

World Bank Client Satisfaction Study 2013:

EXECUTIVE SUMMARY



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World Bank Customer Satisfaction Study 2013

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INTRODUCTION

This is an Executive Summary and Highlights of the World Bank CSS 2013 conducted by Gallup Pakistan.

A detailed Power Point presentation is also attached with this report.

This Executive Summary is a draft version and Gallup Pakistan and its primary purpose is to set an agenda for discussion on various issues discussed in the survey.

Snapshot of the Survey

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

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

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

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

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

For more details on Methodology, please contact Gallup Pakistan

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SWOT Analysis

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

Strengths:

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

Weaknesses:

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

Opportunities:

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

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

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

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



Section 1:

Overall Attitude Towards World Bank in Pakistan

SECTION SUMMARY:

The Section provide in-depth insight into the perceptions held by stakeholders and clients vis-à-vis the World Bank. Both clients and stakeholders are fully aware of the Bank's presence and operations in Pakistan. However, the respondents disagree on the Bank's overall effectiveness: clients perceive the Bank as more effective, while stakeholders hold mixed opinions. Crucially, both respondents agree that the Bank is an important player in Pakistan's development when compared to other donor agencies. The picture emerging from this Section suggests that the clients are more appreciative of the Bank's operations in Pakistan. Both clients and stakeholders desire continued engagement from the Bank in Pakistan, and suggest that the Bank should improve its expertise (relative to Pakistan) and simplify its procedures to overcome challenges in Pakistan. Clients identified Education and Energy as key sectors that ought to be targeted for improvement by the Bank, and gravitated towards choosing Local Governments and Academia/Research Community as the conduits for channeling assistance to the country.

Awareness of World Bank/IFC:

Clients and Stakeholders are well-acquainted with the Bank/IFC

The majority of respondents were aware of the World Bank's presence and work in Pakistan. A significant proportion of the stakeholders (84%) are



somewhat-to-completely familiar about the Bank's presence and operations, while an overwhelming 97% of the Clients are cognizant of the Bank's work.

Awareness of World Bank/IFC:

Differential awareness levels amongst Stakeholders and Clients

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

1.2.1 Overall Effectiveness:

Positive Appraisal by the Clients, while Stakeholders remain uncertain

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

1.2.2 World Bank Performance Relative to other Donor Agencies:

First Among Equals

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



1.3 Detailed Attributes of World Bank:

Mixed Scorecard

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

1.4.1 Significance of the World Bank's aid in Pakistan's development:

Indecisive Stakeholders and Appreciative Clients

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

1.4.2 Desired involvement of the World Bank in Pakistan's future development agenda:

Robust Demand for Continued Engagement

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



1.5.1 Reasons of Failure:

Extrinsic Challenges – Governance and Political Pressures

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

1.5.2 Advice for Future:

Improve Expertise and Reduce Complexities

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

1.6 Preferred Priorities for World Bank as Described by Respondents:

Energy and Education

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



1.7 Delivery Mechanisms:

Local Government and Academia

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



Section 2:

Views on Country Partnership Strategy

SECTION SUMMARY:

Stakeholders are largely critical of and pessimistic in their assessment of the Pakistani Government's and the World Bank's performance in Pakistan. Contrarily, Clients hold more favourable views about the Bank, and are uncertain about the Pakistani Government. Perhaps not surprisingly, clients are well-aware of the Bank's Country Partnership Strategy, which feeds into their positive evaluation of the policy. Since stakeholders lack complete awareness of the CPS they gravitated towards a more critical evaluative outlook towards the policy. Despite these differences both stakeholders and clients are desirous of continued and robust engagement by the World Bank in Pakistan for CPS 2015-2019.

2.1 STRATEGY AWARENESS:

Well-acquainted clients and unfamiliar stakeholders

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

2.2 Direction of the Strategy:

Supportive Clients and Critical Stakeholders

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



2.3 Performance of Government:

Critical Stakeholders and uncertain clients

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

2.4 World Bank Performance:

Critical Stakeholders and Appreciative Clients

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

2.5 Priorities for future Country Partnership Strategy:

Robust Demand for Increased Assistance in all areas

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



Section 3:

Views and Opinion about Services of World Bank

SECTION SUMMARY:

Stakeholders and clients are divergent in their engagement with the Bank's knowledge and research output in Pakistan. Stakeholders have minimal exposure to this circulation, while clients consult these resources more frequently. For clients, this frequent engagement lends itself to appreciative and positive evaluation of the contributions made by the Bank's knowledge and research resources. Conversely, and predictably, the lack of exposure to the Bank's knowledge and research feeds into lukewarm and critical evaluations by the stakeholders.

3.1 Views about Cash Transfer and Social Protection:

Stakeholders and Clients welcome all measures

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

3.2.1 Usage of Knowledge and Research:

Sporadic Stakeholder usage and frequent client consultation

Stakeholders and clients differed in their usage of knowledge and research produced by the World Bank. Majority of the stakeholders (60%) rarely or never rely on the Bank's publications during the course of their work. In



contrast, 36% of the clients use this knowledge and research on a weekly-to-monthly basis, while 43% rely on this data at least a few times a year.

3.2.2 Overall Knowledge and Knowledge and Research:

Appreciative clients and critical stakeholders

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

3.2.3 Gauging Effectiveness:

Disengaged Stakeholders versus Engaged Clients

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



Section 4:

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

SECTION SUMMARY:

In terms of the informational landscape, clients and stakeholders meet on common ground. Most clients access the Bank's online presence – primarily websites – while stakeholders access these portals infrequently. Despite this difference, both respondents prefer engaging with the Bank online and in-person through more direct interactions. Crucially, the majority of both categories of respondents are unaware of the Bank's Access to Information Policy, which leads to serious overall lack of engagement over the last year. For those, who are aware of the policy, the experience of engaging with the Bank has been largely satisfactory.

4.1 Sources Of Information for Stakeholders/Clients:

News and Information Media is the main medium of information for stakeholders and clients.

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

4.2 Access to World Bank:

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

When quizzed about their preferences for accessing information about the World Bank online, the majority of the clients (**48%**) utilize the Bank's country



and main website. While 45% of the stakeholders access the country website, a substantial **51%** do not access the Bank's online portals.

4.3 Views about World Bank Website:

Clients are frequent users

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

4.3 Views about World Bank Website:

Satisfied Clients and Fragmented Stakeholders

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

4.4 Preferred Way to Access World Bank:

Online Engagement Preferred

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

4.5 World Bank Access to Information Policy:

Stakeholders and Clients are in the dark

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



4.5 World Bank Access to Information Policy:

Absence of engagement for Stakeholders and Clients

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

4.5 World Bank Access to Information Policy:

Satisfied Stakeholders and Clients

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

4.6 Credibility of World Bank:

Direct Information from the Bank preferred

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

4.7 Exposure to The World Bank:

Multi-channel exposure for stakeholders and clients

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



Section 5:

Detailed Views about World Bank from Client side

SECTION SUMMARY:

Clients assess the Bank's performance and operations positively, and rate the institution as an effective and influential partner in Pakistan's development endeavors. Clients rate the bank's staff and technical expertise highly, and express a demand to see greater focus on improvements in governance and different areas of social development. Surprisingly, most of the clients claimed to be unaware of the Bank's procurement policies. Similarly those who are well-acquainted with these policies tend to abstain from suggesting definitive recommendations to improve the procurement procedures. In terms of poverty alleviation, clients hold fragmented opinions. Most of the clients abstained from suggesting effective instruments to combat poverty in the country. For most clients, the Bank's presence and clout is important for the global development agenda, and its financial resources and instruments are powerful instruments in pursuing development. Clients attest the technical necessity and superiority of the Bank's knowledge and research resources and the utility of their circulation in Pakistan. Most clients see the Bank's safeguard policies as effective in delivering and facilitating sustainable development in the country.

5.1 Opinion about World Bank's work in Pakistan:

Positive Assessment of the Bank's operations in Pakistan by the clients

Clients hold positive perceptions about the nature of the Bank's operations in Pakistan, as well as their own experiential interactions with the Bank. A 55%



majority of the clients believes that the Bank treats its clients and stakeholders with respect, while 55% of the clients believe that the Bank works efficiently by selecting and applying its strategic and comparative advantage.

5.2 World bank as an effective development partner:

An effective and influential organization

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

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

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

5.4.1 Well preparedness of World Bank Staff:

World Bank staff is highly-rated

Clients consider the World Bank's staff to be well-prepared to assist Pakistan in overcoming its development-related challenges. A substantial 57% of the



clients rated the Bank's staff as "significant", when asked to assess their preparedness to successfully tackle Pakistan's development issues.

5.4.2 Procurement Policies:

Clients are partially acquainted

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

5.4.2 Procurement Policies:

Procurement Policies Receive Client Support

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

5.4.2 Procurement Policies:

Lack of consensus on improving the effectiveness of procurement policies

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

5.5 Views about World Bank Policy Instruments:

Financial Resources rated as highly valuable

Clients overwhelmingly identified Financial Resources as the World Bank's Greatest Strength, and highly valuable for Pakistan. The majority of clients



(45%) identified Financial resources as having the greatest value,. Technical assistance (20%) received strong support as the activity with the second greatest value in Pakistan.

5.6.1 Reducing Poverty:

Fragmented Opinions

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

5.6.2 Environment and Social Sustainability:

Safeguard Policies are mostly effective

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

5.6.2 Environment and Social Sustainability:

Safeguard Policies deliver sustainable development

Clients view the World Bank's safeguard policies favorably. When asked to assess whether these policies assist in delivering sustainable development, a



slight majority of the clients – **35%** - saw them as “**significant**” in attaining this objective.

5.6.3 World Bank Knowledge and Research:

Valuable sources of technical input

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

5.6.3 World Bank Knowledge and Research:

Source of significant contribution to national development

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

5.6.3 World Bank Knowledge and Research:

Technically Superior Resource

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



5.6.4 Financial Services:

Meet Knowledge and Aid Needs

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

5.6.5 Mobilizing Outside Support:

Partial Acknowledgement of the Bank's Convening Power

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

5.6.6 Non-Bank Expertise:

Uncertain Clients

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

5.6.7 Seeking Global Development agenda:

Clients Demand Robust Bank Involvement

Clients were unanimous in their views on the extent to which the Bank should seek to influence the global development agenda. A substantial **67%** of the



clients concurred that the Bank should play an active role in shaping and influencing the global development agenda.

5.6.8 World Bank's value for money:

Uncertain Clients

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



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