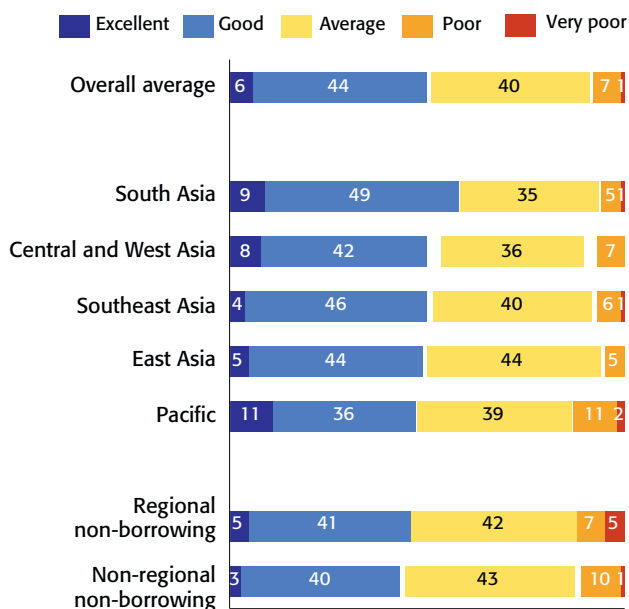
Performance in Reducing Poverty

Although most stakeholders believe that ADB has a positive impact on development and that it is helpful in assisting countries meet their development goals, they are notably less positive when it comes to assessing ADB's performance in helping to reduce poverty. Overall, one in two respondents (50%) feel that ADB is doing either an "excellent" (6%) or "good" job (44%) in helping countries to reduce poverty, a slight increase since 2006 when 45 percent of respondents felt it was doing an excellent or good job. A relatively high proportion (40%) says ADB's performance is "average," and very few continue to say that its performance is poor (8%).

Overall, respondents' views in developing member countries (DMCs) have improved since 2006 (52% say ADB's performance in helping to reduce poverty is good, up from 45%). As Figure 8 shows, across DMCs, there is relatively little difference in opinion about ADB's performance in poverty reduction. However, respondents in South Asia are much more likely than those working in non-regional, non-borrowing countries to rate ADB's performance favourably.

Clients have a somewhat better view of ADB's performance in helping to reduce poverty than non-clients (55% vs 45%, respectively). Across the different stakeholder groups, government respondents in borrowing countries are much more positive than those working in government in non-borrowing countries (71% vs 50%; in 2006, there was not as strong a difference in views). However, non-borrowing government respondents are no more critical than others, with just 9 percent saying ADB is doing a poor job in reducing poverty. Stakeholders working in CSOs are the most negative about ADB's performance when it comes to poverty reduction, which is consistent with results from 2006.

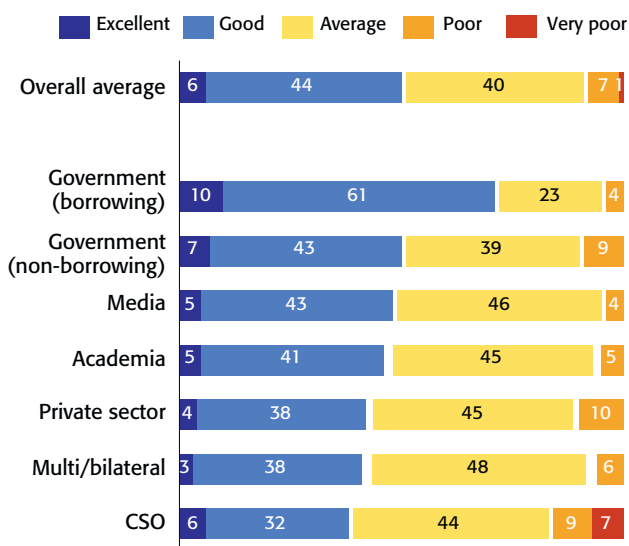
ADB's Performance in Helping DMCs Reduce Poverty By Region, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 8, Q. 17

ADB's Performance in Helping DMCs Reduce Poverty By Stakeholder Group, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 9, Q. 17

Overall Impressions of ADB

Reasons for Views about ADB's Performance in Poverty Reduction

ADB clients were asked to elaborate their assessment of ADB's performance in reducing poverty. Among those who felt that ADB is doing a good job, the main reasons attributed to this good performance include: 1) that it makes poverty reduction a top priority (95% say this is an important reason); 2) it has the knowledge and expertise (90%); 3) it allocates enough financial resources (88%); and 4) it effectively implements and monitors projects (84%). There are no differences in opinion between borrowing and non-borrowing country responses. As in 2006, making poverty reduction a priority continues to be seen as the main driver of ADB's success.

And when those clients who rated ADB's performance as poor or average were asked to assess the importance of several possible reasons for this poor or average rating, they indicated the following: 1) that poverty is too big a problem for any organization to solve (67% say this is an important reason); 2) ADB does not monitor its projects effectively (63%); 3) it does not allocate sufficient financial resources (61%); 4) it does not make poverty reduction a top priority (56%); and 5) ADB lacks the knowledge and expertise to help reduce poverty (52%). It is notable that the primary reason attributed to ADB's poor performance is that poverty is simply too big or complicated for any organization to solve. Results point to the underlying importance of collaboration and partnerships in helping to fight poverty in the region. Perceptions of ADB's performance in this regard is discussed in greater detail in Sections 2 and 3.

Overall Impressions of ADB

Perceived Strengths and Weaknesses

All stakeholders were asked to state (in their own words) what they believe are ADB's key strengths and weaknesses. These verbatim comments were then analyzed and grouped into themes to highlight valued strengths and areas where stakeholders think ADB can improve.

Perceived Strengths

Overall, stakeholders primarily point to ADB's knowledge of the region and its focus on Asia and the Pacific as its greatest strength. It is the most mentioned strength across all stakeholder groups.

There are differences in opinion across the regions as to what stakeholders see as ADB's greatest strength. For example, stakeholders in Central and West Asia and the Pacific Islands are much less likely to say ADB's knowledge and focus on the Asia/Pacific region is its core strength (9% and 8%, respectively, say this). Instead, in the Pacific Islands, it is ADB's efforts to improve infrastructure (19%), and in Central and West Asia, it is its operational effectiveness (13%) that respondents think is its greatest asset. While ADB's financial resources are mentioned, it is not perceived to be among the bank's top strengths, perhaps because stakeholders assume ADB has the necessary resources to support development in the region.

ADB's Greatest Strength

Unprompted, Total Mentions, by Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Asian focus / knowledge of region	24	9	22	18	24	8	27	45
Improving infrastructure	8	5	5	13	7	19	4	6
Operational effectiveness / quality control	7	13	7	9	2	7	6	5
Providing loans / grants / financial assistance	7	9	15	6	7	9	3	4
Financial resources / capacity	6	5	5	3	11	3	8	3
Reducing poverty / focus on social or humanitarian causes	5	8	8	7	6	9	2	0
Thought leadership / advice	5	2	4	3	7	3	8	4
Collaboration/partnerships	4	5	2	6	3	3	1	6
Focus on development	4	6	3	4	5	6	4	2
Professional staff / good team	4	4	5	7	4	4	3	3
Strategic/relevant investments/projects	4	10	1	3	4	4	3	2


 Top mention in region

Fig. 10, Q. 8

Responses made by fewer than 3 percent of respondents have not been included in this chart.

Overall Impressions of ADB

In both borrowing and non-borrowing countries, stakeholders say that ADB's greatest strength is its Asian focus and knowledge of the region. However, respondents in non-borrowing countries are especially likely to say this is ADB's greatest strength (36% mention this vs 18% in borrowing countries). Instead, respondents in borrowing countries are more likely than those in non-borrowing countries to mention such things as ADB's provision of loans, infrastructure improvements, and focus on poverty reduction.

Perceived Weaknesses

As with perceived strengths, stakeholders across all regions and across most stakeholder groups also consistently point to one theme as ADB's greatest weakness: that it is bureaucratic, inflexible, and slow. Government respondents are particularly inclined to identify this as a challenging area for ADB (mentioned by 28%). Clients are more likely to say this is ADB's greatest weakness compared to non-clients (24% vs 12%), which is important feedback from respondents who have worked closely with ADB in the past three years.

Overall, stakeholders appeared to have a more difficult time identifying ADB's weaknesses than its strengths (21% vs 14%, respectively, said "don't know" when asked to name a weakness or a strength).

ADB's Greatest Weakness

Unprompted, Total Mentions, by Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Bureaucratic/inflexible/slow	18	17	13	18	23	17	13	22
Project management (implementation/monitoring/efficiency)	7	7	8	8	9	6	7	3
Communications/visibility	5	3	3	5	5	3	7	4
Inadequate understanding of local contexts	5	3	4	6	3	5	9	5
Insufficient collaboration with local actors / other agencies	5	4	7	4	6	13	3	4
Government relations*	4	1	9	5	3	10	2	3
Insufficient funds / resources	3	1	6	2	4	0	3	4
Knowledge / expertise of staff and consultants	3	3	5	2	3	5	4	4
Lack of transparency / corruption in projects supported	3	4	1	3	2	2	1	6
Not enough focus on private sector	3	3	4	4	1	2	4	3


 Top mention in region

Fig. 11, Q. 9

*includes too much/little interaction, insufficient influence, and over-reliance on government to channel funds. Responses made by fewer than 3 percent of respondents have not been included in this chart.

Overall Impressions of ADB

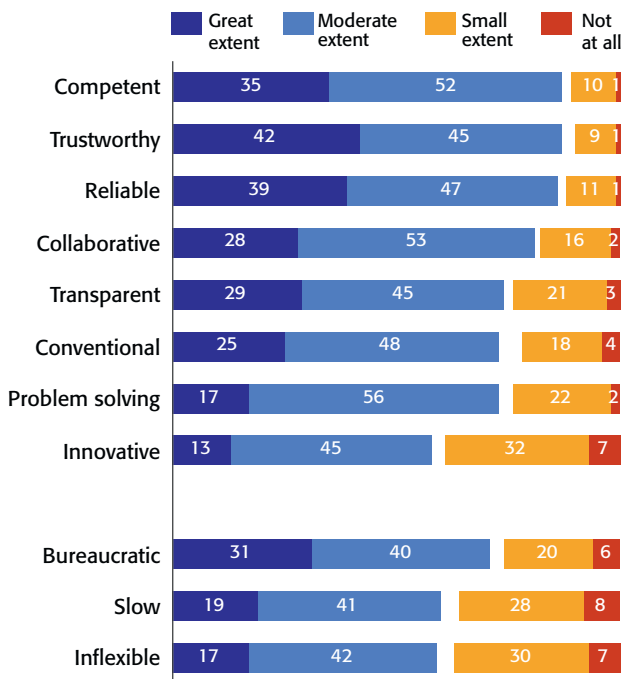
Personality Attributes Associated with ADB

To provide additional insight into stakeholders' overall views of ADB this year, respondents were presented with a list of "personality" attributes and asked the extent to which they believe each describes ADB. These included both positive and negative attributes.[†]

As Figure 12 shows, stakeholders are most likely to think "trustworthy," "competent," and "reliable" describe ADB. Even among more critical stakeholder groups, including CSO and multi/bilateral respondents, three-quarters or more think ADB is trustworthy (74% and 85%, respectively). This is a very positive finding for ADB as it suggests that it has clearly and consistently earned the trust of its stakeholders across all regions and is seen as a competent and reliable organization.

Characteristics Associated with ADB

Average of All Countries, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 12, Q. 12

Overall Impressions of ADB

As Figure 13 shows, there is quite a consistent view of ADB across borrowing regions, with strong majorities of respondents in each seeing ADB as a competent, trustworthy, and reliable organization. However, substantial majorities in all regions and stakeholder groups believe that some of the more negative characteristics included in the survey also describe ADB, including that it is bureaucratic (71%), slow (60%), and inflexible (59%).

Overall, the attribute that stakeholders are least likely to say describes ADB is “innovative,” with less than six in ten respondents (58%) saying this describes ADB either to a great or moderate extent. Stakeholders working in non-borrowing countries are among the least likely to think “innovative” describes ADB.

There are considerable differences in opinion between stakeholders in borrowing and non-borrowing countries regarding ADB’s “personality.” One of the biggest differences is views on transparency: While more than eight in ten (81%) stakeholders in DMCs think “transparent” describes ADB, fewer than six in ten stakeholders in non-borrowing countries feel this way (61% in regional non-borrowing countries and 55% in non-regional non-borrowing countries). Overall, respondents in non-borrowing countries are less likely to think that each of the positive attributes describe ADB; in fact, they are more inclined than their counterparts in DMCs to say that the negative attributes (i.e., slow, bureaucratic, inflexible) describe ADB.

Characteristics Associated with ADB

“Descriptive (1+2),”* by Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Competent	87	90	83	91	87	91	75	91
Trustworthy	87	91	88	90	86	89	81	84
Reliable	85	90	85	91	83	92	75	82
Collaborative	80	88	85	84	80	77	71	76
Transparent	74	85	68	82	83	79	61	55
Conventional	73	60	81	76	64	86	69	87
Problem solving	73	85	79	78	69	82	62	66
Innovative	58	65	69	71	60	64	35	44
Bureaucratic	71	62	61	76	64	78	72	79
Slow	60	59	62	60	50	67	54	73
Inflexible	59	53	65	59	57	63	56	63

Most descriptive

Fig. 13, Q. 12

*1+2 reflects those saying either “great extent” or “moderate extent”, that is, 1 or 2 on a 5-point response scale.

†Negative attributes include “bureaucratic,” “slow,” and “inflexible.”

Overall Impressions of ADB

CSO stakeholders are also less inclined than others to think that transparency describes ADB (61% feel this way, compared to 74% overall). They are generally less likely than others to believe that any of the positive attributes describe ADB. Overall, this group tends to have more critical views of ADB than others on most aspects of performance.

For most of the positive personality traits, government stakeholders in borrowing countries are more likely than those working for government in non-borrowing countries to think they describe ADB, especially “innovative,” “problem solving,” and “transparent.”

Characteristics Associated with ADB

“Descriptive (1+2),”* by Stakeholder Group, 2009

	Overall average (%)	Academic (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Competent	87	88	79	95	85	89	84	85
Trustworthy	87	91	74	93	87	91	85	88
Reliable	85	87	73	92	83	91	83	86
Collaborative	80	83	68	90	77	86	77	78
Transparent	74	73	61	93	57	68	71	75
Conventional	73	77	69	71	80	74	72	75
Problem solving	73	79	65	85	64	71	74	68
Innovative	58	49	52	78	42	59	52	55
Bureaucratic	71	71	75	67	79	68	72	69
Slow	60	58	67	52	62	56	56	67
Inflexible	59	57	65	57	56	53	60	61

Most descriptive

Fig. 14, Q. 12

*1+2 reflects those saying either “great extent” or “moderate extent”, that is, 1 or 2 on a 5-point response scale.

Section 2: Perceived Priorities at ADB

Results show that stakeholders believe ADB puts a priority on all areas included in the survey, and especially on improving infrastructure and poverty reduction. Stakeholders identify several serious threats to development (including corruption, climate change, and poor infrastructure); of note is that majorities (i.e., more than 50%) think ADB puts a priority on these areas. Given the recent launch of Strategy 2020, in which ADB highlighted its funding and operational priorities for the coming decade, results in this section provide useful insight into the alignment between internally stated priorities and what external stakeholders think are priorities at ADB.

Threats to Economic and Social Development

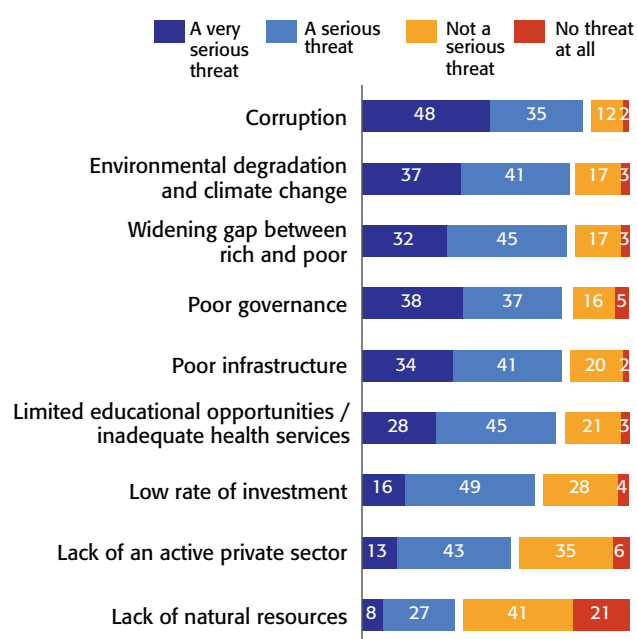
Stakeholders in developing member countries (DMCs) were given a list of issues and asked to indicate the threat of each to their country's economic and social development efforts. As Figure 15 shows, corruption tops the list of perceived threats to development, with nearly a majority (48%) seeing this as a very serious threat. Along with corruption, other threats perceived to be very serious include poor governance (38%), environmental degradation (37%), poor infrastructure (34%), and a widening rich-poor gap (32%). Perceptions of ADB's performance in corruption mitigation and improving governance are elaborated in Section 3 of this report.

While there is widespread agreement that corruption is a very serious threat to development, there are regional differences in what is seen as the most serious threat. For example, limited health services and educational opportunities, along with poor governance, are seen as the most urgent threats to development according to respondents in the Pacific Islands, whereas environmental degradation and a widening rich-poor gap top the list in East Asia (see Figure 16 on the next page).

Given that ADB's Strategy 2020 puts a priority on infrastructure development, governance, and environmental sustainability (among other areas), results suggest there is alignment between ADB's stated core operational areas and what stakeholders believe are the key risks to development in their country. Later in this section we elaborate what stakeholders think are the actual priorities at ADB, providing greater insight into whether respondents think ADB is addressing the key risks to development.

Threats to Country's Economic and Social Development

Average of DMCs,* 2009



*Asked only in developing member countries (n=624)

The white space in this chart represents "Refused" and "DK/NA."

Fig. 15, Q. 5

Perceived Priorities at ADB

A majority of stakeholders in DMCs (56%) believes that a lack of an active private sector is a serious threat to their country's economic and social development efforts. However, for most stakeholders, this is seen as a less serious threat compared to corruption or environmental degradation. The exceptions are private sector stakeholders and those in the Pacific Islands, who are more likely than all others to say this is a serious threat—although in neither case does it top the list. It is unclear if this lack of overall concern about an active private sector is due to a belief among stakeholders that the private sector is already strong in their country or that an active private sector is less important to development than other factors.

Threats to Country's Economic and Social Development

"Serious Threat (1+2),"* DMCs,** by Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)
Corruption	83	83	86	80	87	73
Environmental degradation and climate change	78	59	93	77	84	76
Widening gap between rich and poor	77	65	91	76	80	78
Poor infrastructure	76	63	59	81	83	80
Poor governance	75	61	69	73	84	86
Limited educational opportunities / inadequate health services	73	79	73	63	77	86
Low rate of investment	65	65	35	69	70	79
Lack of an active private sector	56	63	52	51	54	74
Lack of natural resources	36	21	58	35	33	43


 Most serious threat within region

Fig. 16, Q. 5

*1+2 reflects those saying either "a very serious threat" or "a serious threat," that is, 1 or 2 on a 5-point response scale.

**Asked only in developing member countries (n=624)

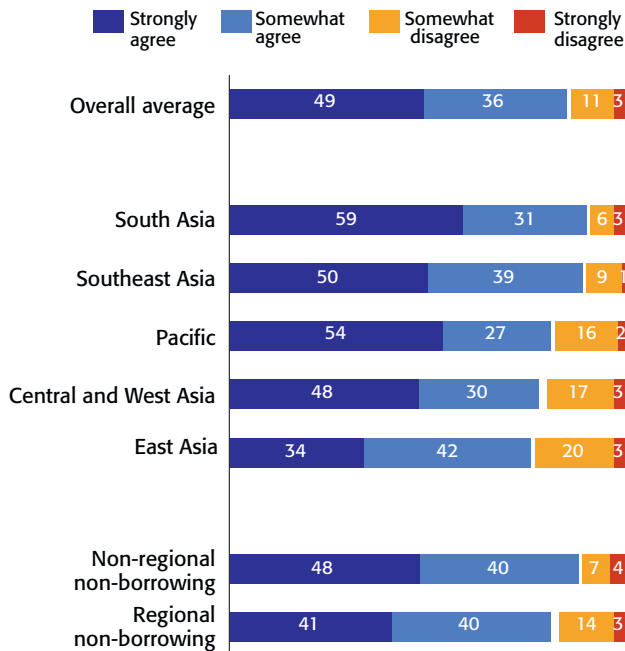
Perceived Priorities at ADB

Nevertheless, when stakeholders in both DMCs and non-borrowing countries are asked if they think the private sector is the key driver of future growth and development in the region, strong majorities (85%) agree that it is, as shown in Figure 17 below.

In addition, there is clear buy-in among stakeholders in DMCs that regional economic integration is key to their country's economic development. A strong majority (91%) of stakeholders in these countries agrees that the economy of their country is more likely to expand and grow if it is integrated with economies of other countries in the region. This strong agreement is true among clients and non-clients alike, across all regions, and among all stakeholder groups (summarized in Figure 18 below).

Private Sector Is Key to Future Growth

By Region, 2009

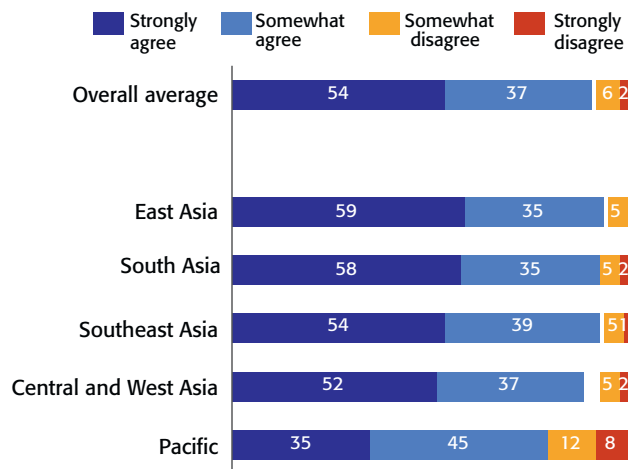


The white space in this chart represents "Refused" and "DK/NA."

Fig. 17, Q. 6e

Economy Will Grow If Integrated with Other Countries

DMC Stakeholders,* by Region, 2009



The white space in this chart represents "Refused" and "DK/NA."
*Asked only in developing member countries (n=624)

Fig. 18, Q. 6b

Perceived Priorities at ADB

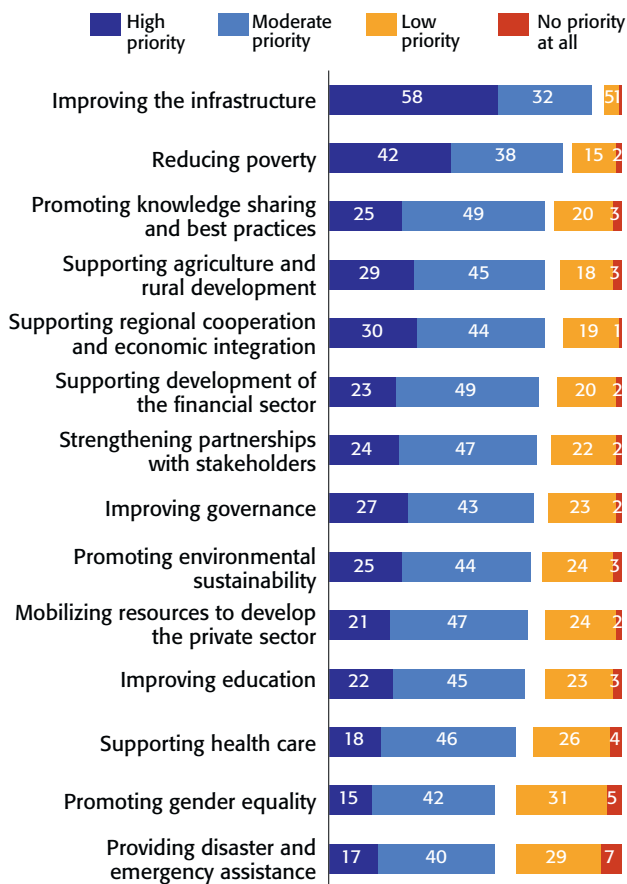
Stakeholder Perceptions of ADB's Priorities

Improving the welfare of people in developing countries in the Asia/Pacific region, including reducing overall poverty, requires a highly integrated approach to programming and funding across a wide range of areas. Through its Strategy 2020, ADB has identified several key areas that it calls “drivers of change,” “core operational areas,” and “other operational areas” to help focus on priorities to which it can direct loans, grants, and technical assistance (see box below for an elaboration of these operational areas and drivers of change, along with ADB's overarching mission). Stakeholders were presented with these drivers of change and operational areas and asked to rate the extent to which they feel ADB is prioritizing each. Results provide ADB with insight into the alignment between internal priorities and what external stakeholders think ADB prioritizes in its day-to-day operations. In the next several pages, each of these areas is discussed in greater detail.

We start the discussion by looking first at poverty reduction and then delving into operational areas and drivers of change.

Perceptions of ADB's Priorities in Asia/Pacific

Average of All Countries, 2009



The white space in this chart represents “Refused” and “DK/NA.”

Fig. 19, Q. 10-11

ADB's Mission: To help its developing member countries reduce poverty and improve the quality of life of their people.

Key Components of Strategy 2020

Core Areas of Operation:

- Infrastructure
- Environment
- Regional cooperation and integration
- Finance sector development
- Education

Other Areas of Operation:

- Agriculture and rural development
- Supporting health care
- Providing disaster and emergency assistance

Drivers of Change:

- Private sector development and private sector operations
- Good governance and capacity development
- Gender equity
- Knowledge solutions
- Partnerships

Perceived Priorities at ADB

Poverty reduction. This is an overarching aim of all of ADB's work within the region, and is an implied integral outcome of each of the areas detailed in Strategy 2020. Therefore it is encouraging that a strong majority of stakeholders believes poverty reduction is a high priority at ADB (80%). However, compared to 2006, respondents are now slightly less likely to think ADB puts a high or moderate priority on this area (85% thought this was a priority at ADB in 2006). Given that poverty reduction is fundamental to ADB's overall mission, even this slight overall decline among specific stakeholders is noteworthy. The most notable change in views since 2006 has been among respondents working for civil society organizations (CSOs)—from 82 percent in 2006 to 72 percent in 2009—and those in Central and West Asia (69%, down 10 points from 2006). Respondents in Central and West Asia are now among the least likely to think poverty reduction is a priority at ADB.

Perceived Priorities at ADB

Perceived Priority that ADB Places on Core Operational Areas

Improving infrastructure. Across all regions and stakeholder groups, there is little doubt in stakeholders' minds that improving infrastructure is a top priority at ADB: 90 percent of respondents say ADB places a high or moderate priority on infrastructure, which is higher than any other area tested in the survey. This mirrors results from 2006, when improving infrastructure also topped the list of perceived priorities at ADB, rated by 92 percent of respondents as being a high or moderate priority.

Such a uniform view across regions and stakeholder groups suggests ADB's financial and technical assistance are very consistent across the Asia/Pacific region. The main differences by region and stakeholder group are based on the percentage of those saying that improving infrastructure is a high versus a moderate priority. Regionally, respondents in East Asia are the least likely to believe that improving infrastructure is a high priority (37% compared to 58% overall). CSO respondents are less likely than others to think improving infrastructure is a high priority at ADB (48% feel this way), especially in comparison to those working for multi/bilateral organizations (65%), in government (borrowing, 63% and non-borrowing, 64%), and in academia (63%). This year's results are largely in line with results from 2006.

Promoting environmental sustainability. As a core operational area, ADB has committed to emphasize the environment in its programs, policies, and strategies. Currently, just under seven in ten respondents (69%) think ADB places either a high (25%) or moderate priority (44%) on this area. Of the 14 areas that stakeholders rated, environmental sustainability ranks 9th overall. In 2006, a similar proportion felt this was a high or moderate priority (71%).

Regionally, stakeholders in East Asia (76%), Southeast Asia (75%), and South Asia (74%) are significantly more likely to believe ADB puts a priority on environmental sustainability, compared to those in Central and West Asia (56%) and the Pacific Islands (55%). Both CSO stakeholders (56%) and those working at multi/bilateral organizations (59%) are the least inclined to think this is a priority at ADB. The difference between these groups and the other stakeholders is particularly apparent when looking at the proportion that believe this is a high priority for ADB: Just 14 and 16 percent of CSO and multi/bilateral respondents, respectively, believe promoting environmental sustainability is a high priority, compared to around one-third of borrowing government (35%) and private sector (31%) stakeholders who think this way.

Perceptions of ADB's Priorities in Asia/Pacific (Core Operational Areas)

"Priority (1+2),"* by Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Improving the infrastructure	90	89	92	90	91	88	94	88
Supporting regional cooperation and economic integration	74	67	78	65	86	76	72	78
Supporting development of the financial sector	71	66	62	66	81	79	73	72
Promoting environmental sustainability	69	56	76	74	75	55	67	67
Improving education	67	63	73	70	64	60	70	68

 Highest rated priority in region (Core Operational Areas)

Fig. 20, Q. 10-11

*1+2 reflects those saying either "high priority" or "moderate priority," that is, 1 or 2 on a 5-point response scale.

Perceived Priorities at ADB

Supporting regional cooperation and economic integration. Three-quarters of respondents see regional cooperation and economic integration, another core operational area identified in Strategy 2020, as among ADB's top priorities. ADB's focus in this area likely resonates with stakeholders. As discussed earlier in this section, more than nine in ten stakeholders believe the economy of their country is more likely to expand and grow if it is integrated with the economies of other countries in Asia and the Pacific. The proportion believing this is a priority at ADB has remained relatively unchanged since 2006 (77% rated it as a high or moderate priority in 2006). And while there are little differences in opinion across stakeholder groups, regionally, a higher proportion of respondents in Southeast Asia (86%) believe regional cooperation and economic integration is a priority at ADB compared to those in Central and West Asia (67%) and South Asia (65%).

Supporting financial sector development.† Most stakeholders believe this core operational area is a priority at ADB (71% overall say it is a high or moderate priority). Among stakeholders in the Pacific Islands, financial sector

development is the area that draws the second highest proportion saying it is a priority (79%, after improving infrastructure); it is also mentioned by a high proportion of people in Southeast Asia (81%). Both are significantly higher than South Asia (66%) and East Asia (62%). It is notable that fewer stakeholders from the private sector (63%) believe financial sector development is a priority, particularly in comparison to borrowing and non-borrowing government and media stakeholders, where around three-quarters believe it is a high or moderate priority.

Improving education.† Improving education is the core operational area that the lowest proportion of stakeholders believe is a priority at ADB (67%). Regionally, there are no significant differences in perceptions. However, across the stakeholder groups, people working in CSOs stand out as being the least likely to believe ADB puts a priority on improving education (58%), especially when compared to respondents working for borrowing country governments (74%), media (73%), and academia (70%).

Perceptions of ADB's Priorities in Asia/Pacific (Core Operational Areas)

"Priority (1+2),"* by Stakeholder Group, 2009

	Overall average (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Improving the infrastructure	90	90	87	93	94	89	91	89
Supporting regional cooperation and economic integration	74	77	72	74	82	77	73	71
Supporting development of the financial sector	71	72	70	74	80	75	70	63
Promoting environmental sustainability	69	72	56	78	72	73	59	56
Improving education	67	70	58	74	68	73	63	65

 Highest rated priority in stakeholder group (Core Operational Areas)

Fig. 21, Q. 10-11

*1+2 reflects those saying either "high priority" or "moderate priority," that is, 1 or 2 on a 5-point response scale.

†In 2006, "supporting financial sector development" was asked as "supporting the development of local capital markets" and "improving education" was asked as "improving social services such as health care and education." Because of these wording changes the results of these questions cannot be compared to results from 2006.

Perceived Priorities at ADB

Perceived Priority that ADB Places on Other Operational Areas

Supporting agriculture and rural development.[†] This is perceived to be among ADB's top five priorities, which is notable given that agriculture and rural development is not a core operational area at ADB and has accounted for a relatively small proportion of ADB's loans and grants in the past several years. Those who are further removed from ADB (i.e., non-clients) are more likely than clients to think this is a priority at ADB (77% vs 71%, respectively). Media stakeholders, more than any other group, believe ADB puts a priority on agriculture and rural development (85% vs 74% overall).

Supporting health care.^{††} While supporting health care is perceived to be among the lowest of ADB's current priorities, a majority (64%) all the same believes that ADB places at least a moderate priority in this area. Regionally, there is little difference in the perceptions of stakeholders. The least likely to think that ADB puts a priority on supporting health care are CSO stakeholders and those working for multi/bilateral organizations (both 56%), especially when compared to media stakeholders (73% believe supporting health care is a priority at ADB, more than any other group).

Perceptions of ADB's Priorities in Asia/Pacific (Other Operational Areas)

"Priority (1+2),"* by Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Supporting agriculture and rural development	74	73	81	76	80	50	77	67
Supporting health care	64	60	72	67	65	68	60	59
Providing disaster and emergency assistance	57	48	70	63	55	51	55	53

Highest rated priority in region (Other Operational Areas)

Fig. 22, Q. 10-11

*1+2 reflects those saying either "high priority" or "moderate priority," that is, 1 or 2 on a 5-point response scale.

[†]Not asked in the 2006 survey

^{††}In 2006, "supporting health care" was asked as "improving social services such as health care and education." Because of these wording changes the results of this question cannot be compared to results from 2006.

Perceived Priorities at ADB

Providing disaster and emergency assistance.†

Comparatively few stakeholders (57%) think providing disaster and emergency assistance is a priority at ADB. Just 17 percent of respondents overall believe that ADB places a high priority on this area, with a further 40 percent believing that it is a moderate priority at ADB. In East Asia and South Asia, a relatively high proportion of respondents believe ADB puts a priority on providing disaster and emergency assistance (70% and 63%, respectively), which could reflect ADB's fairly extensive project work in the People's Republic of China, Bangladesh, India, and Sri Lanka over the past several years.

Perceptions of ADB's Priorities in Asia/Pacific (Other Operational Areas)

†Priority (1+2),** by Stakeholder Group, 2009

	Overall average (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Supporting agriculture and rural development	74	76	70	76	72	85	71	70
Supporting health care	64	62	56	73	49	73	56	67
Providing disaster and emergency assistance	57	58	46	64	48	62	49	63

■ Highest rated priority in stakeholder group (Other Operational Areas)

Fig. 23, Q. 10-11

*1+2 reflects those saying either "high priority" or "moderate priority," that is, 1 or 2 on a 5-point response scale.

†In 2006, "providing disaster and emergency assistance" was asked as "establishing effective disaster management systems." Because of these wording changes the results of this question cannot be compared to results from 2006.

Perceived Priorities at ADB

Perceived Priority that ADB Places on Drivers of Change

Resource mobilization for private sector development.

Over two-thirds of stakeholders (69%) think ADB puts a high or moderate priority on resource mobilization for private sector development. Compared to 2006, stakeholders are slightly more likely to think it is a priority (69% in 2009 compared to 61% in 2006). Regionally, stakeholders in Southeast Asia are the most likely to think this is a priority at ADB (73%), much more than in Central and West Asia (59%) and East Asia (52%). Compared to 2006, there has been a significant increase in the proportion of stakeholders in South Asia who believe mobilizing resources for private sector development is a priority at ADB (from 48% in 2006 to 68% in 2009).

Notably, it is private sector stakeholders who are the least likely to think that ADB makes this a priority (60%). In 2006, 58 percent of private sector stakeholders felt that mobilizing resources for private sector development was a priority, a similar proportion to CSO (57%) and academic respondents (59%). However, in 2009, CSO and academic respondents are now more likely to believe this area is a priority for ADB (71% and 76%, respectively), while views among private sector stakeholders remain unchanged.

Perceptions of ADB's Priorities in Asia/Pacific (Drivers of Change)

"Priority (1+2),"* by Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Promoting knowledge sharing and best practices	73	59	81	75	80	70	73	72
Strengthening partnerships with stakeholders	72	68	76	75	76	70	70	65
Improving governance	70	60	67	74	77	75	71	63
Mobilizing resources to develop the private sector	69	59	52	68	73	66	78	74
Promoting gender equality	57	57	58	72	58	47	43	51

Highest rated priority in region (Drivers of Change)

Fig. 24, Q. 10-11

*1+2 reflects those saying either "high priority" or "moderate priority," that is, 1 or 2 on a 5-point response scale.

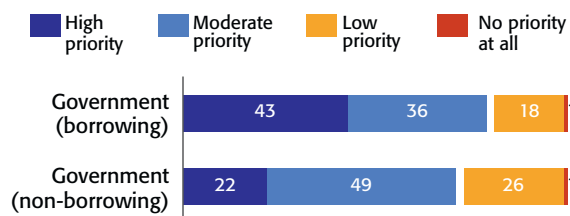
Perceived Priorities at ADB

Improving governance.[†] A majority of respondents (70%) thinks ADB makes improving governance a priority, which is an important finding given that stakeholders across all DMCs identify corruption as the most serious threat to development in their country (see Section 1). In 2006, a similar proportion (67%) felt that improving governance was a priority at ADB. Regionally, stakeholders in Central and West Asia are the least likely to think ADB puts a priority on governance (60%). Moreover, in this region, the proportion who believe that governance is a high priority has decreased from 32 percent in 2006 to 17 percent in 2009. This is a significant finding, as respondents in this region are also the most likely (along with those in Southeast Asia) to say corruption is a very serious threat to development. In comparison, the proportion of respondents in South Asia believing this is a high priority at ADB has increased significantly from 22 percent to 39 percent.

Country borrowing status has an impact on the perceived priority that ADB places on governance: Respondents in borrowing countries (30%) are more likely than their counterparts in non-borrowing countries (20%) to think that ADB places a high priority on improving governance. The

Perceived Priority at ADB: Improving Governance

Government Stakeholders, by Borrowing Status, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 25, Q. 11c

difference is even more pronounced between government stakeholders in borrowing versus non-borrowing countries (as shown in Figure 24): Those working for government in borrowing countries are much more likely than their counterparts in non-borrowing countries to think ADB makes improving governance a high priority (43% vs 22%, respectively).

Perceptions of ADB's Priorities in Asia/Pacific (Drivers of Change)

"Priority (1+2),"* by Stakeholder Group, 2009

	Overall average (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Promoting knowledge sharing and best practice	73	79	66	81	67	76	61	75
Strengthen partnerships with stakeholders	72	70	63	81	70	77	67	71
Improving governance	70	72	61	78	71	62	74	69
Mobilizing resources to develop the private sector	69	76	71	67	79	68	70	60
Promoting gender equality	57	52	56	74	42	48	50	56


 Highest rated priority in stakeholder group (Drivers of Change)

Fig. 26, Q. 10-11

*1+2 reflects those saying either "high priority" or "moderate priority," that is, 1 or 2 on a 5-point response scale.

[†]While governance was not defined for stakeholders, ADB considers governance to refer both to anti-corruption and public management.

Perceived Priorities at ADB

Promoting gender equality. Although identified as a driver of change in ADB's Strategy 2020, relatively few stakeholders (57%) think ADB puts a priority on promoting gender equality. And notably, since 2006, fewer stakeholders now believe this is a priority (63% felt it was a priority in 2006). This decrease is driven mostly by changes in views among respondents in non-borrowing countries: In 2006, 56 percent in these countries believed promoting gender equality was a priority, less than one-half (47%) now feel this way. In comparison, respondents in borrowing countries are much more inclined to think ADB makes gender equality a priority (61%).

Media stakeholders are among the least likely to think that promoting gender equality is a priority at ADB (48% believe it is, compared to 57% overall). There is also a strong difference in perceptions between government respondents in borrowing and non-borrowing countries: While three-quarters of government stakeholders in borrowing countries think ADB makes gender equality a priority, just 42 percent of those in non-borrowing countries believe this. Overall, there is very little difference in opinion between male and female stakeholders on the perceived priority ADB places on promoting gender equality.

Promoting knowledge sharing.[†] Promoting knowledge sharing is less about a specific operational area or outcome (such as poverty reduction or improving infrastructure), and more about the way in which ADB works (i.e., sharing its expertise and knowledge through advisory service, networks, publications, the website, etc.). A majority of stakeholders (73%) thinks ADB puts a priority on knowledge sharing. It is only in Central and West Asia (59%) and among CSO and multi/bilateral respondents (66% and 61%, respectively), where there is less certainty that this is a priority focus for ADB. In Central and West Asia, this may be due to a lack of awareness, as a fairly high percentage of respondents here (11%, compared to 4% overall) said "don't know" when asked about this area.

Strengthening partnerships.[†] Similar to knowledge sharing, strengthening partnerships is more about the way in which ADB works (i.e., in a collaborative manner). Around seven in ten respondents think ADB puts a priority on this, and especially borrowing government stakeholders (81%). Views are fairly consistent across the regions and more differences are noted by stakeholder group. Specifically, people working in CSOs and multi/bilateral organizations are more likely than others to say that this is not a priority at ADB.

[†]Promoting knowledge sharing and strengthening partnerships were not included in the 2006 research.

Perceived Priorities at ADB

Preferred Focus for ADB

ADB was interested to know not only the attention that stakeholders think it is placing on key areas related to Strategy 2020, but also what areas stakeholders think ADB should prioritize to help reduce poverty and help developing countries in Asia and the Pacific achieve their development goals. To this end, respondents were asked to describe in their own words what key areas ADB should

focus on to achieve these goals. These responses were then analyzed and grouped into themes to highlight the areas that stakeholders believe ADB should most focus on.

As Figure 27 below shows, while no single area is mentioned by a majority of respondents, stakeholders do mention two areas much more than others as preferred priorities for ADB: Infrastructure (mentioned by 31% of respondents) and education (mentioned by 27%).

Main Areas on Which ADB Should Focus

Unprompted, Total Mentions, by Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Infrastructure	31	27	23	43	35	42	26	21
Education	27	32	35	28	27	23	25	22
Agriculture / rural development	18	17	14	26	21	16	14	12
Health / health care	13	19	9	19	12	14	6	12
Governance/corruption/transparency	13	8	12	11	17	2	12	18
Private sector involvement/investment/development	12	16	11	8	5	24	11	19
Agriculture	11	14	4	16	12	3	5	10
Good/democratic governance	9	8	9	10	10	1	9	11
Rural development	9	4	13	10	12	13	10	3
Environment/climate change	7	2	20	4	8	0	7	9
Affordable/clean/sustainable energy	6	12	1	9	4	4	4	6
Corruption/transparency	5	1	4	3	9	1	7	7
Poverty reduction	5	2	15	6	5	0	5	2
Jobs/employment	4	7	1	3	5	3	2	2
Micro-finance	4	5	1	3	3	3	4	6
Regional cooperation/integration/trade/development	4	6	8	1	0	4	7	5

Top mention in region

Fig. 27, Q. 13

Responses made by fewer than 4 percent of respondents have not been included in this chart.

Perceived Priorities at ADB

Given that corruption is identified as the most serious threat to development, it follows that governance/corruption/transparency is mentioned relatively frequently as a recommended area of focus (by 13% of stakeholders overall).

The most preferred focus area differs by region:

Infrastructure tops the list in South Asia, the Pacific Islands, and Southeast Asia, whereas education does in Central and West Asia and East Asia. Stakeholders in both regional and non-regional non-borrowing countries mention infrastructure and education about equally. However, respondents in non-regional non-borrowing countries also want to see ADB focus on private sector development, much more than those working in regional non-borrowing countries. Less frequent mentions of private sector development by respondents working in regional non-borrowing countries could be because respondents here may believe the private sector is already strong in many developing countries in the region.

Government and multi/bilateral stakeholders are most likely to say that infrastructure should be a priority (both 40%) while only 15 percent of CSO stakeholders say this should be a priority. Instead, CSO respondents want ADB to focus on a number of social-oriented areas, including education and health/health care. In some case, preferred focus areas reflect respondents' sector; for example, private sector respondents are the most likely to say private sector development should be ADB's focus; academic respondents are the most likely to say education should be the priority.

Health/health care is the third most mentioned area by stakeholders. Across the stakeholder groups, the proportions mentioning this are fairly even. However, regionally, a higher proportion in Central and West Asia and South Asia (both 19%) say ADB should prioritize health/health care.

Overall, each of ADB's operational areas (both core and other) and drivers of change are mentioned by stakeholders as preferred areas of focus, albeit by substantially different proportions, some of which include:

- Environmental sustainability / climate change: Most likely to be mentioned by respondents in East Asia (20%, compared to 7% overall and not at all in the Pacific Islands);
- Private sector development: Frequently mentioned by respondents in the Pacific Islands (24%, compared to 12% overall, and just 5% by those in Southeast Asia);
- Gender equality: Infrequently mentioned across all regions and stakeholder groups (2% or less).

Section 3: Perceptions of ADB's Performance

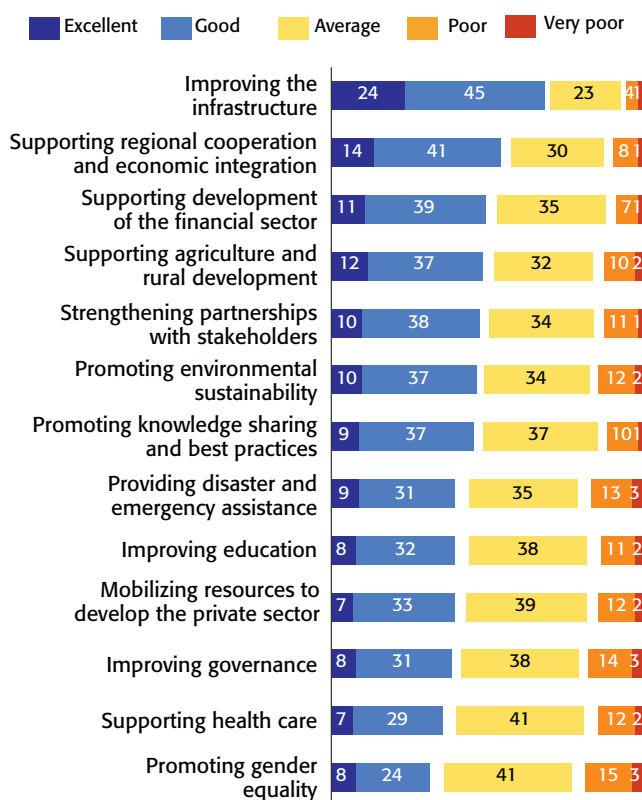
ADB gets its best performance ratings on improving infrastructure and supporting regional cooperation and economic integration, two core operational areas of Strategy 2020. Consistently, government stakeholders in borrowing countries tend to be the most positive about ADB's performance in each area, and they are more likely to give ADB a favourable rating than those working for government in non-borrowing contexts. In some areas, respondents are as likely to give ADB an "average" rating as they are to give a "good" rating.

Perceptions of ADB: Related to Strategy 2020

Respondents were presented with a number of areas and asked to rate ADB's performance in each. These areas include all core and other operational areas, as well as drivers of change as defined in ADB's Strategy 2020, spanning the many areas in which ADB is involved to help fight poverty in the region. In the following pages, we discuss stakeholder perceptions of ADB's performance in each of these three areas, beginning with core operational areas.

Perceptions of ADB's Performance in Key Areas

Average of All Countries, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 28, Q. 20

Perceptions of ADB's Performance

Perceptions of Performance: Core Operational Areas

Improving infrastructure. In Strategy 2020, ADB states that its investment in infrastructure is fundamental to achieving poverty reduction and inclusive growth, as well as contributing to environmentally sustainable growth. Based on financing activity, infrastructure is the most important operational area for ADB, accounting for around three-quarters of all loans and grants in 2008.[†] As Section 2 showed, stakeholders themselves clearly think ADB makes infrastructure a priority (90% felt it was either a high or moderate priority). And infrastructure is mentioned most frequently when stakeholders are asked what areas ADB should prioritize to best help reduce poverty and help developing countries achieve their development goals.

It follows then, that of all the areas on which stakeholders rated ADB's performance, ADB gets its best performance ratings on improving infrastructure. This is the case across all regions and stakeholder groups. Overall, around seven in ten respondents believe ADB is doing either an excellent (24%) or good (45%) job in this area, and very few think it is doing

a poor job (4%). There has been little change since 2006, except that respondents are now more likely to say ADB's performance is excellent (24%, up from 19% in 2006).

While improving infrastructure is the highest rated area in each of the regions, there are notable differences in how positive stakeholders in each region are. Respondents in South Asia stand out as the most positive about ADB's performance in improving infrastructure, with 78 percent saying it is excellent or good (the same as in 2006 where it also stood out as the most positive). The result is particularly significant when compared to perceptions in Southeast Asia (66%) and Central and West Asia (62%).

Interestingly, it is stakeholders working in non-borrowing countries *outside* the Asia/Pacific region who have a more favourable view of ADB's performance in improving infrastructure than those working in non-borrowing countries *within* the region (69% vs 58%, respectively). And respondents in borrowing countries are also much more favourable than those in non-borrowing countries within the region (71% vs 58%).

Perceptions of ADB's Performance in Key Areas (Core Operational Areas)

"Good Performance (1+2),"* by Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Improving the infrastructure	69	62	75	78	66	74	58	69
Supporting regional cooperation and economic integration	55	52	62	49	67	54	49	54
Supporting development of the financial sector	50	47	54	50	59	63	36	46
Promoting environmental sustainability	47	42	70	54	51	44	38	31
Improving education	41	43	45	52	43	41	27	29


 Top performance in region (Core Operational Areas)

Fig. 29, Q. 20

*1+2 reflects those saying either "excellent" or "good," that is, 1 or 2 on a 5-point response scale.

[†]See <http://www.adb.org/Documents/Reports/Development-Effectiveness-Review/2008-Development-Effectiveness.pdf>, p86

Perceptions of ADB's Performance

Government stakeholders in both borrowing (82%) and non-borrowing countries (74%) have a very positive view of ADB when it comes to improving infrastructure, especially in comparison to those working for civil society organizations (CSOs). Just over one-half of CSO stakeholders (55%) say ADB's performance is good or excellent (no statistically significant change from 2006) and nearly one-third say it is average, more than any other group (31% compared to 23% overall). Despite these more moderate views, however, it is on improving infrastructure that ADB gets its best marks from CSO respondents.

Promoting environmental sustainability. In Strategy 2020, ADB stresses that it will strengthen its operational emphasis on the environment in order to achieve environmentally sustainable growth. As Section 2 of this report elaborated, around seven in ten stakeholders (69%) feel that ADB puts a priority on environmental sustainability (compared to 90% who feel this way about infrastructure).

Performance ratings in this area are comparatively lower: Less than one-half of respondents (47% with little overall change since 2006) rate ADB as excellent or good at promoting environmental sustainability. Respondents in East Asia are much more positive about ADB's performance than all others (70% compared to 54% in South Asia, the

region with the next most favourable views). This favourable rating from stakeholders in East Asia, which includes the People's Republic of China and Mongolia, could be driven by: 1) how serious a threat respondents in this region think environmental degradation and climate change is to economic and social development (93% say it is a serious threat, more than in any other region); and 2) a strong belief among stakeholders in East Asia that ADB is putting a high priority on promoting environmental sustainability (more so than in any other region).

Across stakeholder groups, government stakeholders in borrowing countries are the most positive about ADB's performance in promoting environmental sustainability, followed by those from the private sector. There is little change in these proportions from 2006, as these two groups were also the most positive about ADB's performance three years ago. Among the least likely to give ADB a favourable rating include: stakeholders working in academia, for CSOs, at multi/bilateral organizations, and in government in non-borrowing countries. This is a similar picture to 2006 when these groups were also the least positive. Moreover, in 2009, as with a number of the other operational areas, a substantial proportion of CSO stakeholders (28%) rate ADB's performance as poor or very poor.

Perceptions of ADB's Performance

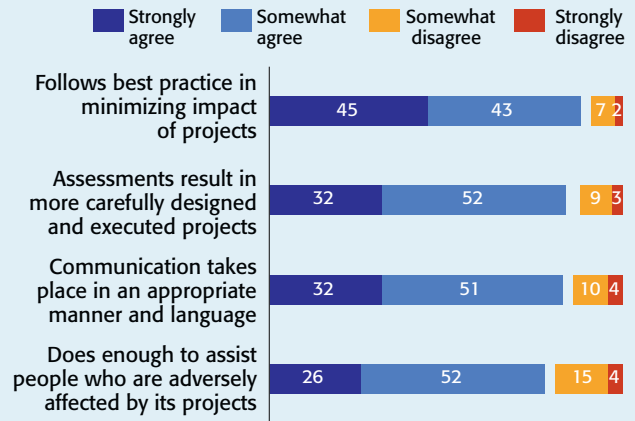
Environmental and Social Impacts of ADB Projects

An integral part of ADB's project financing assistance for its developing member countries (DMCs) typically involves assessments to help mitigate any potential adverse social and environmental impacts of the project. In this light, clients in DMCs were asked to rate ADB's performance in these assessments, ranging from its communication with potentially affected communities to the impact its assessments have on project design and execution. Across each of these areas, it is clear that clients in DMCs think ADB acts in a responsible way and that it takes necessary action to mitigate against any adverse impacts projects may have on people and the environment. Strong majorities (around 80% or more) agree with each of the statements detailed in Figure 30. There is little difference in opinion across each of the five DMC regions.

Among clients in DMCs, government stakeholders are the most positive about each of these elements, particularly when compared to CSO and multi/bilateral stakeholders.

ADB's Efforts to Mitigate Adverse Environmental and Social Impacts of Projects

Clients in DMCs,* 2009



The white space in this chart represents "Refused" and "DK/NA."
 *Only asked to clients in developing member countries (n=326).

Fig. 30, Q. 16

Perceptions of ADB's Performance

Supporting regional cooperation and integration (RCI).

In Strategy 2020, ADB indicates its intention to “scale up” the support it provides for RCI. In doing so, it will increase the volume of operations in this area, and also the share of RCI in its total operations. ADB aims to fill some of the substantial unmet demand for RCI investments in the region.

The importance of RCI to stakeholders was clearly detailed in Section 2. A substantial majority of stakeholders in DMCs and from all regions and stakeholder groups believes that the economy of their country is more likely to expand and grow if it is integrated with the economies of other countries in the region.

A slight majority of stakeholders (55%) believes that ADB is doing an excellent (14%) or good job (41%) in this area and very few (9%) believe that ADB is performing poorly. There has been little change in stakeholders' perceptions since 2006.

The main difference across the regions is between Southeast Asia and South Asia: Views are much more positive in Southeast Asia (67%, up from 58% in 2006) than in South Asia (49%, up from 38% since 2006). In both 2006 and 2009, respondents in South Asia are the least likely to give ADB a positive rating on RCI.

As with performance ratings on a number of other areas, government stakeholders in borrowing countries are among the most positive about ADB's performance in supporting RCI (65% vs 55% overall). Their views are especially favourable in comparison to CSO stakeholders, who consistently offer the least favourable ratings of ADB on most areas (48% say ADB is doing a good or excellent job on supporting RCI, no change from 2006).

Perceptions of ADB's Performance in Key Areas (Core Operational Areas)

"Good Performance (1+2),"* by Stakeholder Group, 2009

	Overall average (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Improving infrastructure	69	67	55	82	74	67	68	64
Supporting regional cooperation and economic integration	55	60	48	65	55	52	51	53
Supporting development of the financial sector	50	49	44	63	48	54	46	39
Promoting environmental sustainability	47	33	34	66	40	43	38	50
Improving education	41	36	31	58	24	48	34	37

Top performance in stakeholder group (Core Operational Areas)

Fig. 31, Q. 20

*1+2 reflects those saying either “excellent” or “good,” that is, 1 or 2 on a 5-point response scale.

Perceptions of ADB's Performance

Supporting the development of the financial sector.†

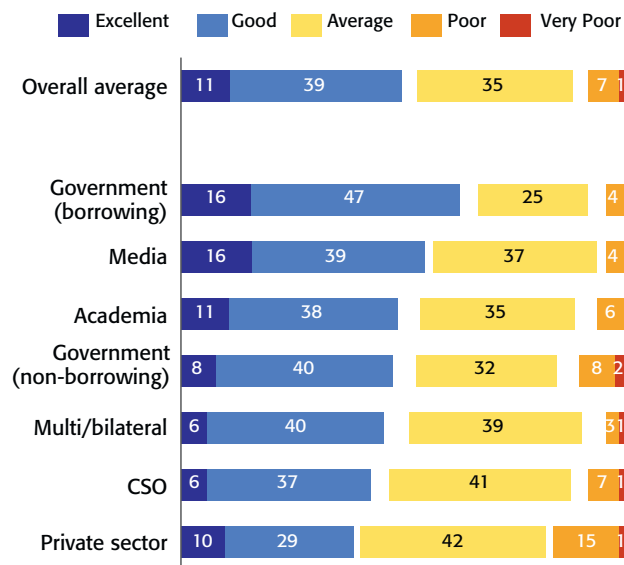
Stakeholders are slightly more positive about ADB's performance on financial sector development compared to other areas, with one-half of respondents (50%) saying that ADB is either doing an excellent (11%) or good job (39%). While ratings are not resoundingly positive, note that few stakeholders rate ADB's performance as poor (8%).

Regionally, stakeholders in the Pacific Islands (63%) and Southeast Asia (59%) are the most likely to think ADB is doing an excellent or good job in supporting the development of the financial sector. In comparison, respondents in Central and West Asia (47%) and from non-borrowing countries (41%) have a much less favourable perception of ADB's performance in this area.

Across the stakeholder groups, people working for government in DMCs have a more favourable opinion than others of ADB's efforts to support the development of the financial sector (63%). This is especially true in comparison to those working in private sector, who are notably the most likely to give ADB a negative rating (16% say it is doing a poor or very poor job, compared to 8% overall). Private sector respondents clearly have an interest in seeing greater support of the financial sector and ADB may not yet be meeting this stakeholder group's expectations.

ADB Supporting Development of the Financial Sector

Performance Rating, by Stakeholder Group, 2009



The white space in this chart represents "DK/NA."

Fig. 32, Q. 20b

†In 2006, "supporting development of the financial sector" was asked as "supporting the development of local capital markets." Because of these wording changes the results of this question cannot be compared to results from 2006.

Perceptions of ADB's Performance

Improving education.[†] In Strategy 2020, ADB acknowledges that investment in and access to education and training are important for inclusive growth in countries in Asia and the Pacific. Moreover, a majority of stakeholders believes that limited educational opportunities are a serious threat to economic and social development (see Section 2). However, respondents think improving education is one of the lowest priority areas at ADB (and the lowest perceived priority of the five core operational areas). This is reflected in lower than average performance ratings in this area.

Four in ten stakeholders (41%) believe that ADB is excellent or good at improving education, with only a minority overall saying ADB's performance is poor (13%). Similar to many other areas, a relatively high proportion of respondents give an average rating (38%). Respondents in non-borrowing countries, both within and outside the region, are the most likely to give an average rating.

CSO stakeholders stand out as being the most critical: One-quarter (24%) believe that ADB's efforts to improve education are poor. And consistent with most other ratings of operational areas, government stakeholders in borrowing countries (58%) are more positive compared to others, and especially in comparison to their peers working in government in non-borrowing countries (24%).

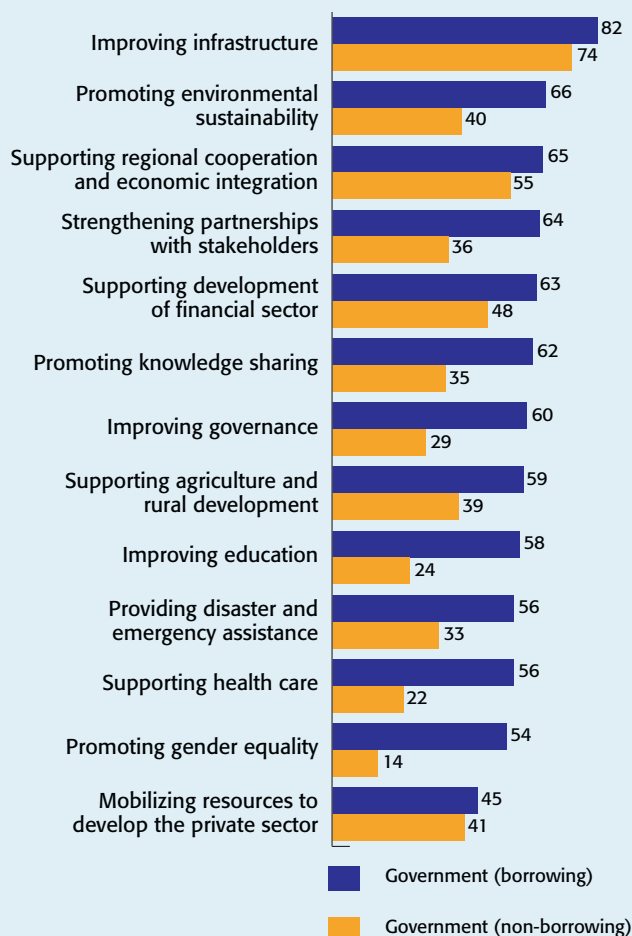
Figure 33 provides a summary of these consistently different views between borrowing and non-borrowing government stakeholders across all operational areas and drivers of change.

High Marks from Borrowing Governments; What about from Non-Borrowing Governments?

Consistently, respondents working for government in borrowing countries are much more likely than their counterparts in non-borrowing countries to give ADB positive performance ratings. As Figure 33 below shows, this is true for core and other operational areas and each driver of change.

Perceptions of ADB's Performance in Key Areas

"Good Performance (1+2),"* 2009



*1+2 reflects those saying either "excellent" or "good," that is, 1 or 2 on a 5-point response scale.

Fig. 33, Q. 20

[†]In 2006, "improving education" was asked as "improving social services such as health care and education." Because of these wording changes the results of this question cannot be compared to results from 2006.

Perceptions of ADB's Performance

Perceptions of Performance: Other Operational Areas

Supporting agriculture and rural development.[†] In Strategy 2020, ADB notes that support for agriculture and rural areas is an underlying component of growth in the region. Notably, the percentage of investments in agriculture in 2008 exceeded that of some core operational areas including education.^{††}

Possibly reflecting ADB's significant historical investments in rural infrastructure and agriculture production, agriculture and rural development is among the higher rated areas. Nearly a majority of stakeholders (49%) thinks ADB is doing either an excellent (12%) or good job (37%). These relatively positive perceptions of ADB's performance reflect the similarly high proportion of respondents who believe that ADB makes agriculture and rural development a priority.

The strongest ratings come from stakeholders in borrowing countries (52% say ADB's performance is good or excellent compared to 41% in non-borrowing countries). Media and borrowing country government stakeholders have the most positive views of ADB's performance in supporting agriculture and rural development (58% and 59%, respectively). This compares to more critical views among CSO and non-

borrowing government respondents (of whom 17% and 18%, respectively, say ADB's performance is poor).

Supporting health care.^{†††} ADB approaches health and health care through focusing on health outcomes of infrastructure, health systems, and regional health concerns. Perhaps reflecting ADB's less direct and program-based involvement, health care is one of the few areas in which stakeholders are more likely to rate ADB's performance as average (41%) as opposed to good (37%).

Perceptions of ADB's performance in supporting health care are significantly more favourable in East Asia and Central and West Asia (49% and 46%, respectively, say it is doing a good or excellent job) compared to respondents in both regional and non-regional non-borrowing countries (29% and 25%, respectively).

Across the stakeholder groups, performance ratings on health care reflect a recurring theme in the results: 1) the most positive ratings come from stakeholders working for government in borrowing countries; and 2) the least positive ratings come from respondents working for multi/bilateral organizations, CSOs, and in government in non-borrowing countries.

Perceptions of ADB's Performance in Key Areas (Other Operational Areas)

"Good Performance (1+2),"* by Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Supporting agriculture and rural development	49	48	56	54	54	45	44	39
Providing disaster and emergency assistance	40	44	50	44	40	44	30	35
Supporting health care	37	46	49	36	42	35	29	25

 Top performance in region (Other Operational Areas)

Fig. 34, Q. 20

*1+2 reflects those saying either "excellent" or "good," that is, 1 or 2 on a 5-point response scale.

[†]Not included in the 2006 survey

^{††}See <http://www.adb.org/Documents/Reports/Development-Effectiveness-Review/2008-Development-Effectiveness.pdf>, p86

^{†††}In 2006, "supporting health care" was asked as "improving social services such as health care and education." Because of these wording changes the results of this question cannot be compared to results from 2006.

Perceptions of ADB's Performance

Providing disaster and emergency assistance.[†] As ADB states in Strategy 2020, the Asia and Pacific region suffers more natural disasters than any other region in the world. In terms of perceived performance in providing disaster and emergency assistance, four in ten respondents (40%) give ADB a good performance rating. While stakeholders are more likely to say its performance is average (35%) rather than poor (15%), more respondents give it a negative rating compared to several other areas, including infrastructure (on which 4% of stakeholders say its performance is poor), financial sector development (8%), or regional cooperation and economic integration (9%).

Regionally, only in East Asia do as many as one-half of respondents (50%) rate ADB's performance in this area as excellent or good. CSO stakeholders are most likely to believe that ADB's performance is poor (25% feel this way). And by stakeholder group, it is only among government stakeholders in borrowing countries where a majority (56%) believes ADB performs well in providing disaster and emergency assistance.

Perceptions of ADB's Performance in Key Areas (Other Operational Areas)

"Good Performance (1+2),"* by Stakeholder Group, 2009

	Overall average (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Supporting agriculture and rural development	49	51	43	59	39	58	38	46
Providing disaster and emergency assistance	40	38	25	56	33	40	31	45
Supporting health care	37	34	28	56	22	43	25	32

 Top performance in stakeholder group (Other Operational Areas)

Fig. 35, Q. 20

*1+2 reflects those saying either "excellent" or "good," that is, 1 or 2 on a 5-point response scale.

[†]In 2006, "providing disaster and emergency assistance" was asked as "establishing effective disaster management systems." Because of these wording changes the results of this question cannot be compared to results from 2006.

Perceptions of ADB's Performance

Perceptions of Performance: Drivers of Change

Mobilizing resources to develop the private sector.

One of ADB's goals through Strategy 2020 is to expand its work with the private sector, to generate greater economic growth in the Asia/Pacific region. While a majority of respondents (69%) feels that resource mobilization for private sector development is a priority at ADB, just four in ten rate ADB's performance as excellent or good. Nearly the same proportion (39%) give ADB average marks and 14 percent believe its performance is poor. There has been no notable change in perceptions (overall) since 2006.

By region, the most favourable ratings come from respondents in the Pacific Islands (52%, the same proportion as in 2006) and Southeast Asia (45%, a slight but not significant increase from 39%). Conversely, respondents in East Asia are much less positive about ADB's performance in mobilizing resources to help develop the private sector (31%, no change since 2006). Unlike for most of the other opera-

tional areas and drivers of change, on mobilizing resources for private sector development, there is little difference in perceptions between stakeholders in borrowing and non-borrowing countries (40% in each rate ADB's performance as good or excellent).

Across stakeholder groups, private sector stakeholders offer the most critical assessment of ADB in mobilizing resources to develop the private sector, with nearly one-quarter (22%) rating ADB's performance as poor (in comparison, only 7% of media and 10% of academic stakeholders give ADB a poor rating). In 2006, nearly one-half (46%) of private sector stakeholders were positive about ADB in this area, but this has decreased to around one-third (35%) in 2009.

As was discussed in Section 2, almost nine in ten stakeholders believe that the private sector is the key driver of future growth and development in Asia and Pacific. On page 51, we elaborate the results of a number of other questions related to stakeholders' perceptions and expectations of ADB's interaction and engagement with the private sector.

Perceptions of ADB's Performance in Key Areas (Drivers of Change)

"Good Performance (1+2),"* by Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Strengthening partnerships with stakeholders	47	51	49	54	58	52	35	31
Promoting knowledge-sharing and best practices	46	43	55	53	51	47	38	32
Mobilizing resources to develop the private sector	40	36	31	37	45	52	37	42
Improving governance	38	39	43	45	47	50	26	23
Promoting gender equality	32	33	46	47	30	38	18	11


 Top performance in region (Drivers of Change)

Fig. 36, Q. 20

*1+2 reflects those saying either "excellent" or "good," that is, 1 or 2 on a 5-point response scale.

Perceptions of ADB's Performance

Improving governance. One of five “drivers of change” identified in Strategy 2020, ADB's focus on governance covers the following key elements: Accountability, participation, predictability, and transparency. As the 2009 stakeholder survey included broader questions about governance (not just about ADB's performance in improving governance) as well as on corruption, results of these questions are also reported in this section.

Just under four in ten (38%) stakeholders believe ADB is doing a good or excellent job at improving governance. Respondents are as likely to rate ADB's performance as good or excellent as they are to rate it as average. Improving governance is among the lowest rated areas—only health care and gender equality are rated lower—and the percentage of respondents giving ADB a poor rating has increased since 2006 (from 13% to 17%).

Regionally, the strongest differences in stakeholder perceptions are based on borrowing status. Respondents in borrowing countries have a significantly more favourable view of ADB's performance in improving governance than their counterparts in non-borrowing countries, both within and outside the Asia/Pacific region. Further, while government stakeholders in borrowing countries have the most positive view of any group (60% think ADB is doing a good job), all stakeholders groups in borrowing countries are more likely than their peers in non-borrowing countries to rate ADB favourably in improving governance.

ADB clients in developing countries are substantially more satisfied with ADB's performance in improving governance (51% say its performance is good or excellent), particularly in comparison to clients in developed countries (29%) and non-clients in both borrowing (37%) and non-borrowing countries (22%).

Promoting gender equality. This is the lowest rated of all the areas and respondents are more likely to give ADB an average rating (41%) rather than a good or excellent rating (32%). Further, since 2006, the proportion of respondents indicating ADB is doing a poor job in this area has increased (from 10% to 19%). This reflects the finding that stakeholders are now less likely than they were in 2006 to think ADB puts a priority on gender equality (see Section 2).

The most positive ratings come from stakeholders in South Asia (47% think ADB is doing a good or excellent job—a slight increase from 2006). Respondents in this region are also the most likely to think gender equality is a priority area at ADB. In comparison, just three in ten respondents in Southeast Asia (30%) give ADB a positive rating.

Overall, perceptions of ADB's performance in promoting gender equality are considerably more positive (although still low) among respondents in borrowing countries (39%) compared to those in non-borrowing countries either outside the region (11%) or within the region (18%).

A majority of government stakeholders in borrowing countries (54%) believes ADB is performing well in this area, compared to just 14 percent of government stakeholders working in non-borrowing countries.

Perceptions of ADB's Performance

Fighting Corruption

Fighting corruption is a key priority area for ADB. As described in Section 2, stakeholders rate corruption ahead of all other issues as the most serious threat to development. Moreover, almost six in ten (58%) stakeholders agree with the statement, "because of corruption, foreign development assistance is mostly wasted." This belief is held most strongly among stakeholders in Southeast Asia and South Asia (68% and 63% agree, respectively).

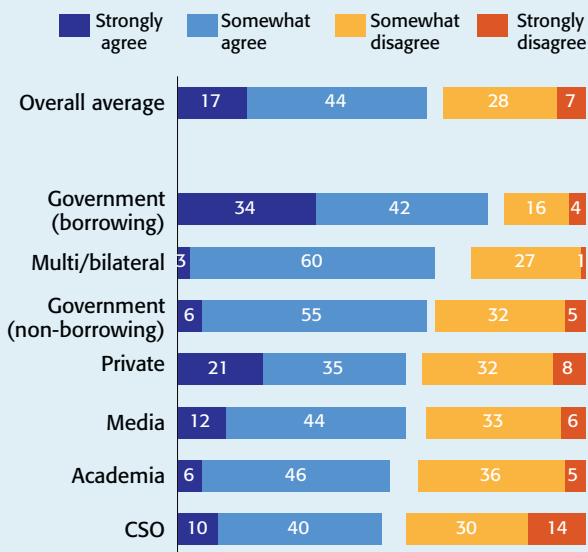
To what extent then do respondents think ADB is taking sufficient steps to prevent corruption in its own projects? A majority of stakeholders (60%) agrees either strongly or somewhat that ADB is doing enough in this regard.

Stakeholders in the Pacific Islands are the most likely to agree that ADB is taking sufficient steps (80%), much more so than in any other region. A strong majority (76%) of borrowing government stakeholders agrees that ADB is doing enough, whereas their non-borrowing counterparts are less likely to agree (60%). And a strong majority (72%) of clients in developing countries (i.e., those who have had on-the-ground experience with ADB projects) also agrees that ADB is taking sufficient steps to prevent corruption in its projects.

Analysis shows that the perception that ADB is taking sufficient steps to reduce corruption in its projects strongly drives perceptions of ADB's performance in improving governance. Among those who strongly agree that ADB takes sufficient steps to prevent corruption, nearly three-quarters (71%) say ADB is doing a good job in improving governance. However, among those who disagree, just 17% think ADB is doing a good job in this regard.

ADB Takes Sufficient Steps to Prevent Corruption in Its Projects

By Stakeholder Group, 2009



The white space in this chart represents "DK/NA."

Fig. 37, Q. 23d

Perceptions of ADB's Performance

Promoting knowledge sharing.[†] In Strategy 2020, ADB recognizes that knowledge solutions drive development, and because of this, it aims to play a strong role in putting knowledge to work in the region.

Overall, ratings of ADB's performance in promoting knowledge sharing is similar to ratings of other areas: 46 percent say ADB's performance is good or excellent. Regionally, a majority in East Asia (55%), South Asia (53%), and Southeast Asia (51%) believes that ADB is doing an excellent or good job in promoting knowledge sharing. This is slightly (though not significantly) higher than the plurality of stakeholders who believe this in the Pacific Islands (47%) and Central and West Asia (43%).

The notion that ADB is promoting knowledge sharing is stronger among some stakeholder groups than others. The groups are divided between:

- 1) those where a majority feels that ADB is doing an excellent or good job in this area, including government stakeholders in borrowing countries (62%), media (52%), and private sector (50%); and
- 2) those where less than a majority thinks this way, including CSOs (31%), multi/bilateral (33%), and non-borrowing government (35%) stakeholders, and academics (39%).

There is little difference in opinion between clients and non-clients about ADB's performance in promoting knowledge sharing. And it is important to note that a very low proportion of respondents overall say ADB's performance is poor (12%), with the exception of CSO respondents (22% think ADB's performance is poor).

Perceptions of ADB's Performance in Key Areas (Drivers of Change)

"Good Performance (1+2),"* by Stakeholder Group, 2009

	Overall average (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Strengthening partnerships with stakeholders	47	32	38	64	36	46	47	48
Promoting knowledge sharing and best practice	46	39	31	62	35	52	33	50
Mobilizing resources to develop the private sector	40	39	42	45	41	39	34	35
Improving governance	38	33	28	60	29	35	36	33
Promoting gender equality	32	16	28	54	14	28	22	31

 Top performance in stakeholder group (Drivers of Change)

Fig. 38, Q. 20

*1+2 reflects those saying either "excellent" or "good," that is, 1 or 2 on a 5-point response scale.

[†]Promoting knowledge sharing was not included in the 2006 survey.

Perceptions of ADB's Performance

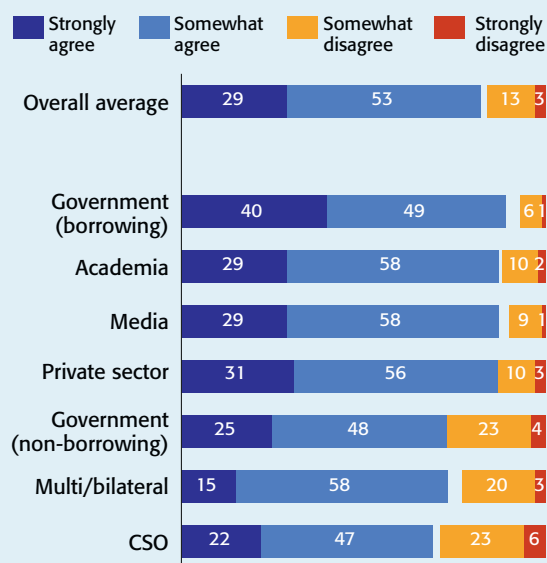
ADB as a Source of Knowledge on Development

In a related question, stakeholders were asked to rate how much they agreed or disagreed with the statement that "ADB is an excellent source of knowledge on development issues."

While stakeholders give average marks to ADB in promoting knowledge sharing, they are much more favourable about it being an excellent source of knowledge on development issues: More than eight in ten agree either strongly (29%) or somewhat (53%) with this statement. Views are consistently positive across all regions and stakeholder groups. While strong majorities of CSO and multi/bilateral respondents agree with this statement, they are much less likely than all others to agree. Clearly, most respondents believe ADB is an excellent source of knowledge; the challenge is for ADB to promote knowledge sharing in its projects and operations in order to solve development challenges.

ADB Is an Excellent Source of Knowledge on Development Issues

By Stakeholder Group, 2009



The white space in this chart represents "DK/NA."

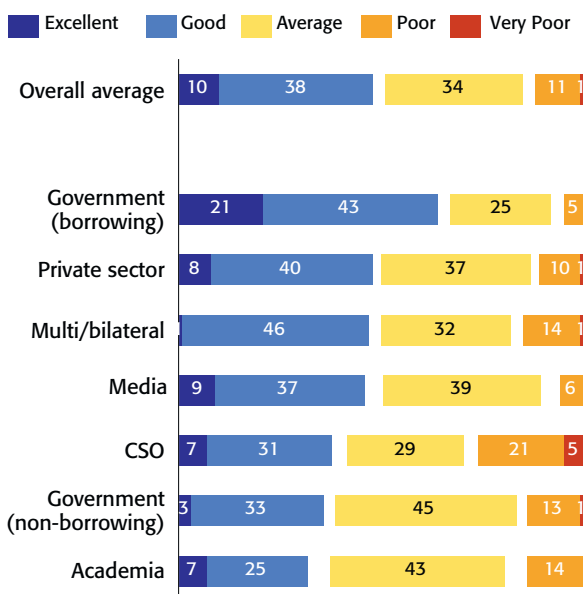
Fig. 39, Q. 23a

Strengthening partnerships with stakeholders.[†] Section 2 noted that 72 percent of stakeholders overall think ADB places a high or moderate priority on strengthening partnerships with stakeholders. However, less than a majority of respondents (47%) thinks ADB is doing a good or excellent job in strengthening partnerships.

There are no significant differences across the five DMC regions. However, stakeholders in borrowing countries are significantly more likely than those in non-borrowing countries to give ADB a favourable rating (54% vs 33%, respectively). The most favourable ratings come from government stakeholders in borrowing countries, especially in comparison to their counterparts in non-borrowing countries (64% vs 36%, respectively). CSO stakeholders and those from academia are significantly less likely to think ADB is doing a good job at strengthening stakeholder partnerships.

Strengthening Partnerships with Stakeholders

Performance Rating, by Stakeholder Group, 2009



The white space in this chart represents "DK/NA."

Fig. 40, Q. 20m

[†]Strengthening partnerships with stakeholders was not included in the 2006 survey.

Perceptions of ADB's Performance

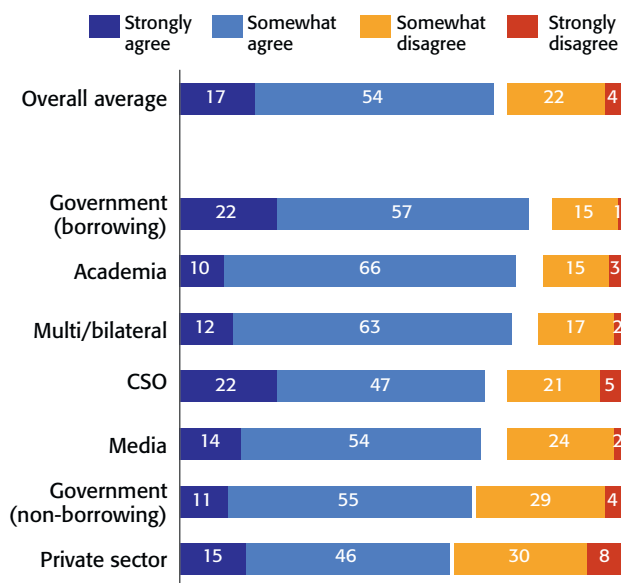
Private Sector Outreach: ADB's Performance to Date

ADB is committed to expanding its operations in support of private sector development. In this context, ADB is interested to understand stakeholder views about its outreach and engagement to date with the private sector, and opinions on the best way to enhance private sector development in developing countries in the Asia/Pacific region going forward.

On its efforts to reach out and build partnerships with the private sector, a majority of respondents (71%) agrees either strongly (17%) or somewhat (54%) that ADB is doing enough in this regard. Mirroring results on perceptions of ADB's performance in mobilizing resources for private sector development, stakeholders in the Pacific Islands (82%) and Southeast Asia (79%) are the most likely to agree ADB is doing enough to reach out to the private sector in their respective countries. In comparison, views are much less favourable in East Asia (63%) and Central and West Asia (67%).

ADB Doing Enough to Build Partnerships with Private Sector

By Stakeholder Group, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 41, Q. 21

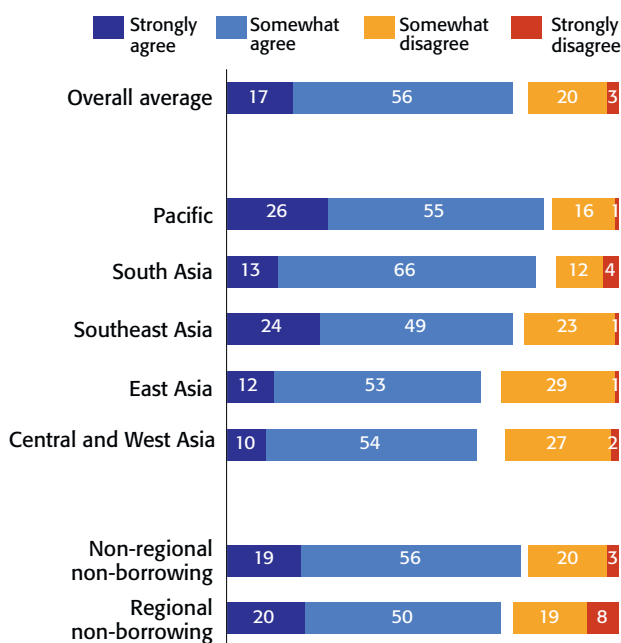
Across stakeholder groups, private sector stakeholders—the very group that ADB is trying to reach out to—are among the most critical of ADB's efforts to date: Nearly four in ten (38%) respondents from the private sector disagree that ADB is doing enough. There is little difference in opinion between private sector respondents in borrowing and non-borrowing countries. Clearly, these stakeholders—regardless of where they are located—see much room for improvement.

Stakeholders were also asked whether ADB is playing a useful role in enhancing private sector development. Similar to positive views about its efforts to date in reaching out and building strong partnerships, a fairly strong majority (73%, unchanged from 2006) also agrees that ADB plays a useful role in private sector development.

On a regional and stakeholder group basis, perceptions of ADB's usefulness in enhancing private sector development mirror perceptions of its outreach to date with the private sector: Respondents in the Pacific Islands and Southeast Asia are among the most likely to agree that ADB plays a useful role, and private sector and CSO stakeholders are the least likely to think this way.

ADB Plays a Useful Role in Enhancing Private Sector

By Region, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 42, Q. 23b

Perceptions of ADB's Performance

Stakeholders' advice to help ADB promote private sector development. Respondents were presented with five options and asked to select the two areas they think ADB should most focus on to best promote private sector development in developing countries in Asia and the Pacific.

Of the five possible options, only "providing funds to develop infrastructure projects" is selected by a majority of stakeholders (51%). The only option that did not have a funding dimension to it—"providing policy advice to governments"—is selected least frequently, by just one-quarter of respondents overall (26%).

Views in East Asia differ considerably from other regions: Just over one-quarter of stakeholders in this region (28%) feel that "providing funds to develop infrastructure projects" should be among the primary focus areas for ADB (compared to 58% in South Asia and Southeast Asia). Instead, stakeholders in East Asia are most likely to think that "supporting private sector projects by providing loans, equity, and guarantees" should be the primary area for ADB to focus on (59%). In Central and West Asia, results are much more divided, with nearly equal proportions selecting all but "providing policy advice to governments" as priorities for ADB to focus on to best promote private sector development.

Investing in infrastructure projects is clearly preferred by respondents working in government, multi/bilateral organizations, the private sector, and academia—each group selects this ahead of the other options as the key focus for ADB's private sector development. CSO respondents are somewhat more likely than others to say ADB should focus on providing policy advice to governments as a way to promote private sector development (33% vs 26% overall). Private sector respondents are significantly more likely than others to think that ADB should support private sector projects by providing loans, equity, and guarantees (47% select this option, compared to 28% of multi/bilateral respondents).

Area ADB Should Focus On to Develop Private Sector

Prompted, Total Mentions, by Stakeholder Group, 2009

	Overall average (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Providing funds to develop infrastructure projects	51	55	43	47	57	51	62	54
Providing credit to financial institutions to support small and medium sized enterprises	45	47	52	44	40	54	33	42
Supporting private sector projects by providing loans, equity, and guarantees	37	34	32	40	40	32	28	47
Providing funds for public-private partnerships	37	30	32	45	37	33	41	35
Providing policy advice to governments	26	34	33	25	25	25	23	21

Top mention in stakeholder group

Fig. 43, Q. 22

Perceptions of ADB's Performance

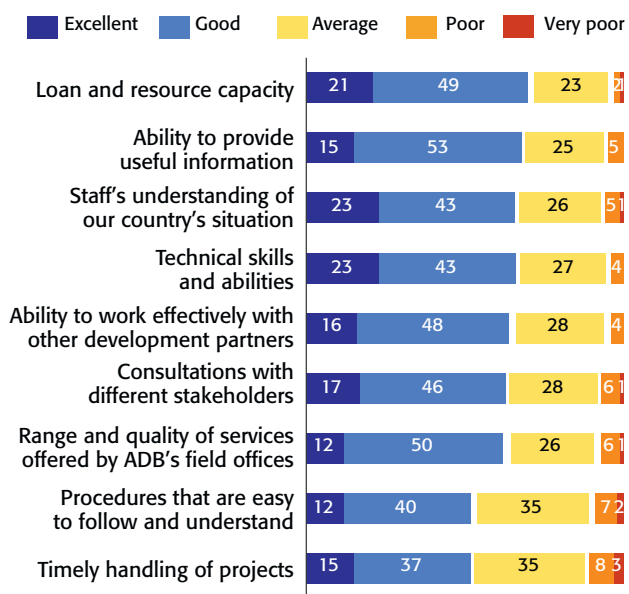
Operational Effectiveness According to ADB Clients

In addition to rating ADB's performance on its operational areas and drivers of change, ADB's clients[†] in developing countries were also asked to rate the bank on a number of areas, ranging from the technical capabilities of its staff to its loan capacity and consultation with different stakeholder groups. On all attributes, a majority of clients (i.e., more than 50%) rates ADB's performance as good or excellent.

Overall, ADB gets its best marks from clients on its loan and resource capacity (70% say this is either excellent or good) and on its ability to provide useful information (68%). While there are no significant differences in opinion across regions or stakeholder groups on perceptions of ADB's loan capacity or on providing useful information, clients working in government give ADB the most positive ratings, especially compared to clients working in private sector or for CSOs.

ADB's Performance in Helping DMCs Meet Development Goals

Average of DMCs,* 2009



*Asked only of ADB clients in developing member countries ($n=326$)

The white space in this chart represents "Refused" and "DK/NA."

Fig. 44, Q. 15

[†]Recall that a client is a respondent who has worked with ADB on a project, program, or research study in the past three years.

Perceptions of ADB's Performance

Clients are much less likely to give ADB a good rating on both its timely handling of projects (52%) or having procedures that are easy to follow (53%). Lower ratings in these areas are consistent with perceptions that ADB's primary weaknesses are its bureaucracy and slowness (as discussed in Section 1). On easy to follow procedures, among the most critical of ADB's performance are clients working in multi/bilateral organizations (27% give ADB a good or excellent performance rating), especially in comparison to clients working in government (64% rate its performance as good or excellent).

Overall, clients from multi/bilateral organizations are the least positive about ADB across all attributes. For example, significantly fewer multi/bilateral clients give ADB good

marks on handling projects in a timely manner (37% vs 52% overall) or providing useful information (50% vs 68% overall). In comparison, clients working for governments in borrowing countries are the most positive on all attributes.

There are fewer differences in opinion across the regions than across stakeholder groups, but overall, clients in both Central and West Asia and in South Asia are more positive about ADB's performance. One notable finding comes from clients in Southeast Asia: While they are generally positive about ADB on most of the attributes, they are particularly critical about ADB's timely handling of projects (just 37% give ADB a positive rating, compared to 52% overall).

ADB's Performance in Helping DMCs Meet Development Goals and Objectives

"Good (1+2),"* DMC Clients,** by Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)
Loan and resource capacity	70	67	63	72	72	70
Ability to provide useful information	68	66	62	75	66	60
Staff's understanding of our country's situation	66	75	50	71	62	63
Technical skills and abilities	65	70	64	63	64	72
Ability to work effectively with other development partners	64	64	50	74	61	62
Consultations with different stakeholders	63	62	49	72	62	48
Range and quality of services offered by ADB's field offices	62	66	57	64	59	63
Procedures that are easy to follow and understand	53	56	49	57	50	46
Timely handling of projects	52	62	52	64	37	46

 Top performance in region

Fig. 45, Q. 15

*1+2 reflects those saying either "excellent" or "good," that is, 1 or 2 on a 5-point response scale.

**Asked only of ADB clients in developing member countries (n=326)

Section 4: Perceptions of ADB's Communications

While a majority of respondents (62%) continues to think that ADB communicates its mission and activities well, views have not changed since 2006. Readership of ADB publications and website visits are up, and importantly, stakeholders increasingly say that ADB reports, research, and resources have an influence on their thinking about development.

Quality of ADB Communications and its Responsiveness

When asked how well they think ADB communicates its mission and activities to people like themselves, a majority of stakeholders (62%) says that ADB does this either very well (18%) or somewhat well (44%). However, a sizable minority of respondents (37%) feels that ADB does not communicate on its mission or activities well. It is important to note that stakeholders' views have not changed significantly since 2006.

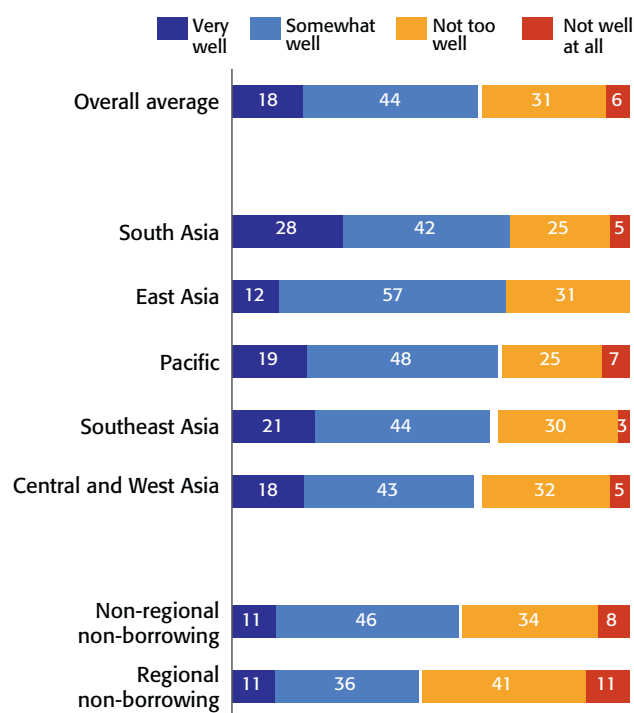
There is little difference in opinion across the five developing member country (DMC) regions. However, respondents in borrowing countries are more favourable than those in non-borrowing countries (66% vs 52%). Interestingly, among

the non-borrowing countries, it is respondents *outside* the region who give ADB better marks than those within the region (56% vs 48%, respectively).

There are significant differences across the stakeholder groups regarding ADB communications. As is the case on many other performance ratings, government stakeholders working in borrowing countries are much more satisfied with ADB's communications on its mission than government stakeholders working in non-borrowing countries (80% vs 63%, respectively, with no significant change since 2006). All other stakeholder groups give ADB considerably lower marks in this regard, and especially those working in academia (54%) and for civil society organizations (CSOs, 50%). As in 2006, ADB clients continue to be more positive than non-clients in this regard (73% vs 52%, respectively).

ADB's Performance in Communicating Its Mission and Activities

By Region, 2009

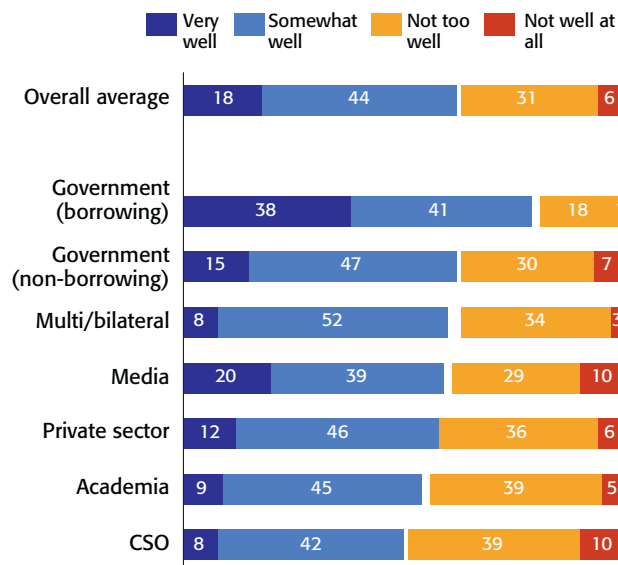


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Fig. 46, Q. 24

ADB's Performance in Communicating Its Mission and Activities

By Stakeholder Group, 2009



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Fig. 47, Q. 24

Perceptions of ADB's Communications

ADB's Responsiveness to Requests for Information

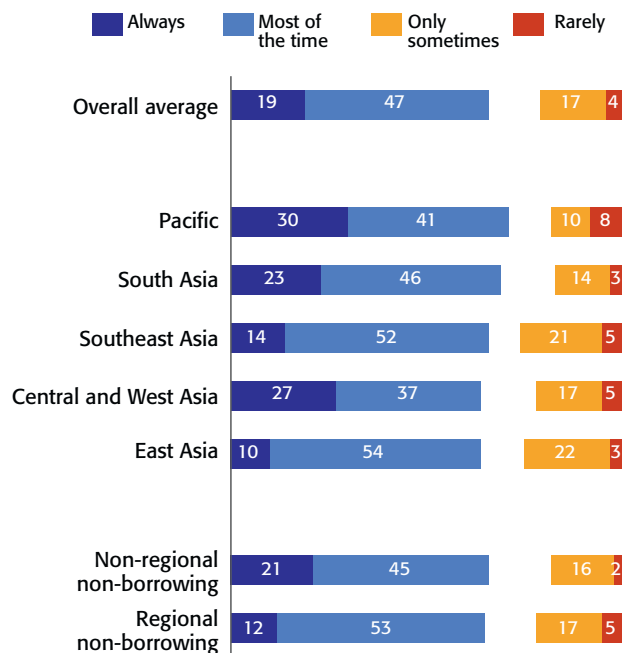
A key part of stakeholder communications and engagement is being responsive to inquiries and requests for information. It is therefore encouraging that a majority of stakeholders surveyed (66%) thinks ADB is responsive to their requests either always (19%) or most of the time (47%). However, as with perceptions of ADB's communications on its mission, a relatively large proportion—21 percent—think that ADB is responsive only sometimes (17%) or rarely (4%).

There are notable differences in perceptions across regions and stakeholder groups that ADB is "always" responsive to their requests. Respondents in the Pacific Islands and in Central and West Asia are the most likely to say that ADB is always responsive (30% and 27%, respectively), whereas stakeholders working in East Asia are the least likely to feel this way (10%).

Government stakeholders see ADB as particularly attentive to them: Three-quarters (73%) say ADB is responsive to their requests always or most of the time, with little difference in opinion between borrowing and donor government respondents. Private sector, CSO, and academic respondents have a comparatively more critical opinion of ADB, with less than two-thirds in each group saying ADB gets back to them either always or most of the time (62%, 62%, and 59%, respectively).

ADB Is Responsive to Information Requests

By Region, 2009

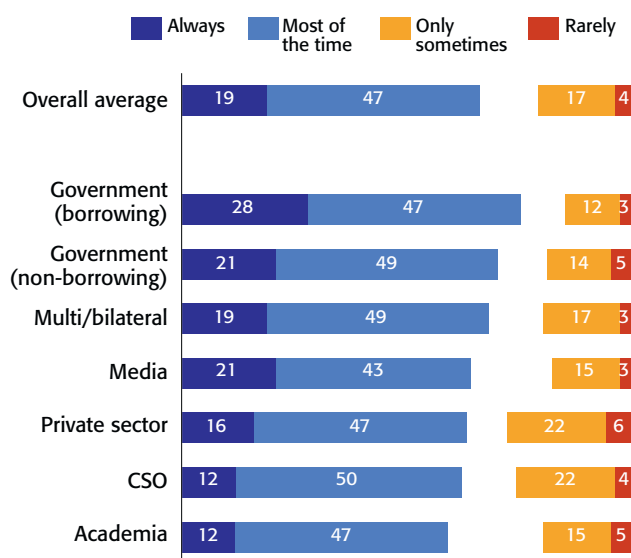


The white space in this chart represents "Refused" and "DK/NA."

Fig. 48, Q. 30

ADB Is Responsive to Information Requests

By Stakeholder Group, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 49, Q. 30

Perceptions of ADB's Communications

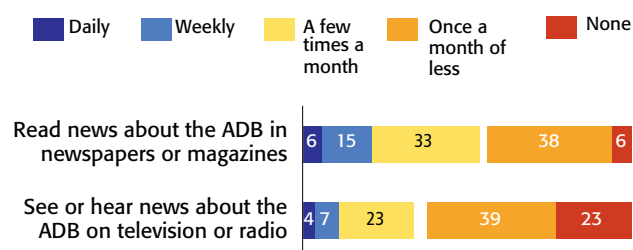
Sources of Information

ADB uses a variety of methods and channels to communicate with stakeholders, including via newspapers, magazines, television, and radio. As in 2006, respondents are more likely to learn or hear about ADB through newspapers and magazines than through TV or radio.

However, for both sources, fewer than three in ten respondents say they obtain news about ADB daily or weekly through newspapers (21%) or TV or radio (11%). Use of these sources continues to be fairly passive, with a majority saying they obtain news about ADB in newspapers or magazines (71%) or see or hear about ADB on TV or radio (62%) a few times a month or less.

Frequency of Accessing Information about ADB in Different Media

Average of All Countries, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 50, Q. 26a-b

Frequency of Accessing Information about ADB in Different Media

By Region,* 2009

	Overall Average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Read news about ADB in newspapers or magazines	54	55	52	60	55	57	60	44
See or hear news about ADB on television or radio	34	37	34	40	37	43	38	7

*Total mentions of daily, weekly, and a few times a month

Fig. 51, Q. 26a-b

Perceptions of ADB's Communications

ADB Publications: Readership and Influence on Thinking

Readership. All stakeholders were asked if they have read any ADB publications in the past three years. A strong majority indicates that they have (82%, a significant increase since 2006, when 73% said they had).

Readership is higher among clients than non-clients (89% vs 76%) and among respondents in non-borrowing countries than in borrowing countries (87% vs 80%). Regionally, stakeholders in Southeast Asia are most likely to have read ADB publications in the past three years. By stakeholder group, respondents working for CSOs are the most likely to have read ADB publications (89%, up from 68% in 2006). Since 2006, ADB report readership has increased significantly among respondents working for CSOs, media, and the private sector. And while three-quarters of multi/bilateral respondents still say they read ADB publications, this has dropped significantly over the past three years (from 90% in 2006 to 75% in 2009).

Have Read ADB Publications in Past Three Years "Yes," by Region, 2009

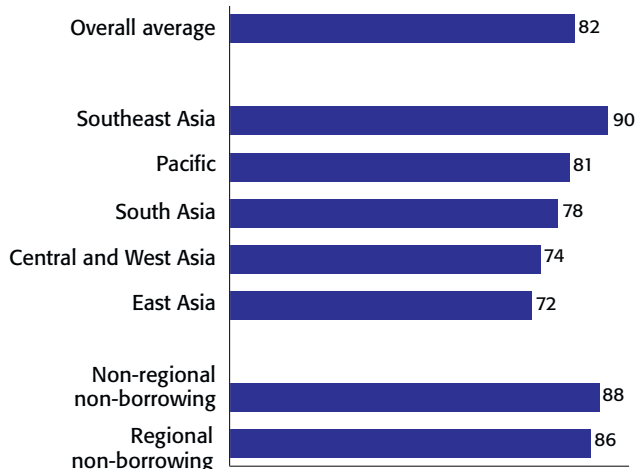


Fig. 52, Q. 31

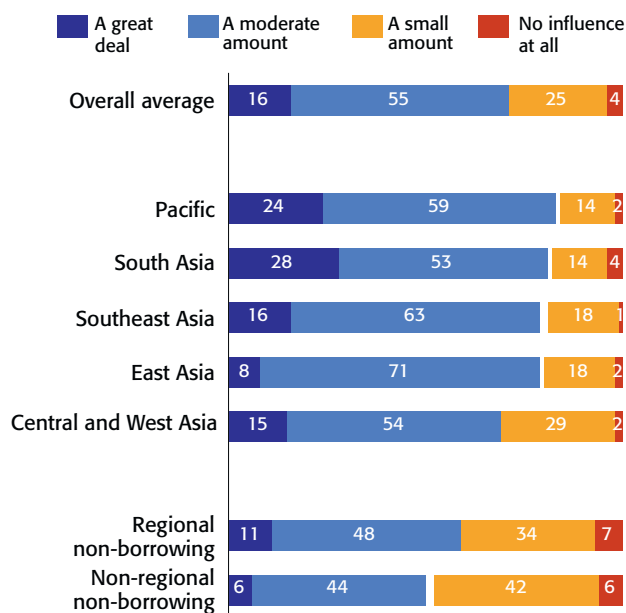
Perceptions of ADB's Communications

Influence on thinking. Stakeholders who have read ADB publications in the past three years were asked to rate the influence these have on their thinking about development issues. Stakeholders are now more likely than they were three years ago to say ADB publications have a great or a moderate impact on their thinking (from 64% in 2006 to 71% in 2009).

In four of the five DMC regions, around eight in ten or more stakeholders say ADB reports and research have a positive influence on their thinking about development; respondents in Central and West Asia are less likely to feel this way (69%, no change since 2006). By stakeholder group, respondents from borrowing country governments are the most likely to say they are influenced by ADB publications, while their peers working for non-borrowing governments are the least likely.

Influence of ADB Publications on Thinking about Development Issues

By Region,* 2009



*Asked only to those who had read ADB publications (n=742)

The white space in this chart represents "Refused" and "DK/NA."

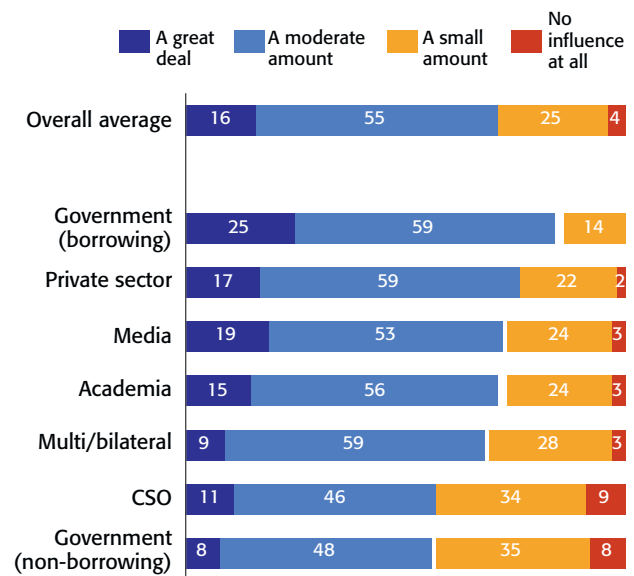
Fig. 53, Q. 32

There is still room for ADB to improve in this regard, as nearly three in ten respondents continue to say that ADB publications have a small impact (25%) or no impact at all (4%) on their thinking. CSO stakeholders are the most likely to feel this way (42% say ADB reports have little or no influence on their thinking).

Borrowing status is important here: Overall, stakeholders in non-borrowing countries are significantly more likely than their peers in borrowing countries to say that ADB publications have little or no influence on their thinking about development issues (45% vs 21%, respectively). Figure 54 summarizes these differences in opinion by stakeholder group.

Influence of ADB Publications on Thinking about Development Issues

By Stakeholder Group,* 2009



*Asked only to those who had read ADB publications (n=742)

The white space in this chart represents "Refused" and "DK/NA."

Fig. 54, Q. 32

Perceptions of ADB's Communications

Use of and Feedback on ADB Website

Use of Website

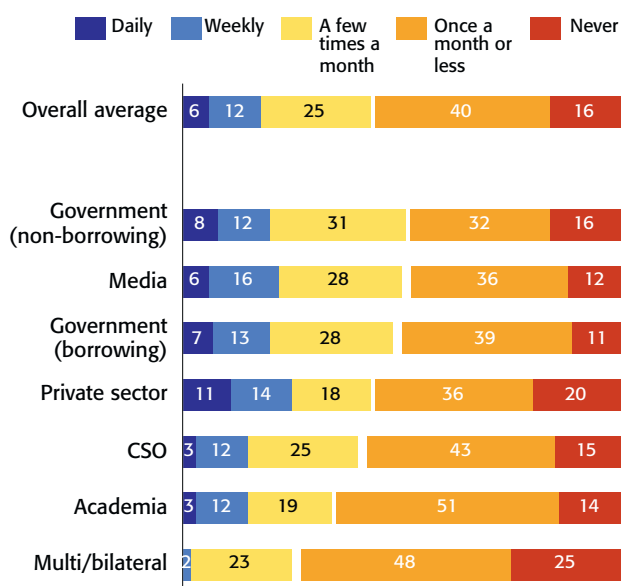
Stakeholders were asked how often they use the ADB website. As in 2006, while a majority still does not use the site daily or weekly, there has been a slight increase in usage over the past three years. In 2006, 13 percent said they used it either daily (3%) or weekly (10%); in 2009, 18 percent say they use it either daily (6%) or weekly (12%).

A majority of stakeholders continues to visit the site either a few times a month (25%, up from 14%) or once a month or less (40%, no change since 2006). Notably, since 2006, significantly fewer stakeholders say they have never visited the website (16% in 2009, compared with 34% in 2006).

Regionally, there are no significant differences in how often stakeholders visit the website on a weekly or monthly basis. By stakeholder group, media stakeholders and those from government—in both non-borrowing and borrowing countries—remain the most likely to use the ADB website at least a few times a month.

Frequency of Using ADB Website

By Stakeholder Group, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 55, Q. 26c

Perceptions of ADB's Communications

Reasons for Visiting the Website

Stakeholders who say they access the website were asked the primary reason for their visit (from a prompted list of 7 possible reasons). A majority of stakeholders says they come to the ADB website to learn about ADB projects (55% of respondents overall). Other important reasons for visiting the website include to find economic research reports and statistics and to find country-specific information. Significantly fewer respondents visit the site to find business and employment opportunities, to learn about ADB's financial products, or to read press releases.

By region, there is little difference in the reasons for visiting the website; however, there are some notable differences by stakeholder group. Whereas all other groups say the primary reason for going to the website is to learn about ADB projects, for media and academic stakeholders, it is to find economic research reports and statistics. Moreover, media stakeholders are significantly more likely than all others to visit the site to read press releases.

Primary Reason for Visiting ADB's Website

By Region, 2009

	Overall average (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Learn about ADB projects	55	54	52	49	62	51	59	56
Find economic research reports and statistics	46	39	48	37	52	40	52	48
Find country specific information	40	33	26	44	39	45	35	52
Find publications	33	23	26	29	40	34	26	44
Read press releases	23	22	35	15	24	16	32	22
Learn about ADB's financial products	16	19	16	18	22	14	6	11
Find business and employment opportunities	15	18	15	15	15	19	11	14


 Top reason in region

Fig. 56, Q. 27

Perceptions of ADB's Communications

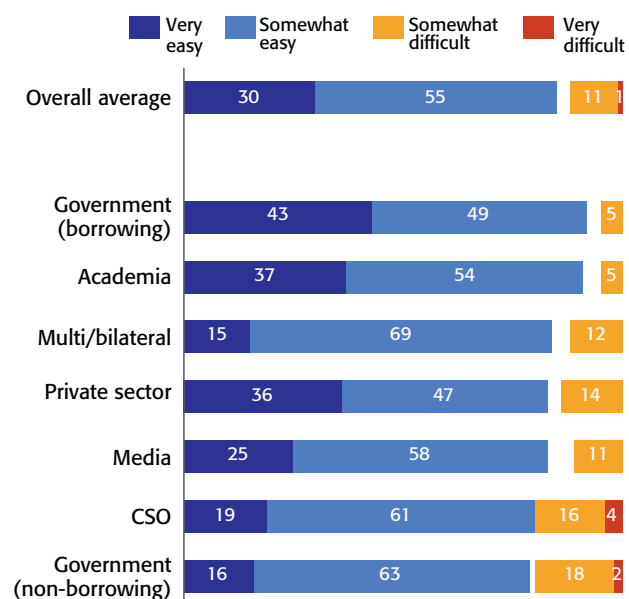
Website Experience: Ease of Use and Finding Information

Ease of Use

Overall, among those who use the website, a strong majority (85%) feels it is either very easy (30%) or somewhat easy to use (55%). Stakeholders are now more likely to say that the site is very easy to use than they were in 2006 (30% in 2009 vs 24% in 2006). There are few overall differences either by region or across the stakeholder groups, with strong majorities in each saying the website is either very or somewhat easy to use. However, only 3 percent of website visitors in East Asia feel the website is very easy to use compared to 51 percent of visitors in South Asia. Only among CSO respondents and those working in government in non-borrowing countries do a relatively high proportion feel the site is difficult to manage, though even among these two groups, fewer than one-quarter of respondents feel this way.

ADB's Website: Ease of Use

Website Users,* by Stakeholder Group, 2009



*Asked only to website users (n=745)

The white space in this chart represents "Refused" and "DK/NA."

Fig. 57, Q. 29

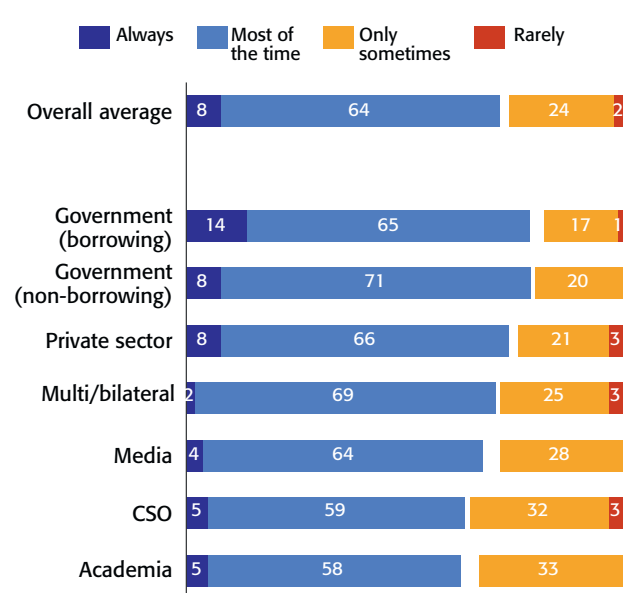
Finding Information

Among website visitors, a majority says the site provides the information they need or want either always (8%, no change since 2006) or most of the time (64%, up from 56% in 2006). It is encouraging to see that stakeholders are now more likely than they were in 2006 to say that the site provides the information they need most of the time. However, there are opportunities for improvement, as one-quarter of respondents (24%, down from 29% in 2006) continue to say that only sometimes they get the information they need or want from ADB's site.

Strong majorities (70% or more) say the website provides the information they need or want either all or most of the time in all regions except East Asia, where respondents are significantly less likely to feel this way (56% compared to 72% overall). By stakeholder group, there is more variation in opinion: Government respondents are the most likely to find what they need (79%, with little difference based on borrowing status), especially in comparison to those working in CSOs (64%) and academia (63%); only among CSO respondents has there been a significant improvement since 2006.

ADB's Website: Provides Needed Information

Website Users,* by Stakeholder Group, 2009



*Asked only to website users (n=745)

The white space in this chart represents "Refused" and "DK/NA."

Fig. 58, Q. 28

Section 5: Foreign Development Assistance in the Region

Results in this section show that while a majority of stakeholders believes enough money is being spent on foreign development assistance, many respondents have issues with how the money is actually being spent. Furthermore, while most stakeholders think foreign development assistance organizations allocate aid resources effectively to developing countries, there is underlying concern about how effectively this aid is being used by developing countries in the region, especially among multi/bilateral respondents.

Perceptions of Foreign Assistance: Enough Spent, Not Wisely Used?

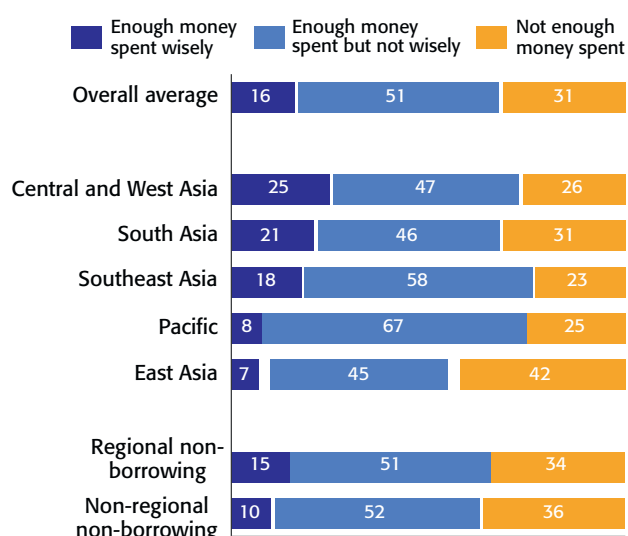
While most stakeholders believe that enough money is being spent on foreign development assistance, there is concern about how wisely these funds are being used. Specifically, a majority of respondents (51%) says that enough money is being spent, but not wisely, and a further one-third (31%) say altogether not enough money is spent. A minority of stakeholders (16%) feel that both enough is spent and that it is spent wisely. Overall, views remain relatively unchanged since 2006.

There are some notable differences in opinion across the regions. Stakeholders in the Pacific Islands and East Asia are the most critical about aid allocation and use, particularly respondents in East Asia. Here, nearly one-half of respondents (42%) believe that simply not enough money is spent on development assistance (in 2006, 39% felt this way). Views are most positive in South Asia and Central and West Asia. In both these regions, a higher than average proportion of respondents (21% and 25%, respectively, compared to 16% overall) believe that enough money is spent on foreign development assistance and that it is spent wisely.

There are also some differences across stakeholder groups. In all but one group—government—majorities feel that enough money is spent, but not wisely. Government respondents are more likely than others to think that enough money is spent and spent wisely, and notably, this is true regardless of whether the government respondent is from a non-borrowing or borrowing country. It is only among private sector stakeholders where there has been a significant change in opinion since 2006. Specifically, private sector respondents are more likely than they were in 2006 to think that enough money is spent, but not wisely (55% in 2009, up from 43% in 2006).

Foreign Assistance to Developing Countries in Asia and the Pacific

By Region, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 59, Q. 1

Foreign Development Assistance in the Region

Perceptions of Foreign Assistance: Effective Allocation and Use

Stakeholders were also asked their views on how effectively foreign development assistance organizations allocate resources to developing countries in Asia and the Pacific, and in turn, how effectively these countries are using the foreign development assistance they receive.

Seven in ten respondents think that foreign development assistance organizations allocate aid either very or somewhat effectively (12% and 59%, respectively). However, opinion on how well this aid is used by developing countries in the region is somewhat weaker. Almost two-thirds of respondents overall think developing countries in Asia/Pacific are using it very (13%) or somewhat effectively (49%).

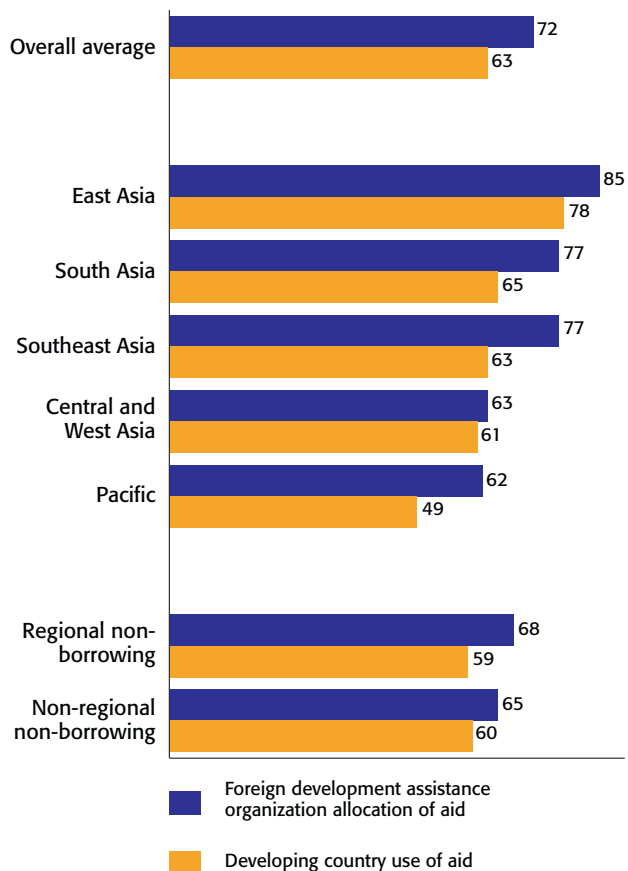
Stakeholders in East Asia are the most positive about both the effectiveness of aid allocation and how countries in the region are using it (85% and 78% respectively). In comparison, views among respondents in the Pacific Islands are much less positive, both about how the aid gets allocated (62% say effectively) and how countries in the region are using this aid (49% say effectively, compared to 63% overall).

Government stakeholders in borrowing countries are more positive about both the effectiveness of aid allocation and how countries are using it (85% and 81%, respectively) compared to those in non-borrowing countries (72% and 71%, respectively).

Among stakeholders working for multi/bilateral organizations, there is a substantial gap in perceptions between how effectively they feel aid is allocated and how it is used. Three-quarters (75%) believe that aid is allocated effectively, but less than six in ten (57%) believe that it is being used effectively.

Despite concern about how effectively foreign aid is used by developing countries in the region, stakeholders in developing member countries (DMCs) do not question the commitment of their government when it comes to taking responsibility for development: 87 percent strongly or somewhat agree that their government supports and take responsibility for development efforts in their country. There is little change in opinion since 2006.

Foreign Development Assistance Organization Aid Allocation vs Country Use of Development Assistance
"Effective (1+2),"* by Region, 2009



*1+2 reflects those saying either "very effectively" or "somewhat effectively," that is, 1 or 2 on a 5-point response scale.

Fig. 60, Q. 2-3

Foreign Development Assistance in the Region

MDGs: Effort by Government and Foreign Development Assistance Organizations

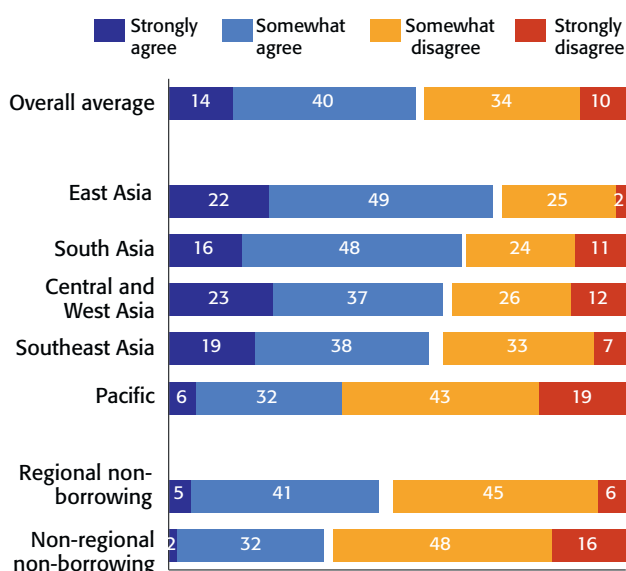
Stakeholders are divided on the sufficiency of efforts of foreign development assistance organizations and national governments of developing countries in Asia and the Pacific to achieve the Millennium Development Goals (MDGs) by 2015. Overall, about one-half of respondents (54%) say that governments and foreign development assistance organizations are doing enough to achieve the MDGs, while a similar proportion (44%) disagree, with significant differences across regions and stakeholder groups.

Views of foreign development assistance organizations and developing country governments in Asia/Pacific are much more favourable in East Asia and South Asia, where fairly strong majorities believe that both are doing enough. This is in stark contrast to more pessimistic views in both the Pacific Islands and in non-borrowing countries. Just over one-third of respondents in the Pacific Islands (38%) and four in ten (40%) respondents in non-borrowing countries agree that enough is being done by foreign development organizations and national governments of developing countries in the Asia/Pacific region to achieve the MDGs by 2015.

Government stakeholders from borrowing countries are the most positive about efforts to date of national governments of developing countries in the Asia/Pacific region and foreign development assistance organizations to achieve the MDGs, particularly compared to their government counterparts in non-borrowing countries (72% vs 53%, respectively). In contrast, less than half of all CSO respondents (44%) and those from the media (42%) believe that enough is being done.

Enough Done by Government and Foreign Development Assistance Organizations to Reach MDGs by 2015

By Region, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 61, Q. 6c

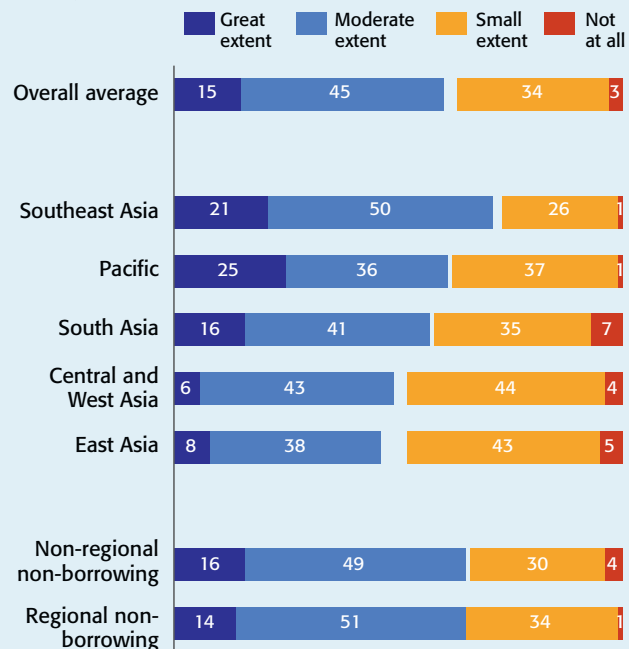
Foreign Development Assistance in the Region

Foreign Development Assistance Organizations during the Economic Crisis

Overall, views are generally positive about the helpfulness of foreign development assistance organizations in the current economic crisis: Six in ten respondents (61%) say that foreign development assistance organizations have helped developing countries either to a great or moderate extent during the economic crisis. Stakeholders in Central and West Asia (49%) and in East Asia (46%) have a more critical view than others.

Extent that Foreign Development Assistance Organizations Help Government Deal with Current Economic Crisis

By Region, 2009



The white space in this chart represents "Refused" and "DK/NA."

Fig. 62, Q. 4

Methodological Report

In 2009, ADB commissioned GlobeScan, a stakeholder research consultancy, to conduct a second multinational perceptions survey of its stakeholders in both borrowing countries—also referred to as developing member countries (DMCs)—in the Asia and Pacific region, and in developed non-borrowing countries within and outside the region. The goal of this research is to assess stakeholder opinion of ADB’s role and effectiveness in the development context of the Asia/Pacific region. A similar exercise was carried out in 2006, by Princeton Survey Research Associates International. Dalberg Global Development Advisors, a strategic advisory firm specializing in international development, has also played a role in the 2009 stakeholder research, specifically in helping with the interpretation of the survey results and in facilitating internal discussions at ADB on next steps.

With the formal launch of Strategy 2020 in 2008, in which ADB defined its long-term strategic framework for the coming decade, ADB has redirected itself in light of both rapid economic growth in the Asia/Pacific region and significant shifts in the development, aid, and financial landscape. Therefore, 2009 was an ideal time for ADB to revisit the research to obtain an updated and expanded view of what key stakeholders are thinking vis-à-vis its efforts to date in helping fight poverty.

Between October and December 2009, 900 interviews were carried out with individuals who hold senior-level positions in government, multi/bilateral organizations, civil society organizations (CSOs), the private sector, media, and academia. To qualify for the study, respondents had to describe themselves as at least somewhat knowledgeable about ADB and its activities. In the following pages, we detail the sampling strategy, including the selection of countries, sample sizes, sample selection, professional sectors, fieldwork logistics, and questionnaire design.

Country Selection and Sample Size

In total, GlobeScan interviewed 900 stakeholders in 31 countries, both within and outside the Asia/Pacific region that are either borrowing or non-borrowing countries. To select these countries, ADB and GlobeScan used probability proportional to size cluster sampling (PPS). PPS relies on a specific measure of size. For this research, ideally, we would use the number of stakeholders in a given country as our measure of size, however, this number is difficult to determine with accuracy. Therefore, for DMCs, a readily available proxy measure of size was used, specifically, ADB’s portfolio in each country, which consists of ADB’s major products (i.e., loans, grants, and technical assistance). For non-borrowing countries, this measure is not applicable, so instead of portfolio, ADB shareholding and population of the country were used as the measure of size.

Borrowing and non-borrowing countries come from the following seven regional groupings:

Non-borrowing Countries	Non-regional non-borrowing countries
	Regional non-borrowing countries
Borrowing Countries	Central and West Asia DMCs
	East Asia DMCs
	South Asia DMCs
	Southeast Asia DMCs
	Pacific DMCs

Fig. 63

Note that these regions and the corresponding countries differ from 2006, as ADB changed its regional definitions since then. To allow for valid comparisons between the 2006 and 2009 results, the 2006 survey countries were re-grouped to match ADB’s current regional definitions.

Methodological Report

Countries were grouped into two strata, using the measure of size as the criteria to define these stratum: 1) certainty countries, which comprises the bigger countries; and 2) non-certainty countries, which includes all others. This stratification was not applied in East Asia since this region only comprises two countries. All countries in the certainty stratum were selected (by definition), whereas countries in the non-certainty stratum were selected using multi-stage random selection method.

The total sample size of 900 was determined on the basis of the 2006 survey. Of the 900 interviews, 300 were allocated to non-borrowing countries and 600 to borrowing countries, as specified by ADB. The sample size for borrowing countries was based on its relative representation in ADB's portfolio (i.e., driven by the number of loans, grants, and technical assistance each country receives). For non-borrowing countries, the sample size was driven by its shareholdings and population of the country (i.e., the greater its shareholdings, the more interviews conducted in the country).

Figure 64 summarizes the participating countries in the 2009 survey, along with the number of interviews conducted in each country.

In order to balance the sample for non-response, data were weighted against the original sample allocation plan, on a country and professional sector basis; a similar weighting procedure was used in 2006.

Sample Size by Country

	Number of interviews
Azerbaijan	29
Pakistan	50
Uzbekistan	29
Central and West Asia	109
Mongolia	15
People's Republic of China	64
East Asia	78
Cambodia	29
Indonesia	35
Philippines	35
Thailand	29
Viet Nam	50
Southeast Asia	179
Bangladesh	50
Bhutan	25
India	68
Nepal	25
Sri Lanka	39
South Asia	208
Federated States of Micronesia	8
Papua New Guinea	14
Samoa	10
Solomon Islands	10
Timor-Leste	9
Pacific	50
Australia	21
Japan	58
Malaysia	16
Singapore	16
Republic of Korea	21
Regional Non-borrowing	130
Canada	21
France	16
Germany	21
Sweden	16
United Kingdom	16
United States of America	58
Non-regional Non-borrowing	146
Overall	900

Fig. 64

Methodological Report

Professional Sectors

As in 2006, the survey sample consists of respondents from the following six categories: 1) government; 2) multi/bilateral organizations; 3) CSOs; 4) private sector; 5) media; and 6) academia. The table below provides a summary of the definitions that were used to classify each category.

Category	Eligible Organizations	Eligible Individuals
Government 1	Prime Minister's office (where applicable) and the Ministries of Finance, Development and Planning	Senior Civil Servant level and above (typically Director or Director General level); Ministers or Deputies may be considered for small economies if deemed appropriate.
	Parliamentarians or politicians, where applicable	Parliamentarians or Politicians or senior staff of relevant committees, such as finance, development, or foreign affairs
Government 2	Technical ministries (e.g., Energy, Agriculture, Health, Education)	Senior Civil Servant level and above (typically Director or Director General level); Ministers or Deputies may be considered for small economies if deemed appropriate.
Multi/bilateral organizations (Developing countries only)	The leading multilateral partners for ADB plus a selection of the most important bilateral partners for ADB in a given developing member country	Heads of local offices of multi/bilaterals or senior staff as deemed appropriate
Civil Society Organizations	Both local and multinational nongovernmental, religious, and/or advocacy organizations, governmental organizations foundations, and movements whose mission is related to international affairs, economic development, environmental issues, or poverty alleviation	Heads of or senior staff of non-governmental organizations
Private sector	Reputable large and medium-sized private sector firms involved in development work (to include a range of financial institutions involved in development co-financing projects)	CEOs or other senior business people, including financial consultants or business experts who are known for their international expertise
Media	An organization that derives its business from media-driven activities including both publicly and privately funded radio, television, press, and the Internet	Editors or journalists who report on finance, economics, international affairs, or development and who are knowledgeable about the Asia/Pacific region
Academia	Any university, college, or think tank	Professors within relevant departments, such as Finance, Economics, International Affairs, Political Science, Sociology; heads of, or senior staff of, relevant think tanks or institutions

Fig. 65

Methodological Report

Targeted sample sizes for the professional sectors were driven by what was achieved in the 2006 survey, which was developed by ADB. This distribution is summarized in Figure 66. Note that multi/bilateral respondents were not a stakeholder group in non-borrowing countries; as a result, the proportion of interviews among CSO, media, government, and academic respondents was slightly larger in non-borrowing countries compared to borrowing countries.

Proportion of Interviews by Stakeholder Group

	Overall (%)	Borrowing countries (%)	Non-borrowing countries (%)
Government	33	34	30
Private sector	19	20	19
Civil society organization (CSO)	17	13	24
Media	11	10	13
Multi/bilateral	11	16	0
Academia	9	7	13

Fig. 66

Margin of Error

For the purposes of this study we have used the probability proportional to size cluster sampling with additional stratification by stakeholder types. Respondents within strata were selected at random. Figure 67 summarizes the number of interviews conducted along with the corresponding margin of error across regions and stakeholders groups.

Margin of error should be interpreted with caution as it is not the only indicator of data accuracy. Precision of survey estimates is normally a function of multiple effects, for example, homogeneity of target population, quality of sampling frames, quality of questions and scales, question order on the questionnaire, interviewing style, data collection mode, response rates, among other things.

Region / Stakeholder Group	Number of interviews	Margin of error [†]
All respondents	900	±2.5%
Central and West Asia	109	±6%
East Asia	78	±8%
Southeast Asia	179	±2%
South Asia	208	±3%
Pacific	50	±10%
Regional non-borrowing	130	±11%
Non-regional non-borrowing	146	±5%
Government	295	±3.5%
Private sector	174	±5%
Civil society organization (CSO)	151	±9%
Media	102	±5%
Multi/bilateral	97	±5.5%
Academia	81	±3.5%

Fig. 67

[†]The margins of error expressed here have been derived from Question 7d in the survey. The margins of error for all other survey questions are available upon request.

Sampling Frame

Similar to 2006, names of potential respondents in each country were compiled from both ADB and GlobeScan sources. For GlobeScan contacts, GlobeScan worked with its in-country research partners to generate names, using publicly available material for each of the sectors mentioned. These lists were complemented with contacts from GlobeScan's own global opinion leader database. ADB provided GlobeScan with its own lists of contacts in each country. The GlobeScan and ADB lists were then combined and duplicate names were removed. ADB then reviewed and approved the final list of potential respondents, of which around 70 percent came from ADB and the balance from GlobeScan. At no point after the fieldwork began was ADB made aware of who participated, ensuring that all participating stakeholders remained anonymous.

Respondents were randomly selected to be contacted, reflecting the likely participation rates in each group. For example, if five respondents were needed in a particular category, then 20 contacts were randomly chosen; if these contacts were insufficient, then more contacts were randomly drawn as necessary.

Recruiting Respondents

To accommodate stakeholders' busy schedules, prospective respondents were offered the option of doing the survey online, by telephone, or via face-to-face interview. The following process was used to recruit prospective respondents.

- 1) GlobeScan sent out an email introduction and invitation letters to a random selection of contacts in each country with an email address (in all countries, most respondents had an email address). Two reminder emails were sent. This invitation offered respondents the three participation options (online, telephone, face-to-face).
- 2) In the case of non-responsive contact by email, GlobeScan then made up to three follow-up telephone calls, asking respondents to participate in the survey either online, by telephone, or by face-to-face interview.
- 3) If there was no response after the three emails and three follow-up telephone calls, the respondent was replaced with the next person on the list of randomly selected names.
- 4) Where respondents replied with a request for a telephone or face-to-face interview, GlobeScan engaged the in-country research partners to conduct this interview.

In total, 72 percent of respondents took the survey online, while 21 percent were interviewed over the telephone and six percent opted for a face-to-face interview. One percent completed a paper version of the survey.

Overall, response to the survey was generally positive and most stakeholders were happy to participate. However, as in 2006, there were challenges in reaching high-level officials (because of gatekeepers and/or busy schedules) and in reaching some stakeholder groups in some countries (e.g., the NGO group in Japan proved particularly difficult to engage in this year's research). And similar to 2006, in non-regional non-borrowing countries (e.g., Sweden, the United Kingdom, Canada, the United States, France, Germany), our local partners related their difficulties in accessing respondents with sufficient knowledge of ADB, despite many of these contacts coming from ADB itself. As a result, response rates varied significantly across the 31 participating countries, from as low as 5 percent to as high as 50 percent. This participation rate is consistent with other stakeholder research that targets high-level opinion leaders who need to have detailed knowledge of an organization in order to qualify to participate.

Screening

As with the 2006 research, to qualify for the survey, prospective respondents had to describe themselves as at least "somewhat" knowledgeable about ADB and its activities. Those contacts who did not qualify were thanked for their time and given a courteous explanation as to why they did not qualify for the survey.

Around one-quarter of respondents (26%) described themselves as "very" knowledgeable about ADB, with the remainder "somewhat" knowledgeable, similar to 2006. Respondents are experienced in development issues, with almost one-half (48%) saying they have been working on international development issues for more than 10 years. They also have direct experience working with ADB: 50 percent say they have been involved in an ADB project, program, or research study in the past three years (identified as "clients" in the report). Three-quarters of respondents interviewed were male, a similar proportion to 2006. Respondents were asked if they participated in the 2006 survey; four percent said they did, 13 percent could not remember, and the rest (83%) said they did not.

Methodological Report

Fieldwork Logistics

To carry out the research in 31 countries, GlobeScan worked closely with in-country research partners, who were chosen for their in-depth experience in conducting this type of research with senior-level officials and opinion leaders. All research partners were carefully screened for their experience in conducting perception research. Prior to fieldwork, GlobeScan conducted extensive in-person and telephone briefings and training with all partners. This briefing covered a review of the study objectives, reporting protocols, data capture procedures, a full walk-through on the questionnaire, as well as practice interviews.

In-country research partners performed quality control steps and back-checks as per GlobeScan specifications, and GlobeScan performed regular data quality and interview checks with all in-country research partners throughout the duration of fieldwork.

	Country	Local Company Conducting Interviews	Interviewing Dates	Mode of Interviews
Central and West Asia	Azerbaijan	CESSI	22 October 2009–23 December 2009	Online, telephone
	Pakistan	Tecnova	21 October 2009–8 December 2009	Online, telephone
	Uzbekistan	CESSI	22 October 2009–14 January 2010	Online, telephone, face-to-face
East Asia	People's Republic of China	Nielsen	22 October 2009–15 December 2009	Online, telephone
	Mongolia	CESSI	23 October 2009–12 December 2009	Online, face-to-face, paper
South Asia	Bangladesh	Tecnova	22 October 2009–7 December 2009	Online, telephone, face-to-face
	Bhutan	Tecnova	22 October 2009–8 December 2009	Online, telephone
	India	Tecnova	22 October 2009–7 December 2009	Online, telephone, face-to-face
	Nepal	Tecnova	21 October 2009–8 December 2009	Online, telephone
	Sri Lanka	Tecnova	22 October 2009–8 December 2009	Online, telephone
Southeast Asia	Cambodia	IndoChina Research	22 October 2009–3 January 2010	Online, face-to-face, paper
	Indonesia	Deka	22 October 2009–1 December 2009	Online, face-to-face
	Philippines	Sigma Dos	21 October 2009–24 November 2009	Online
	Thailand	TNS	22 October 2009–22 December 2009	Online, telephone
	Viet Nam	IndoChina Research	22 October 2009–4 December 2009	Online, telephone
Pacific	Federated States of Micronesia	Sigma Dos	30 October 2009–19 December 2009	Online
	Papua New Guinea	Sigma Dos	22 October 2009–28 December 2009	Online
	Samoa	Sigma Dos	21 October 2009–16 December 2009	Online
	Solomon Islands	Sigma Dos	22 October 2009–22 December 2009	Online
	Timor-Leste	Sigma Dos	30 October 2009–15 December 2009	Online, telephone
Regional Non-Borrowing	Australia	Roy Morgan	22 October 2009–30 November 2009	Online
	Japan	SMIS	22 October 2009–4 January 2010	Online
	Malaysia	TNS	21 October 2009–9 December 2009	Online, telephone, face-to-face
	Singapore	TNS	22 October 2009–23 December 2009	Online
	Republic of Korea	EAI	22 October 2009–28 November 2009	Online, face-to-face
Non-Regional Non-Borrowing	Canada	GlobeScan	22 October 2009–4 December 2009	Online, telephone
	France	Efficiencie	22 October 2009–18 December 2009	Online, telephone
	Germany	Efficiencie	22 October 2009–3 December 2009	Online, telephone
	Sweden	Efficiencie	22 October 2009–17 December 2009	Online, telephone
	United Kingdom	GlobeScan	22 October 2009–7 December 2009	Online, telephone
	United States of America	GlobeScan	22 October 2009–3 December 2009	Online, telephone

Fig. 68

Methodological Report

Questionnaire Design and Translations

The 2009 survey was developed by both ADB and GlobeScan. Parts of the 2006 survey were included in the 2009 instrument, however, given the recent launch of ADB's Strategy 2020, changes were made to reflect ADB's new strategic direction. The questionnaire comprised mainly closed-ended questions, although three open-ended questions were included (a similar number to the 2006 survey).

In most countries, respondents were provided with two language options in which to take the survey, as summarized in Figure 69. GlobeScan's in-country research partners translated the ADB approved questionnaire; these translations were then back-proofed against the English version of the questionnaire to ensure quality translation and comprehension. ADB then reviewed and approved the final translation. Any issues with translations were addressed with the local in-country research partner. Once finalized, the translated versions were sent to the in-country research partners for fieldwork set up and interviewer training and briefing.

	Survey Language		Survey Language
Central and West Asia		Pacific	
Azerbaijan	Azerbaijani, English	Federated States of Micronesia	English
Pakistan	Urdu, English	Papua New Guinea	English
Uzbekistan	Russian	Samoa	English
East Asia		Solomon Islands	English
People's Republic of China	Mandarin, English	Timor-Leste	Portugese
Mongolia	Mongolian, English	Regional Non-Borrowing	
South Asia		Australia	English
Bangladesh	English, Bangla	Japan	Japanese
Bhutan	English, Dzongkha	Malaysia	English
India	English	Singapore	English
Nepal	Nepali, English	Republic of Korea	Korean
Sri Lanka	English	Non-Regional Non-Borrowing	
Southeast Asia		Canada	English
Cambodia	English, Khmer	France	French, English
Indonesia	English, Bahasa	Germany	German, English
Philippines	English	Sweden	English
Thailand	English, Thai	United Kingdom	English
Viet Nam	Vietnamese	United States of America	English

Fig. 69

Survey Questions

Prepared by GlobeScan Incorporated for the Asian Development Bank, September 2009

Screening questions

S1. How knowledgeable would you say you are about the Asian Development Bank and its activities? Are you very knowledgeable, somewhat knowledgeable, not too knowledgeable, or not knowledgeable at all?

- 01 Very knowledgeable
- 02 Somewhat knowledgeable
- 03 Not too knowledgeable [terminate interview]
- 04 Not knowledgeable at all [terminate interview]
- VOLUNTEERED (DO NOT READ)
- 05 Refused [terminate interview]
- 99 Don't know [terminate interview]

S2. And how much experience have you had with the Asian Development Bank—a great deal, a moderate amount, a small amount, or none at all?

- 01 A great deal
- 02 A moderate amount
- 03 A small amount
- 04 None at all
- VOLUNTEERED (DO NOT READ)
- 05 Refused
- 99 Don't know

S3. Have you been involved in an ADB project, program, or research study in the past three years?

- 01 Yes [Ask “client only” questions along with all other relevant questions]
- 02 No [Do not ask “client only” questions]
- VOLUNTEERED (DO NOT READ)
- 03 Refused [Do not ask “client only” questions]
- 99 Don't know [Do not ask “client only” questions]

Section 1—Regional and Foreign Assistance Context

ASK ALL

(T) Q1. Thinking about foreign development assistance in general, some people say that not enough money is spent on foreign assistance to developing countries in Asia and the Pacific. Others say that enough money is spent, but that it is not spent wisely. Still others say that enough is being spent and that it is being spent wisely. Which view is closest to yours?

- 01 Not enough money is spent
- 02 Enough money is spent, but not spent wisely
- 03 Enough money is spent and spent wisely
- VOLUNTEERED (DO NOT READ)
- 04 Refused
- 99 Don't know

ASK ALL

Q2. How effectively do you think foreign development assistance organizations are allocating aid resources to [name of country] [developing countries in Asia and the Pacific]—very effectively, somewhat effectively, not too effectively, or not effectively at all?

- 01 Very effectively
- 02 Somewhat effectively
- 03 Not too effectively
- 04 Not effectively at all
- VOLUNTEERED (DO NOT READ)
- 05 Refused
- 99 Don't know

ASK ALL

Q3. And how effectively [is name of country] [are developing countries in Asia and the Pacific] using the foreign development assistance [it receives] [they receive]—very effectively, somewhat effectively, not too effectively, or not effectively at all?

- 01 Very effectively
- 02 Somewhat effectively
- 03 Not too effectively
- 04 Not effectively at all
- VOLUNTEERED (DO NOT READ)
- 05 Refused
- 99 Don't know

QUESTIONNAIRE

ASK ALL

Q4. To what extent do you think foreign development assistance organizations are helping governments in [name of country][developing countries in the Asia and Pacific region] deal with the current economic crisis—a great extent, moderate extent, small extent, or not at all?

- 01 Great extent
- 02 Moderate extent
- 03 Small extent
- 04 Not at all
- VOLUNTEERED (DO NOT READ)
- 05 Refused
- 99 Don't know

ASK IN DEVELOPING COUNTRIES ONLY

Q5. How serious are each of the following threats to [country's] economic and social development efforts –is [...] a very serious threat, a serious threat, not a serious threat, or no threat at all?

- a. poor infrastructure**
 - 01 A very serious threat
 - 02 A serious threat
 - 03 Not a serious threat
 - 04 No threat at all
 - VOLUNTEERED (DO NOT READ)
 - 05 Refused
 - 99 Don't know
- b. environmental degradation and climate change**
- c. corruption**
- d. limited educational opportunities and inadequate health services**
- e. low rate of investment**
- f. lack of an active private sector**
- g. poor governance**
- h. lack of natural resources**
- i. widening gap between rich and poor**

QUESTIONNAIRE

ASK Q6A AND Q6B IN DEVELOPING COUNTRIES ONLY; ASK Q6C, Q6D, Q6E TO ALL

Q6. Now I'm going to read you some statements. For each indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

ASK Q6A & Q6B IN DEVELOPING COUNTRIES ONLY

- (T) a. The government of [name of country] supports and takes responsibility for development efforts in [name of country]. [ASK ONLY IN DEVELOPING COUNTRIES]
- (T) b. The economy of [name of country] is more likely to expand and grow if we integrate the economy with other countries in Asia and the Pacific. [ASK ONLY IN DEVELOPING COUNTRIES]

ASK Q6C, Q6D, & Q6E TO ALL

- c. Enough is being done by [your government] [governments in developing countries in Asia and the Pacific] and foreign assistance organizations to achieve the Millennium Development Goals¹ by 2015 in [name of country] [developing countries in the region].
 - (T) d. Because of corruption, foreign development assistance to [name of country] [developing countries in the Asia and Pacific region] is mostly wasted.
 - (T) e. The private sector is the key driver of future growth in your [country / developing countries in the Asia and Pacific region].
 - 01 Strongly agree
 - 02 Somewhat agree
 - 03 Somewhat disagree
 - 04 Strongly disagree
- VOLUNTEERED (DO NOT READ)
- 05 Refused
 - 99 Don't know

¹The Millennium Development Goals set global targets for poverty reduction, hunger, universal education, gender equality, maternal and child health, communicable diseases and environment sustainability.

Section 2—General Impressions of ADB

ASK ALL

Q7. Here is a list of entities. For each, please indicate what kind of impact it is having on the overall development of [name of country] [developing countries in Asia and the Pacific]. Is [...] having a very good, somewhat good, somewhat bad, or very bad impact on the overall development of [name of country] [developing countries in Asia and the Pacific]?

- (T) a. the government of [name of country]
- (T) b. the United Nations Development Programme (UNDP)
- (T) c. the World Bank
- (T) d. the Asian Development Bank (ADB)
- (T) e. the International Monetary Fund (IMF)

- 01 Very good
- 02 Somewhat good
- 03 Somewhat bad
- 04 Very bad

VOLUNTEERED (DO NOT READ)

- 05 No influence
- 06 Refused
- 99 Don't know

ASK ALL

(T) Q8. In one short phrase, what is the greatest strength of the Asian Development Bank (ADB)?
[open-ended, record one response only]

ASK ALL

(T) Q9. And in one short phrase, what is the greatest weakness of the Asian Development Bank (ADB)?
[open-ended, record one response only]

QUESTIONNAIRE

ASK ALL

- Q10. To the best of your knowledge, how much of a priority does ADB place on each of the following in [country / developing countries in Asia and the Pacific]—is it a high, moderate, low, or no priority at all?
- (T) a. Reducing poverty
 - (T) b. Supporting regional cooperation and economic integration
 - c. Supporting development of the financial sector
 - (T) d. Promoting environmental sustainability²
 - e. Providing disaster and emergency assistance
 - (T) f. Improving the infrastructure (i.e., water, sanitation, transport, and electricity)
 - g. Supporting health care
 - h. Improving education
 - i. Supporting agriculture and rural development
 - 01 High priority
 - 02 Medium priority
 - 03 Low priority
 - 04 No priority at all
 - VOLUNTEERED (DO NOT READ)
 - 06 Refused
 - 99 Don't know

ASK ALL

- Q11. And similarly, for each of the following areas, indicate how much of a priority you think ADB places on each in [name of country / developing countries in Asia and the Pacific]—is it a high, moderate, low, or no priority at all?
- (T) a. Mobilizing resources to develop the private sector
 - (T) b. Promoting gender equality
 - (T) c. Improving governance
 - d. Promoting knowledge-sharing and best practices to solve the development challenges
 - e. Strengthening partnerships with stakeholders³
 - 01 High priority
 - 02 Medium priority
 - 03 Low priority
 - 04 No priority at all
 - VOLUNTEERED (DO NOT READ)
 - 05 Refused
 - 99 Don't know

²Ensuring that development occurs in a way that minimizes harm to the environment and helps mitigate and adapt to climate change.

³Governments, development institutions, private sector, academe, media, and civil society

ASK ALL

Q12. To what extent do each of the following describe the ADB to you—a great extent, moderate extent, small extent, or not at all?

- a. transparent
- b. trustworthy
- c. reliable
- d. slow
- e. bureaucratic
- f. collaborative
- g. competent
- h. problem solving
- i. innovative
- j. conventional
- k. inflexible

01 Great extent

02 Moderate extent

03 Small extent

04 Not at all

VOLUNTEREED (DO NO READ)

05 Refused

99 Don't know

Section 3—ADB Priorities and Effectiveness

ASK ALL

Q13. Addressing poverty reduction and the development needs of the region requires ADB to focus its operations in many crucial areas.

In your opinion, what are the two main areas that ADB should focus on in order to best help reduce poverty and achieve the [country's /developing countries in Asia and Pacific] development objectives? Please use two or three words to describe these primary focus areas.

1. _____

2. _____

QUESTIONNAIRE

ASK ALL

(T) Q14. In the past three years, how helpful has the ADB been in assisting [name of country / developing countries in Asia and the Pacific] to meet its development goals and objectives—very helpful, somewhat helpful, not too helpful, or not helpful at all?

- 01 Very helpful
- 02 Somewhat helpful
- 03 Not too helpful
- 04 Not helpful at all
- VOLUNTEREED (DO NO READ)
- 05 Refused
- 99 Don't know

ONLY ASK TO CLIENTS (S3 = 01) IN DEVELOPING COUNTRIES

Q15. How would you rate the ADB's performance in each of the following areas in helping [country] meet its development goals and objectives—excellent, good, average, poor, or very poor?

- a. its technical skills and abilities
 - b. procedures that are easy to follow and understand
 - c. its timely handling of projects
 - d. its staff's understanding of our country's situation
 - e. its loan and resource capacity
 - f. its ability to work effectively with other development partners
 - g. its consultations with different stakeholders
 - i. the range and quality of services offered by ADB's field offices
 - j. its ability to provide useful information
- 01 Excellent
 - 02 Good
 - 03 Average
 - 04 Poor
 - 05 Very poor
 - VOLUNTEREED (DO NO READ)
 - 06. Refused
 - 99 Don't know

ONLY ASK TO CLIENTS (S3 = 01) IN DEVELOPING COUNTRIES

Q16. When the Asian Development Bank (ADB) makes a loan for a project, it typically requires environmental and social assessments or plans be done to help mitigate any adverse impacts on the environment as well as on people affected by its projects.

With the above in mind, indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements:

- a. ADB ensures that communication with people affected by its projects takes place in an appropriate manner and language
- b. ADB follows international best practice in minimizing social and environmental impacts from its projects
- c. ADB's environmental and social assessments or plans result in more carefully designed and executed projects
- d. ADB does enough to assist people who are adversely affected by its projects

01 Strongly agree

02 Somewhat agree

03 Somewhat disagree

04 Strongly disagree

VOLUNTEERED (DO NOT READ)

05 Refused

99 Don't know

ASK ALL

(T) Q17. Poverty can be reduced directly through programs designed to aid low-income populations and indirectly through programs that aim to increase economic growth and develop the private sector.

Knowing this, how good a job does the ADB do in helping [name of country] [developing countries in Asia and the Pacific] reduce poverty—excellent, good, average, poor, or very poor?

01 Excellent

02 Good

03 Average

04 Poor

05 Very poor

VOLUNTEERED (DO NOT READ)

06 Refused

99 Don't know

QUESTIONNAIRE

CLIENT ONLY (S3 = 1) AND THOSE WHO SAY 01 OR 02 IN Q17

- Q18. To what extent do the following help explain why you think ADB is doing a good job in helping to reduce poverty in [name of country] [developing countries in Asia and the Pacific]? Is [...] a very important reason, somewhat important reason, not too important reason, or not a reason at all for why ADB has done a good job?
- (T) a. ADB makes poverty reduction a top priority
 - (T) b. ADB allocates enough financial resources to poverty reduction
 - (T) c. ADB has the knowledge and expertise to help reduce poverty
 - d. ADB effectively implements and monitors projects
 - 01 Very important reason
 - 02 Somewhat important reason
 - 03 Not too important a reason
 - 04 Not a reason at all
- VOLUNTEERED (DO NOT READ)
- 05 Refused
 - 99 Don't know

CLIENT ONLY (S3 = 1) AND THOSE WHO SAY 03, 04, or 05 IN Q17

- Q19. To what extent do the following help explain why you think ADB is not doing an excellent or good job in helping to reduce poverty in [name of country] [developing countries in Asia and the Pacific]? Is [...] a very important reason, somewhat important reason, not too important reason, or not a reason at all for why ADB hasn't done a good job?
- (T) a. ADB does not make poverty reduction a top priority
 - (T) b. ADB does not allocate enough financial resources to poverty reduction
 - (T) c. ADB does not have the knowledge and expertise to help reduce poverty
 - d. ADB is not effective in implementing and monitoring projects
 - e. poverty is a problem that is too big and complicated for any organization to solve
 - 01 Very important reason
 - 02 Somewhat important reason
 - 03 Not too important a reason
 - 04 Not a reason at all
- VOLUNTEERED (DO NOT READ)
- 05 Refused
 - 99 Don't know

QUESTIONNAIRE

ASK ALL

Q20. For each of the following, rate the Asian Development Bank's performance in [name of country] [developing countries in Asia and the Pacific]. What about on [...]—is ADB's performance excellent, good, average, poor, or very poor?

- (T) a. supporting regional cooperation and economic integration
 - b. supporting development of the financial sector
 - (T) c. promoting environmental sustainability
 - d. providing disaster and emergency assistance
 - (T) e. improving the infrastructure
 - f. supporting health care
 - g. improving education
 - h. supporting agriculture and rural development
 - (T) i. mobilizing resources to develop the private sector
 - (T) j. promoting gender equality
 - (T) k. improving governance
 - l. promoting knowledge-sharing and best practices to solve the development challenges
 - m. strengthening partnerships with stakeholders
- 01 Excellent
 - 02 Good
 - 03 Average
 - 04 Poor
 - 05 Very poor
 - VOLUNTEERED (DO NOT READ)
 - 06 Refused
 - 99 Don't know

ASK ALL

Q21. ADB is committed to expanding its operations supporting private sector development. Please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree, that ADB is doing enough to reach out and build partnerships with the private sector.

- 01 Strongly agree
- 02 Somewhat agree
- 03 Somewhat disagree
- 04 Strongly disagree
- VOLUNTEERED (DO NOT READ)
- 05 Refused
- 99 Don't know

QUESTIONNAIRE

ASK ALL

Q22. Of the following five areas, which **two areas** do you think ADB should most focus on to best promote private sector development in [name of country] [developing countries in Asia and the Pacific]?

- 01 providing policy advice to governments
- 02 supporting private sector projects by providing loans, equity, and guarantees
- 03 providing funds for public-private partnerships
- 04 providing funds to develop infrastructure projects
- 05 providing credit to financial institutions to support small and medium sized enterprises

VOLUNTEERED (DO NOT READ)

- 06 All equally
- 07 None of the above
- 99 Don't know

ASK ALL

Q23. For each of the following statements, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

- a. ADB is an excellent source of knowledge on development issues
- (T) b. ADB plays a useful role in enhancing private sector development in [name of country] [developing countries in Asia and the Pacific]
- (T) c. ADB is moving towards a more collaborative and responsive partnership with [the government of name of country] [governments of developing countries in Asia and the Pacific]
- d. ADB takes sufficient steps to prevent corruption in its projects in [name country] [developing countries in Asia and the Pacific]

- 01 Strongly agree
- 02 Somewhat agree
- 03 Somewhat disagree
- 04 Strongly disagree

VOLUNTEERED (DO NOT READ)

- 05 Refused
- 99 Don't know

Section 4—ADB Communications and Outreach

ASK ALL

(T) Q24. Now thinking about the way the Asian Development Bank (ADB) communicates, overall, how well does ADB communicate its mission and activities to people like you—very well, somewhat well, not too well, or not well at all?

- 1 Very well
- 2 Somewhat well
- 3 Not too well
- 4 Not well at all

VOLUNTEERED (DO NOT READ)

- 05 Refused
- 99 Don't know

Q25 From the following list, choose the group that most influences you and your colleagues' view of the Asian Development Bank. Choose one only.

- 01 Universities / think tanks
- 02 Private sector
- 03 Multilateral organizations
- 04 Media
- 05 Government
- 06 Civil society, non-governmental organizations, not-for-profits
- 07 Other (specify) _____

VOLUNTEERED (DO NOT READ)

- 07 All equally
- 97 Other (specify) _____
- 99 Don't know

QUESTIONNAIRE

ASK ALL

(T) Q26. In general, how often do you (...)—daily, weekly, a few times a month, once a month or less, or never?

- a. Read news about the ADB in newspapers or magazines
- b. See or hear news about the ADB in television or radio
- c. Use the ADB website

- 01 Daily
- 02 Weekly
- 03 A few times a month
- 04 Once a month or less
- 05 Never

VOLUNTEERED (DO NOT READ)

- 06 Refused
- 99 Don't know

ONLY ASK TO THOSE WHO SAY 01, 02, 03, 04 ON Q26C

Q27. What is the primary purpose of your visit to the Asian Development Bank (ADB) website? [Code all that apply]

- 01 Learn about ADB projects
- 02 Read press releases
- 03 Find economic research reports and statistics
- 04 Find business and employment opportunities
- 05 Find country specific information
- 06 Find publications
- 07 Learn about ADB's financial products
- 97 Other (specify): _____

VOLUNTEERED (DO NOT READ)

- 97 Other (specify): _____
- 99 Don't know

ONLY ASK TO THOSE WHO SAY 01, 02, 03, 04 ON Q26C

(T) Q28. Would you say that the ADB website provides the information you need or want always, most of the time, only sometimes, or rarely?

- 01 Always
- 02 Most of the time
- 03 Only sometimes
- 04 Rarely

VOLUNTEERED (DO NOT READ)

- 05 Refused
- 99 Don't know

QUESTIONNAIRE

ONLY ASK TO THOSE WHO SAY 01, 02, 03, 04 ON Q26C

(T) Q29. Would you say the ADB website is very easy, somewhat easy, somewhat difficult, or very difficult to use?

- 01 Very easy to use
 - 02 Somewhat easy to use
 - 03 Somewhat difficult to use
 - 04 Very difficult to use
- VOLUNTEERED (DO NOT READ)
- 05 Refused
 - 99 Don't know

ASK ALL

Q 30. Is the ADB responsive to your information requests and inquiries always, most of the time, only sometimes, or rarely?

- 01 Always
 - 02 Most of the time
 - 03 Only sometimes
 - 04 Rarely
- VOLUNTEERED (DO NOT READ)
- 05 Refused
 - 99 Don't know

ASK ALL

(T) Q31. Over the past three years have you read any publications from the ADB?

- 01 Yes
 - 02 No
- VOLUNTEERED (DO NOT READ)
- 03 Refused
 - 99 Don't know

QUESTIONNAIRE

ONLY ASK TO THOSE WHO SAY 01 IN Q31

(T) Q32. Overall, how much influence have the ADB's publications had on your thinking about development issues—a great deal, a moderate amount, a small amount, or no influence at all?

- 01 A great deal
- 02 A moderate amount
- 03 A small amount
- 04 No influence at all

VOLUNTEERED (DO NOT READ)

- 05 Refused
- 99 Don't know

Section 5—Demographics

And now a few questions about ...

D1. Gender

- 01 Male
- 02 Female

D2. What is your age?

D3. Did you participate in the 2006 ADB perception survey?

- 01 Yes
- 02 No
- 03 Can't remember
- 04 Refused
- 99 Don't know

D4. How many years have you been working on international development issues?

- 01 Less than 5 years
- 02 5 to 10 years
- 03 More than 10 years
- 04 Not applicable
- 05 Refused
- 99 Don't know

QUESTIONNAIRE

D5. Type of respondent

- 01 Government 1 (Prime Minister's / President's office, Ministries of Finance, Economy, Development, Planning, Parliament)
- 02 Government 2 (Technical ministries–i.e., Transport, Energy, Agriculture, Health, Education, Industry and Trade, etc.)
- 03 Donor partners (Developing countries only)
- 04 Civil Society Organization
- 05 Private sector
- 06 Media
- 07 University, think tank, academia
- 97 Other (specify): _____

D6. Record respondent location (do not ask)

D7. Language of interview (do not ask)

D8. Date of interview

DD/MM/YYYY

D9. Length of interview in minutes

D10. Mode of interview

- 01 Telephone interview
- 02 Face-to-face interview
- 03 Online self-administered
- 04 Paper self-administered

ADB Perceptions Survey: Multinational Survey of Stakeholders 2009

The 2009 ADB Perceptions Survey gauges stakeholders' perceptions of ADB's mission to help reduce poverty and contribute to development in Asia and the Pacific. The survey, the second of its kind since 2006, was carried out among 900 opinion leaders in 31 member countries, drawn from a broad cross section of stakeholders in government, media, civil society, academia, the private sector, and development partners.

Key findings reveal that stakeholders strongly acknowledge ADB's impact on development. A considerable majority of stakeholders view ADB as a trusted, reliable, and competent organization with excellent knowledge of the region. ADB also received high marks for its work in improving infrastructure and supporting regional economic cooperation and integration. At the same time, stakeholders believe that ADB could improve its performance in the areas of bureaucracy, speed, and project execution and monitoring, while doing more to strengthen governance and gender equality.

About the Asian Development Bank

ADB's vision is an Asia and Pacific region free of poverty. Its mission is to help its developing member countries substantially reduce poverty and improve the quality of life of their people. Despite the region's many successes, it remains home to two-thirds of the world's poor: 1.8 billion people who live on less than \$2 a day, with 903 million struggling on less than \$1.25 a day. ADB is committed to reducing poverty through inclusive economic growth, environmentally sustainable growth, and regional integration.

Based in Manila, ADB is owned by 67 members, including 48 from the region. Its main instruments for helping its developing member countries are policy dialogue, loans, equity investments, guarantees, grants, and technical assistance.

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