



ADB Perceptions Survey

Multinational Survey of Stakeholders 2012

August 2013

Asian Development Bank

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Note:

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Abbreviations

ADB	Asian Development Bank
CSO	civil society organization
DMC	developing member country
RCI	regional cooperation and integration
SMEs	small and medium-sized enterprises

Survey Countries

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



Introduction

In 2012, the Asian Development Bank (ADB) commissioned GlobeScan, a global stakeholder and reputation research consultancy, to conduct the third perceptions survey of its stakeholders in 31 of ADB's member countries, including borrowing and non-borrowing countries in the Asia and Pacific region, and in developed non-borrowing countries within and outside the region. A perceptions survey of external stakeholders is one of the monitoring and reporting mechanisms under ADB's Public Communications Policy results framework underscoring ADB's proactive public communications approach. The first perceptions survey was conducted by Princeton Survey Research Associates International in 2006. This was followed by the second perceptions survey in 2009 by GlobeScan, with input from Dalberg Global Development Advisors. The survey questionnaire was modified in 2009 to align with ADB's long-term strategic framework, Strategy 2020, thereby making 2009 the baseline year for trend comparisons.

Strategy 2020 sets ADB's goals to fulfill its vision for an Asia and Pacific region free of poverty by 2020. It highlights ADB's operational priorities from 2008 until 2020. To fight poverty in a region of more than 828 million poor people surviving on less than \$1.25 a day, the strategy refocuses ADB operations on three development agendas—inclusive economic growth, environmentally sustainable growth, and regional integration. Strategy 2020 identifies drivers of change that will be stressed in its operations—developing the private sector; encouraging good governance; supporting gender equity; helping developing countries gain knowledge; and promoting partnerships with other development institutions, the private sector, and community-based organizations. ADB also refocused its operations into five core areas: (i) infrastructure; (ii) environment, including climate change; (iii) regional cooperation and integration (RCI); (iv) finance sector development; and (v) education. In other areas, such as health, agriculture, and providing disaster assistance, ADB continues its operations selectively in close partnership with other agencies.

The 2012 perceptions survey measures stakeholders' views on development issues in the region and seeks to understand how well ADB's priorities and performance are aligned with its stakeholders' expectations and perceptions, and whether these have changed since the 2009 survey

was conducted. The survey results provide important insights about ADB's performance in contributing to poverty reduction in the Asia and Pacific region under its Strategy 2020.

To assess progress since 2009, ADB retained essentially the same objectives for the 2012 survey:

- To measure stakeholders' perceptions of important regional issues related to ADB's mission and development in the Asia and Pacific region;
- To gather stakeholders' views on how ADB can best fit into the context of international development in Asia and the Pacific, now and in the future;
- To measure perceptions of ADB's relevance, responsiveness, and results, including perceived strengths, weaknesses, and areas for improvement;
- To identify ways ADB can more effectively communicate with its stakeholders; and
- To provide a series of trends in stakeholders' perceptions of ADB (using 2009 as the baseline).

To accomplish ADB's survey research objectives, GlobeScan interviewed 911 stakeholders (weighted to 900) in the same 31 countries surveyed in 2009. The countries included those within and outside the Asia and Pacific region. An average of 31 interviews were conducted in each of the 20 borrowing countries, with a range from 10 in less populous countries to 65 in more populous countries. In the non-borrowing countries, an average of 25 interviews were conducted. Figure 1 shows the weighted number of interviews conducted in each region. In total, 69% of respondents work in borrowing countries, while 31% work in non-borrowing countries (15% in the region and 16% outside the region). These ratios are the same as in 2009.

Names of potential respondents in each country were developed from lists provided by both ADB and GlobeScan. These lists were combined and duplicate names removed. In the final list of prospective respondents, approximately 70% of the names were from ADB. ADB reviewed and affirmed the final list of potential respondents before fieldwork. At no time was ADB made aware of who participated, ensuring that all participants remain anonymous to maintain the independence of the survey.

Sample Size by Region

	# of interviews (weighted)
Overall	900
Central and West Asia	110
East Asia	80
Southeast Asia	180
South Asia	200
Pacific*	55
Regional non-borrowing	130
Non-regional non-borrowing	145

* Pacific refers to ADB's Pacific developing member countries (DMCs). In this survey, it includes the Federated States of Micronesia, Papua New Guinea, Samoa, Solomon Islands, and Timor-Leste. We refer to ADB's Pacific DMCs as "Pacific" in all charts that show results by region.

Fig. 1

As in 2009, the sample consists of individuals working in government, multilateral and 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 conducted across stakeholder groups, is summarized in Figures 2 and 3. The distribution of interviews across stakeholder groups was designed to match the 2009 research.¹

As in 2009, respondents had to be at least somewhat knowledgeable about ADB and its activities to qualify for the survey. Those contacted who did not qualify were thanked and given a courteous explanation on why they did not qualify for participation.

Approximately one-quarter of respondents (28%) described themselves as "very" knowledgeable about ADB, with the remainder "somewhat" knowledgeable, similar to 2009. Respondents are experienced in international development issues, with more than half (59%) saying that they have been

Sample Size by Stakeholder Group

	# of interviews (weighted)
Government	280
Private sector	180
Civil society organization (CSO)	150
Media	103
Multi/bilateral	102
Academia	84

Fig. 2

Proportion of Interviews by Stakeholder Group

	Overall (%)	Borrowing countries (%)	Non-borrowing countries (%)
Government	31	32	28
Private sector	20	20	20
Civil society organization (CSO)	17	13	24
Media	11	10	14
Multi/bilateral	11	16	0
Academia	9	7	14

Fig. 3

working on international development issues for over 10 years. They also have direct experience working with ADB, with nearly half (48%) having been involved in an ADB project, program, or research study in the past 3 years (identified as "clients" in the report). Three-quarters of respondents interviewed were male (similar to 2009).

Prospective respondents were offered the option of doing the survey online, by telephone, or via a face-to-face interview. In total, about 54% of respondents took the survey online, while 40% were interviewed by phone, and 6% opted for a face-to-face interview. The interviews were conducted between December 2012 and May 2013.

¹The numbers and percentages shown in Figures 2 and 3 and in all charts and tables throughout the report have been weighted to account for non-response by interviewees and the fact that extra interviews were conducted in some countries. This approach is similar to that in 2006 and 2009.

Report Outline

The report consists of a summary of key findings with five sections presenting the detailed results of the research, followed by the methodology and the survey questions.

Section 1 describes stakeholders' impressions of ADB, and their perceptions of its impact on development and its help in assisting countries achieve development goals. It also notes ADB's main perceived strengths and weaknesses, and the characteristics that stakeholders think best describe ADB.

Section 2 examines the extent to which stakeholders believe ADB prioritizes each area of operation and driver of change. It also asks stakeholders which two areas ADB should focus on to have the greatest impact in reducing poverty. This section reveals alignment between ADB's strategy and its perceived priorities.

Section 3 examines ADB's performance across many areas. Importantly, it rates stakeholders' perceptions of ADB's performance on its areas of operation and drivers of change as defined in its Strategy 2020. This section provides client feedback on ADB's perceived performance in selected areas. As well, it explores perceptions of ADB's performance relative to the private sector in terms of outreach, support, and partnerships.

Section 4 deals with ADB's communications, including stakeholders' use of ADB publications and information channels, its responsiveness to information requests, and the influence its publications have on stakeholders' thinking about development issues.

The fifth section, titled Regional Development Issues, discusses more general aspects of development in the region, including perceived threats to development, government's responsibility for development, how well foreign development assistance is used, the implications of corruption and ADB's efforts to prevent it, and the importance of regional integration.

Notes to Readers

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

The report notes statistically significant differences between different parts of the sample (e.g., across regions and stakeholder groups). Significance of difference in perceptions across different subsamples is a function of the sample and population sizes and population variance. Caution should be taken when viewing the charts and tables because not every apparent difference between stakeholder groups or regions is statistically significant.

The report highlights changes from 2009 of 4 percentage points or more with arrows in charts and tables (with green arrows for increases and red arrows for decreases), a difference which can generally be considered to be significant when observed on the total sample of respondents. The same approach to noting changes over time (compared to 2006) was applied in the 2009 report. The current report sometimes refers to 2006 data when available and relevant.

The report refers to "borrowing" and "non-borrowing" countries. The former are developing countries within the Asia and Pacific region and are sometimes referred to as "developing member countries" or "DMCs." The latter are developed countries both within and outside the Asia and Pacific region and are referred to, respectively, as "regional non-borrowing" and "non-regional non-borrowing countries."



Key Findings

Overall Impressions of ADB

ADB continues to be seen having a strong impact on development. A very strong majority of stakeholders (93%) continue to think that ADB has a good impact on the overall development of countries in the Asia and Pacific region. While perceptions are very positive and increasingly so, almost two-thirds of stakeholders rate performance as somewhat good, leaving room for improvement. Stakeholders across all regions and all groups highly regard ADB's performance on fostering development. Very strong majorities also continue to think that ADB helps countries meet their development goals and objectives; but again, a majority rates ADB only somewhat helpful.

A slim but growing majority of stakeholders think ADB does a good job in helping reduce poverty.

Almost 6 in 10 respondents think that ADB does an excellent or good job in helping countries reduce poverty, up from 50% in 2009. While few think performance is poor, only 9% judge it to be excellent in this high priority area. Perceived performance improved markedly across most regions and groups. Its success on poverty reduction is attributed to making it a priority at ADB, its knowledge in the area, and effective project implementation and monitoring.

ADB retains its reputation as a trusted, reliable, and competent organization.

Nine in ten stakeholders think that ADB is trustworthy, reliable, and competent. Stakeholders across all regions and groups agree, including CSOs that are relatively critical of ADB. These traits are important in driving stakeholders' perceptions of ADB's impact on development.

ADB's predominant strength is its focus on and knowledge of the Asia and Pacific region.

When asked, unprompted, to name ADB's single greatest strength, most stakeholders mention its specific focus on and knowledge of the Asia and Pacific region. One stakeholder in South Asia noted that ADB's greatest strength is "its technical expertise and comprehensive knowledge about the region, and its commitment toward uplifting development in the region." Other strengths, mentioned far less, include its focus on development, its improvements of infrastructure, and its capacity to provide loans, grants, and assistance.

Areas for improvement include being less bureaucratic and becoming faster and more flexible.

Consistent with 2009, when asked unprompted, stakeholders mention slowness, excessive bureaucracy, and inflexibility as ADB's greatest weaknesses. A stakeholder in Central and West Asia typifies many respondents in saying, "There is a lot of bureaucracy in the bank, and therefore sometimes it is not very flexible in its decisions and does not react quickly to new challenges." The private sector is especially likely to criticize ADB on these counts. Furthermore, when asked to rate ADB on various traits, majorities of stakeholders note that it is slow, bureaucratic, and inflexible. However, according to a drivers' analysis conducted by GlobeScan, these weaknesses are not particularly important in driving stakeholders' perceptions of ADB's impact on development. As another stakeholder explains, "a lot of decisions in the bank are taken very slowly, but it happens in a lot of other large international organizations."

Perceived Priorities at ADB

Stakeholders see a closer association of ADB's priorities with Strategy 2020's core operational areas and drivers of change than in 2009.

Since 2009, ADB is seen to place greater priority on two core areas of Strategy 2020, namely, supporting regional cooperation and economic integration, and promoting environmental sustainability, with more modest increases in other areas. Over the same period, stakeholders think that ADB has an increased priority on two drivers of change, specifically strengthening partnerships with stakeholders and promoting gender equality, with smaller increases on the remaining three drivers of change. Three-quarters of stakeholders think ADB prioritizes knowledge sharing and best practices, up very slightly from 2009 with more seeing it as a high priority. These findings point to stakeholders' perceptions of demonstrated implementation of ADB's Strategy 2020.

Stakeholders think that ADB places its highest priority on improving infrastructure.

When asked to rate how much of a priority ADB places on each of 14 strategic areas under Strategy 2020, 9 in 10 stakeholders rate improving infrastructure as the highest priority at ADB. This is true of all groups and across all regions, far higher than any other area. This finding is consistent with the 2006 and 2009 results.

Increasingly strong majorities of stakeholders believe that ADB puts a priority on strengthening partnerships.

Strengthening partnerships with stakeholders is one of

ADB's drivers of change under Strategy 2020. Nearly 8 in 10 stakeholders think that ADB considers strengthening partnerships to be a high or moderate priority, the highest priority among the five drivers of change. Since 2009, stakeholders are significantly more likely to think that ADB puts a priority here, with increases seen across a number of stakeholder groups and regions.

Promoting gender equality is considered a low but growing priority at ADB. Although promoting gender equality is a driver of change in ADB's Strategy 2020, stakeholders rank it second to last among the 14 rated priorities—only 6 in 10 respondents think gender equality is a current high or moderate ADB priority. However, stakeholders believe that gender equality is more of a priority now than it was in 2009.

Perceptions of ADB's Performance

ADB gets top marks for improving infrastructure. ADB gets its best marks, by far, among the 13 rated performance areas for improving infrastructure, as was the case in 2006 and 2009. Over 7 in 10 stakeholders rate ADB's performance as either excellent or good; performance is perceived to have improved since 2009.

Improved performance on regional cooperation and economic integration. ADB is seen to be performing well on supporting RCI with 6 in 10 stakeholders saying performance is excellent or good, up from 2009. A strong majority of stakeholders believe that RCI will foster their country's economic growth. Strategy 2020 calls for increased ADB support in this core area, and stakeholders clearly think that it performs well in this area.

ADB improves on promoting environmental sustainability. Promoting environmental sustainability is a core operational area for ADB, and nearly 8 in 10 think ADB prioritizes it. Slightly more than half of stakeholders give ADB good marks for promoting environmental sustainability, a significant increase since 2009. Also, a very strong majority of ADB's clients in DMCs agree that ADB acts responsibly in executing environmental assessments and plans to mitigate potential adverse impacts of projects.

On operational effectiveness, ADB's best ratings are for its technical skills and abilities. ADB's clients rate ADB highest for its technical skills and abilities, when asked to rate

ADB on nine attributes relevant to helping their respective country meet its development goals. Nearly 8 in 10 consider ADB excellent or good on these attributes, more than in 2009.

ADB is perceived as an excellent source of knowledge on development but less noted for promoting knowledge sharing and best practices. Although knowledge solutions are a driver of change for ADB, stakeholders think that promoting knowledge sharing and best practices is only a medium priority at ADB. Stakeholders see ADB more as a source of knowledge than as a promoter of knowledge sharing and best practices. Nine in ten respondents agree ADB is an excellent source of knowledge, but only half give good marks for promoting knowledge sharing and best practices.

ADB rated relatively low, but improving, on promoting gender equality. Although promoting gender equality is a driver of change at ADB and is increasingly seen by stakeholders as a priority of ADB, fewer than 4 in 10 stakeholders give it good marks for its performance in this area. Although it is the lowest rated area, perceived performance on gender equality is up from 2009.

Significant improvement of perceptions on ADB's performance in Central and West Asia. ADB's performance in Central and West Asia is perceived to have improved in most areas since 2009, including all core areas of operation and four of the five drivers of change.

Non-borrowing government stakeholders see broad improvement in ADB. Stakeholders in most groups see improved performance by ADB across a broad range of areas, but it is among non-borrowing government stakeholders that the sense of improvement is greatest. For instance, in rating ADB's performance in 13 areas (improving infrastructure, promoting environmental sustainability, etc.), non-borrowing government stakeholders are more positive than in 2009 on 11 of these areas.

ADB and the Private Sector

Private sector considered the key driver of future economic growth with a role for ADB. Stakeholders clearly believe that the private sector is the key driver of future economic growth. This view has strengthened since 2009. When asked what ADB should prioritize to help reduce poverty and to help developing countries

in the region achieve their development goals, 13% of stakeholders mention private sector involvement without prompting, in third place (along with governance) behind education and infrastructure.

Advice to help ADB promote private sector development. Stakeholders think that ADB should focus on providing funds for infrastructure as the best way, by far, to promote private sector development in their country. The next three most popular ways are (i) providing funds for public-private partnerships; (ii) providing credit to financial institutions to support small and medium-sized enterprises; and (iii) supporting private sector projects by providing loans, equity, and guarantees.

Stakeholders are divided on ADB's performance in private sector development currently. Seven in ten stakeholders think that ADB places a priority on resource mobilization for private sector development. But only 4 in 10 stakeholders think ADB is doing an excellent or good job in this area and 13% think ADB's performance is poor. ADB's performance here ranks fourth out of the five drivers of change and it is the only driver on which performance has not improved since 2009. At the same time, nearly 8 in 10 stakeholders agree that ADB is playing a useful role enhancing private sector development. Private sector stakeholders themselves are among the most inclined to disagree that ADB is playing a useful role here (25% disagree), but their assessment has improved since 2009.

Building partnerships with the private sector. Three-quarters of stakeholders agree that ADB is doing enough to reach out and build partnerships with the private sector. However, private sector stakeholders are less likely than average to agree, and one-third disagree. Notwithstanding this, the views of the private sector have improved since 2009.

Perceptions of ADB's Communications

A majority of stakeholders think that ADB communicates its mission and activities well. Two-thirds of respondents say that ADB communicates its mission and activities either very well or somewhat well, but one third think its communications are not satisfactory. Government stakeholders are much more satisfied than others, especially those in CSOs and media. Perceived performance, overall, has not changed significantly since 2009.

ADB is considered fairly responsive to information requests. A majority of stakeholders find that ADB is responsive to information requests at least most of the time, but only 21% say that ADB always performs well here. Since 2009, perceived performance is up significantly among non-borrowing governments, but down for borrowing governments, CSOs, and academia.

Stakeholders read ADB's publications and are influenced by them. Eight in ten stakeholders have read ADB publications in the past 3 years, similar to 2009 but above 2006. Seven in ten readers say that ADB publications at least moderately influenced their thinking about development issues.

ADB website use. About 4 in 10 stakeholders visit ADB's website at least a few times a month. Almost 9 in 10 respondents accessing ADB's website find the site easy to use, a significant improvement from 2009. Visits are primarily to learn about ADB projects and find economic research reports and statistics. A strong majority of website visitors are able to find what they need either always or most of the time.

Regional Development Issues

Corruption remains the greatest perceived threat to development. Corruption remains seen as the greatest perceived threat to development in Asia and the Pacific. While most stakeholders think that ADB does enough to prevent corruption in its projects, 3 in 10 think more could be done. Stakeholders increasingly believe that poor infrastructure is also a serious threat to development.

Regional integration fosters growth. Strong majorities of stakeholders across all regions and groups believe that regional economic integration will foster their country's economic expansion and growth.

Foreign assistance allocation and use are more positively viewed. As in 2009, stakeholders feel more positively about the effectiveness of foreign development organizations in allocating assistance than about the effectiveness of developing countries in using the assistance provided to them. However, stakeholder perceptions of both allocation and use have improved.

Split on achieving the Millennium Development Goals. A small majority believe that enough is being done to achieve their country's Millennium Development Goals (MDGs), but 4 in 10 stakeholders, especially those in CSOs, are skeptical.

Changes in Stakeholder Perceptions

Figure 4 compares survey results from all three perceptions surveys for the questions that appeared in all three surveys. Stakeholder perceptions have remained fairly consistent with no instances of large fluctuations in response. Where

there has been change between 2009 and 2012 (indicated in the far right column), the changes consistently reflect an improvement in perceptions. One of the strongest upward trends in the survey results since 2006 is stakeholders' more favorable perception of ADB's performance in helping developing countries in Asia reduce poverty (question 17).

Change in Stakeholder Perceptions

Overall Perceptions of ADB		2006 (%)	2009 (%)	2012 (%)	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	88	↔
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	58	↑
Q7. ADB is having a very or somewhat good impact on developing countries' development in Asia/Pacific		90	90	94	↑
Perceived Priorities at ADB		2006 (%)	2009 (%)	2012 (%)	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	92	↔
	Reducing poverty	85	80	83	↔
	Supporting regional cooperation and economic integration	77	74	78	↑
	Improving governance	67	70	77	↑
	Promoting environmental sustainability	71	69	74	↑
	Mobilizing resources to develop the private sector	61	69	71	↔
	Promoting gender equality	63	57	64	↑
Perceptions of ADB's Performance		2006 (%)	2009 (%)	2012 (%)	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	74	↑
	Supporting regional cooperation and economic integration	53	55	59	↑
	Promoting environmental sustainability	45	47	53	↑
	Mobilizing resources to develop the private sector	41	40	42	↔
	Improving governance	41	38	43	↑
	Promoting gender equality	35	32	37	↑
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	77	↑
Perceptions of ADB's Communications		2006 (%)	2009 (%)	2012 (%)	Change*
Q24. ADB communicates its mission and activities to people like you very or somewhat well		63	62	66	↑
Q32. ADB's publications have a great deal or a moderate amount of impact on thinking about development issues **		64	71	73	↔

*The green arrows pointing up indicate an increase of 4 percentage points or greater since 2009. The amber arrows pointing both left and right indicates that the percentage point change since 2009 has been less than 4%.

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

Fig. 4



Section 1: Overall Impressions of ADB

ADB is increasingly well regarded by its stakeholders as having a positive impact on development. A very strong majority think that ADB helps countries meet their development goals, but somewhat fewer give ADB good marks for reducing poverty—ADB’s overarching mission—which tends to be perceived as too big a problem for one organization to address alone. ADB’s focus on and knowledge of the Asia and Pacific region is seen, by far, as its greatest strength, while being slow and bureaucratic is considered its greatest weakness. Importantly, ADB continues to be regarded as very trustworthy, competent, and reliable, but it is not thought to be particularly innovative.

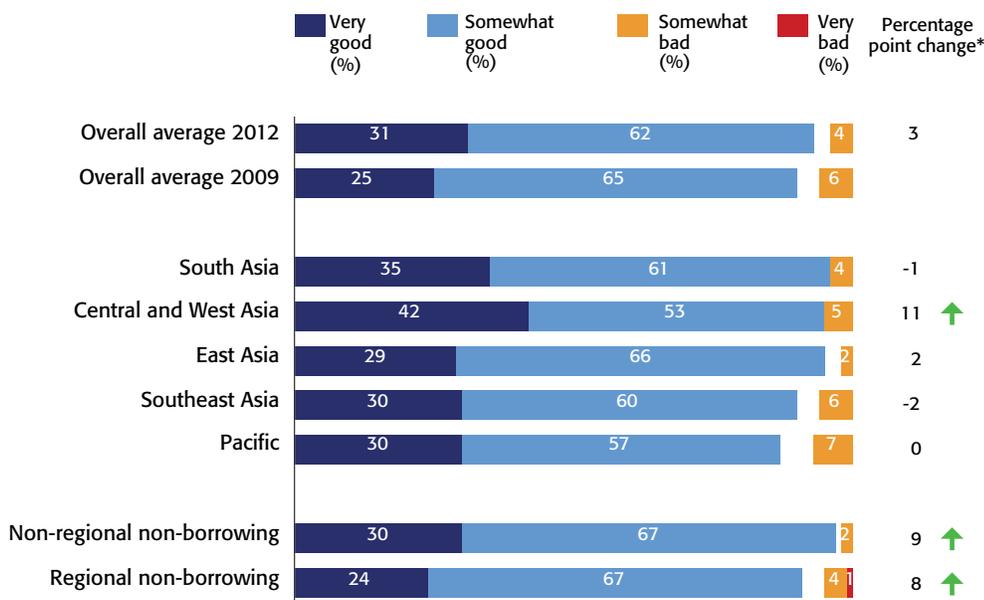
Overall Impact on Development

Nine in ten respondents think that ADB’s impact on development is either very good (31%) or good (62%) across all regions and stakeholder groups, except CSOs. The proportion of stakeholders rating ADB’s impact as “very good” is up six percentage points from 2009. Since 2009, perceptions in Central and West Asia are far more positive.

Borrowing government stakeholders are the most positive about ADB, with over half (56%) rating ADB very good. In the case of CSOs, their views remain somewhat lower than other groups but have improved since 2009 (86% say very good or somewhat good in 2012 vs. 79% in 2009).

ADB’s Impact on Developing Countries’ Development in Asia and the Pacific

By Region, 2012



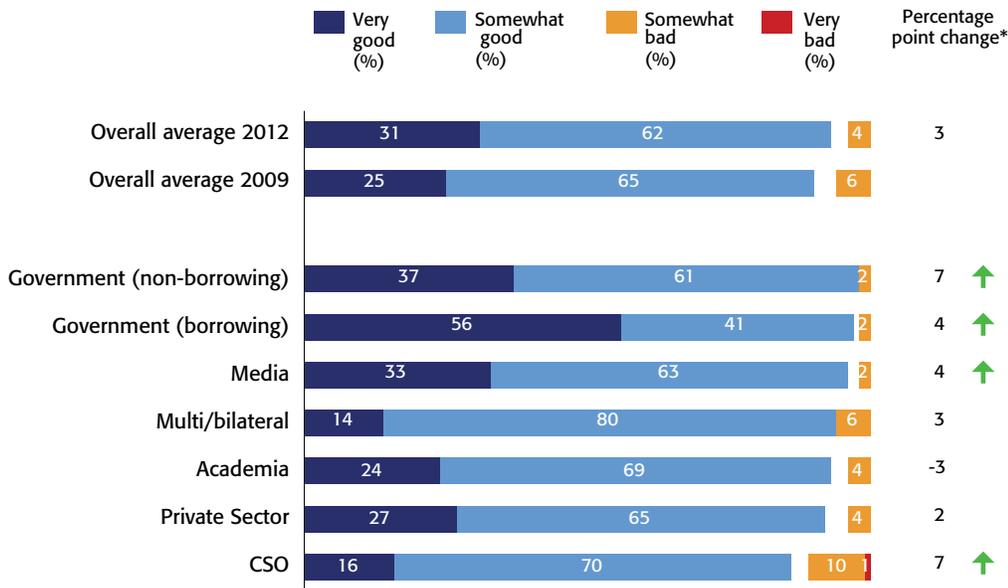
*Refers to a change in percentage points for “Very good” and “Somewhat good” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 5, Q. 7

ADB’s Impact on Developing Countries’ Development in Asia and the Pacific

By Stakeholder Group, 2012



*Refers to a change in percentage points for “Very good” and “Somewhat good” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 6, Q. 7

ADB’s Helpfulness in Meeting Development Goals and Objectives

Stakeholders also continue to have very positive views of ADB’s impact on helping countries meet their development goals and objectives. About 9 in 10 (88%, a similar proportion to both 2006 and 2009 findings) believe that ADB has been helpful in this regard.

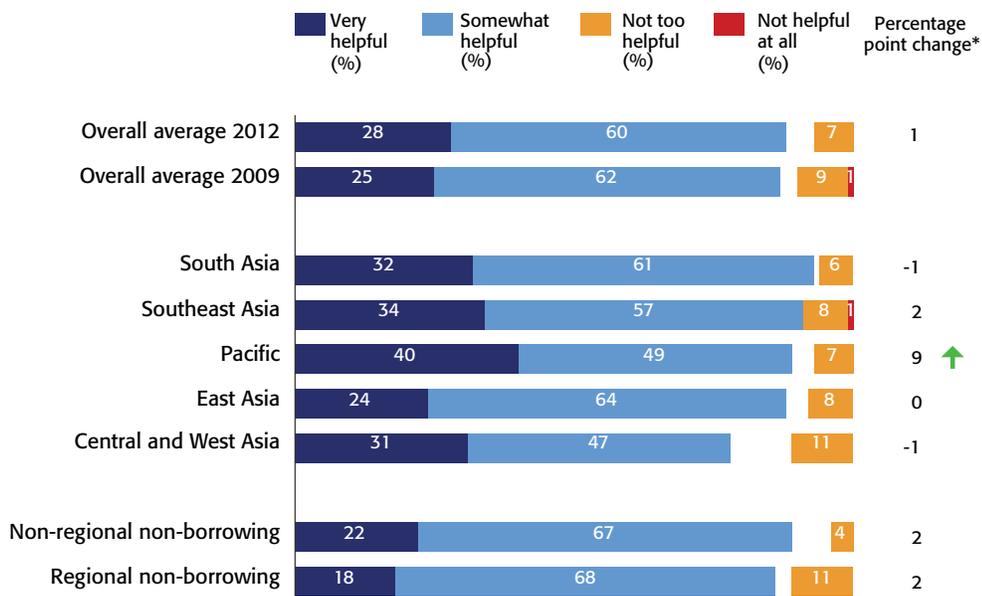
Stakeholders in South Asia and Southeast Asia are the most positive about ADB, with more than 9 in 10 feeling that ADB has been helpful. Stakeholders in Central and West Asia are less positive than others; but even here, nearly 8 in 10 say ADB has been helpful. Ratings in most regions are consistent with 2009, except for the Pacific where stakeholders’ views have considerably improved.

ADB’s clients are more likely than non-clients to think that it has been helpful (clients 94% vs. non-clients 83%) in assisting DMCs to meet their development goals. In 2009, perceptions of clients and non-clients did not differ.

Stakeholders in the government are more inclined than others, especially CSOs, to be positive about ADB’s helpfulness. Since 2009, perceptions among stakeholder groups significantly changed, with stakeholders in non-borrowing governments and the private sector being more impressed than in 2009, and those in media and multi/bilateral organizations being less impressed.

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

By Region, 2012



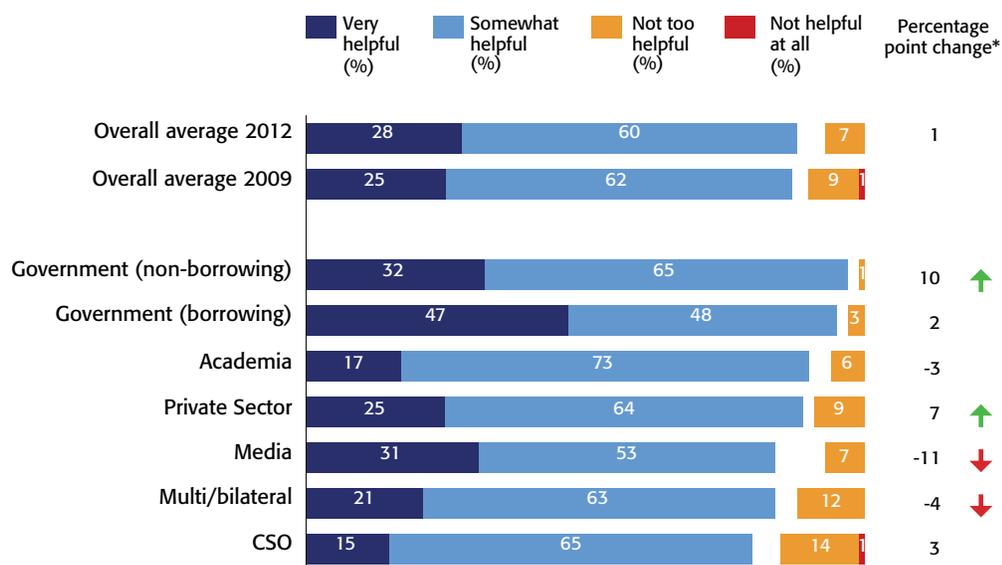
*Refers to a change in percentage points for "Very helpful" and "Somewhat helpful" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 7, Q. 14

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

By Stakeholder Group, 2012



*Refers to a change in percentage points for "Very helpful" and "Somewhat helpful" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 8, Q. 14

Performance in Reducing Poverty

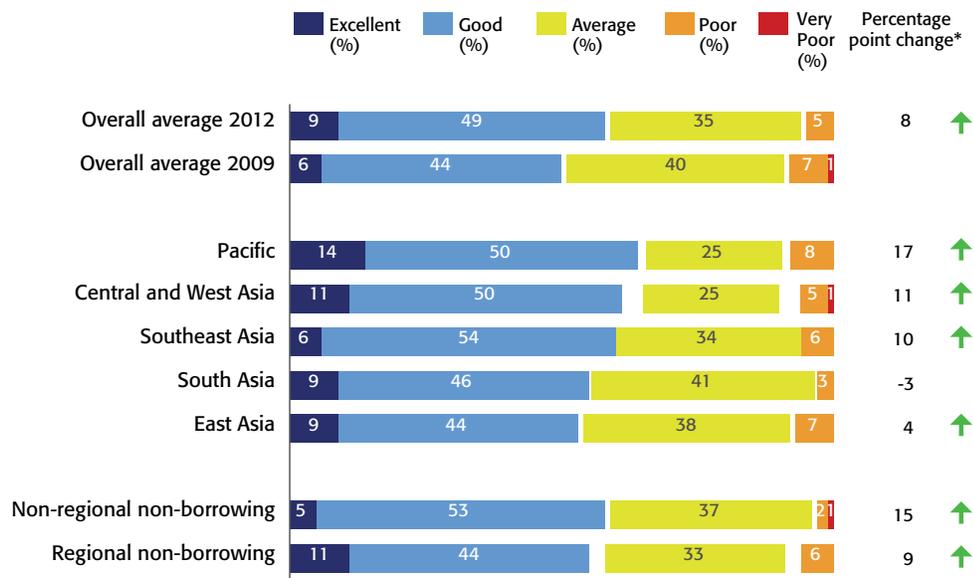
Stakeholders see improvement since 2009 in ADB's performance in poverty reduction. Almost 6 in 10 respondents (58%) think that ADB does an excellent (9%) or good (49%) job helping countries reduce poverty, up from 50% in 2009.

Perceptions of ADB's performance have improved markedly (9% or more) since 2009 in the Pacific, Central and West Asia, and Southeast Asia regions, as well as in non-borrowing countries.

Again, the perceptions of government stakeholders on ADB's performance in helping DMCs reduce poverty are more positive than others. Perceptions have improved significantly across nearly all groups, especially non-borrowing governments. Clients are significantly more likely than non-clients to think ADB is doing a good job helping reduce poverty (65% vs. 51%).

ADB's Performance in Helping DMCs Reduce Poverty

By Region, 2012



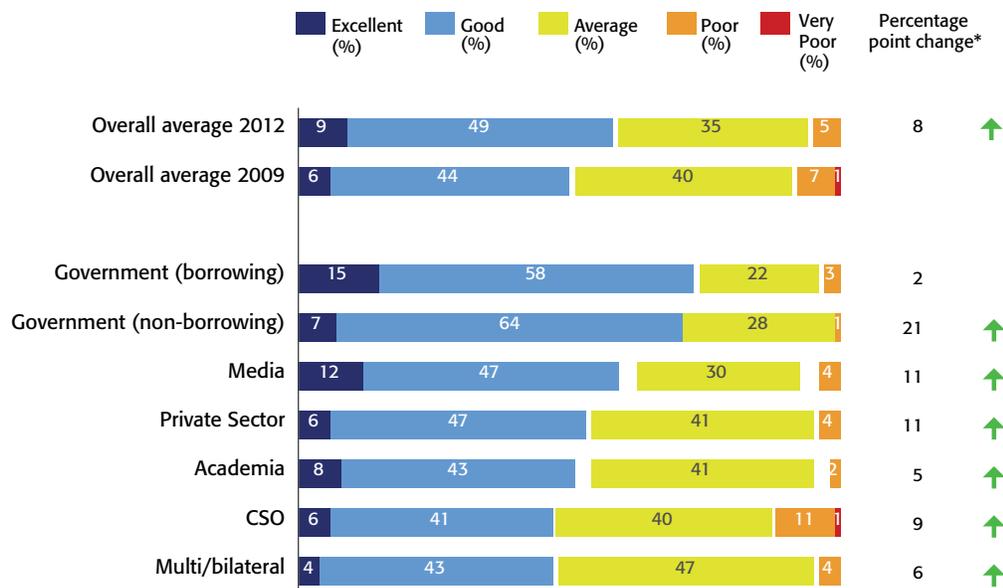
*Refers to a change in percentage points for "Excellent" and "Good" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 9, Q. 17

ADB's Performance in Helping DMCs Reduce Poverty

By Stakeholder Group, 2012



*Refers to a change in percentage points for "Excellent" and "Good" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 10, Q. 17

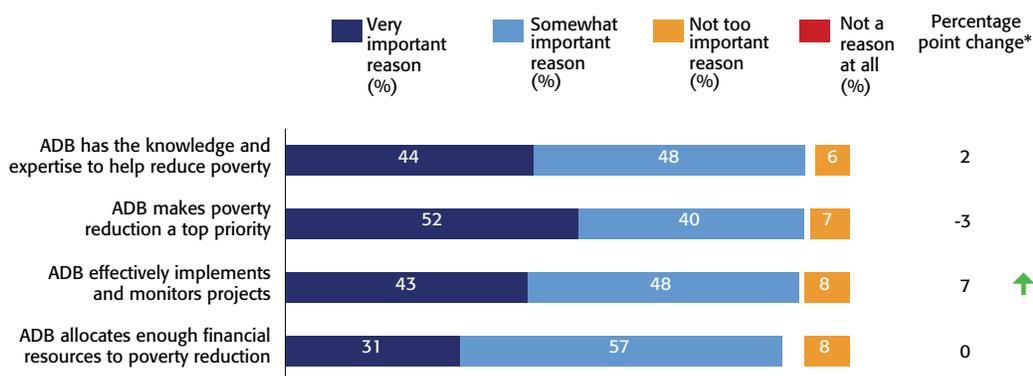
Reasons for Views about Poverty Reduction

Among those who believe that ADB is doing a good job, the main reasons for good performance are shown in Figure 11.

ADB's clients were asked to explain their assessments of ADB's performance in reducing poverty in the region.

To What Extent Do the Following Explain Why ADB Is Doing a Good Job in Helping to Reduce Poverty?

Overall Average, 2012



*Refers to a change in percentage points for "Very important reason" and "Somewhat important reason" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 11, Q. 18

All reasons are essentially unchanged since 2009 except for effective implementation and monitoring, which is up 7 percentage points.

When the 40% of stakeholders who rated ADB's performance on poverty reduction as average or poor were asked to assess the importance of five possible factors for this rating, they selected the following (again in descending order):

1. Poverty is too big a problem for any organization to solve (63% say that this is an important reason).
2. ADB does not allocate adequate financial resources (59%).
3. ADB does not implement and monitor its projects effectively (58%).
4. ADB lacks the knowledge and expertise to reduce poverty (56%).

In 2009, the enormity of the problem of poverty was also cited as the top reason for relatively poor performance, again suggesting that partnerships and cooperation with a wide range of development partners are critical in addressing poverty.

Perceived Strengths and Weaknesses

Stakeholders were asked to state (in their own words) what they believe to be ADB's greatest strengths and weaknesses. These verbatim comments were then analyzed and grouped by theme to highlight strengths and potential areas for improvement.

Perceived Strengths

As shown in Figure 12, stakeholders most frequently mention ADB's Asian focus and knowledge of the region as its greatest strength (31% mention it vs. 24% in 2009). Unlike in 2009, this factor is the top mention across all regions and across all stakeholder groups in 2012. Stakeholders in non-borrowing countries, whether in or outside the Asia and Pacific region, are especially likely to consider its Asian focus and knowledge as ADB's greatest strength (47% mention this vs. 24% in borrowing countries).

ADB's focus on development (mentioned by 9% of stakeholders); its improvements of infrastructure (8%); and its provision of loans, grants, and technical assistance

(8%) are the next most frequently mentioned strengths, but they fall far behind Asian focus and knowledge. That being said, ADB's ability to provide loans is especially well recognized, and increasingly so, in the Pacific (23% mention it), while ADB's focus on development is especially salient in the views of East Asia stakeholders (19% mention it).

Below are some verbatim quotes by stakeholders describing ADB's main strengths:

- "ADB is very strong in implementing infrastructure projects that support domestic and intraregional economic development."—Australia
- "ADB is the most effective among all the international financial organizations to really understand the Asian Pacific economic issues."—Canada
- "As ADB has governments of the Asia [and] Pacific region as member countries, ADB is well positioned to align its strategy and programs in accordance with the development priorities of the region."—Germany
- "The ability to provide Asian lessons, that is, experience from the region, to policy makers in Asia..."—India
- "[Its] traditional strength has been to fund physical and social infrastructure. This remains important for energy and transport (roads, shipping railways, and transport hubs). Continued investment in social sectors in education and health is required."—Philippines
- "Concentration on its particular expertise and comparative advantage, and excellent dialogue with government and development partners..."—Solomon Islands

Perceived Weaknesses

Stakeholders across most regions and stakeholder groups note that ADB's greatest weakness is that it is bureaucratic, inflexible, and slow (see Figure 13). It is the top-cited weakness in all regions except for the Pacific, where it ranked a very close second. Among stakeholder groups, the private sector is especially likely to mention ADB's bureaucracy (21%), with government stakeholders also somewhat more inclined to do so (19%). Since 2009, perceptions on ADB's bureaucracy are improving in Southeast Asia and the Pacific, as well as in non-regional non-borrowing countries. As in 2009, respondents have more difficulty articulating weaknesses than strengths: in 2012, 19% said "don't know" when asked about weaknesses, compared with 11% for strengths.

ADB's Greatest Strength

Unprompted, Total Mentions, by Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Asian focus / knowledge of region	31 ↑	24	17	34 ↑	18	29	24	45	48
Focus on development	9 ↑	4	14 ↑	19 ↑	9 ↑	9 ↑	4	7 ↑	5
Improving infrastructure	8	8	6	6	13	11 ↑	11 ↓	2	6
Providing loans / grants / technical assistance	8	7	6 ↓	4	8	8 ↑	23 ↑	5	8
Financial resources / capacity	7	6	10 ↑	9 ↑	7 ↑	7 ↓	13 ↑	5	5
Reducing poverty / focus on social/humanitarian causes	6	5	13 ↑	7	8	3	5 ↓	5	3
Strategic/relevant investments and projects	5	4	10 ↑	6	7	2	5	5	4

Top mention in region

↑ Increase of 4 percentage points or more from 2009 to 2012

↓ Decrease of 4 percentage points or more from 2009 to 2012

Responses made by fewer than 5% of respondents have not been included in this chart.

Fig. 12, Q. 8

Below are some verbatim quotes by stakeholders describing ADB's main weaknesses:

- "The decision making, tendering takes too much time. A lot of time is spent for negotiating very small issues."—Azerbaijan
- "Rigid procedures which sometimes do not match with field realities..."—India
- "Pressure to prepare projects to unrealistically tight time frames and constraints on supervision budgets can impair project outcomes."—Indonesia
- "Bureaucratic hurdles to integrate local governments and local/national NGOs in the development process..."—Nepal
- "The procedures during the implementation stage of the project are not flexible enough. Tendering procedures should be reconsidered, they should be made easier."—Uzbekistan
- "Technical advisers are not familiar with local country requirements."—People's Republic of China
- "Lack of strong cooperation with other development partners, especially UN agencies..."—Viet Nam

Stakeholders also increasingly mention weaknesses related to government relations, including being too close, dependent, and aligned with governments, as well as lacking influence with governments. One stakeholder notes, "They [ADB] do not take independent decisions and listen to the government too much." Another states that ADB does not pay "enough attention to building the capacity of governments in the implementation and enforcement of policies and laws—practical 'how-to' skills."

Characteristics Associated with ADB

To provide additional insights into how stakeholders view ADB, respondents were presented with a list of positive and negative "personality" attributes and asked the extent to which they think each attribute describes ADB.

A majority of stakeholders think that "trustworthy," "competent," and "reliable" describe ADB. About 9 in 10 stakeholders believe that each of these attributes describes ADB either to a great extent or a moderate extent. Even among more critical stakeholder groups, such as CSOs, about 8 in 10 stakeholders think that ADB is trustworthy, competent, and reliable.

ADB's Greatest Weakness

Unprompted, Total Mentions, by Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Bureaucratic/inflexible/slow	16	18	17 ↑	12	18	16 ↓	11 ↓	17 ↑	15 ↓
Government relations	8 ↑	4	7 ↑	7	10 ↑	9 ↑	2 ↓	4	12 ↑
Project management (implementation/monitoring/efficiency)	7	7	11 ↑	2 ↓	8	8	12 ↑	8	4
Communications/visibility	5	5	5	4	5	3	7 ↑	5	5
Insufficient funds/resources	5	3	2	8	5	7	6 ↑	5	3

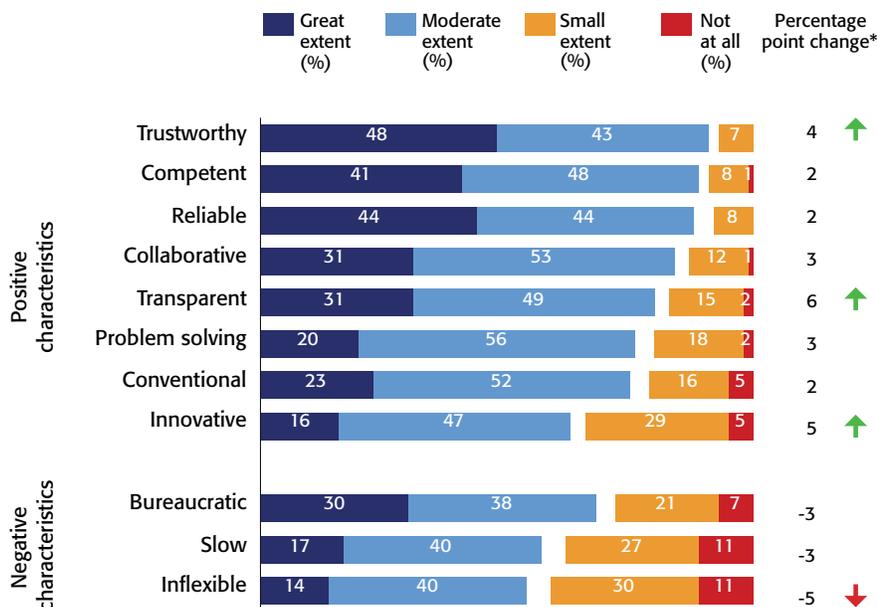
Top mention in region
↑ Increase of 4 percentage points or more from 2009 to 2012
↓ Decrease of 4 percentage points or more from 2009 to 2012

Responses made by fewer than 5% of respondents have not been included in this chart.

Fig. 13, Q. 9

Characteristics Associated with ADB

Average of All Countries, 2012



*Refers to a change in percentage points for "Great extent" and "Moderate extent" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 14, Q. 12

Likewise, as shown in Figure 15, views are consistent geographically. Nearly 9 in 10 or more stakeholders across all borrowing regions have similar views on ADB's alignment with these three traits. Importantly, and as in 2009, the research confirms that ADB is seen as a trustworthy, competent, and reliable organization.

While strong majorities of respondents associate ADB with all of the positive attributes, majorities of them also think that negative attributes describe ADB. Seven in ten think ADB is bureaucratic and over five in ten think that it is slow and inflexible. Government stakeholders in non-borrowing countries are more inclined than those in borrowing countries to find ADB slow (62% vs. 45%).

Characteristics Associated with ADB

"Descriptive (1+2),"* by Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Trustworthy	90	87	90	93 ↑	96 ↑	88	90	85 ↑	90 ↑
Competent	89	87	95 ↑	88 ↑	93	88	90	81 ↑	87 ↓
Reliable	88	85	90	91 ↑	94	89 ↑	87 ↓	79 ↑	88 ↑
Collaborative	85 ↑	80	89	91 ↑	86	87 ↑	90 ↑	74	80 ↑
Transparent	81 ↑	74	87	84 ↑	88 ↑	83	83 ↑	69 ↑	70 ↑
Problem solving	76	73	87	78	76	79 ↑	69 ↓	66 ↑	76 ↑
Conventional	74	73	56 ↓	77 ↓	79	75 ↑	74 ↓	72	82 ↓
Innovative	63 ↑	58	76 ↑	76 ↑	68	66 ↑	63	38	56 ↑
Bureaucratic	68	71	47 ↓	64	74	62	80	63 ↓	84 ↑
Slow	57	60	42 ↓	54 ↓	58	52	52 ↓	61 ↑	73
Inflexible	54 ↓	59	44 ↓	58 ↓	57	55	55 ↓	55	54 ↓

- Highest rating in region
- ↑ Increase of 4 percentage points or more from 2009 to 2012
- ↓ Decrease of 4 percentage points or more from 2009 to 2012

*1+2 reflects those saying either "Great extent" or "Moderate extent", that is, 1 or 2 on a 4-point response scale.

Fig. 15, Q. 12

Characteristics Associated with ADB

"Descriptive (1+2),"* by Stakeholder Group, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Trustworthy	90	87	90	79 ↑	91	98 ↑	96 ↑	89 ↑	94 ↑
Competent	89	87	89	79	91 ↓	91 ↑	92	95 ↑	89 ↑
Reliable	88	85	91 ↑	80 ↑	89	90 ↑	88	89 ↑	93 ↑
Collaborative	85 ↑	80	89 ↑	67	91	90 ↑	86	83 ↑	87 ↑
Transparent	81 ↑	74	82 ↑	64	93	76 ↑	82 ↑	75 ↑	84 ↑
Problem solving	76	73	74 ↓	63	87	80 ↑	76 ↑	82 ↑	71
Conventional	74	73	78	73 ↑	72	80	74	73	75
Innovative	63 ↑	58	56 ↑	54	78	54 ↑	65 ↑	62 ↑	57
Bureaucratic	68	71	76 ↑	71 ↓	62 ↓	65 ↓	62 ↓	70	71
Slow	57	60	66 ↑	61 ↓	45 ↓	62	46 ↓	52 ↓	69
Inflexible	54 ↓	59	55	67	56	50 ↓	41 ↓	41 ↓	58

- Highest rating in stakeholder group
- ↑ Increase of 4 percentage points or more from 2009 to 2012
- ↓ Decrease of 4 percentage points or more from 2009 to 2012

*1+2 reflects those saying either "Great extent" or "Moderate extent", that is, 1 or 2 on a 4-point response scale.

Fig. 16, Q. 12

Of the positive or neutral characteristics, being innovative remains the least descriptive of ADB (63% say ADB is innovative), but perceptions have improved since 2009, as has ADB's reputation for being collaborative (85%) and transparent (81%). ADB is also judged to be less inflexible than in 2009, particularly in Central and West Asia, East Asia, and the Pacific.

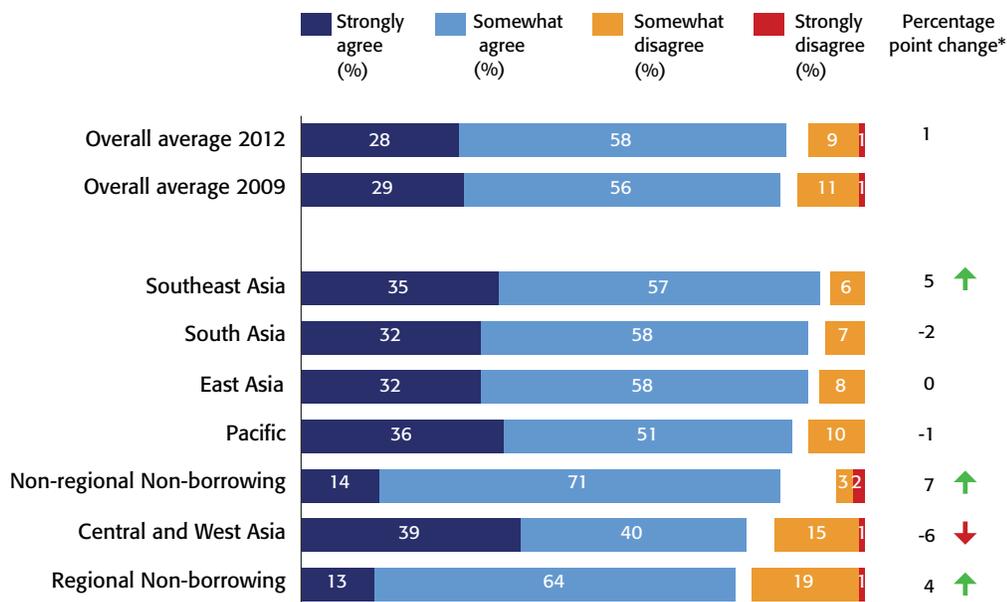
Most of the improvement in perceptions on the positive or neutral characteristics since 2009, generally, is seen to have occurred in Southeast Asia, East Asia, and in non-borrowing countries, as well as among stakeholders in the private sector, multi/bilateral organizations, and non-borrowing governments. Perceptions of being bureaucratic have lessened since 2009 across several groups (e.g., government, media, and CSOs) and in Central and West Asia.

Collaboration with Government Stakeholders

When asked if they agree that ADB is moving toward a more collaborative and responsive relationship with the government of their country, more than 8 in 10 stakeholders agree (see Figures 17 and 18). Borrowing government stakeholders are more likely than others, particularly CSOs, (93% vs. 80%) to agree that this is the case. Overall perceptions have not changed since 2009 with the exception of an increase by 5 percentage points in Southeast Asia and a decline in Central and West Asia by 6 percentage points.

ADB Is Moving Toward a More Collaborative and Responsive Partnership with the Government

By Region, 2012



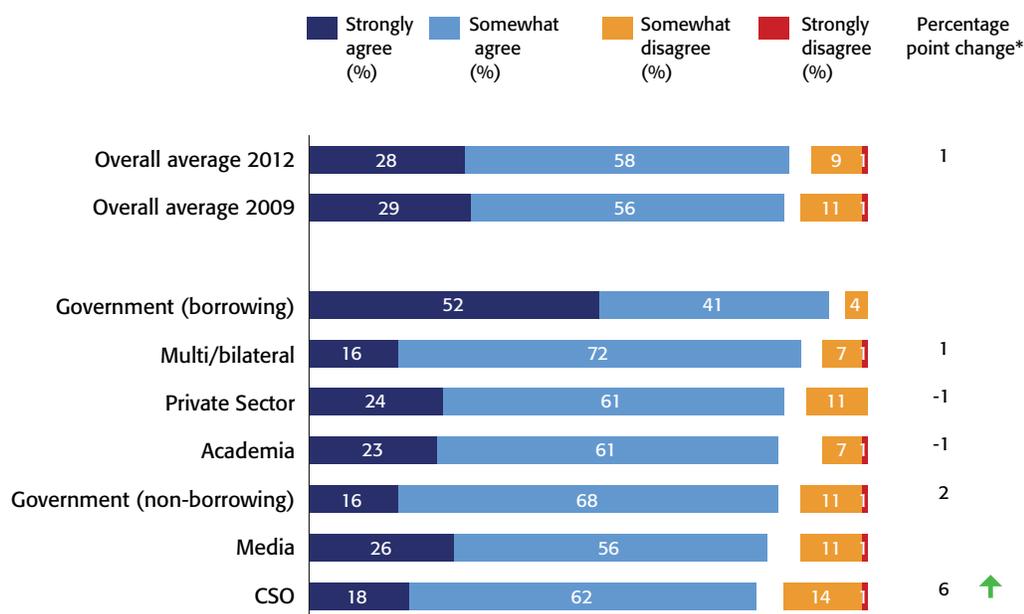
*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 17, Q. 23c

ADB Is Moving Toward a More Collaborative and Responsive Partnership with the Government

By Stakeholder Group, 2012



*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 18, Q. 23c



Section 2: Perceived Priorities at ADB

A majority of stakeholders believe that ADB places at least a moderate priority on all 14 areas surveyed, with perceived priorities increasing on half of them since 2009. ADB is seen to place its highest priority, by far, on improving infrastructure, followed by poverty reduction. Stakeholders think ADB places a relatively low, but increasing, priority on gender equality, one of ADB’s five drivers of change. When asked, unprompted, where ADB should prioritize to help reduce poverty and help developing countries achieve their development goals, stakeholders point to education and infrastructure.

Stakeholder Perceptions of ADB’s Priorities

ADB’s mission is to help its DMCs reduce poverty and improve the quality of life of their people. Achieving this challenging mission requires a highly integrated approach to programming and funding across a number of areas. Through ADB’s Strategy 2020, ADB has identified 14 critical areas that it calls “core areas of operation,” “other operational areas,” and “drivers of change,” for which it can offer loans, grants, and technical assistance (see box below for an elaboration of these operational areas and drivers of change, all unchanged from 2009).

Stakeholders were asked to rate the extent to which they believe ADB prioritizes each of its areas of operation and drivers of change. The results provide ADB with insight into the degree of alignment between external stakeholders’ perceptions and ADB’s stated internal priorities. Figure 19 indicates that ADB is seen to put at least a moderate priority on all 14 areas and drivers of change. By far the highest priority is seen to be improving infrastructure, followed by reducing poverty.

Each of these areas is discussed in some detail in the following pages. We start discussing poverty reduction, given its prominence in ADB’s mission, and then go on to examine operational areas and drivers of change.

Poverty reduction

This is an overarching goal of all of ADB’s work in the region and is an integral outcome (whether explicit or implicit) anticipated in each area detailed in Strategy 2020. Indeed, over 8 in 10 stakeholders (84%) think that poverty reduction is considered a priority by ADB (46% as a high priority and a further 38% a moderate priority). Compared with 2009, stakeholders are now slightly more likely to see ADB treating poverty reduction as a high or moderate priority, but the 2012 results are similar to 2006 levels.

Perceived Priority that ADB Places on Core Operational Areas

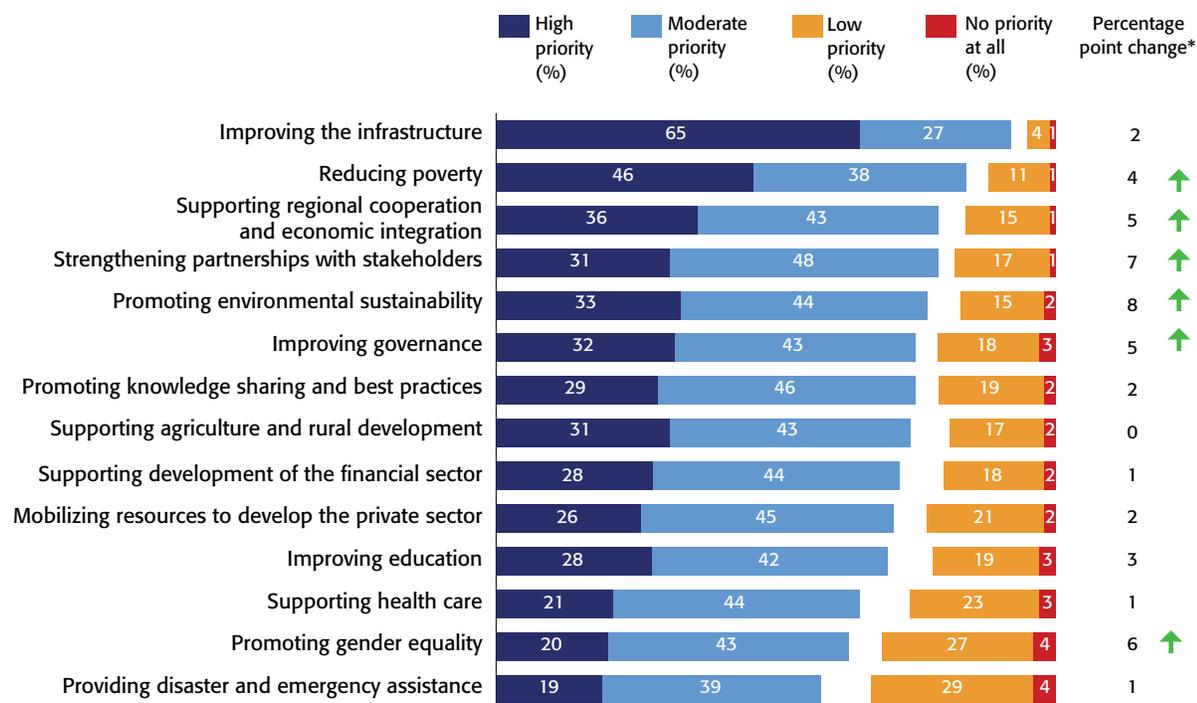
Improving infrastructure

Stakeholders across all groups and all regions think that ADB considers improving infrastructure to be its highest core operational priority. Ninety-two percent of stakeholders say that ADB places a high (65%) or moderate (27%) priority on it—far higher than any other core operational area. These results are similar to those found in 2009 and 2006 (90% and 92%, respectively). Stakeholders in East Asia are somewhat less inclined than others (and less than in 2009) to think that ADB places a high priority on infrastructure improvement.

Key Components of Strategy 2020		
Core Areas of Operation	Other Areas of Operation	Drivers of Change
Infrastructure	Agriculture and rural development	Private sector development and private sector operations
Environment	Supporting health care	Good governance and capacity development
Regional cooperation and integration (RCI)	Providing disaster and emergency assistance	Gender equality
Finance sector development		Knowledge solutions
Education		Partnerships

Perceptions of ADB’s Priorities in Asia/Pacific

Average of All Countries, 2012



*Refers to a change in percentage points for “High priority” and “Moderate priority” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 19, Q. 10–11

Multi/bilateral organizations, ADB clients, and government stakeholders are significantly more inclined than others to think that ADB places a high priority on improving infrastructure.

Supporting regional cooperation and economic integration

Nearly 8 in 10 stakeholders (79%) believe that ADB places a high (36%) or medium (43%) priority on supporting regional cooperation and economic integration. This finding aligns with stakeholder views that regional economic integration will foster their country’s economic expansion and growth, as noted in Section 5 of this report. Borrowing government stakeholders are more likely than others to think that ADB has this priority, and, to a lesser extent, so do stakeholders in East Asia, the Pacific and Southeast Asia. The proportion believing that RCI is considered a high or moderate priority at ADB has increased since 2009, with stakeholders in academia and borrowing governments and in several regions more likely to have this notion.

Promoting environmental sustainability

ADB is committed to promoting environmental sustainability in its programs, policies, and strategies. Nearly 8 in 10 stakeholders believe that ADB puts a high (33%) or moderate (44%) priority on this area, ranked fifth overall out of the 14 areas rated.

Stakeholders in East Asia and Southeast Asia are more likely than other regions to think that ADB prioritizes environmental sustainability. CSOs are more skeptical than other groups.

Environmental sustainability is viewed as having become more of a priority for ADB since 2009, when it ranked ninth overall and was seen as a high or moderate priority by 69% of respondents vs. 77% in 2012. Stakeholders in all regions, except South Asia, and in all groups are increasingly likely to think that ADB puts a priority on this area.

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

"Priority (1+2),"* by Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Improving the infrastructure	92	90	91	87 ↓	95 ↑	94	93 ↑	84 ↓	94 ↑
Supporting regional cooperation and economic integration	79 ↑	74	78 ↑	83 ↑	71 ↑	83	84 ↑	74	83 ↑
Promoting environmental sustainability	77 ↑	69	76 ↑	86 ↑	76	82 ↑	76 ↑	72 ↑	75 ↑
Supporting development of the financial sector	72	71	75 ↑	62	70 ↑	72 ↓	78	75	73
Improving education	70	67	63	69 ↓	70	73 ↑	66 ↑	68	75 ↑

- Highest rating in region
- ↑ Increase of 4 percentage points or more from 2009 to 2012
- ↓ Decrease of 4 percentage points or more from 2009 to 2012

*1+2 reflects those saying either "High priority" or "Moderate priority," that is, 1 or 2 on a 4-point response scale.

Fig. 20, Q. 10–11

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

"Priority (1+2),"* by Stakeholder Group, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Improving the infrastructure	92	90	89	88	95	96	86	98 ↑	91
Supporting regional cooperation and economic integration	79 ↑	74	83 ↑	76 ↑	85 ↑	81	74	75	75 ↑
Promoting environmental sustainability	77 ↑	69	75 ↑	60 ↑	86 ↑	81 ↑	80 ↑	83 ↑	78 ↑
Supporting development of the financial sector	72	71	74	76 ↑	76	78	67 ↓	67	67 ↑
Improving education	70	67	71	69 ↑	69 ↓	75 ↑	73	69 ↑	68

- Highest rating in stakeholder group
- ↑ Increase of 4 percentage points or more from 2009 to 2012
- ↓ Decrease of 4 percentage points or more from 2009 to 2012

*1+2 reflects those saying either "High priority" or "Moderate priority," that is, 1 or 2 on a 4-point response scale.

Fig. 21, Q. 10–11

Supporting the financial sector

Stakeholders think that supporting the financial sector is a relatively lower priority for ADB than infrastructure, regional cooperation/integration, and environmental sustainability. Seven in ten believe that ADB places a high (28%) or moderate (44%) priority in supporting the financial sector. Non-borrowing governments are more likely than media, multi/bilaterals, and the private sector to believe that ADB has this priority. Regionally, supporting the financial sector is seen as less of a priority in East Asia (only 62% think it is a priority vs. 78% in the Pacific). Otherwise, consistency is relatively high across regions.

Since 2009, overall findings are stable; however, the private sector and CSOs are increasingly likely to believe that financial sector support is a high or moderate priority, while media has become even less inclined to think that this is so.

Improving education

Among the five core areas, stakeholders rank improving education as the lowest among the five core areas where ADB places its priorities. Seven in ten believe that ADB places a high (28%) or medium (42%) priority on education. Findings are fairly consistent among stakeholder groups but there are differences across regions, with stakeholders in Southeast Asia and non-regional non-borrowing countries more likely to think that ADB places a high or moderate priority on education compared to respondents in Central and West Asia.

Although there has been little overall change since 2009, perceptions across groups and regions in how ADB prioritizes support for improving education have changed. Multi/bilaterals, CSOs, and non-borrowing government stakeholders now consider that improving education is more of a priority for ADB while borrowing government stakeholders are less inclined to think that. Stakeholders in the Pacific, Southeast Asia, and in non-regional non-borrowing countries are increasingly likely to think that ADB places a priority on education, while there has been a modest decrease in this sector in East Asia since 2009.

Perceived Priority that ADB Places on Other Operational Areas

ADB has three other operational areas under Strategy 2020: (i) supporting agriculture and rural development, (ii) supporting health care, and (iii) providing disaster and emergency assistance.

Overall, there has been no significant change since 2009 in the extent to which stakeholders think that ADB considers each one a high or moderate priority.

Supporting agriculture and rural development

Stakeholders consider this to be ADB's eighth most important priority, ranked marginally behind three of the core areas and far more important than health care and disaster assistance. Three in four think that ADB considers agriculture and rural development a high (31%) or moderate (43%) priority. Views are consistent across groups, but stakeholders in East Asia (81%) consider it more of a priority than those in the Pacific (62%).

Although there has been little overall change since 2009, stakeholders in the Pacific and non-regional non-borrowing countries, CSOs, and non-borrowing governments see it as a higher priority at ADB, while the media (still high at 80%) and academics see it as a lower priority than 2009.

Supporting health care

Supporting health care is perceived to be among ADB's lowest current priorities; nonetheless, a majority (65%) continues to believe that ADB puts at least a moderate priority on it. The private sector and academics are more likely than others to have this notion, and increasingly so since 2009. Stakeholders in Southeast Asia are also somewhat more inclined than others to have the same view.

Since 2009, non-borrowing governments, academics, and the private sector are more likely to think that ADB puts a priority on health care, while stakeholders in East Asia and the Pacific are less inclined to think that.

Providing disaster and emergency assistance

Fewer than 6 in 10 (58%) stakeholders believe that ADB puts a priority on disaster and emergency assistance. Borrowing government stakeholders and those in Southeast Asia and East Asia are more likely than most other groups to view this as a current ADB priority. Since 2009, stakeholders in

East Asia and South Asia and in the media and the private sector are less likely to think that ADB puts a priority on disaster assistance. Conversely, stakeholders in academia, CSOs, and government are more inclined to think it is a priority, as do those in Central and West Asia.

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

"Priority (1+2),"* by Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Supporting agriculture and rural development	75	74	76	81	73	76 ↓	62 ↑	75	75 ↑
Supporting health care	65	64	62	65 ↓	65	69 ↑	57 ↓	66 ↑	64 ↑
Providing disaster and emergency assistance	58	57	55 ↑	66 ↓	56 ↓	63 ↑	45 ↓	56	59 ↑

- Highest rating in region
- ↑ Increase of 4 percentage points or more from 2009 to 2012
- ↓ Decrease of 4 percentage points or more from 2009 to 2012

*1+2 reflects those saying either "High priority" or "Moderate priority," that is, 1 or 2 on a 4-point response scale.

Fig. 22, Q. 10–11

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

"Priority (1+2),"* by Stakeholder Group, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Supporting agriculture and rural development	75	74	69 ↓	74 ↑	78	78 ↑	80 ↓	74	70
Supporting health care	65	64	73 ↑	56	67 ↓	62 ↑	67 ↓	55	71 ↑
Providing disaster and emergency assistance	58	57	65 ↑	55 ↑	68 ↑	58 ↑	53 ↓	49	55 ↓

- Highest rating in stakeholder group
- ↑ Increase of 4 percentage points or more from 2009 to 2012
- ↓ Decrease of 4 percentage points or more from 2009 to 2012

*1+2 reflects those saying either "High priority" or "Moderate priority," that is, 1 or 2 on a 4-point response scale.

Fig. 23, Q. 10–11

Perceived Priority that ADB Places on Drivers of Change

Strategy 2020 identifies the following five drivers of change that are stressed across all of its operations: (i) mobilizing resources to develop the private sector; (ii) improving governance; (iii) promoting gender equality; (iv) helping developing countries promote knowledge sharing and best practices; and (v) strengthening partnerships with other development institutions, the private sector, and community-based organizations. Below we discuss stakeholders' perceptions of how ADB prioritizes its drivers of change. More detail is presented in Figures 24 and 25.

Mobilizing resources to develop the private sector

Seven in ten stakeholders (71%) think that ADB places a high (26%) or moderate (45%) priority on resource mobilization for private sector development. Among the drivers of change, it is the top-ranked ADB priority by CSOs and non-borrowing governments. Except for non-borrowing government stakeholders, perceptions are fairly consistent across groups. Regionally, stakeholders in East Asia are significantly less likely than others to think that ADB puts a priority on this.

Since 2009, stakeholders in most regions (except those in regional non-borrowing countries, and Southeast and South Asia) increasingly think that private sector mobilization is a high or moderate ADB priority. The private sector is also increasingly likely to think that ADB places a priority on developing its sector, though it ranked the lowest among the seven stakeholder groups.

Improving governance

Seven in ten stakeholders (75%) think that ADB places a high (32%) or moderate (43%) priority on improving governance in the region, up 5 percentage points from 2009. This notion is especially strong among borrowing government stakeholders (compared to CSOs and media) and among clients. Stakeholders in Southeast Asia and the Pacific are more inclined than others to think that governance is a high or moderate ADB priority.

Promoting gender equality

Consistent with 2009, gender equality is not highly ranked by stakeholders as a priority area by ADB. Of the 14 rated areas, it is second least likely to be considered a priority of ADB, and last among the drivers of change. Only 2 in 10

stakeholders (20%) consider it to be a high priority for ADB. Compared to 2009, however, associations of ADB with gender equality have improved considerably; this year, 63% of stakeholders feel that gender equality is a high or moderate priority for ADB, up 6 percentage points from 57% of stakeholders in 2009. Stakeholders in most audience and regional groups are now more likely to say that gender equality is an ADB priority. These include the Pacific (up 18 percentage points), Southeast Asia (up 11 percentage points), multi/bilaterals (up 16 percentage points), and academics (up 11 percentage points). The exceptions are CSOs, borrowing governments, and those in South Asia—whose views have remained stable since 2009—and Central and West Asia, the only group that is now less likely to associate ADB with work in gender equality (down 8 percentage points).

Promoting knowledge sharing

Promoting knowledge sharing is more about the way in which ADB operates (i.e., sharing its expertise and knowledge) than about a specific operational area or outcome. Over 7 in 10 (75%) stakeholders think that ADB places a high (29%) or moderate (46%) priority on knowledge sharing. Borrowing government stakeholders and clients are especially inclined to think that ADB places knowledge sharing as a high or moderate priority. Since 2009, the overall change is insignificant, but Central and West Asia and Pacific stakeholders are increasingly inclined to believe this, as are those in governments and multi/bilateral organizations.

Strengthening partnerships

Strengthening partnerships with stakeholders is similar to promoting knowledge sharing in that they reflect ADB's ways of operating rather than outcomes. Nearly 8 in 10 (79%) stakeholders think that ADB considers strengthening partnerships to be a high (31%) or moderate (48%) priority. As in 2009, borrowing government stakeholders tend more than others to hold this view (89%). Stakeholders in the Pacific and East Asia are also especially inclined to think that this is a high or moderate ADB priority. Since 2009, stakeholders are significantly more likely to think that ADB puts a priority on strengthening partnerships (up 6 percentage points). Increases are seen across a number of stakeholder groups, as well as in Central and West Asia, East Asia, the Pacific, and non-regional non-borrowing countries.

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

“Priority (1+2),” * by Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Strengthening partnerships with stakeholders	78 ↑	72	82 ↑	86 ↑	76	79	88 ↑	70	78 ↑
Promoting knowledge sharing and best practices	75	73	68 ↑	78	74	78	84 ↑	73	76 ↑
Improving governance	75 ↑	70	63	77 ↑	75	82 ↑	82 ↑	70	72 ↑
Mobilizing resources to develop the private sector	71	69	72 ↑	59 ↑	67	72	72 ↑	70 ↓	79 ↑
Promoting gender equality	63 ↑	57	49 ↓	64 ↑	72	69 ↑	65 ↑	56 ↑	63 ↑

Highest rating in region
↑ Increase of 4 percentage points or more from 2009 to 2012
↓ Decrease of 4 percentage points or more from 2009 to 2012

*1+2 reflects those saying either “High priority” or “Moderate priority,” that is, 1 or 2 on a 4-point response scale.

Fig. 24, Q. 10–11

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

“Priority (1+2),” * by Stakeholder Group, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Strengthening partnerships with stakeholders	78 ↑	72	81 ↑	61	89 ↑	80 ↑	79	79 ↑	78 ↑
Promoting knowledge sharing and best practices	75	73	78	65	86 ↑	74 ↑	73	72 ↑	74
Improving governance	75 ↑	70	74	66 ↑	83 ↑	76 ↑	69 ↑	77	73 ↑
Mobilizing resources to develop the private sector	71	69	77	72	68	82	68	72	65 ↑
Promoting gender equality	63 ↑	57	63 ↑	53	74	69 ↑	56 ↑	66 ↑	61 ↑

Highest rating in stakeholder group
↑ Increase of 4 percentage points or more from 2009 to 2012
↓ Decrease of 4 percentage points or more from 2009 to 2012

*1+2 reflects those saying either “High priority” or “Moderate priority,” that is, 1 or 2 on a 4-point response scale.

Fig. 25, Q. 10–11

Two Main Areas for ADB to Best Help Reduce Poverty

In addition to knowing what stakeholders think are ADB priorities, ADB is interested in knowing what they think the organization should prioritize to help reduce poverty and to help developing countries in the region achieve their development goals. Accordingly, respondents were asked to describe in their own words two main areas that ADB should focus on to achieve these goals. Their responses were analyzed and then grouped by theme to highlight the suggested areas.

Two areas stand out above all the rest: infrastructure and education, with almost 3 in 10 stakeholders mentioning each of these. Below these is a cluster of three areas—private sector development, governance, and agriculture—each mentioned by over 10% of stakeholders. All other suggestions were mentioned by fewer than 10% of stakeholders.

Infrastructure

Stakeholders in South Asia, Southeast Asia, and the Pacific name infrastructure most frequently as a priority for ADB to best help reduce poverty, with more than a third of stakeholders mentioning it. East Asia and Central and West Asia, however, ranked education higher than infrastructure as the main area to help reduce poverty. Multi/bilateral organizations and, to a lesser extent, clients and borrowing governments are more positive than others about infrastructure. Since 2009, endorsement of a focus on infrastructure has been unchanged overall, but has decreased in Central and West Asia and regional non-borrowing countries.

Education

Stakeholder support for education as a preferred area to best help reduce poverty is fairly consistent across groups and regions. It is the top-ranked area among the private sector, CSOs, media, and academia, as well as in Central and West Asia, East Asia, and in non-borrowing countries. Since 2009, fewer mentions of education are noted in Central and West Asia (22%) and East Asia (23%), with a higher number in the Pacific (37%) and in non-regional non-borrowing countries (31%).

Other Areas

Overall, most of ADB's core and other operational areas are suggested by stakeholders as preferred areas of focus to best help reduce poverty by ADB, albeit by significantly varying levels of support. Below are several such areas, as well as other findings worth noting:

Agriculture and rural development are mentioned by 17% of stakeholders (11% for agriculture and 6% for rural development). There is no significant change from 2009.

Private sector involvement (including investment and development) is mentioned by 13% of stakeholders, most frequently by those in non-borrowing governments, academia, private sector, media, Central and West Asia, and non-regional non-borrowing countries. There is a higher number of mentions since 2009 in Central and West Asia and South Asia, but fewer in the Pacific.

Mentions of good governance have increased since 2009 (13% vs. 9%), with boosts in East Asia, Southeast Asia, the Pacific, and non-regional non-borrowing countries. Figure 26 highlights the most frequently mentioned areas.

Top Areas on which ADB Should Focus to Best Reduce Poverty

Unprompted, Total Mentions, by Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Infrastructure	29	31	21 ↓	22	42	35	40	16 ↓	20
Education	28	27	22 ↓	23 ↓	27	30	37 ↑	27	31 ↑
Private sector involvement/investment/development	13	12	20 ↑	9	12 ↑	7	15 ↓	13	20
Good governance	13 ↑	9	11	13 ↑	10	19 ↑	8 ↑	10	17 ↑
Agriculture	11	11	15	10 ↑	14	12	6	8	10
Health / health care	8 ↓	13	7 ↓	12	9 ↓	7 ↓	11	9	6 ↓
Environment / climate change	7	7	5	19	4	7	4 ↑	9	6
Finance/banking (access to)	7 ↑	1	12 ↑	3	3	3	10 ↑	13 ↑	7 ↑
Rural development	6	9	6	5 ↓	10	8 ↓	8 ↓	2 ↓	2
Corruption/transparency	6	5	2	4	3	7	1	6	12 ↑
Affordable/clean/sustainable energy	5	6	12	3	7	2	4	3	5

Top mention in region

↑ Increase of 4 percentage points or more from 2009 to 2012

↓ Decrease of 4 percentage points or more from 2009 to 2012

Responses made by fewer than 5% of respondents have not been included in this chart.

Fig. 26, Q. 13



Section 3: Perceptions of ADB's Performance

As in 2009, ADB receives its best performance ratings for improving infrastructure and supporting regional cooperation and economic integration, both core operational areas of Strategy 2020. Promoting gender equality is ranked lowest. Government stakeholders tend to be the most positive about ADB. Perceived performance has improved on 8 of the 13 areas surveyed, including three core areas and four drivers of change. Perceptions of stakeholders in Central and West Asia on ADB's performance have improved substantially since 2009.

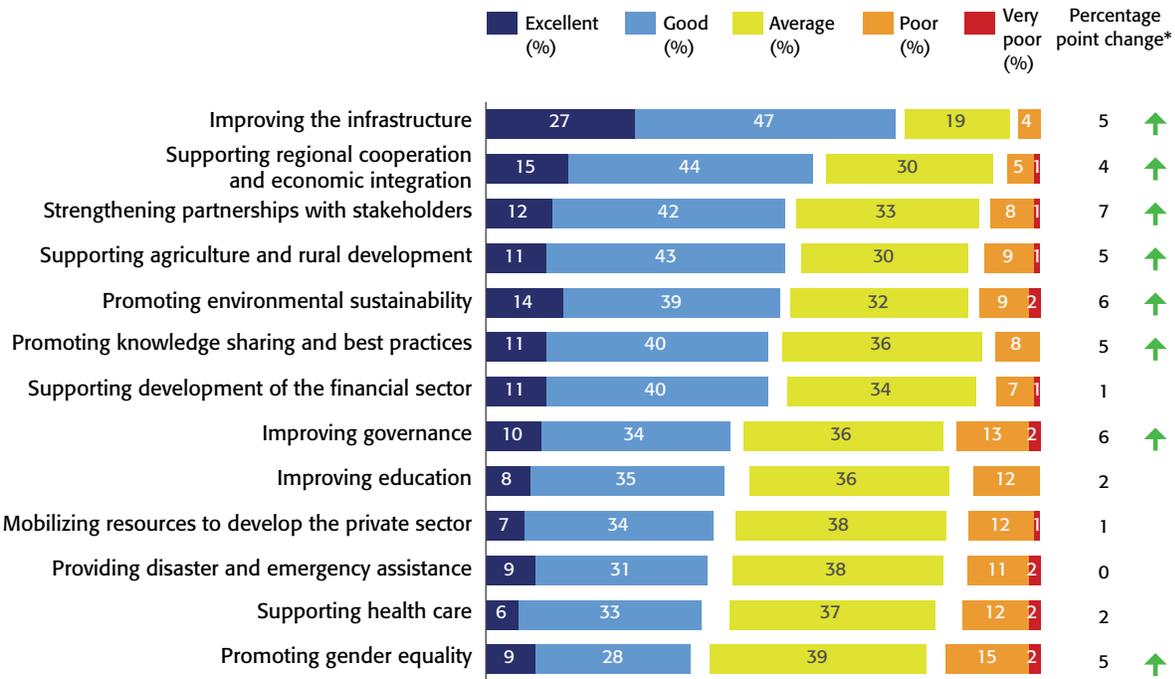
Perceptions of ADB's Performance: Related to Strategy 2020

Respondents were asked to rate ADB's performance in their country on 13 areas, including all of its core areas of operation, other areas of operation, and drivers of

change as defined in ADB's Strategy 2020. In the following pages, we discuss stakeholder perceptions in all of these dimensions, beginning with the core areas.

Perceptions of ADB's Performance in Asia/Pacific

Average of All Countries, 2012



*Refers to a change in percentage points for "Excellent" and "Good" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 27, Q. 20

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. Infrastructure is the most important operational area for ADB and, as shown in Section 2, stakeholders clearly think that ADB considers improving infrastructure as its highest priority. They also think that ADB should make it a top priority to reduce poverty and to help developing countries achieve their development goals.

Among the 13 areas rated, ADB gets its best marks, by far, for improving infrastructure. Over 7 in 10 (74%, up five

points from 2009) stakeholders rate ADB's performance here as either excellent (27%) or good (47%). Very few think ADB is doing a poor job in this area. Government stakeholders tend to be more impressed than others (83% say excellent or good) and clients are more favorable than non-clients. Also, those in South Asia tend to be especially favorable (80% rate excellent or good). Again, as in 2009, stakeholders in non-borrowing countries outside the region have somewhat better impressions of performance than non-borrowers inside the region (73% vs. 64%).

ADB's performance is perceived to have improved since 2009, with better ratings in Southeast Asia, Central and West Asia, and in non-borrowing countries. Conversely, perceived performance in improving infrastructure in East Asia has weakened since 2009.

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

"Good Performance (1+2),"* by Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Improving the infrastructure	74 ↑	69	74 ↑	65 ↓	80	77 ↑	74	64 ↑	73 ↑
Supporting regional cooperation and economic integration	59 ↑	55	59 ↑	59	57 ↑	63 ↓	57	54 ↑	63 ↑
Promoting environmental sustainability	53 ↑	47	59 ↑	68	53	59 ↑	56 ↑	41	43 ↑
Supporting development of the financial sector	51	50	67 ↑	40 ↓	46 ↓	55	62	44 ↑	46
Improving education	43	41	49 ↑	45	47 ↓	50 ↑	52 ↑	34 ↑	30

Highest rating in region
↑ Increase of 4 percentage points or more from 2009 to 2012
↓ Decrease of 4 percentage points or more from 2009 to 2012

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

Fig. 28, Q. 20

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

"Good Performance (1+2),"* by Stakeholder Group, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Improving the infrastructure	74 ↑	69	70	63 ↑	82	86 ↑	70	78 ↑	69 ↑
Supporting regional cooperation and economic integration	59 ↑	55	60	53 ↑	68	67 ↑	55	50	58 ↑
Promoting environmental sustainability	53 ↑	47	42 ↑	30 ↓	74 ↑	45 ↑	55 ↑	41	63 ↑
Supporting development of the financial sector	51	50	53 ↑	52 ↑	59 ↓	44 ↓	48 ↓	45	46 ↑
Improving education	43	40	42 ↑	32	58	33 ↑	44 ↓	42 ↑	41 ↑

 Highest rating in region

↑ Increase of 4 percentage points or more from 2009 to 2012

↓ Decrease of 4 percentage points or more from 2009 to 2012

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

Fig. 29, Q. 20

Promoting environmental sustainability

Strategy 2020 stresses that ADB will increase its emphasis on the environment to help achieve environmentally sustainable development. Section 2 of this report shows that nearly 8 in 10 stakeholders think that ADB puts priority on promoting environmental sustainability. When it comes to perceived performance in this area, half of stakeholders (53%) rate ADB as either excellent (14%) or good (39%). Government stakeholders in borrowing countries and the private sector rate performance far more highly than others do, especially compared to CSOs (only 30% say excellent or good). Ratings tend to be consistent across regions, but borrowing countries and clients are more likely than others to give high ratings.

Since 2009, the overall performance rating on promoting environmental sustainability has increased by 6 percentage points (53% vs. 47% in 2009), with improvements seen in Central and West Asia, Southeast Asia, the Pacific, and non-regional non-borrowing countries.

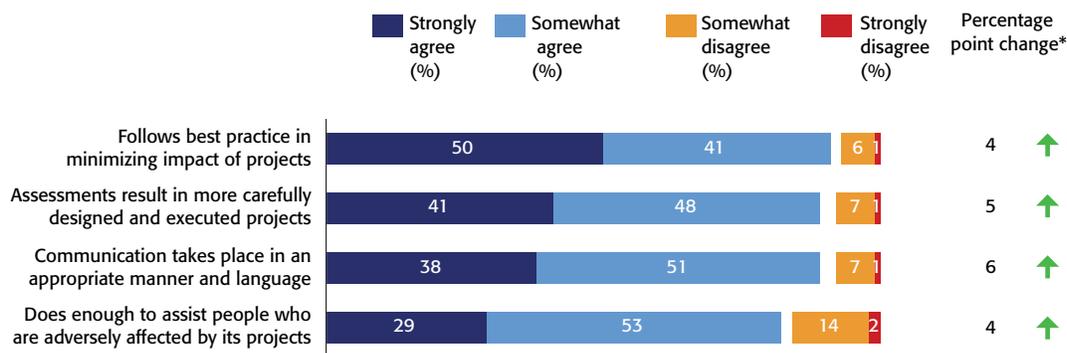
Environmental and Social Impacts of ADB Projects

ADB’s project financing assistance for its developing member countries (DMCs) typically requires assessments or plans designed to minimize any adverse impacts to the environment or communities from the project being implemented. Clients in DMCs were asked to rate ADB’s performance in the execution of these assessments and plans, which include appropriateness of communications with and adequacy of assistance for affected people, use of international best practices to minimize impacts, and positive impacts of assessments on project design and execution. Survey findings indicate that very strong majorities of clients agree that ADB acts in a responsible way in all four of these areas—fully 8 in 10 respondents agree on each area. Stakeholders least agree on the adequacy of assistance provided by ADB to adversely

affected people. While 82% of respondents think that assistance is adequate, fewer than 3 in 10 strongly agree (by far the lowest result across the four areas). CSOs, multi/bilateral organizations, and respondents in the Pacific tend to be less impressed with ADB’s efforts to mitigate adverse environmental and social impacts of ADB-funded projects. Generally, opinions across regions are consistent, though stakeholders in East Asia are most positive. Multi/bilateral organizations tend to have less favorable opinions than others in these areas; CSOs are especially critical about the appropriateness of ADB’s communications.

Since 2009, perceived performance on each of these activities to mitigate adverse environmental and social impacts has improved slightly but still only one-half or less of client respondents strongly agree in each of the four areas.

ADB’s Efforts to Mitigate Adverse Environmental and Social Impacts of Projects 2012



Only asked of ADB clients in borrowing countries (n=337)

*Refers to a change in percentage points for “Strongly agree” and “Somewhat agree” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 30, Q. 16

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

By Region,* 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	Pacific (%)	South Asia (%)	Southeast Asia (%)
Follows best practice in minimizing impact of projects	91 ↑	87	91 ↑	100 ↑	93	91	88
Assessments result in more carefully designed and executed projects	89 ↑	84	84	98 ↑	84 ↓	91 ↑	88 ↑
Communication takes place in an appropriate manner and language	89 ↑	83	88 ↑	99 ↑	85 ↑	89 ↑	87 ↑
Does enough to assist people who are adversely affected by its projects	82 ↑	78	88 ↑	96 ↑	72	82	77

 Highest rating in stakeholder group
↑ Increase of 4 percentage points or more from 2009 to 2012
↓ Decrease of 4 percentage points or more from 2009 to 2012

*1+2 reflects those saying either "Great extent" or "Moderate extent," that is, 1 or 2 on a 4-point response scale.

Fig. 31, Q. 16

Supporting regional cooperation and integration

In Strategy 2020, ADB signals its intent to scale up the support it provides for RCI to satisfy some of the substantial unmet demand for such investments in the Asia and Pacific region. This will be done by increasing the volume of operations in RCI and the share of RCI in ADB's total operations.

As noted in Section 5, stakeholders in DMCs in all regions and groups believe that their country's economy will likely benefit from integration with other economies in the region (9 in 10 agree with this notion).

Six in ten stakeholders (59%) believe that ADB is doing an excellent (15%) or good (44%) job in supporting RCI. While ratings are consistent across regions, there are differences among groups—government and client stakeholders are more likely than others to give high performance ratings to ADB. Compared with 2009, perceived performance on RCI is up overall (by 4 percentage points) and in Central and West Asia, South Asia, and non-borrowing countries generally.

Supporting development of the financial sector

Stakeholders' views of ADB's performance in supporting the development of the financial sector rank fourth out of five core operational areas. Five in ten stakeholders (51%) rate ADB's performance as either excellent (11%) or good (40%) in this area. While ratings across most groups tend to be consistent, stakeholders in borrowing governments, Central and West Asia, the Pacific, and clients are more inclined than others to give ADB high performance ratings. There is no change overall since 2009 but, regionally, perceived performance has improved in Central and West Asia and regional non-borrowing countries while deteriorating in East and South Asia. Also, the private sector's ratings of ADB's performance, while still low, have increased to 46% positive (excellent or good) in 2012 from 39% in 2009.

Improving education

As noted in Strategy 2020, investment in and access to education and training are important for inclusive growth in the Asia and Pacific region. Stakeholders consider

limited educational opportunities as only a middling threat to their country's development. They also think that ADB places a relatively low priority on improving education, which ranked fifth out of five core operational areas and ranked 11 out of 14 priority areas under Strategy 2020. Stakeholders would prefer that ADB place a higher priority on education (ranked second highest, just behind infrastructure) to best help reduce poverty. However, when it comes to ADB's performance on improving education, stakeholders give it

below average marks with 4 in 10 (43%) rating it excellent (8%) or good (35%). Perceived performance ranks fifth out of the five core operational areas. Borrowing government stakeholders tend to give high performance ratings, especially compared to CSOs. Clients also think that performance on education is good relative to others. Conversely, stakeholders in non-borrowing countries are more inclined than others to think performance is lackluster. Since 2009, perceived performance is up in most regions, but down in South Asia.

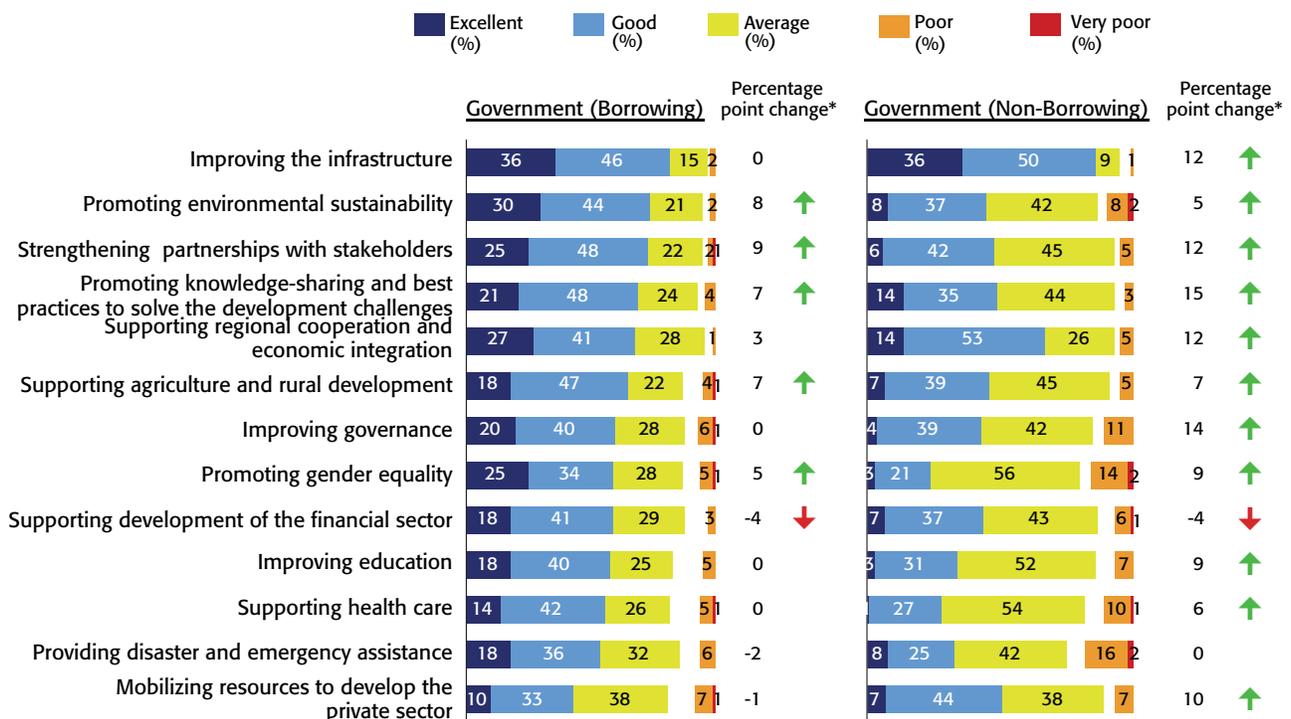
Perspectives of Borrowing and Non-Borrowing Governments Continue to Differ

As in 2009, government respondents in borrowing countries are more likely than their counterparts in non-borrowing

countries to rate ADB's performance positively. This is true across nearly all operational areas, except infrastructure and mobilizing resources to develop the private sector where non-borrowing government stakeholders are more positive than their borrowing government counterparts.

Perceptions of ADB's Performance in Key Areas

Average of All Countries, 2012



*Refers to a change in percentage points between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 32, Q. 20

Perceptions of Performance: Other Operational Areas

“Other operational areas” include supporting agriculture and rural development, providing disaster and emergency assistance, and supporting health care.

Supporting agriculture and rural development

Strategy 2020 views support for agriculture and rural development as an underlying component of growth in the region. Most stakeholders think that agriculture and rural development is indeed a priority area for ADB: it ranks just behind three of the five core operational areas. In terms of stakeholders' preferred focal areas for ADB to best help reduce poverty, agriculture is clustered with private sector involvement and governance, positioned well behind education and infrastructure but well ahead of other areas.

Agricultural/rural development performance is rated significantly higher than the other operational areas. Over 5 in 10 stakeholders (54%) feel that ADB is doing an excellent (11%) or a good (43%) job in this area. Media and borrowing government stakeholders (66% each give excellent or good ratings) and clients are more likely than others to rate ADB highly. Those in the Pacific rank this area the lowest. Perceived performance has increased since 2009, most notably in Central and West Asia, Southeast Asia, and non-regional non-borrowing countries.

Supporting health care

ADB approaches health and health care in its operations indirectly by focusing on health outcomes of infrastructure, health systems, and regional health concerns. Stakeholders are more inclined to rate its performance here lower than for agriculture and rural development. Four in ten stakeholders (40%) rate ADB's performance on health as excellent (6%) or good (33%). Borrowing government stakeholders are more inclined than others to rate ADB highly—56% say performance is excellent or good, compared with 28% for non-borrowing governments. Clients and stakeholders in Central and West Asia and Southeast Asia are also more positive than others, while multi/bilaterals and CSOs are less positive (less than one in three give excellent or good ratings). Since 2009, performance ratings are up in Southeast Asia, the Pacific, and non-regional non-borrowing countries, and down in East Asia.

Providing disaster and emergency assistance

The Asia and Pacific region suffers more natural disasters than any other region in the world. ADB has a long history of responding to DMC's emergency needs for rehabilitation and reconstruction when a disaster strikes. Under Strategy 2020, ADB continues to mainstream disaster risk management and provide early and medium-term disaster response and assistance in partnership with specialized aid agencies. In terms of perceived performance, 4 in 10 respondents (40%) give ADB excellent (9%) or good (31%) ratings for performance. However, 13% give ADB a poor rating, equivalent to other operational areas but higher than for core areas such as infrastructure and cooperation/integration. Stakeholders in borrowing governments are far more inclined than non-borrowing governments to give ADB good ratings (54% vs. 33%). Client stakeholders also give especially positive ratings. Conversely, multi/bilateral organizations are more critical—only 24% give good performance ratings in this area. Overall performance is stable since 2009, but perceptions have improved in Southeast Asia and regional non-borrowing countries, and have deteriorated in East Asia, South Asia, and the Pacific. The number of natural disasters occurring in the past 3 years in different sub-regions would obviously impact these perceptions.

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

“Good Performance (1+2),”* by Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Supporting agriculture and rural development	54 ↑	49	59 ↑	58	50 ↓	60 ↑	44	47	53 ↑
Providing disaster and emergency assistance	40	40	43	43 ↓	36 ↓	47 ↑	34 ↓	41 ↑	36
Supporting health care	40	37	47	44 ↓	38	48 ↑	45 ↑	31	29 ↑

- Highest rating in region
- ↑ Increase of 4 percentage points or more from 2009 to 2012
- ↓ Decrease of 4 percentage points or more from 2009 to 2012

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

Fig. 33, Q. 20

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

“Good Performance (1+2),”* by Stakeholder Group, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Supporting agriculture and rural development	54 ↑	49	44 ↓	50 ↑	66 ↑	46 ↑	66 ↑	42 ↑	50 ↑
Providing disaster and emergency assistance	40	40	41	34 ↑	54	33	46 ↑	24 ↓	38 ↓
Supporting health care	40 ↑	36	40 ↑	31	56	28 ↑	38 ↓	32 ↑	39 ↑

- Highest rating in stakeholder group
- ↑ Increase of 4 percentage points or more from 2009 to 2012
- ↓ Decrease of 4 percentage points or more from 2009 to 2012

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

Fig. 34, Q. 20

Perceptions of Performance: Drivers of Change

Here we discuss stakeholders' perceptions of ADB's performance on four of its five drivers of change: (i) improving governance, (ii) promoting gender equality, (iii) helping developing countries by promoting knowledge sharing and best practices, (iv) and strengthening partnerships with stakeholders. Performance on the fifth driver of change—mobilizing resources to develop the private sector—is covered at the end of Section 3 in a special section looking at ADB and the private sector.

Improving governance

ADB's focus on governance includes accountability, participation, predictability, and transparency. Just over 4 in 10 stakeholders (44%, up from 38% in 2009) believe that ADB is doing an excellent (10%) or good (34%) job improving governance. Government stakeholders tend to be more positive (55% excellent or good), while those in CSOs tend to be far less so (32%). Clients give better ratings than non-clients do (51% vs. 36%), and stakeholders in borrowing countries are more positive than those in non-borrowing ones (47% vs. 35%) about ADB's performance on governance. Perceived performance has improved in most regions since 2009; South Asia is an exception since ratings declined there.

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

"Good Performance (1+2),"* by Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Strengthening partnerships with stakeholders	54 ↑	47	64 ↑	65 ↑	55	56	71 ↑	40 ↑	45 ↑
Promoting knowledge sharing and best practices	51 ↑	46	63 ↑	57	44 ↓	56 ↑	52 ↑	44 ↑	50 ↑
Improving governance	44 ↑	38	48 ↑	52 ↑	40 ↓	50	56 ↑	33 ↑	36 ↑
Mobilizing resources to develop the private sector	41	40	50 ↑	32	33 ↓	43	52	40	50 ↑
Promoting gender equality	37 ↑	32	33	45	41 ↓	46 ↑	43 ↑	21	29 ↑

 Highest rating in region

↑ Increase of 4 percentage points or more from 2009 to 2012

↓ Decrease of 4 percentage points or more from 2009 to 2012

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

Fig. 35, Q. 20

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

“Good Performance (1+2),”* by Stakeholder Group, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Strengthening partnerships with stakeholders	54 ↑	48	48 ↑	39	73 ↑	48 ↑	57 ↑	46	56 ↑
Promoting knowledge sharing and best practices	51 ↑	46	44 ↑	41 ↑	69 ↑	50 ↑	63 ↑	33	49
Improving governance	44 ↑	39	36	32 ↑	60	43 ↑	39 ↑	39	43 ↑
Mobilizing resources to develop the private sector	41	40	40	40	44	51 ↑	49 ↑	38 ↑	35
Promoting gender equality	37 ↑	32	34 ↑	32 ↑	59 ↑	23 ↑	31	23	34

- Highest rating in stakeholder group
- ↑ Increase of 4 percentage points or more from 2009 to 2012
- ↓ Decrease of 4 percentage points or more from 2009 to 2012

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

Fig. 36, Q. 20

Promoting gender equality

As in 2009, this is the lowest rated of the 13 performance areas. Only 37% give ADB an excellent (9%) or good (28%) performance score on promoting gender equality. Government stakeholders give far better ratings than all other groups (49% excellent or good vs. 23% from multi/bilateral respondents and approximately 30% from other groups). Borrowing governments are especially positive. Southeast and East Asian stakeholders tend to be more impressed than those in other regions, as are clients. Although ADB gets a relatively poor score in 2012, it is up 5 percentage points over 2009. Changes vary across regions, with improvement in Southeast Asia, the Pacific, and non-regional non-borrowing countries, and a slight decrease in South Asia, which still remains above the overall average.

Promoting knowledge sharing

Recognizing that knowledge solutions drive development, ADB intends to play a strong and active role in leveraging knowledge in the region. In terms of perceived ADB performance, knowledge sharing ranks second among the drivers of change and in the middle of the 13 areas measured. Half (51%) of stakeholders give ADB an excellent (11%) or good (40%) rating for promoting knowledge sharing and best practices to solve development problems. Government and media stakeholders tend to give better marks than other groups do. Stakeholders in Central and West Asia (63% give an excellent or good rating) and clients (59% say excellent or good) are also especially impressed with ADB in this area. Overall performance is up 5 percentage points since 2009, thanks to improvements in Central and West Asia, Southeast Asia, and the Pacific, as well as in non-borrowing countries.

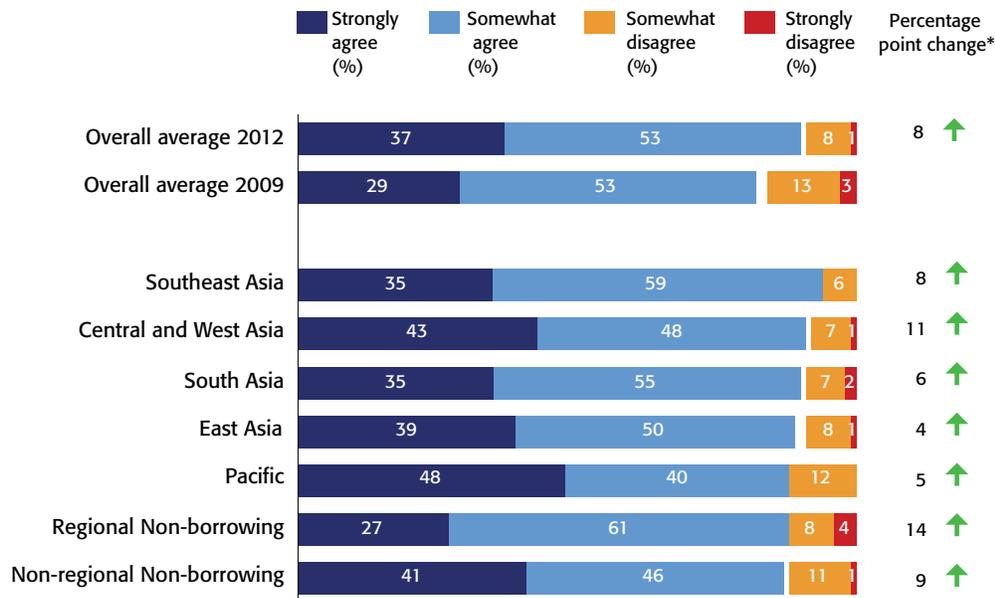
ADB as a Source of Knowledge on Development

Stakeholders were asked to rate the extent to which they agree or disagree that "ADB is an excellent source of knowledge on development issues." Nine in ten (90%) agree (including 37% who strongly agree) with the statement. Government and media stakeholders tend to be more positive than other groups. Those in Southeast Asia are inclined to be more in agreement than stakeholders in non-borrowing countries.

Perceptions of ADB as a source of knowledge have improved overall and across all stakeholder groups compared to 2009.

ADB Is an Excellent Source of Knowledge on Development Issues

By Region, 2012



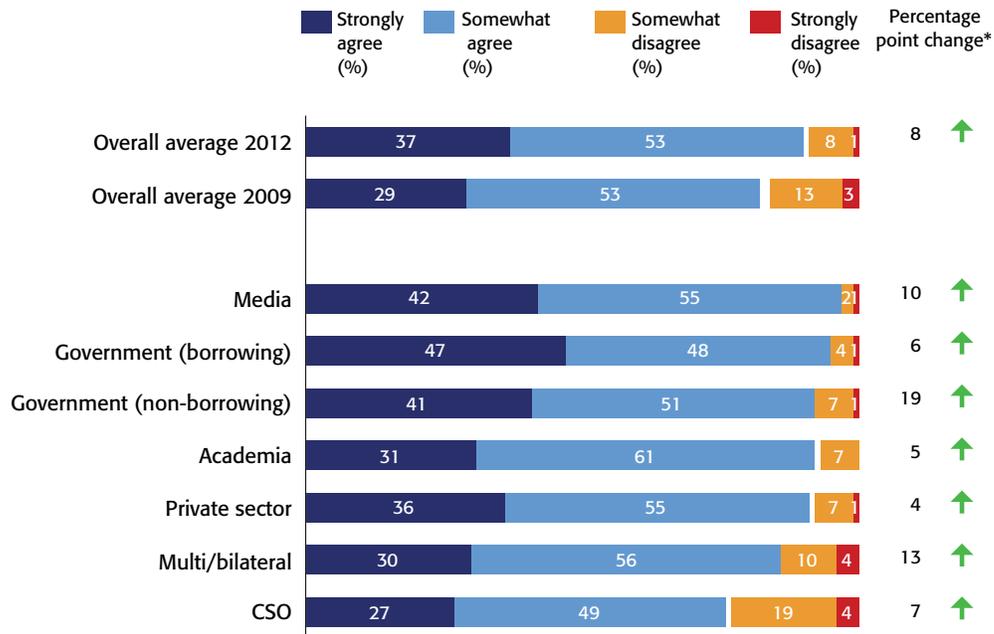
*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 37, Q. 23a

ADB Is an Excellent Source of Knowledge on Development Issues

By Stakeholder Group, 2012



*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 38, Q. 23a

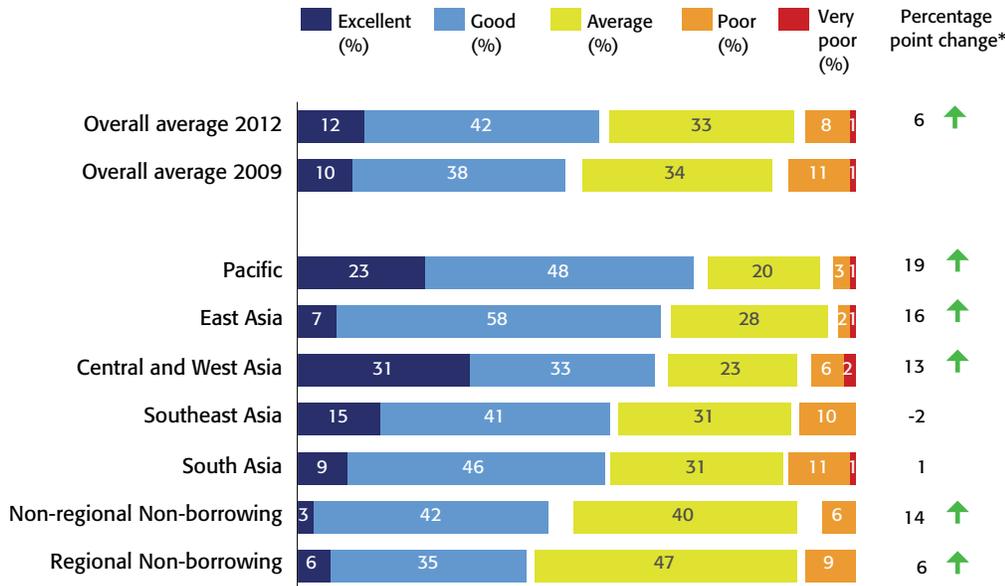
Strengthening partnerships with stakeholders

Section 2 indicates that nearly 8 in 10 stakeholders believe that ADB places a high or moderate priority on strengthening partnerships with its stakeholders, the highest among the drivers of change. When it comes to ADB's performance, strengthening partnerships is the most highly rated driver and ranks third among all areas surveyed. A small majority (54%) of stakeholders rate its performance as excellent (12%) or good (42%). Government stakeholders, especially those in borrowing

countries, give ADB the highest marks (73%), with CSOs least positive (39%) about ADB's performance on partnering with stakeholders. Clients also give higher marks than non-clients. Regionally, stakeholders in the Pacific are far more positive than those in other regions. Since 2009, ADB's perceived performance has improved significantly (up 7 percentage points), with gains experienced across the region, including Central and West Asia, East Asia, the Pacific, and non-borrowing countries.

Strengthening Partnerships with Stakeholders

Performance Rating, by Region, 2012



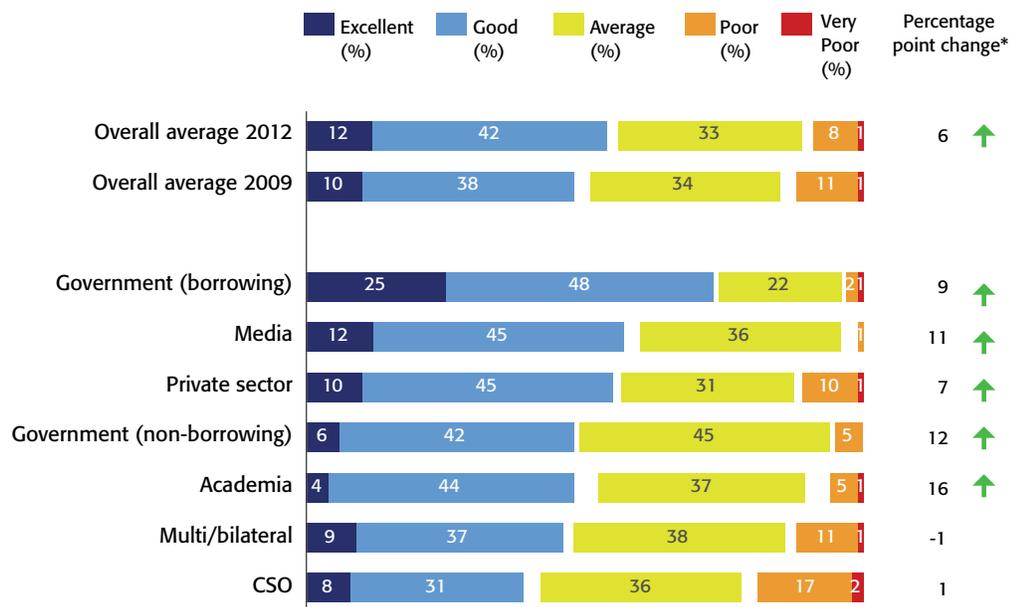
*Refers to a change in percentage points for "Excellent" and "Good" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 39, Q. 20m

Strengthening Partnerships with Stakeholders

Performance Rating, by Stakeholder Group, 2012



*Refers to a change in percentage points for "Excellent" and "Good" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 40, Q. 20m

Operational Effectiveness According to ADB Clients

ADB’s clients in developing countries were asked to rate it on nine operational attributes in terms of helping their country meet its development goals and objectives. The attributes range from the technical capabilities of ADB staff to its loan capacity. As in 2009, on all attributes, a majority of clients rate ADB’s performance as good or excellent.

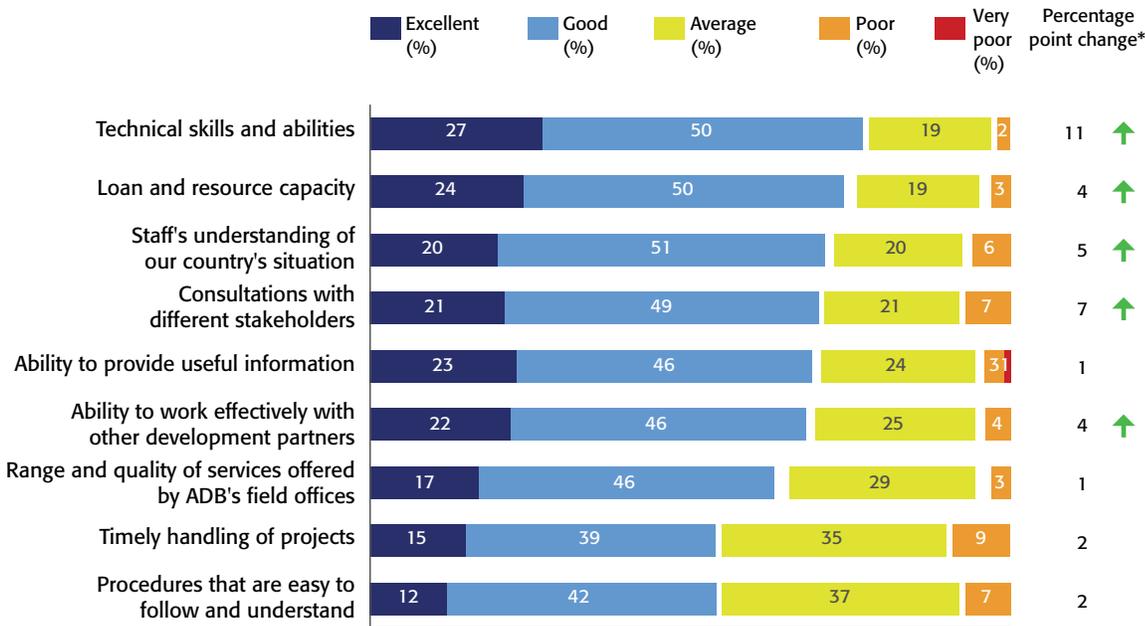
ADB’s best ratings are for its technical skills and abilities, with 77% rating it excellent or good, followed by ratings on its loan and resource capacity (74%). ADB receives its lowest marks for the timely handling of projects and for the ease of its procedures, with 54% of stakeholders saying excellent or good for both. Government stakeholders tend to be more positive than others about ADB’s performance

across most attributes. Regionally, there is not a lot of variation, except that clients in Central and West Asia tend to be more impressed than others across more than half of the attributes, including loan and resource capacity with 84% of stakeholders rating ADB excellent or good, providing useful information (82%), the range and quality of services offered by its field offices (78%), and the timely handling of projects (66%). Southeast Asia continues to give ADB low marks for the timely handling of projects, but performance has improved since 2009 (45% positive in 2012 vs. 37% in 2009).

Since 2009, ADB’s perceived performance has improved in five areas: (i) technical skills, (ii) loan and resource capacity, (iii) understanding the situation in client countries, (iv) consultations with stakeholders, and (v) working well with other development partners.

ADB’s Performance in Helping DMCs Meet Development Goals

Average of DMCs, 2012



Only asked of ADB clients in borrowing countries (n= 326)

*Refers to a change in percentage points for “Excellent” and “Good” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 41, Q. 15

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

Average of DMCs, "Good Performance (1+2),"* 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)
Technical skills and abilities	77 ↑	65	80 ↑	74 ↑	74 ↑	78 ↑	79 ↑
Loan and resource capacity	74 ↑	70	84 ↑	70 ↑	72	74	69
Staff's understanding of our country's situation	71 ↑	66	78	71 ↑	67 ↓	73 ↑	68 ↑
Consultations with different stakeholders	70 ↑	63	74 ↑	78 ↑	73	65	64 ↑
Ability to provide useful information	69	68	82 ↑	71 ↑	69 ↓	65	61
Ability to work effectively with other development partners	68 ↑	64	82 ↑	64 ↑	72	62	65
Range and quality of services offered by ADB's field offices	64	62	78 ↑	65 ↑	61	62	56 ↓
Timely handling of projects	54	52	66 ↑	57 ↑	62	45 ↑	41 ↓
Procedures that are easy to follow and understand	54	53	52 ↓	70 ↑	54	52	43

 Highest rating in region

 Increase of 4 percentage points or more from 2009 to 2012

 Decrease of 4 percentage points or more from 2009 to 2012

Only asked of ADB clients in borrowing countries (n= 326)

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

Fig. 42, Q. 15

Perceptions of Performance: ADB and the Private Sector

Supporting the growth of a strong and dynamic private sector in its DMCs has long been a priority of ADB; private sector development is also a prominent component of ADB's Strategy 2020. Given the importance of private sector development to economic growth, this section explores a number of questions related to stakeholders' perceptions and expectations of ADB's engagement with this sector.

The importance of private sector development

When asked whether they think the private sector is the key driver of future economic growth in their country, 9 in 10 stakeholders (89% vs. 85% in 2009) say yes. Furthermore, at least one-half of stakeholders in all regions strongly agree, except East Asia where only one in four strongly agree that the private sector is the key to growth. Endorsement for the

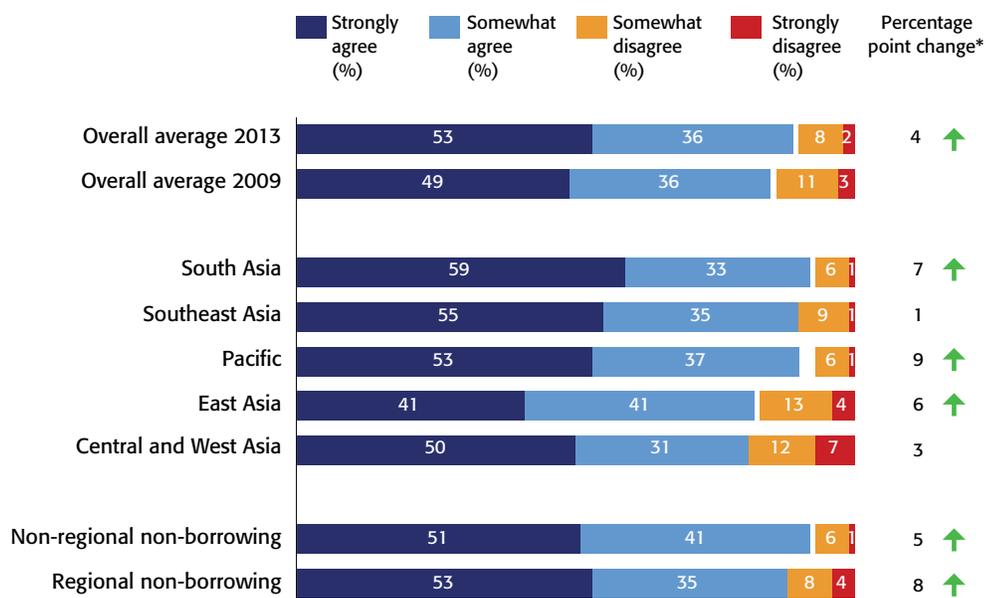
role of the private sector has strengthened significantly since 2009 in South Asia, East Asia, and the Pacific, as well as in non-borrowing countries.

ADB's perceived performance on enhancing private sector development

Stakeholders were also asked whether ADB is playing a useful role in enhancing private sector development. Nearly 8 in 10 (77%, up from 73% in 2009) stakeholders agree. Media and government stakeholders are more inclined to agree than most other groups. Private sector stakeholders themselves are among the most inclined to disagree that ADB is playing a useful role here (25% disagree). Non-borrowing governments are more impressed than borrowing government stakeholders (88% vs. 76%). There is variation across regions: non-borrowing countries, the Pacific, and Southeast Asia tend to agree more than Central and West Asia and South Asia.

Private Sector Is Key to Future Growth

By Region, 2012



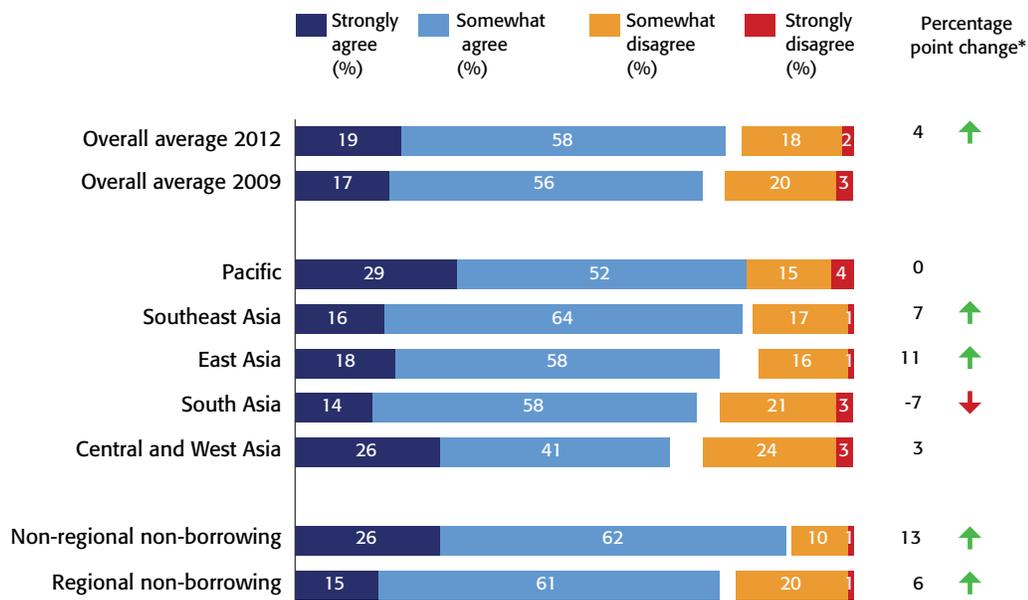
*Refers to a change in percentage points for “Strongly agree” and “Somewhat agree” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 43, Q. 6e

ADB Plays a Useful Role in Enhancing the Private Sector

By Region, 2012



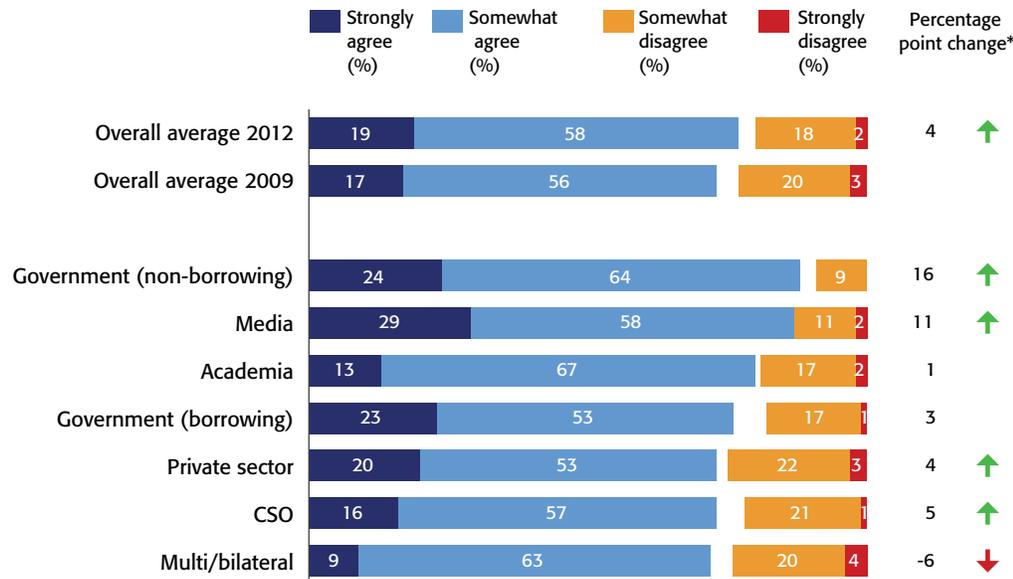
*Refers to a change in percentage points for “Strongly agree” and “Somewhat agree” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 44, Q. 23b

ADB Plays a Useful Role in Enhancing the Private Sector

By Stakeholder Group, 2012



*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 45, Q. 23b

ADB's perceived performance on private sector outreach

ADB is committed to increasing its support for private sector development. Accordingly, ADB wishes to understand stakeholder views about its outreach and engagement with the private sector. When asked whether they agree that ADB is doing enough to reach out and build partnerships with the private sector, three-quarters (74%) of stakeholders either strongly (20%) or somewhat (54%) agree. While government and media stakeholders tend to agree (79% and 80%, respectively) more than others, the very relevant private sector is less certain—only 66% agree, while 31% disagree. However, the private sector's views have improved since 2009 when 38% disagreed that ADB was doing enough to build partnerships. Opinions are quite consistent across regions and across other variables. Overall, there has been little change since 2009 in views of ADB's partnering with the private sector.

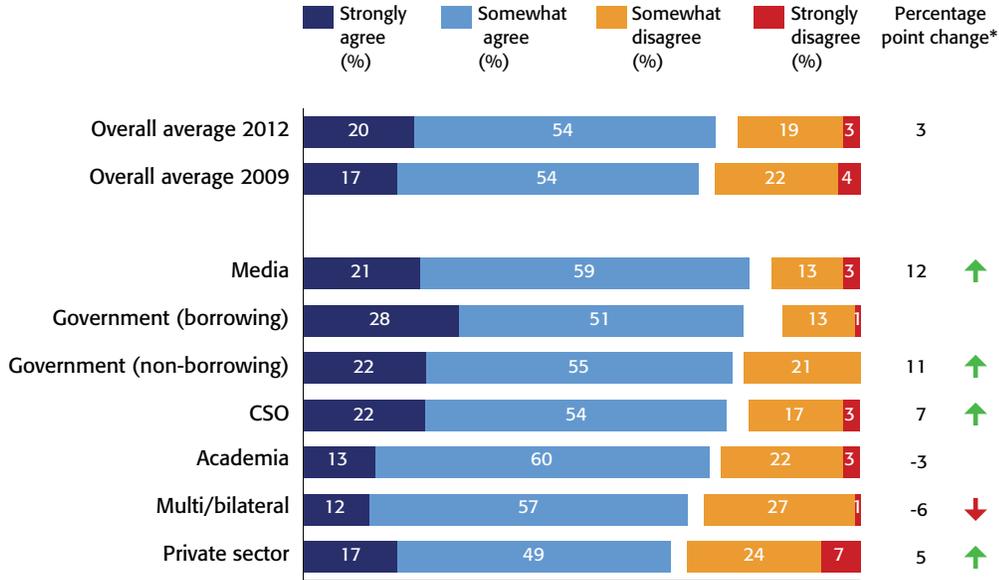
ADB's perceived performance on mobilizing resources to develop the private sector

One of ADB's goals in Strategy 2020 is to expand its work with the private sector to increase economic growth in the region. While 7 in 10 stakeholders think this is a current high or moderate ADB priority, it ranks fourth out of five in terms of performance and is the only driver on which performance has not improved since 2009. Four in ten (41%) stakeholders think ADB is doing an excellent (7%) or good (34%) job in this area, but 13% think performance is poor.

Government and media stakeholders are more positive than those in the private sector. The private sector is especially critical—24% say ADB is doing a poor job. Stakeholders in East Asia and South Asia are also less impressed than those in other regions. Typically, clients are more supportive than non-clients. Since 2009, overall perceptions of performance on this point have remained stable, but stakeholders in Central and West Asia and non-regional non-borrowing countries are now more positive compared to 2009.

ADB Is Doing Enough to Build Partnerships with the Private Sector

By Stakeholder Group, 2012

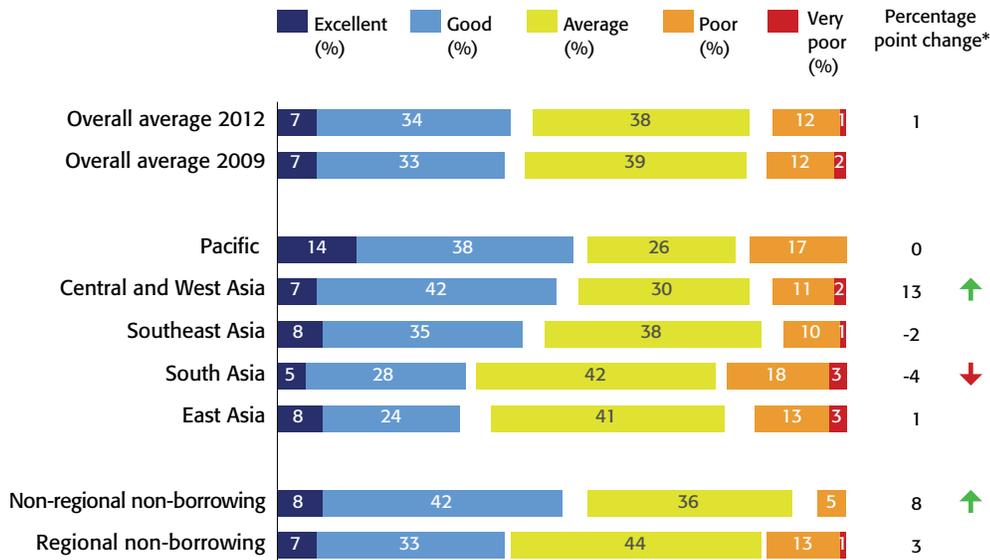


*Refers to a change in percentage points for “Strongly agree” and “Somewhat agree” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater. The white space in this chart represents “Refused” and “DK/NA.”

Fig. 46, Q. 21

Mobilizing Resources to Develop the Private Sector

Performance Rating, by Region 2012

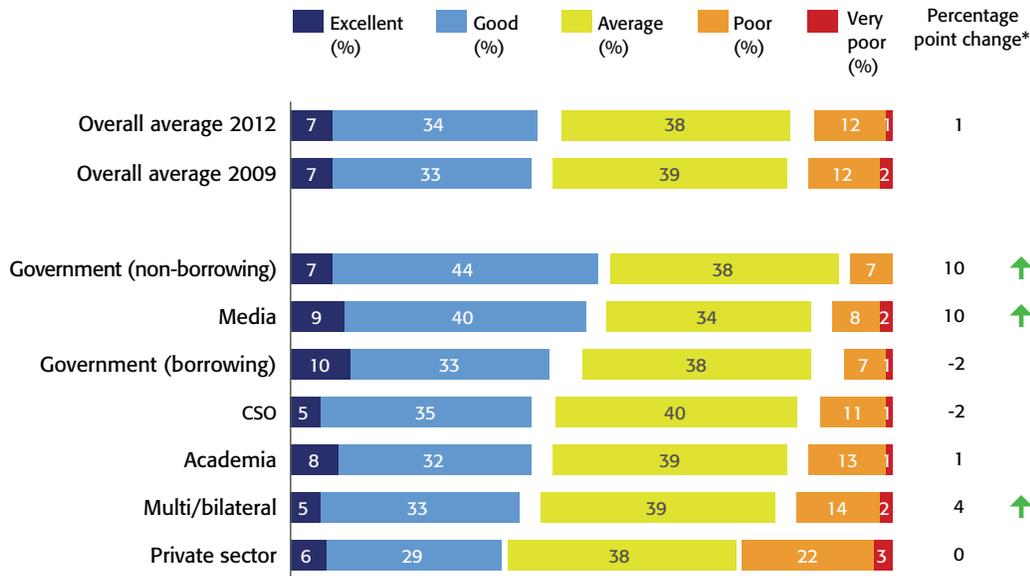


*Refers to a change in percentage points for “Excellent” and “Good” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater. The white space in this chart represents “Refused” and “DK/NA.”

Fig. 47, Q. 20i

Mobilizing Resources to Develop the Private Sector

Performance Rating, by Stakeholder Group, 2012



*Refers to a change in percentage points for “Excellent” and “Good” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater. The white space in this chart represents “Refused” and “DK/NA.”

Fig. 48, Q. 20i

Stakeholders’ advice to help ADB promote private sector development

Respondents were asked to choose two areas—from a list of five—that ADB should focus on to best promote private sector development in their country. The most popular, by far, is that ADB provide funds to develop infrastructure projects. This area was selected by nearly half (48%) of respondents and is the top choice of five of the seven stakeholder groups (all but CSOs and media) and across five of the six regions (all but East Asia).

The next three most popular areas were each selected by approximately 38% of respondents: (i) providing funds for public–private partnerships; (ii) providing credit to financial institutions to support small and medium-sized enterprises (SMEs); and (iii) supporting private sector projects by providing loans, equity, and guarantees. Financial support for SMEs is the top choice of media and CSO stakeholders. Funds for public–private partnerships rank the same as infrastructure funding among multi/bilateral organizations. It is the second choice for both

borrowing and non-borrowing governments, and for respondents in the non-borrowing countries, Central and West Asia, and South Asia.

The least frequently selected option as a preferred focus for ADB—and the only one that does not have a funding dimension to it—is to provide policy advice to governments, chosen by less than one in three stakeholders. However, it is a relatively popular choice among CSOs and stakeholders in East Asia.

In terms of stakeholder groups, government is most in favor of infrastructure funding while the private sector is most likely to support loans, equity, and guarantees for private sector projects by ADB. CSOs tend to prefer different areas of focus; namely, credit to financial institutions for SMEs and providing policy advice to governments.

Compared with 2009, support is down for credit support for SMEs from 45% in 2009 to 38% in 2012. This area experienced flat or declining support across all stakeholder groups.

ADB Perceptions Survey 2012

Areas on which ADB Should Focus to Develop the Private Sector

Prompted, Total Mentions, by Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	Pacific (%)	South Asia (%)	Southeast Asia (%)	Non-regional Non-borrowing (%)	Regional Non-borrowing (%)
Providing funds to develop infrastructure projects	48	51	50 ↑	20 ↓	56	54 ↓	51 ↓	45	51 ↓
Providing funds for public-private partnerships	39	37	46	34 ↑	35 ↑	43 ↓	34	37	39
Providing credit to financial institutions to support small and medium-sized enterprises	38 ↓	45	31 ↓	45	42 ↓	42	36 ↓	41 ↓	31 ↓
Supporting private sector projects by providing loans, equity, and guarantees	37	37	39	48 ↓	37	34	34	34 ↓	40 ↑
Providing policy advice to governments	29	26	21	49 ↑	27	20	37 ↑	30 ↑	30

Top mention in region

↑ Increase of 4 percentage points or more from 2009 to 2012

↓ Decrease of 4 percentage points or more from 2009 to 2012

Fig. 49, Q. 22

Areas on which ADB Should Focus to Develop the Private Sector

Prompted, Total Mentions, by Stakeholder Group, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Government (non-borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Providing funds to develop infrastructure projects	48	51	50 ↓	36 ↓	53 ↑	55	47 ↓	49 ↓	51
Providing funds for public-private partnerships	39	37	35 ↑	34	45	46 ↑	31	49 ↑	33
Providing credit to financial institutions to support small and medium-sized enterprises	38 ↓	45	42 ↓	50	32 ↓	22 ↓	52	27 ↓	38 ↓
Supporting private sector projects by providing loans, equity, and guarantees	37	37	41 ↑	25 ↓	31 ↓	40	46 ↑	32 ↑	49
Providing policy advice to governments	29	26	23 ↓	43 ↑	30 ↑	28	20 ↓	37 ↑	22

Top mention in stakeholder group

↑ Increase of 4 percentage points or more from 2009 to 2012

↓ Decrease of 4 percentage points or more from 2009 to 2012

Fig. 50, Q. 22

Section 4: Perceptions of ADB's Communications



While a majority of stakeholders think that ADB communicates its mission and activities well, only 21% think ADB does it very well. A small majority find that ADB is responsive to information requests at least most of the time, but 20% remain less satisfied. Stakeholders are more likely to hear about ADB in print media than on radio or television: radio and TV exposure has declined. Stakeholders find ADB's website increasingly easy to use. Readership of ADB's publications remains high and, importantly, they continue to influence a strong majority's thinking about development issues when read.

Quality of ADB's Communications and Responsiveness

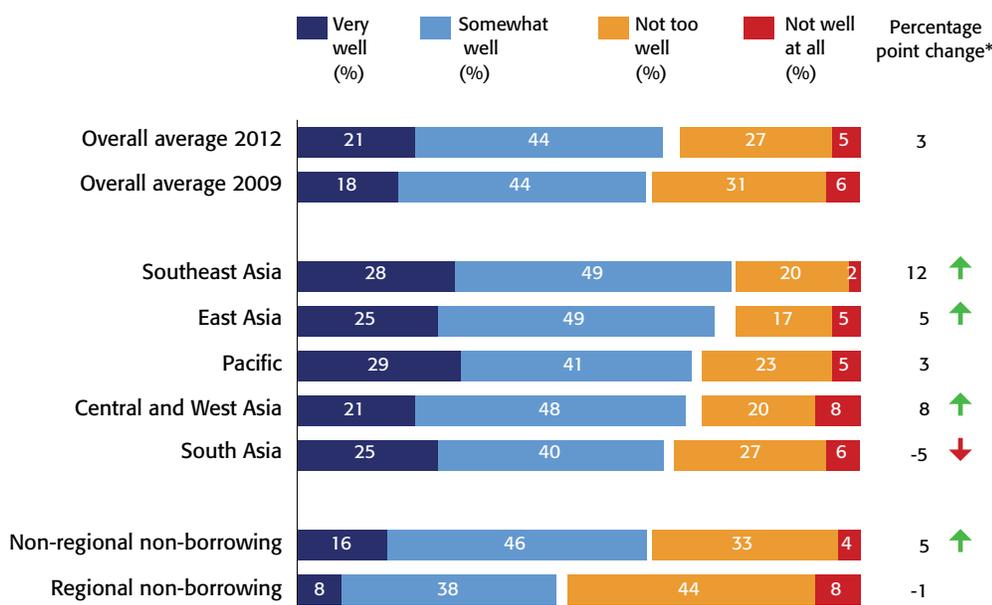
All stakeholders were asked to rate how well ADB communicates its mission and activities to them. A majority (65%) say that ADB communicates either very well (21%) or somewhat well (44%), but one-third think its communications are not satisfactory in this area. Government stakeholders, especially those in borrowing countries (86%), are much more satisfied than others. CSOs and media stakeholders are the least positive. There is little difference across DMC regions, except to note that stakeholders in Southeast Asia tend more than

others to think highly of ADB's communications. Non-regional non-borrowing countries are more positive than regional non-borrowing countries.

While views, overall, have not changed much since 2009, ratings in Southeast Asia and Central and West Asia have improved significantly (percentage saying very good or somewhat good is up 12 percentage points and 8 percentage points, respectively) while those in South Asia have declined (down 5 percentage points).

ADB's Performance in Communicating Its Mission and Activities

By Region, 2012



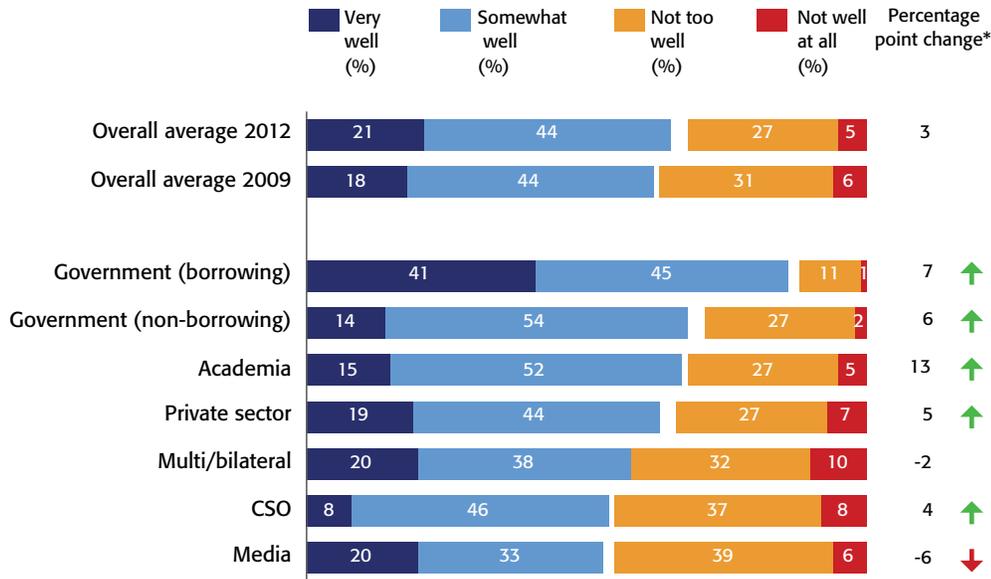
*Refers to a change in percentage points for "Very well" and "Somewhat well" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 51, Q.24

ADB’s Performance in Communicating Its Mission and Activities

By Stakeholder Group, 2012



*Refers to a change in percentage points for “Very well” and “Somewhat well” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 52, Q. 24

ADB’s Responsiveness to Requests for Information

Being responsive to inquiries and requests for information is an integral part of stakeholder communications and engagement. Six in ten (64%) stakeholders find that ADB is responsive either always (21%) or most of the time (43%). Non-borrowing governments are, by far, the most satisfied (82%), while CSOs and those in academia are least satisfied—only 50% of CSOs are satisfied either always or most of the time, a large drop from 2009 (down 12 percentage points).

Stakeholders in Southeast Asia are more satisfied than others (69% say that ADB is responsive either always or

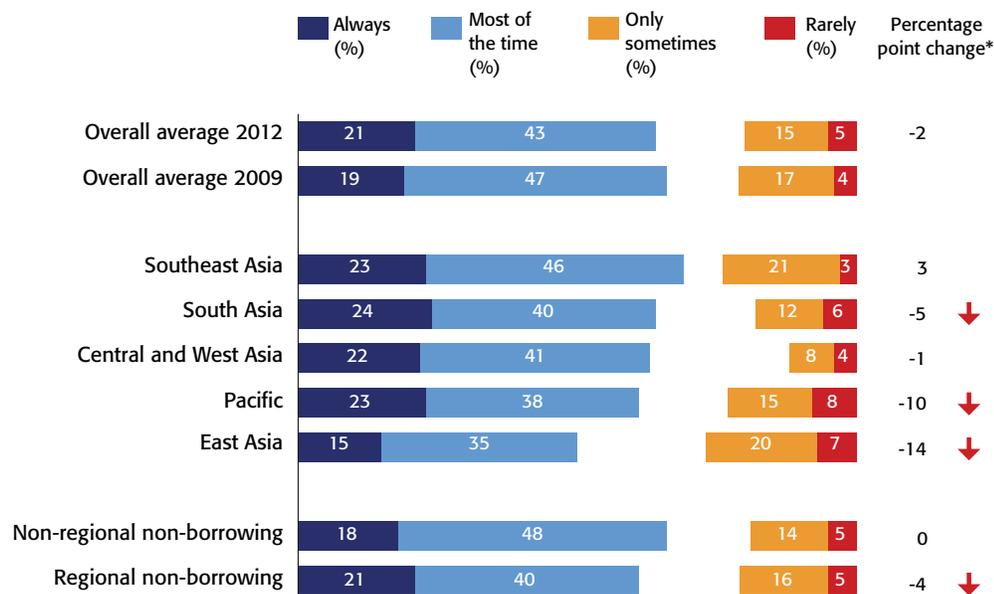
most of the time). Except for East Asia, 6 in 10 or more stakeholders in the remaining regions are also satisfied with the level of service. Stakeholders in East Asia are less positive—only half say that ADB is responsive either always or most of the time.

Since 2009, perceived performance is up significantly among non-borrowing governments, but down for borrowing governments. Satisfaction in East Asia has also dropped significantly since 2009 (down 14 percentage points). Moreover, ratings have fallen in the Pacific and South Asia (down 10 and 5 percentage points, respectively).

Section 4: Perceptions of ADB's Communications

ADB Is Responsive to Information Requests

By Region, 2012



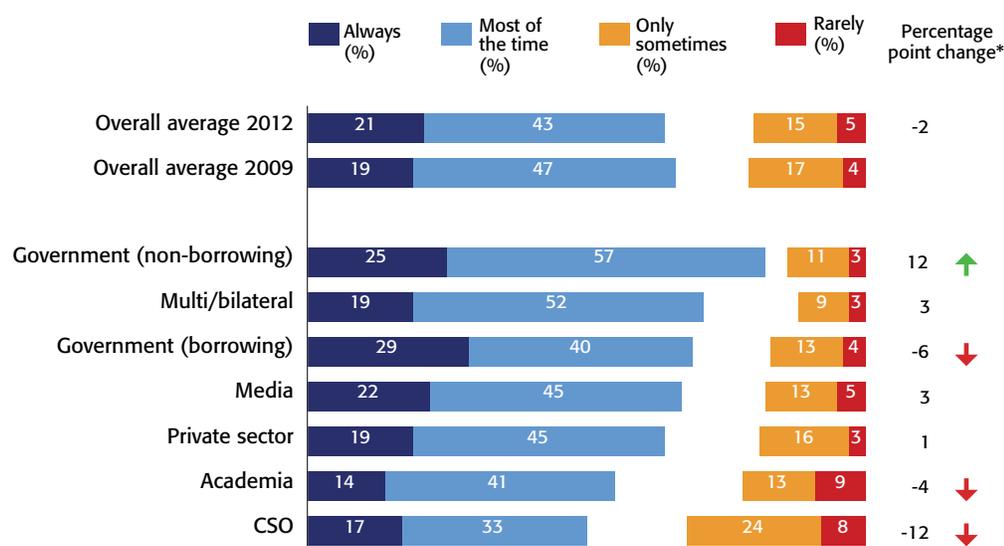
*Refers to a change in percentage points for "Always" and "Most of the time" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 53, Q. 30

ADB Is Responsive to Information Requests

By Stakeholder Group, 2012



*Refers to a change in percentage points for "Always" and "Most of the time" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 54, Q. 30

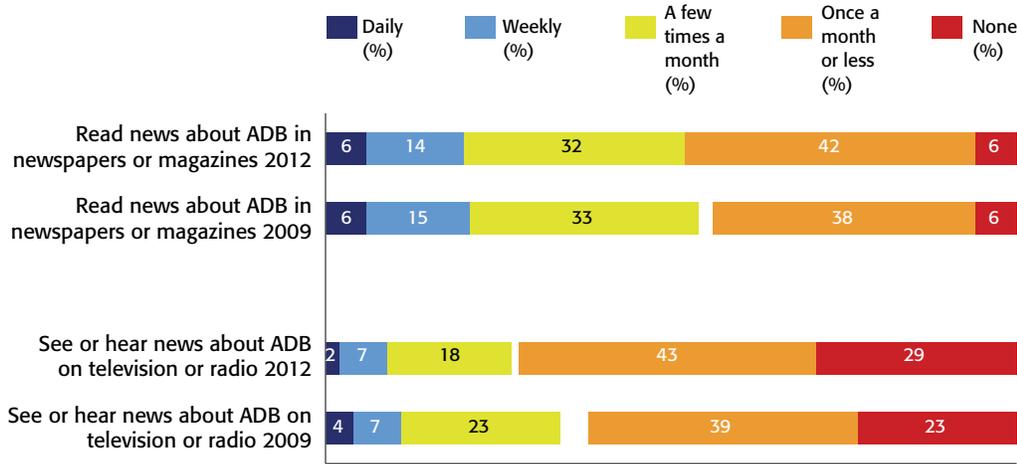
Sources of Information

ADB uses various methods and channels to communicate with stakeholders. Respondents are more likely to see news or hear about ADB in newspapers or magazines. Over half of the respondents (52%) say this occurs at least a few times a month, compared to TV or radio where 27% say at least a few times a month).

Reported frequency of TV or radio as a source has dropped since 2009 overall and in the Pacific, South Asia, and East Asia. Stakeholders in a number of regions obtained news about ADB less frequently in newspapers or magazines than in 2009; overall, the decrease is not significant.

Frequency of Accessing Information about ADB in Different Media

Average of All Countries, 2012



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

Fig. 55, Q. 26a–b

Frequency of Accessing Information about ADB in Different Media

By Region,* 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)
Read news about ADB in newspapers or magazines	52	54	51 ↓	48 ↓	54 ↓	61 ↑	52 ↓
See or hear news about ADB on television or radio	27 ↓	34	36	25 ↓	33 ↓	35	34 ↓

↑ Increase of 4 percentage points or more from 2009 to 2012

↓ Decrease of 4 percentage points or more from 2009 to 2012

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

Fig. 56, Q. 26a–b

ADB Publications: Readership and Influence on Thinking

Readership

A strong majority (83%) of stakeholders have read ADB publications in the past 3 years. This is unchanged from 2009, but continues to be well above the 73% reported readership level in 2006.

There is not much variability across stakeholder groups, except that academics are more likely to have read ADB publications. Clients are also more inclined than non-clients to have done so (90% of clients have read publications). Regionally, stakeholder readership is higher in Southeast Asia (88%) and Central and West Asia (85%), but lower in the Pacific (72%).

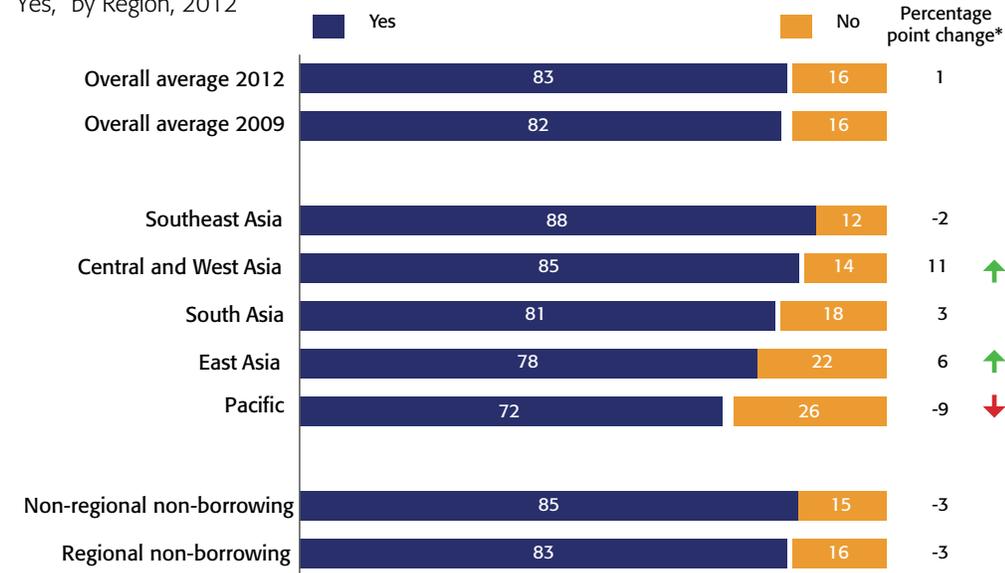
Since 2009, readership has increased significantly in Central and West Asia and East Asia, but has dropped in the Pacific.

Influence on thinking

Stakeholders who have read ADB publications recently were asked to rate the influence that these publications have on their thinking about development issues. Seven in ten stakeholders say that ADB's publications have great (17%) or moderate (56%) influence on their thinking. Respondents in East Asia are more likely than others to be at least moderately influenced, and those in the Pacific are especially inclined to feel a great deal of influence on their thinking. Also, private sector and government stakeholders in borrowing countries tend to be more influenced than others. While there has been little change since 2009 overall, private sector, multi/bilateral, and non-borrowing government respondents are now more influenced than in 2009, while CSOs find the publications to be less influential on their thinking about development issues.

Have Read ADB Publications in Past Three Years

"Yes," by Region, 2012

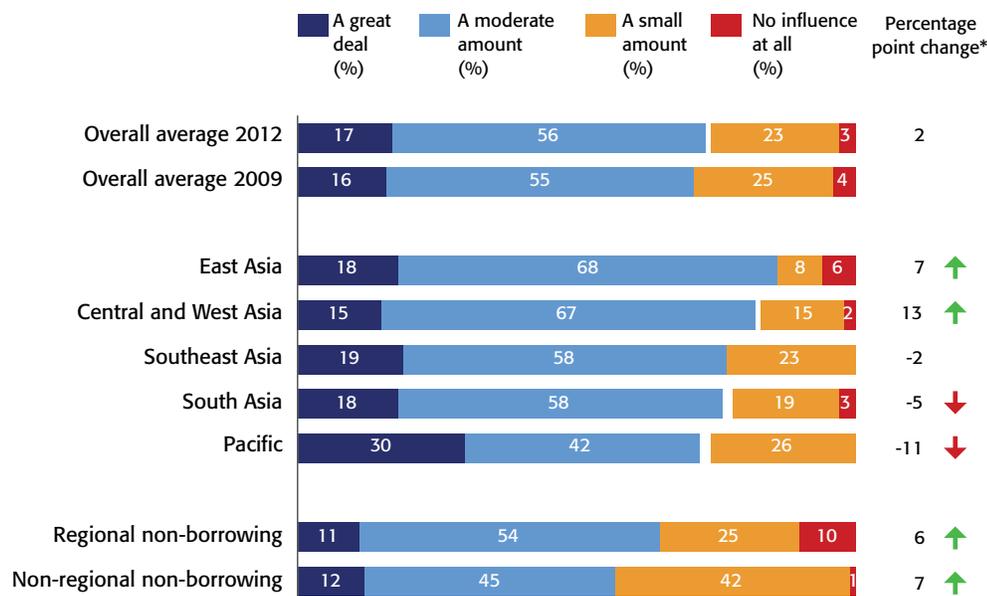


*Refers to a change in percentage points for "Yes" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

Fig. 57, Q. 31

Influence of ADB Publications on Thinking about Development Issues

By Region, 2012



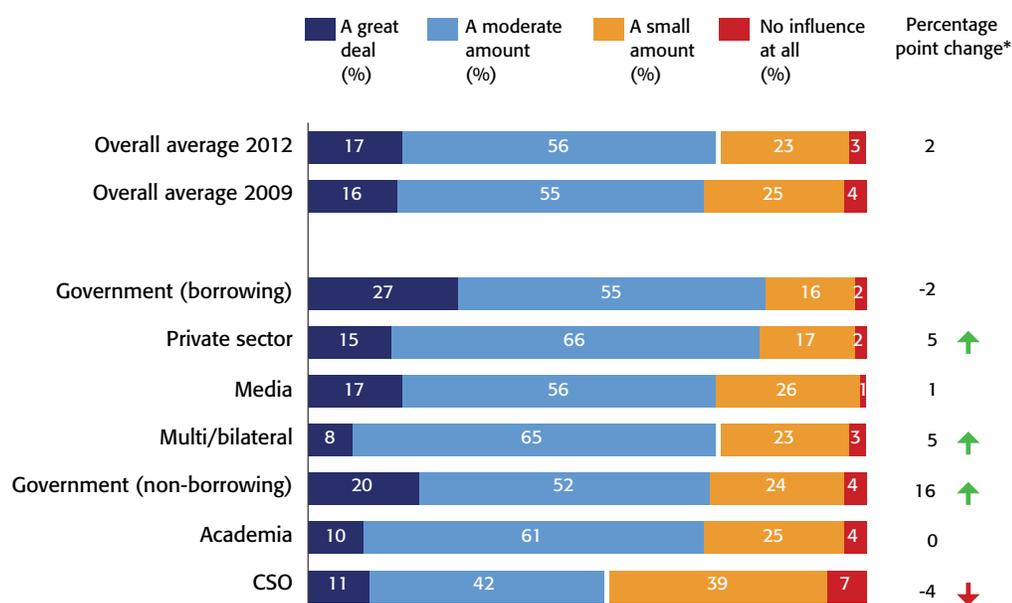
*Refers to a change in percentage points for "A great deal" and "A moderate amount" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 58, Q. 32

Influence of ADB Publications on Thinking about Development Issues

By Stakeholder Group, 2012



*Refers to a change in percentage points for "A great deal" and "A moderate amount" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 59, Q. 32

Use of ADB's Website

When asked how often they use ADB's website, about 4 in 10 (38%) stakeholders say they do so at least a few times per month. Both borrowing and non-borrowing government stakeholders are the most frequent, using the website at least a few times a month (52% and 51%, respectively), while multi/bilateral organizations and the private sector are the least frequent (26% and 31%, respectively).

Since 2009, the frequency of use is down from 43% to 38% of respondents, saying they use ADB's website at least a few times per month. The biggest decline is observed among the private sector respondents (down 12 percentage points).

Reasons for Visiting ADB's Website

Stakeholders who say they visit the website were asked of their primary reason for doing so with a prompted list of seven possible reasons. A majority of respondents (54%) say that they visit the site to learn

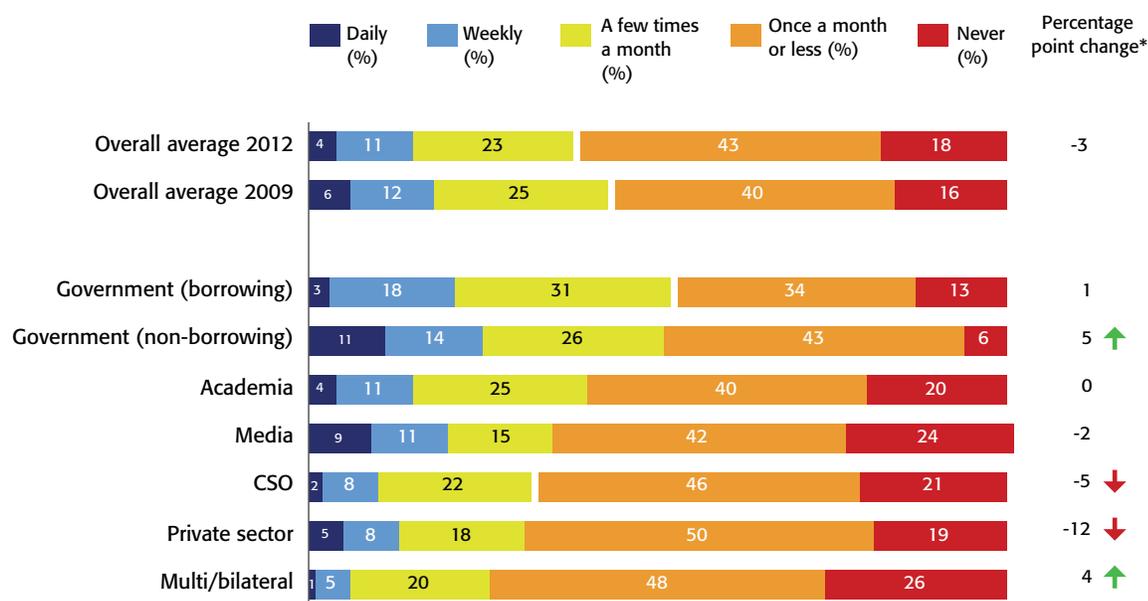
about ADB projects. Other important reasons include finding economic research reports and statistics (46%) and country specific information (38%). Learning about ADB's financial products (14%) and finding business and employment opportunities at ADB (13%) are relatively rare reasons for visiting ADB's website.

Media and government stakeholders are more inclined than others to visit the site to read press releases. Academics tend more than others to look for research reports and for publications, while the private sector expresses relatively more interest than others in ADB's financial products.

Since 2009, there are no significant changes, overall, in why stakeholders visit the site. However, learning about ADB projects is less important across several regions, including Southeast Asia, the Pacific, and non-borrowing countries. Those in East Asia are more interested in several areas of the site than they were in 2009, namely, information about ADB projects, country-specific information, and information about ADB's financial products.

Frequency of Using ADB's Website

By Stakeholder Group, 2012



*Refers to a change in percentage points for "Daily" and "Weekly" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 60, Q. 26c

Primary Reason for Visiting ADB’s Website

By Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)	Regional non-borrowing (%)	Non-regional non-borrowing (%)
Learn about ADB projects	54	55	52	64 ↑	56 ↑	57 ↓	47 ↓	51 ↓	49 ↓
Find economic research reports and statistics	46	46	36	47	41 ↑	56 ↑	40	50	43 ↓
Find country-specific information	38	40	34	30 ↑	39 ↓	39	43	34	46 ↓
Find publications	31	33	37 ↑	25	24 ↓	42	31	26	28 ↓
Read press releases	21	23	24	25 ↓	13	24	25 ↑	26 ↓	18 ↓
Learn about ADB’s financial products	14	16	14 ↓	24 ↑	10 ↓	21	15	6	12
Find business and employment opportunities	13	15	13 ↓	14	15	12	16	10	11

- Top reason in region
- ↑ Increase of 4 percentage points or more from 2009 to 2012
- ↓ Decrease of 4 percentage points or more from 2009 to 2012

Fig. 61, Q. 27

Website Experience: Ease of Use and Finding Information

Ease of use

A strong majority of ADB website users (88%) find the site very easy (26%) or somewhat easy (62%) to use. All groups and regions find the site readily navigable and differences among them are insignificant. Since 2009, perceptions of ease of use have improved significantly across four of the seven stakeholder groups.

Finding information

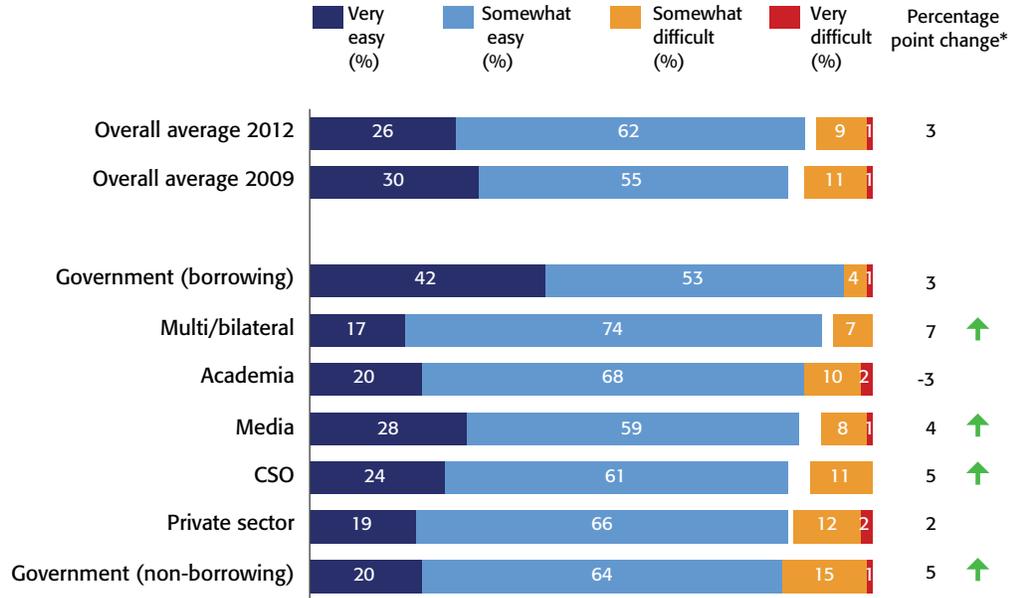
Among ADB website visitors, a strong majority (73%) say that the site provides the information sought either always (12%) or most of the time (61%). Although there are no significant differences between groups, satisfaction

is marginally higher among borrowing government stakeholders (76%). CSOs are the least satisfied but, even among them, two-thirds find what they need most of the time. Differences exist across regions: Central and West Asia stakeholders tend more than others to find what they are looking for, with 88% of stakeholders saying they get what they need at least most of the time.

Changes since 2009 are mixed. Although there are no overall shifts, satisfaction in finding information has improved among academics, media, and multi/bilaterals, but worsened somewhat among the private sector and government stakeholders.

ADB's Website: Ease of Use

Website Users, by Stakeholder Group, 2012



Only asked of website users (n=747)

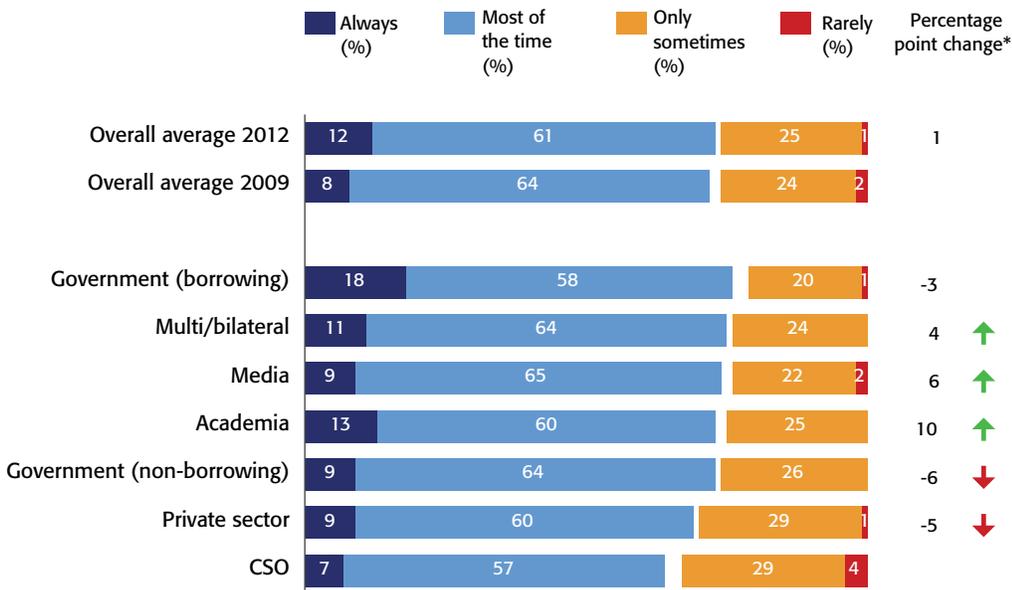
*Refers to a change in percentage points for "Very easy" and "Somewhat easy" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 62, Q. 29

ADB's Website: Provides Needed Information

Website Users, by Stakeholder Group, 2012



Only asked of website users (n=747)

*Refers to a change in percentage points for "Always" and "Most of the time" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 63, Q. 28



Section 5: Regional Development Issues

This section presents results related to the context in which ADB operates in the Asia and Pacific region. In terms of the foreign development assistance provided to the region overall, a strong majority of stakeholders believe that enough money is spent, but fewer are satisfied that the money is well spent. Likewise, most believe that assistance is allocated effectively to countries, while fewer think that it is used effectively, though improvements are perceived in both allocation and use compared to 2009. Stakeholders remain largely skeptical about whether enough is being done to achieve their country's Millennium Development Goals. Corruption is considered to be an ongoing, serious challenge in the region—stakeholders see it as the most serious threat to development and a significant cause of waste of foreign assistance—though they believe that ADB generally takes sufficient steps to prevent corruption in its projects. Stakeholders see regional economic integration as a continuing opportunity for their country's economic growth.

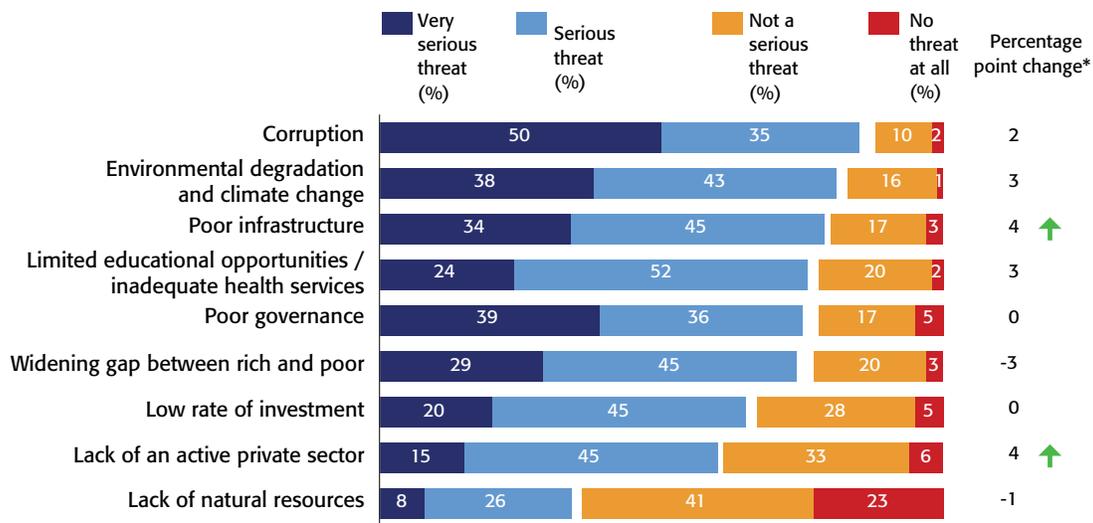
Threats to Economic and Social Development

Stakeholders in DMCs were given a list of nine potential issues and asked to rate each in terms of the seriousness of the threat to their country's economic and social development. Corruption remains, by far, the most serious

issue with half of DMC stakeholders (50%) thinking that corruption is very serious. Other very serious threats include poor governance with 39% of stakeholders rating it as very serious, followed by environmental degradation and climate change (38%), poor infrastructure (34%), and the widening gap between rich and poor (29%).

Threats to Country's Economic and Social Development

Average of DMCs, 2012



Only asked in borrowing countries ($n=642$)

*Refers to a change in percentage points for "Very serious threat" and "Serious threat" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 64, Q. 5

Corruption is of greatest concern in Southeast Asia, with 60% saying it is very serious, followed by 51% in Central and West Asia. Among the media, 66% say it is very serious, followed by 57% among those who are not ADB clients. Government stakeholders are the least inclined to view corruption as serious (35% say it is very serious). Poor

governance is of special concern to media stakeholders (57%). Environment and climate change is more of a concern among media (52%) and CSO (48%) stakeholders, as well as in Southeast Asia (47%). Government stakeholders are the least concerned about the environment (only 31% say it is very serious).

Threats to Country's Economic and Social Development

Very Serious (1),** DMCs, by Region, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Central and West Asia (%)	East Asia (%)	South Asia (%)	Southeast Asia (%)	Pacific (%)
Corruption	50	48	51	42 ↑	47	60 ↑	37
Poor governance	39	38	44 ↑	29 ↑	37 ↓	43	40
Environmental degradation and climate change	38	37	23	45	38 ↑	47	31 ↓
Poor infrastructure	34	34	30 ↑	26 ↑	36	36 ↓	37
Widening gap between rich and poor	29	32	28	30	25 ↓	34 ↓	33 ↑
Limited educational opportunities / inadequate health services	24 ↓	28	32 ↓	22	13 ↓	29	35 ↓
Low rate of investment	20 ↑	16	34 ↑	18 ↑	20 ↑	14	18 ↓
Lack of an active private sector	15	13	25 ↑	14 ↑	16 ↑	7 ↓	24
Lack of natural resources	8	8	4 ↓	14	8	10	7 ↓

 Highest rating in region

 Increase of 4 percentage points or more from 2009 to 2012

 Decrease of 4 percentage points or more from 2009 to 2012

Only asked in borrowing countries (n=624)

*1 reflects those saying "A very serious threat," that is, 1 on a 4-point response scale.

Fig. 65, Q. 5

Threats to Country's Economic and Social Development

Very Serious (1),** DMCS, by Stakeholder Group, 2012

	Overall Average 2012 (%)	Overall Average 2009 (%)	Academia (%)	CSO (%)	Government (borrowing) (%)	Media (%)	Multi/bilateral (%)	Private sector (%)
Corruption	50	48	60 ↑	58	35	66 ↑	62 ↑	47
Poor governance	39	38	45 ↑	49	23	57 ↑	46 ↑	40
Environmental degradation and climate change	38	37	40	48 ↓	31	52 ↑	39	34
Poor infrastructure	34	34	44 ↑	32	29	49	33	33
Widening gap between rich and poor	29	32	22 ↓	49	20	44	34	23 ↓
Limited educational opportunities / inadequate health services	24 ↓	28	20 ↓	20 ↓	21	38	32	21 ↓
Low rate of investment	20 ↑	16	26 ↑	24 ↑	17	17 ↓	19 ↑	25 ↑
Lack of an active private sector	15	13	13 ↑	16	12	22 ↑	18 ↑	17
Lack of natural resources	8	8	8 ↓	15 ↑	9	11 ↑	3 ↓	5 ↓

Most serious threat within stakeholder group

↑ Increase of 4 percentage points or more from 2009 to 2012

↓ Decrease of 4 percentage points or more from 2009 to 2012

Only asked in borrowing countries (n=624)

*1 reflects those saying "A very serious threat," that is, 1 on a 4-point response scale.

Fig. 66, Q. 5

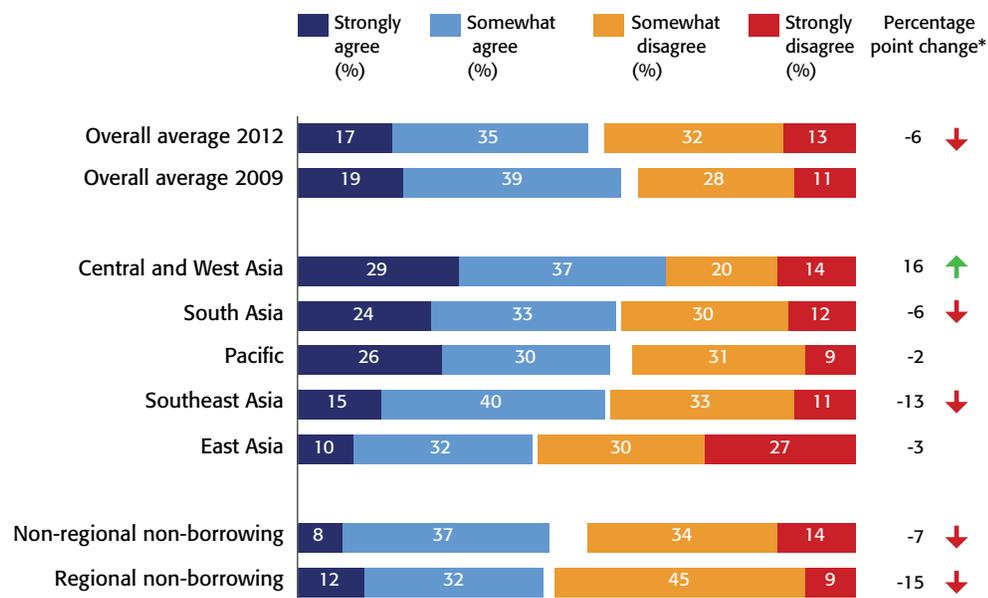
While the ranking of the top five very serious threats in 2012 is consistent with 2009, stakeholders tend to view the low rate of investment in their country as slightly more serious than in 2009.

Stakeholders think that deficiencies related to the investment rate, natural resources, and private sector activity are among the least serious issues; however, concern about the health of the private sector is especially acute in Central and West Asia and the Pacific, as well as among media stakeholders.

Further emphasizing the importance of corruption as a challenge in the region, about half of stakeholders (52%) agree that corruption causes most of the foreign assistance to their country to be wasted. A majority of government stakeholders disagree with this, but majorities—albeit slim ones—in all other groups agree. Respondents in Central and West Asia are more inclined than others to think foreign development assistance goes to waste because of corruption.

Because of Corruption, Foreign Development Assistance Is Mostly Wasted

By Region, 2012



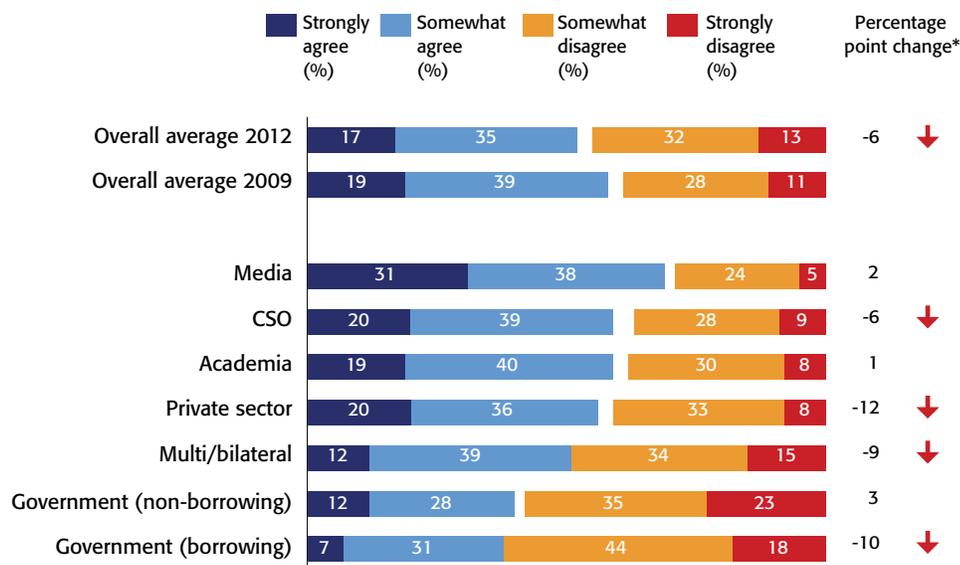
*Refers to a change in percentage points for “Strongly agree” and “Somewhat agree” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 67, Q. 6d

Because of Corruption, Foreign Development Assistance Is Mostly Wasted

By Stakeholder Group, 2012



*Refers to a change in percentage points for “Strongly agree” and “Somewhat agree” between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig 68, Q. 6d

Fighting Corruption

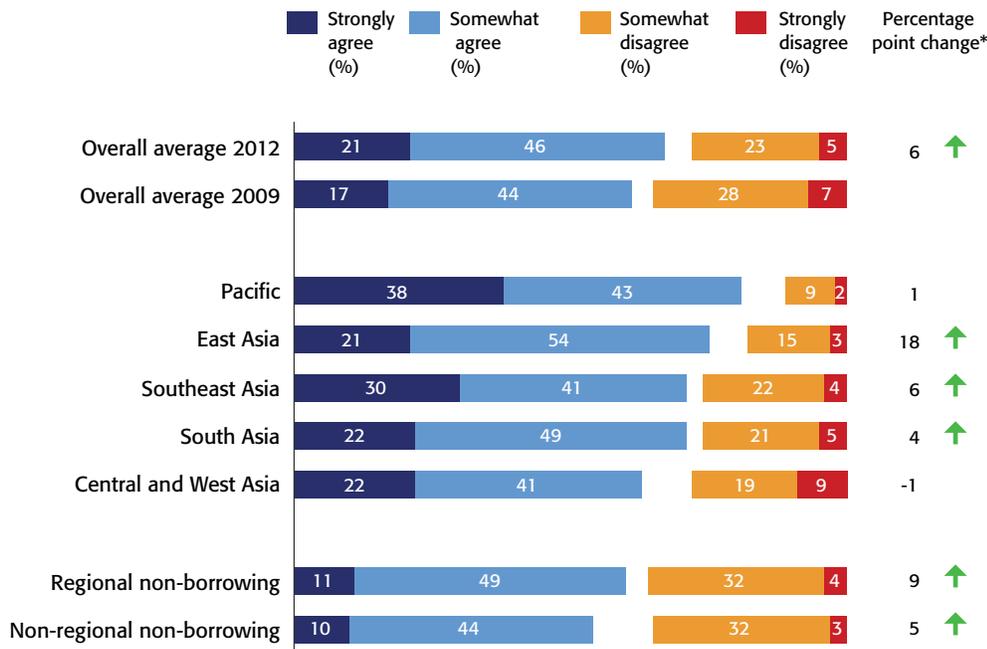
With stakeholders continuing to rate corruption as the most serious threat facing their country's economic and social development, ADB considers fighting corruption a very high priority.

When asked whether they agree or disagree that ADB takes sufficient steps to prevent corruption in their country, two-thirds of all respondents (67%) say that they agree, while 3 in 10 (28%) disagree.

Borrowing government stakeholders are especially inclined to agree (85%), while CSOs are far more inclined than other groups to disagree (44% disagree). By region, respondents in the Pacific are somewhat more inclined to agree that ADB does enough, but otherwise there is fair consistency across borrowing regions. Clients agree more than non-clients (75% vs. 59%) that ADB is doing a good job to prevent corruption in its projects.

ADB Takes Sufficient Steps to Prevent Corruption in Its Projects

By Region, 2012



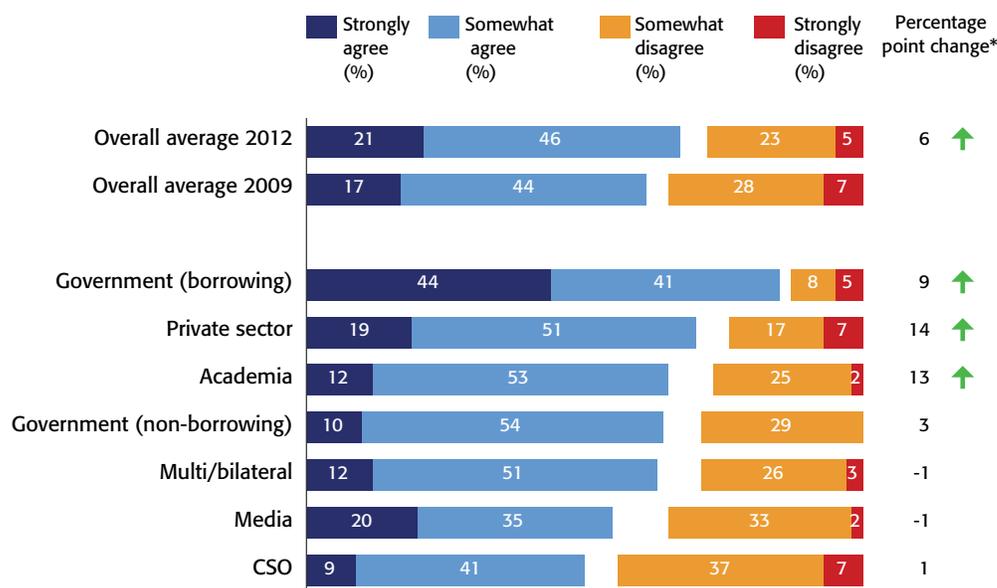
*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 69, Q. 23d

ADB Takes Sufficient Steps to Prevent Corruption in Its Projects

By Stakeholder Group, 2012



*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater. The white space in this chart represents "Refused" and "DK/NA."

Fig. 70, Q. 23d

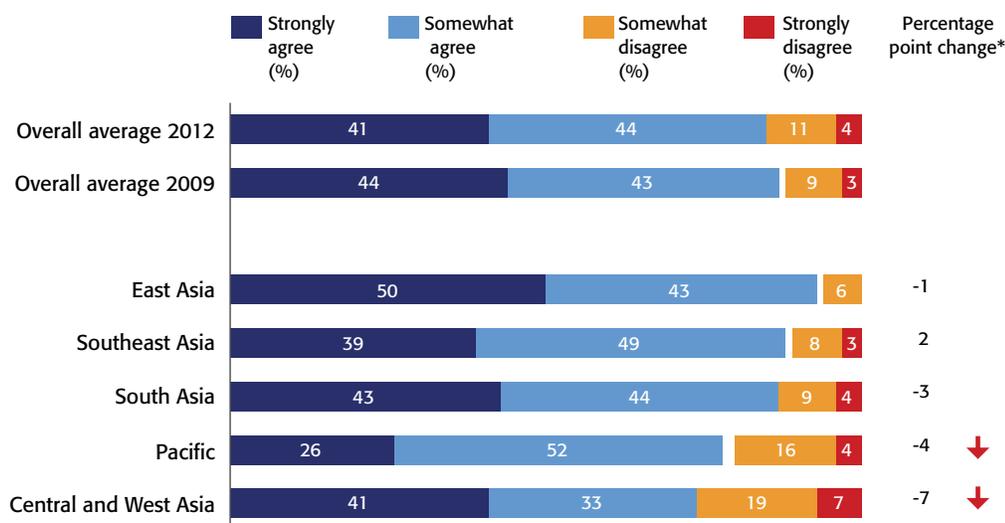
Government Responsibility for Development

A very strong majority (85%) of stakeholders in developing countries either strongly (41%) or somewhat (44%) agree that their national government supports and takes responsibility for development in the country. Not surprisingly, government stakeholders are most inclined to agree that this is the case (93% agree), but at least three-

quarters of respondents in each of the other groups also agree. Stakeholders in East Asia are more inclined than others to agree that their government takes responsibility, while those in Central and West Asia are less inclined to do so; nevertheless, 74% strongly or somewhat agree. Overall, there has been no significant change since 2009.

The Government Supports and Takes Responsibility for Development Efforts

By Region, 2012



Only asked of ADB clients in borrowing countries (n=642)

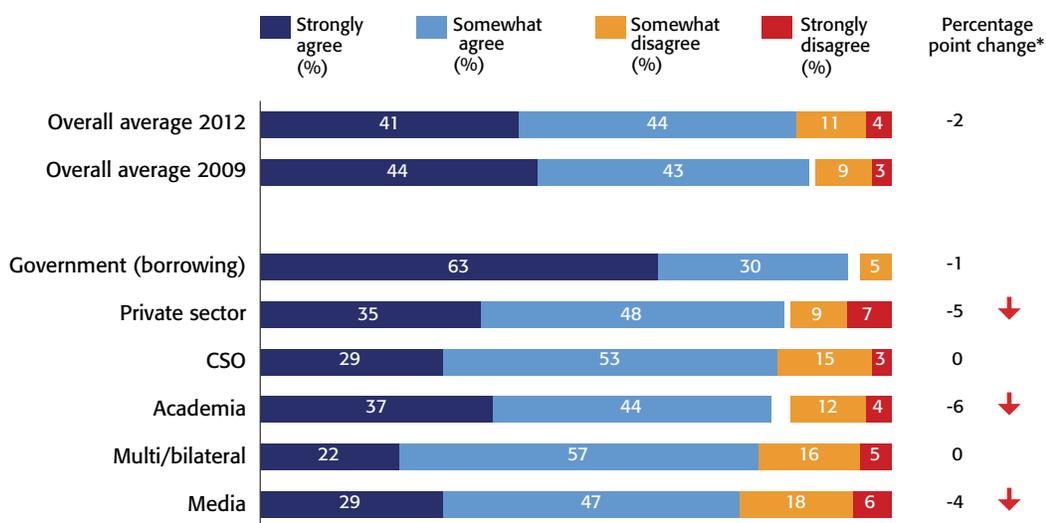
*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 71, Q. 6a

The Government Supports and Takes Responsibility for Development Efforts

By Stakeholder Group, 2012



Only asked of ADB clients in borrowing countries (n=642)

*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 72, Q. 6a

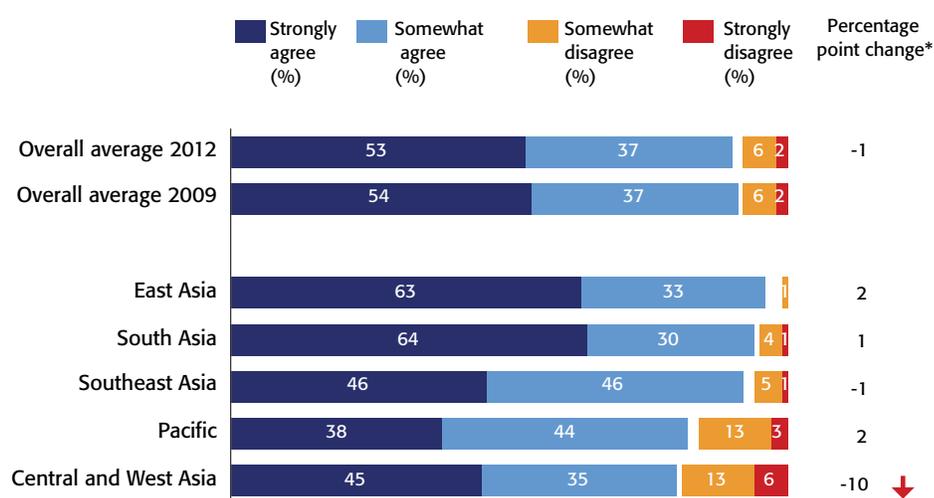
Regional Economic Integration

As in 2009, stakeholders also highly agree that regional economic integration will foster their country's economic expansion and growth (90% agree vs. 91% in 2009). Stakeholders across all regions and stakeholder groups

agree with this notion, with those in South Asia and East Asia more inclined to do so and those in Central and West Asia somewhat less inclined. Even so, 80% of respondents there agree. The level of agreement varies little by stakeholder group.

The National Economy Is More Likely to Expand and Grow if We Integrate It with Other Countries in Asia and the Pacific

By Region, 2012



Only asked of ADB clients in borrowing countries (n=642)

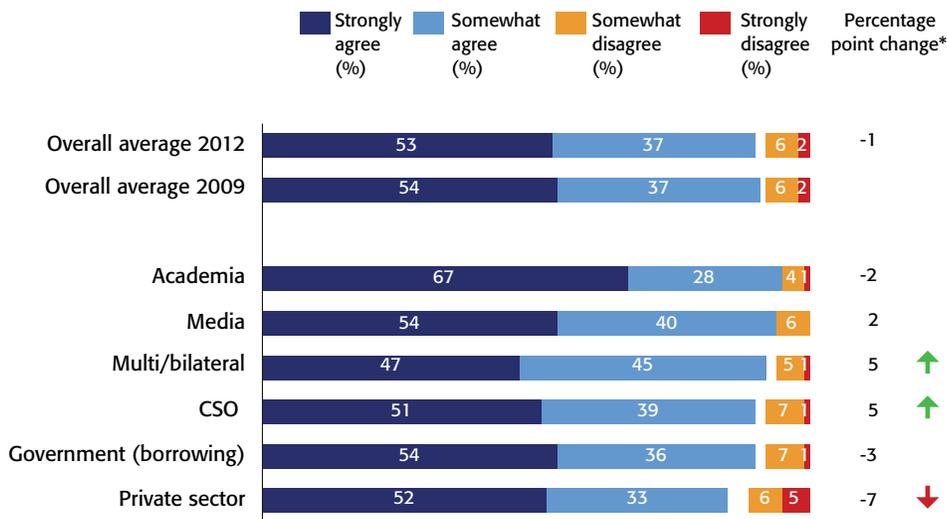
*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 73, Q. 6b

The National Economy Is More Likely to Expand and Grow if We Integrate It with Other Countries in Asia and the Pacific

By Stakeholder Group, 2012



Only asked of ADB clients in borrowing countries (n=642)

*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data.

Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 74, Q. 6b

Perceptions of Foreign Assistance to Asia and the Pacific: Enough Spent, but Not Wisely Used?

While 7 in 10 (70%) stakeholders think that enough money is spent on foreign assistance to help developing countries in the region, nearly half (46%) believe that the money is not spent wisely. Only one in four (24%) think that enough money is spent and that it is spent wisely. Almost 3 in 10 stakeholders hold the view that not enough money is spent on foreign assistance.

There are significant differences across the regions. Stakeholders in Central and West Asia are, by far, the most positive, with nearly 4 in 10 (37%) thinking that enough money is spent and that it is done so wisely. Conversely, fewer than 2 in 10 respondents (17%) in Southeast Asia have this opinion. Stakeholders in South Asia and Southeast Asia are more inclined than others to think that not enough money is spent: approximately one-

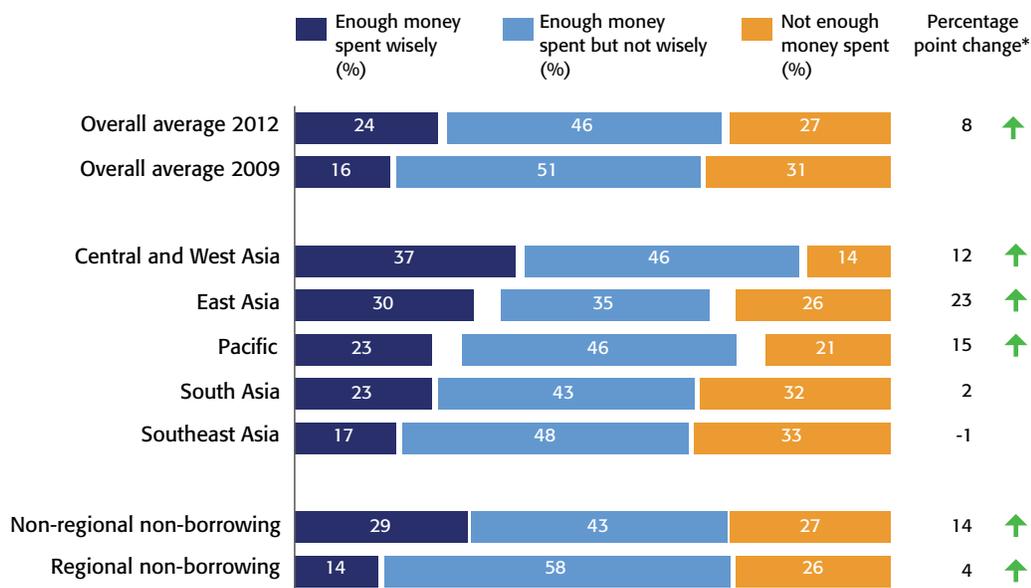
third believe this is the case. In non-borrowing countries, regional stakeholders are more skeptical than non-regional ones about how wisely spending is done (58% vs. 43% say the money is not spent wisely).

Stakeholder groups also have significant differences of opinions. CSOs and media stakeholders are especially prone to thinking that money is enough but it is spent unwisely. Although governments are more inclined than other groups to believe that spending is adequate and done wisely, only one-third (35%) hold this view. Government stakeholders' opinions tend to be more evenly split across the three scenarios than are other groups.

Since 2009 and even 2006, stakeholders are more inclined to think that assistance is adequate and wisely spent (up eight points to 24% and up five points compared to 2006), notably in East Asia, the Pacific, Central and West Asia, and non-regional non-borrowing countries where responses in each region increased by more than 10 percentage points since 2009.

Foreign Assistance to Developing Countries in Asia and the Pacific

By Region, 2012



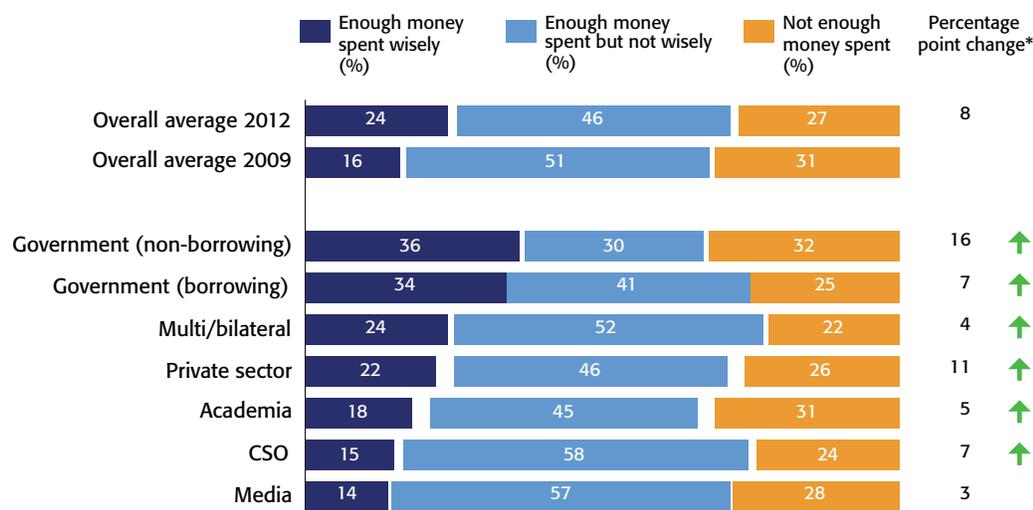
*Refers to a change in percentage points for "Enough money spent wisely" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 75, Q. 1

Foreign Assistance to Developing Countries in Asia and the Pacific

By Stakeholder Group, 2012



*Refers to a change in percentage points for "Enough money spent wisely" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 76, Q. 1

Perceptions of Foreign Assistance by Country: Effective Allocation and Use

All stakeholders were asked how effectively foreign development assistance organizations allocate aid to their country and then how effectively their country uses the assistance received.

Eight in ten respondents think that foreign assistance organizations allocate aid either very or somewhat effectively (79%), up from a total of seven in ten in 2009. When it comes to using aid, however, stakeholders are less positive: two thirds think that developing countries use aid somewhat or very effectively (15% and 53%, respectively). This is also up from 2009 but less so than perceptions of effective allocation.

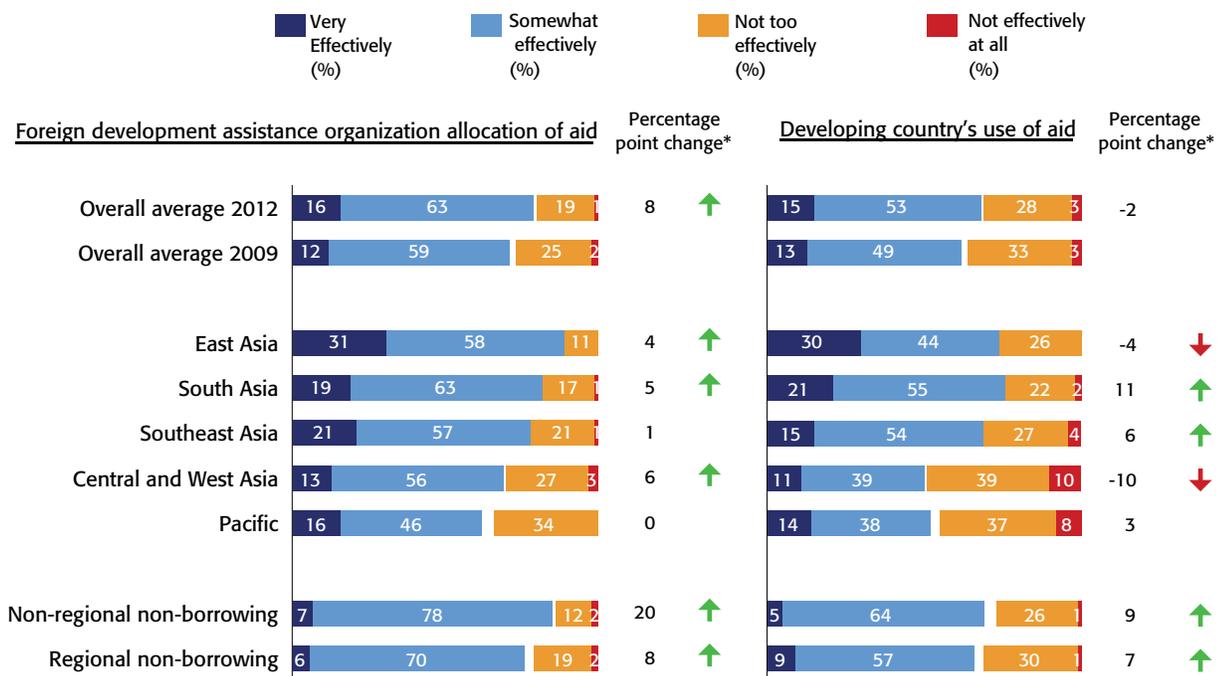
Stakeholders in East Asia, followed by South Asia, are the most positive about foreign assistance allocation: more than four in five stakeholders in each region say allocation is effective, more than in 2009. They are also more inclined than those in other regions to think that assistance is used effectively. Conversely,

stakeholders in Central and West Asia and the Pacific tend to be the least positive about allocation and use. Notably, only half of stakeholders in both of these regions think that aid is used effectively, far less than elsewhere. Since 2009, allocation is seen to have improved in Central and West Asia, South Asia, and East Asia, as well as in non-borrowing countries. However, in Central and West Asia and East Asia, use of aid is judged to be less effective than in 2009.

Government stakeholders are more positive than other groups about the effectiveness of both allocation and use (88% and 83%, respectively, with more than a quarter judging both to be very effective). CSOs are the least positive about allocation, with 3 in 10 saying it is not effective. When it comes to using this assistance, all stakeholder groups except government have similar views, with about 6 in 10 saying that it is effective. Multi/bilateral organizations and the private sector are more inclined than others to think more favorably about assistance allocation than about its use (a spread of approximately 18 percentage points).

Foreign Development Assistance Organization Aid Allocation vs. Country's Use of Development Assistance

By Region, 2012



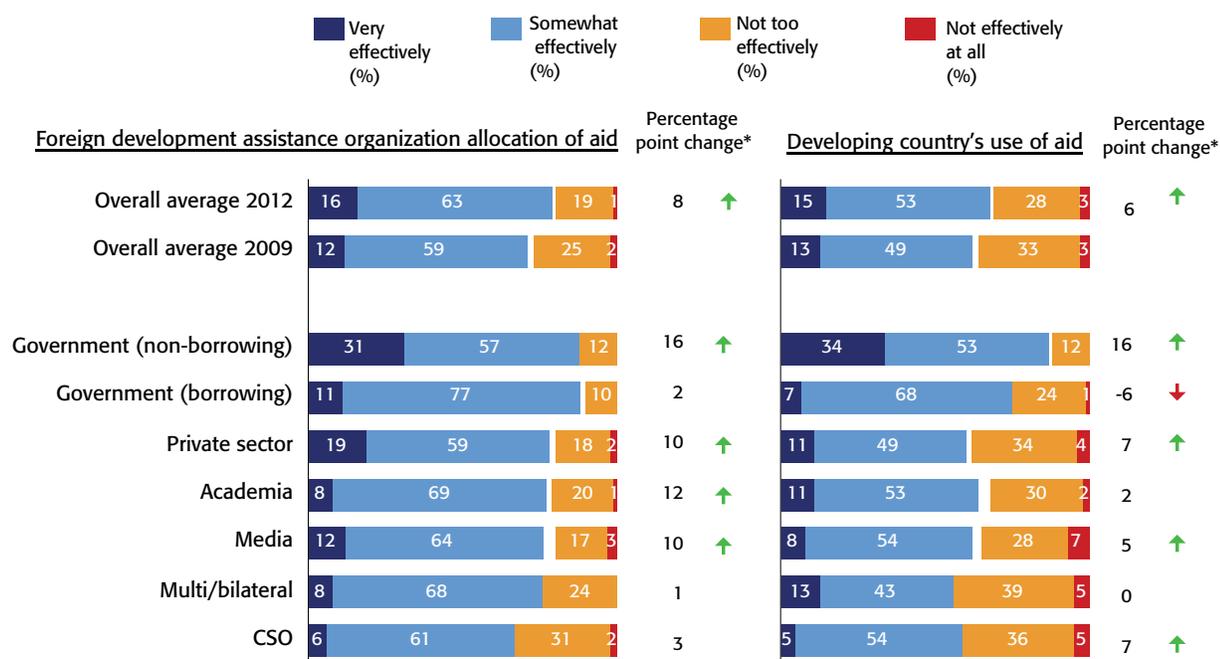
*Refers to a change in percentage points between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 77, Q. 2-3

Foreign Development Assistance Organization Aid Allocation vs. Country's Use of Development Assistance

By Stakeholder Group, 2012



*Refers to a change in percentage points between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 78, Q. 2-3

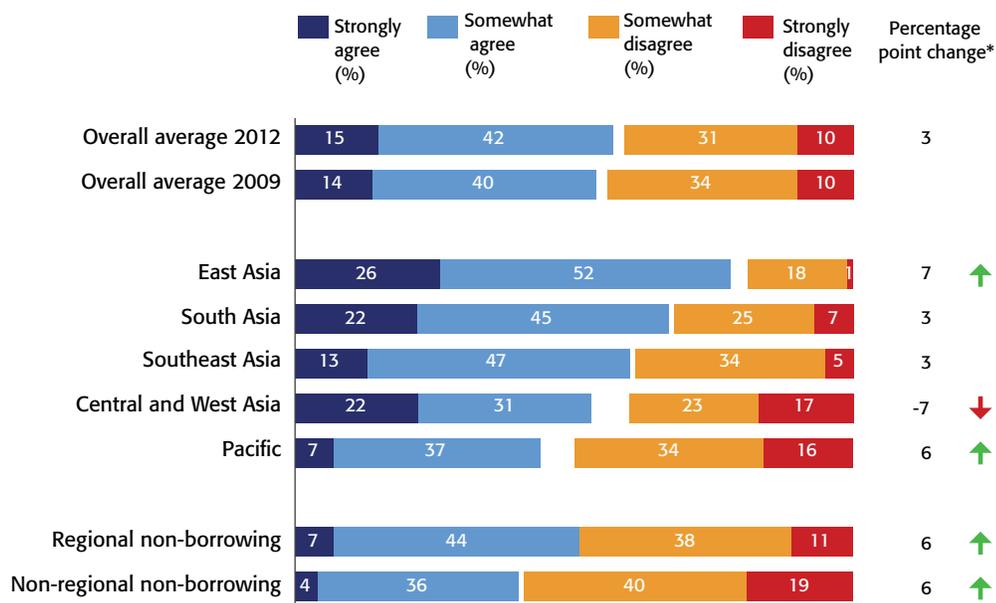
Achieving the Millennium Development Goals

A slim majority of stakeholders (57%) agree that enough is being done by their government and foreign assistance organizations to achieve the Millennium Development Goals by 2015 in their country, but only 15% strongly

agree (42% somewhat agree). Moreover, 4 in 10 disagree that enough is being done. Government stakeholders and those in East Asia are more likely than others to anticipate success, while CSO stakeholders and those in the Pacific and non-borrowing countries are more skeptical. The findings are similar to 2009 overall.

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

By Region, 2012



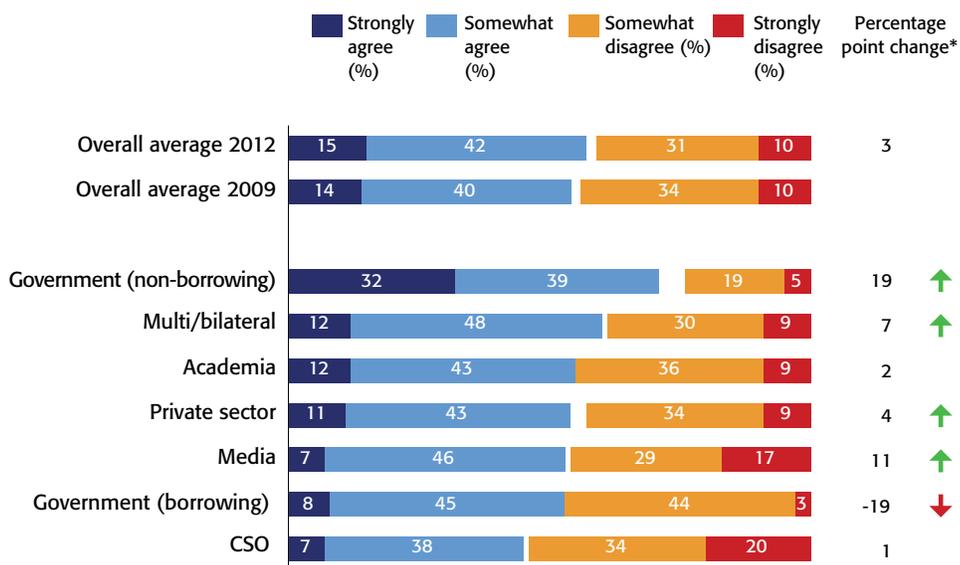
*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 79, Q. 6c

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

By Stakeholder Group, 2012



*Refers to a change in percentage points for "Strongly agree" and "Somewhat agree" between 2009 and 2012 data. Arrows are only displayed for changes of 4 percentage points or greater.

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

Fig. 80, Q. 6c

Methodological Report



In 2012, ADB commissioned GlobeScan, a stakeholder research consultancy, to conduct a third multinational perceptions survey of its stakeholders both in 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 stakeholders' opinions of ADB's role and effectiveness in the development context of Asia and the Pacific. A similar exercise was carried out in 2006 by Princeton Survey Research Associates International and in 2009 by GlobeScan, with assistance from Dalberg Global Development Advisors.

With the formal launch of Strategy 2020 in 2008, in which ADB defined its long-term strategic framework for the coming decade, ADB redirected itself in light of the relatively rapid economic growth in the region, and the significant shifts in development, aid, and the financial landscape. The year 2012 was an ideal opportunity to again revisit the research to obtain an updated view of key stakeholder thinking vis-à-vis ADB's efforts in helping fight poverty.

Between December 2012 and May 2013, 911 interviews were conducted with individuals who hold senior-level positions in government, multi/bilateral 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. The total number, allocation across professional sectors, and qualifications are similar to the 2009 study. 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 911 stakeholders in 31 countries, both within and outside the Asia and Pacific region that are either borrowing or non-borrowing countries. The same countries were selected as in 2009 to be able to meaningfully compare the 2009 and 2012 results. To select these countries in 2009, 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 total number of ADB 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, the ADB portfolio measure is not applicable. Therefore, ADB shareholdings and population of the country were used as the measure of size.

Borrowing and non-borrowing countries come from the following seven regional groupings, as shown in Figure 81.

Regional Groupings of Borrowing and Non-borrowing Countries

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. 81

Note that these regions and the corresponding countries are the same as those from the 2009 study.

Countries were grouped into two strata, using the measure of size as the criterion to define these strata: (i) certainty countries, which comprise the bigger countries, and (ii) non-certainty countries, which include all others. This stratification was not applied in East Asia since this region is composed of only two countries. All countries in the certainty stratum were selected (by definition), whereas countries in the non-certainty stratum were selected using a multistage random selection method.

The total sample size of 900 weighted (911 unweighted) was determined on the basis of the 2006 and 2009 surveys. Of the 900 interviews, 275 were allocated to non-borrowing countries, as specified by ADB.

The sample size for each borrowing country was based on its relative representation in ADB's portfolio (driven by the number of loans, grants, and technical assistance each country receives). For non-borrowing countries, the sample sizes were driven by each country's shareholdings and the population of the country (i.e., the greater its shareholdings, the more interviews conducted in the country).

Figure 82 summarizes the participating countries in the 2012 survey, along with the number of interviews conducted in each country.

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 and 2009.

Professional Sectors

As in 2009, the survey sample consists of respondents in the following six categories, or professional sectors: (i) government, (ii) multi/bilateral organizations, (iii) CSOs, (iv) private sector, (v) media, and (vi) academia. Figure 83 summarizes the definitions used to classify each category.

Targeted sample sizes for the professional sectors were driven by what was achieved in the 2009 survey. The 2012 distribution is summarized in Figure 84 (based on weighted data). Note that multilateral/bilateral respondents were not a stakeholder group in non-borrowing countries: as a result, the proportion of interviews among government, CSOs, media, and academic respondents was slightly larger in borrowing countries compared to non-borrowing countries. Among private sector respondents, 55% were involved in an ADB project, program, or research study (i.e., considered ADB "clients" in this report) in the past 3 years.

Margin of Error

For the purposes of this study, as in 2009, we used the PPS with additional stratification by stakeholder type. Respondents within strata were selected at random where the number of contacts permitted. Figure 85

Sample Size by Region and Country (Weighted)

		# of Interviews
Central and West Asia	Azerbaijan	30
	Pakistan	50
	Uzbekistan	30
	TOTAL	110
East Asia	Mongolia	15
	People's Republic of China (PRC)	65
	TOTAL	80
Southeast Asia	Cambodia	30
	Indonesia	35
	Philippines	35
	Thailand	30
	Viet Nam	50
	TOTAL	180
South Asia	Bangladesh	50
	Bhutan	25
	India	60
	Nepal	25
	Sri Lanka	40
	TOTAL	200
Pacific	Federated States of Micronesia (FSM)	10
	Papua New Guinea	15
	Samoa	10
	Solomon Islands	10
	Timor-Leste	10
	TOTAL	55
Regional Non-borrowing	Australia	20
	Japan	60
	Republic of Korea	20
	Malaysia	15
	Singapore	15
	TOTAL	130
Non-regional Non-borrowing	Canada	20
	France	15
	Germany	20
	Sweden	15
	United Kingdom	15
	United States	60
	TOTAL	145
Overall		900

summarizes the number of interviews conducted along with the corresponding margin of error across regions and stakeholder groups. The margin of error in 2012 remains the same as in 2009. 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 response scales, question order in the questionnaire, interviewing style, data collection mode, and response rates, among other factors.

Six Stakeholder Categories

Category	Eligible Organizations	Eligible Individuals
Government	Ministries of Finance, Development, Planning, Prime Minister's/President's Office, other technical ministries (e.g., Energy, Agriculture, Health, Education), Parliament/Legislature	Senior civil servant level or higher; ministers or deputies may be considered for small economies if deemed appropriate; parliamentarians or politicians or senior staff of relevant committees, such as finance, development, or foreign affairs
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 nongovernment, religious, and/or advocacy organizations, foundations, and movements whose mission is related to international affairs, economic development, environmental issues, or poverty alleviation	Heads or senior staff of nongovernment organizations
Private sector	Reputable large and medium-sized private sector firms involved in development work (including a range of financial institutions involved in the development of co-financing projects)	Chief executive officers or other senior business people, including financial consultants or business experts who are known for their international expertise
Media	Organizations that derive their 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 and Pacific region's development
Academia	Any applicable university, college, or think tank	Professors within relevant departments, such as Finance, Economics, International Affairs, Political Science, Sociology; heads or senior staff of relevant think tanks or institutions

Fig. 83

Sampling Frame

Similar to 2009, 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 sector 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 removed. ADB then reviewed and approved the final list of potential respondents, about 70% of whom came from ADB. At no time was ADB made aware of who participated, ensuring that all participants remained anonymous.

Where the number of available contacts permitted (i.e., a ratio of greater than five contacts per required completed interview), individuals were randomly selected to be contacted, reflecting the likely participation rates in each group. For example, if 5 respondents were needed in a particular category, then 25 contacts were randomly chosen (where the total number of contacts permitted this). If these contacts were insufficient to achieve the five completed surveys, more contacts were randomly drawn as necessary. In cases where the ratio of available contacts per required completed interview was five to one or lower, all contacts were approached from the outset of fieldwork.

Proportion of Interviews by Stakeholder Group

	Overall (%)	Borrowing (%)	Non-borrowing (%)
Government	31	32	28
Private sector	20	20	20
Civil society organization (CSO)	17	14	24
Multi/bilateral	11	16	0
Academia	9	8	14
Media	11	10	14

Fig. 84

Regions and Stakeholder Groups, according to Number of Interviews (Weighted) and Margin of Error

Region / Stakeholder Group	Number of interviews (weighted)	Margin of error*
All respondents	900	±2.5
Central and West Asia	110	±6
East Asia	80	±8
Southeast Asia	180	±2
South Asia	200	±3
Pacific	55	±10
Regional Non-borrowing	130	±11
Non-regional Non-borrowing	145	±5
Government	280	±3.5
Private sector	180	±5
Civil society organization (CSO)	150	±9
Media	103	±5
Multi/bilateral	102	±5.5
Academia	84	±3.5

*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 on request.

Fig. 85

Recruiting Respondents

To accommodate stakeholders' schedules and preferences, prospective respondents were offered the option of completing the survey online, by telephone, or via face-to-face interview (note that the face-to-face option was not offered in all countries). The following process was used to recruit prospective respondents.

1. GlobeScan e-mailed an introduction and invitation letter to randomly selected contacts with an e-mail address in each country (in all countries, most respondents had an e-mail address). Where the number of available contacts was five times the required number of completed interviews or less for a particular category, all contacts with e-mail addresses (rather than a random selection of them) were sent the e-mail invitation. This invitation encouraged completion of the survey online, but also mentioned offline options as an alternative. As needed, two reminder e-mails were sent to encourage participation.
2. Where respondents replied to GlobeScan with a request for a telephone or face-to-face interview, GlobeScan engaged the in-country research partners to conduct this interview.
3. Once this initial phase of fieldwork (primarily online) was complete, contacts who had not responded to the e-mails were forwarded to GlobeScan's in-country fieldwork partners, who then made follow-up telephone calls to ask respondents to participate in the survey using one of the three options.
4. When necessary for certain countries and stakeholder audiences, as contact lists became depleted, GlobeScan supplemented the lists with fresh contacts either from lists that had been put in reserve or by gathering further publicly available names.

Screening

As with the 2009 research, to qualify, 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.

About one-quarter of respondents (28%) described themselves as "very" knowledgeable about ADB, with the remainder saying "somewhat" knowledgeable, similar to 2009 and 2006. Respondents are experienced in international development issues, with more than half (59% in 2012 vs. 48% in 2009) saying that they have been working on them for over 10 years. They also have direct experience working with ADB: 48% (similar to 2009) say that they have been involved in an ADB project, program, or research study in the past 3 years (identified as "clients" in this report). Three-quarters of respondents interviewed were male, a similar proportion to 2009.

Fieldwork Logistics

To carry out the research in 31 countries, GlobeScan worked closely with its in-country research partners, who were carefully selected for their in-depth experience in conducting this type of research with senior officials and opinion leaders. Prior to fieldwork, GlobeScan conducted extensive briefings and training with all partners. These briefings covered a review of study objectives, reporting protocols, data capture procedures, and a full walk-through of the questionnaire.

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 of its partners throughout the duration of the fieldwork. Details of the partners, interview dates and mode of interviews are summarized in Figure 86 below.

Interview Dates and Mode of Interviews by Local Partner, Country, and Region

	Country	Local Company Conducting Interviews	Interviewing Dates	Mode of Interviews
Central and West Asia	Azerbaijan	Institute For Comparative Social Research	17 December 2012 to 29 January 2013	Online, telephone
	Pakistan	Asia Research Partners	14 December 2012 to 6 February 2013	Online, telephone
	Uzbekistan	Institute For Comparative Social Research	15 December 2012 to 29 January 2013	Online, face-to-face
East Asia	People's Republic of China	Survey & Statistics Institute / Asia Research Partners	13 December 2012 to 31 May 2013	Online, telephone
	Mongolia	Institute For Comparative Social Research	15 December 2012 to 16 January 2013	Online
South Asia	Bangladesh	Asia Research Partners	14 December 2012 to 1 February 2013	Online, telephone
	Bhutan	Asia Research Partners	14 December 2012 to 29 January 2013	Online, telephone
	India	Asia Research Partners	14 December 2012 to 30 January 2013	Online, telephone
	Nepal	Asia Research Partners	12 December 2012 to 19 January 2013	Online, telephone
	Sri Lanka	Asia Research Partners	13 December 2012 to 5 February 2013	Online, telephone
Southeast Asia	Cambodia	Indochina Research	14 December 2012 to 8 February 2013	Online, face-to-face
	Indonesia	DEKA Marketing Research	18 December 2012 to 5 February 2013	Online, face-to-face
	Philippines	Sigma Dos	13 December 2012 to 7 February 2013	Online, telephone, face-to-face
	Thailand	Asia Research Partners	13 December 2012 to 6 February 2013	Online, telephone
	Viet Nam	Indochina Research	14 December 2012 to 12 January 2013	Online
Pacific	Federated States of Micronesia	Sigma Dos	18 December 2012 to 13 February 2013	Online, telephone
	Papua New Guinea	Sigma Dos	21 December 2012 to 14 February 2013	Online, telephone
	Samoa	Sigma Dos	7 February 2013 to 21 February 2013	Online, telephone
	Solomon Islands	Sigma Dos	14 December 2012 to 16 February 2013	Online
	Timor-Leste	Sigma Dos	21 December 2012 to 21 February 2013	Online, telephone
Regional Non-borrowing	Australia	Sigma Dos	13 December 2012 to 18 February 2013	Online, telephone
	Japan	CIDO Research	19 December 2012 to 1 February 2013	Online, telephone
	Republic of Korea	The East Asia Institute	22 December 2012 to 7 February 2013	Online, face-to-face
	Malaysia	Asia Research Partners	21 December 2012 to 13 February 2013	Online, telephone
	Singapore	Asia Research Partners	14 December 2012 to 18 February 2013	Online, telephone
Non-regional Non-borrowing	Canada	Tele-Surveys Plus Inc.	12 December 2012 to 14 February 2013	Online, telephone
	France	Efficienc 3	21 December 2012 to 11 February 2013	Online, telephone
	Germany	Efficienc 3	17 December 2012 to 24 January 2013	Online, telephone
	Sweden	Efficienc 3	20 December 2012 to 25 February 2013	Online, telephone
	United Kingdom	Tele-Surveys Plus Inc.	14 December 2012 to 20 February 2013	Online, telephone
	United States	Tele-Surveys Plus Inc.	13 December 2012 to 19 February 2013	Online, telephone

Fig. 86

Questionnaire Design and Translations

Both ADB and GlobeScan developed the 2012 survey based on the 2009 survey for easy tracking of progress. The questionnaire is composed mainly of closed-ended questions, although three open-ended questions were included (the same number as the 2009 survey).

In most countries, respondents were provided with two language options in which to take the survey, as summarized in Figure 87. GlobeScan’s in-country research partners translated the ADB-approved questionnaire (both telephone and face-to-face versions). 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 translations in all languages. Once finalized, the translated versions were sent to the in-country research partners for fieldwork set-up and interviewer briefing and training.

Survey Languages Used

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

Fig. 87



Survey Questions*

Prepared by GlobeScan Incorporated for the Asian Development Bank, November 2012

Screening questions

Before we get started, we would like to ask a few questions about your interaction with the Asian Development Bank ...

S1 How knowledgeable would you say you are about the Asian Development Bank and its activities?

- 01 Very knowledgeable [SKIP TO S2]
- 02 Somewhat knowledgeable [SKIP TO S2]
- 03 Not too knowledgeable
- 04 Not knowledgeable at all [Terminate interview]
- VOLUNTEERED (DO NOT READ)
- 05 Refused [Terminate interview]
- 99 Don't know [Terminate interview]

**ASK IF RESPONDENT ANSWERS 03 AT S1 AND RESPONDENT SOURCE IS ADB.
IF RESPONDENT SOURCE IS GLOBESCAN, TERMINATE INTERVIEW.**

S1A I'd like to reassure you that detailed knowledge is not required to complete this survey. You have actually been identified to us by the Asian Development Bank as someone who may be familiar with their work. Would you like to change your response? [Interviewer to mark new response below, if applicable.]

- 01 Very knowledgeable [PROCEED TO S2]
- 02 Somewhat knowledgeable [PROCEED TO S2]
- 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]

*In 2012 questions S1A and D6A were added to the survey while questions 4 and D3 were removed.

S2 And how much experience have you had with the Asian Development Bank?

- 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]

1dd. The goal of this survey is to understand how the Asian Development Bank (ADB) is viewed by people across 31 specific countries.

From the following list, please choose the country where you currently work.

- | | |
|---|---------------------|
| 01 Australia | 17 Nepal |
| 02 Azerbaijan | 18 Pakistan |
| 03 Bangladesh | 19 Philippines |
| 04 Bhutan | 20 Papua New Guinea |
| 05 Cambodia | 21 Samoa |
| 06 Canada | 22 Singapore |
| 07 People's Republic of China (PRC) | 23 Solomon Islands |
| 08 France | 24 Sri Lanka |
| 09 Germany | 25 Sweden |
| 10 India | 26 Thailand |
| 11 Indonesia | 27 Timor-Leste |
| 12 Japan | 28 United Kingdom |
| 13 Republic of Korea | 29 United States |
| 14 Malaysia | 30 Uzbekistan |
| 15 Federated States of Micronesia (FSM) | 31 Viet Nam |
| 16 Mongolia | |

2dd. And is this the country perspective from which you would like to assess ADB's performance?

- 01 Yes
- 02 No

ASK ONLY IF 2dd = 02

3dd. Choose from the list below the country perspective from which you will assess ADB in this survey.

- | | |
|---|---------------------|
| 01 Australia | 17 Nepal |
| 02 Azerbaijan | 18 Pakistan |
| 03 Bangladesh | 19 Philippines |
| 04 Bhutan | 20 Papua New Guinea |
| 05 Cambodia | 21 Samoa |
| 06 Canada | 22 Singapore |
| 07 People's Republic of China (PRC) | 23 Solomon Islands |
| 08 France | 24 Sri Lanka |
| 09 Germany | 25 Sweden |
| 10 India | 26 Thailand |
| 11 Indonesia | 27 Timor-Leste |
| 12 Japan | 28 United Kingdom |
| 13 Republic of Korea | 29 United States |
| 14 Malaysia | 30 Uzbekistan |
| 15 Federated States of Micronesia (FSM) | 31 Viet Nam |
| 16 Mongolia | |

Section 1—Regional and Foreign Assistance Context

ASK ALL

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]?

- 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] using the foreign development assistance it receives?

- 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 IN BORROWING COUNTRIES ONLY

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

- a. poor infrastructure
- 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

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

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

NOTE: Q6A AND Q6B ARE ASKED IN BORROWING COUNTRIES ONLY; Q6C, 6D, AND 6E ARE ASKED TO ALL

- a. The government of [country] supports and takes responsibility for development efforts in [country]
- b. The economy of [country] is more likely to expand and grow if we integrate the economy with other countries in Asia and the Pacific
- c. Enough is being done by [country]'s government and foreign assistance organizations to achieve the Millennium Development Goals* by 2015 in [country / developing countries in the Asia and Pacific region]
- d. Because of corruption, foreign development assistance to [country / developing countries in the Asia and Pacific region] is mostly wasted
- e. The private sector is the key driver of future growth in [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

*The 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 [country / developing countries in Asia and Pacific region]. Is [entity] having a very good, somewhat good, somewhat bad, or very bad impact on the overall development of [country / developing countries in Asia and Pacific region]?

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

01 Very good

02 Somewhat good

03 Somewhat bad

04 Very bad

VOLUNTEERED (DO NOT READ)

05 Refused

99 Don't know

ASK ALL

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

ASK ALL

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

ASK ALL

Q10. To the best of your knowledge, how much of a priority does the Asian Development Bank (ADB) place on each of the following in [country / developing countries in Asia and Pacific region]. Does it make [insert] a high priority, moderate priority, low priority, or no priority at all?

- a. Reducing poverty
- b. Supporting regional cooperation and economic integration
- c. Supporting development of the financial sector
- d. Promoting environmental sustainability*
- e. Providing disaster and emergency assistance
- 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 Moderate priority
 - 03 Low priority
 - 04 No priority at all
 - VOLUNTEERED (DO NOT READ)
 - 05 Refused
 - 99 Don't know

ASK ALL

Q11. And similarly, for each of the following areas, indicate how much of a priority you think the Asian Development Bank (ADB) places on each in [country / developing countries in the Asia and Pacific region]? Does it make [insert] a high priority, moderate priority, low priority, or no priority at all?

- a. Mobilizing resources to develop the private sector
- b. Promoting gender equality
- c. Improving governance
- d. Promoting knowledge sharing and best practices to solve the development challenges
- e. Strengthening partnerships with stakeholders**
 - 01 High priority
 - 02 Moderate priority
 - 03 Low priority
 - 04 No priority at all
 - VOLUNTEERED (DO NOT READ)
 - 05 Refused
 - 99 Don't know

*That is, ensuring that development occurs in a way that minimizes harm to the environment and helps mitigate and adapt to climate change.

**Governments, development institutions, private sector, academia, media, and civil society

ASK ALL

Q12. To what extent do each of the following describe the Asian Development Bank (ADB) to you? When answering, tell me if you think it describes ADB to a great extent, a moderate extent, a small extent, or not at all. What about [insert]?

- 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 the Asian Development Bank (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 [country / developing countries in the Asia and Pacific region]'s development objectives? Please use two or three words to describe these primary focus areas.

1. _____

2. _____

ASK ALL

Q14. In the past three years, how helpful has the Asian Development Bank (ADB) been in assisting [country / developing countries in the Asia and Pacific region] to meet its development goals and objectives?

- 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 BORROWING COUNTRIES

Q15. How would you rate the Asian Development Bank's (ADB) performance in each of the following areas in helping [country] meet its development goals and objectives? What about [insert]? Is ADB's performance 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 BORROWING 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 this 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

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 Asian Development Bank do in helping [country / developing countries in the Asia and Pacific region] reduce poverty?

- 01 Excellent
- 02 Good
- 03 Average
- 04 Poor
- 05 Very poor
- VOLUNTEERED (DO NOT READ)
- 06 Refused
- 99 Don't know

CLIENTS ONLY (S3 = 1) AND THOSE WHO SAY 01 OR 02 ON Q17

Q18. To what extent do the following help explain why you think the Asian Development Bank (ADB) is doing a good job in helping to reduce poverty in [country / developing countries in the Asia and Pacific region]? [insert]—is this a very important reason, somewhat important reason, not too important a reason, or not a reason at all for why ADB has done a good job?

- a. ADB makes poverty reduction a top priority.
- b. ADB allocates enough financial resources to poverty reduction.
- 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

CLIENTS ONLY (S3 = 1) AND THOSE WHO SAY 03, 04, OR 05 ON Q17

Q19. To what extent do the following help explain why you think the Asian Development Bank (ADB) is not doing an excellent or good job in helping to reduce poverty in [country / developing countries in the Asia and Pacific region]? [insert]—is this a very important reason, somewhat important reason, not too important a reason, or not a reason at all for why ADB hasn't done a good job?

- a. ADB does not make poverty reduction a top priority.
- b. ADB does not allocate enough financial resources to poverty reduction.
- 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

ASK ALL

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

- a. Supporting regional cooperation and economic integration
- b. Supporting development of the financial sector
- c. Promoting environmental sustainability
- d. Providing disaster and emergency assistance
- e. Improving the infrastructure
- f. Supporting health care
- g. Improving education
- h. Supporting agriculture and rural development
- i. Mobilizing resources to develop the private sector
- j. Promoting gender equality
- 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. The Asian Development Bank 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

ASK ALL

Q22. Of the following five areas, which two areas do you think the Asian Development Bank should most focus on to best promote private sector development in [country / developing countries in the Asia and Pacific region]?

- 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.
- b. ADB plays a useful role in enhancing private sector development in [country / developing countries in the Asia and Pacific region].
- c. ADB is moving toward a more collaborative and responsive partnership with the government of [country / developing countries in the Asia and Pacific region].
- d. ADB takes sufficient steps to prevent corruption in its projects in [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

*Expanding transportation systems, enhancing stable electricity supply, etc.

Section 4—ADB Communications and Outreach

ASK ALL

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?

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

ASK ALL

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, nongovernmental organizations, not-for-profits
- 97 Other (specify) _____
- VOLUNTEERED (DO NOT READ)
- 07 All equally
- 99 Don't know

ASK ALL

Q26. In general, how often do you [insert]?

- 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? Choose all that apply. Insert your own answer if the choices below do not apply to you.

- 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)

- 99 Don't know

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

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

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

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 Asian Development Bank 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

Q31. Over the past three years, have you read any publications from the Asian Development Bank?

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

ONLY ASK TO THOSE WHO SAY 01 ON Q31

Q32. Overall, how much influence have the Asian Development Bank's publications had on your thinking about development issues?

- 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

To finish off, we need to ask you some demographic details...

D1. Gender

- 01 Male
- 02 Female

D2. What is your age?

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
- VOLUNTEERED (DO NOT READ)
- 05 Refused
- 99 Don't know

D5. From the list below, select the one that best describes where you work:

- 01 Government 1 (Prime Minister's/President's office, Ministries of Finance, Economy, Development, Planning, Parliament/Legislature)
- 02 Government 2 (Technical ministries, i.e., Transport, Energy, Agriculture, Health, Education, Industry and Trade, etc.)
- 03 Multilateral or bilateral donor partner (i.e., United Nations, IMF, World Bank, etc.) [for borrowing countries only]
- 04 Civil society organization (i.e., nongovernment organization, charity, not-for-profit)
- 05 Private sector
- 06 Media
- 07 University, think tank, academia
- 97 Other (specify): _____

D6. We will be pleased to send you a report on the highlights of the survey findings. If you would like to receive a copy of this by e-mail, please provide your e-mail address. Please be assured that your responses will be kept completely confidential. All personal information collected in this survey will only be used to send you the highlights of the survey findings.

E-mail: _____

D6A. Would you like to recommend a senior colleague—within or outside of your organization—who is also knowledgeable about ADB and who may be interested in participating in this survey?

D7 Language of interview (DO NOT ASK)

D8 Date of interview

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 2012

The 2012 ADB Perceptions Survey gauges and tracks stakeholders' perceptions of the mission of the Asian Development Bank (ADB) to help reduce poverty and contribute to development in Asia and the Pacific.

The survey, the third 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 of the survey reveal that stakeholders continue to strongly acknowledge ADB's impact on development. Majority of stakeholders also view ADB as a trusted, reliable, and competent organization with excellent knowledge of the region.

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 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: 1.7 billion people who live on less than \$2 a day, with 828 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.