

Listening to Leaders 2021: A report card for development partners in an era of contested cooperation

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Contents

| | |
|--|----|
| Figures and Tables | iv |
| Acronyms | v |
| 1. Introduction | 1 |
| 1.1 Leaders: Who participated in the 2020 Listening to Leaders Survey? | 1 |
| 1.2 Partners: Which development partners did leaders evaluate? | 4 |
| 1.3 Topics: What insights did leaders share about their priorities and experiences working with development partners? | 5 |
| 2. Priorities: Which problems do leaders want to solve, and what do they want from their partners? | 6 |
| 2.1 Development partners are in step with national priorities in health and good governance, but appear less attuned to education and jobs that leaders see as gateways to growth | 7 |
| 2.2 Leaders say that their preferred development partners are those that can best adapt their strategies to local needs and plan for long-term sustainability | 11 |
| 2.3 Leaders prefer development projects that are transparent and generous, focused on infrastructure, and provide political cover to lock in desirable reforms | 13 |
| 2.4 Leaders place a premium on timely, accurate data from trusted organizations to guide their decisions, while senior officials are more concerned about the political feasibility of recommendations | 14 |
| 3. Footprint: From which development partners did leaders receive advice or assistance? | 16 |
| 3.1. The UN system and large OECD donors have the largest footprints, supplying advice and assistance to the most leaders overall | 16 |
| 3.2 Middle powers and specialized multilaterals have more concentrated footprints with outsized focus in particular geographies or sectors | 20 |
| 3.3 In line with its global ambitions, China eclipsed other emerging donors in working with 15 percent of leaders from 113 countries in 2020 | 22 |
| 3.4 UNICEF increased its footprint with a much larger percentage of leaders since 2017, while China dramatically expanded by an additional 52 countries | 22 |
| 4. Performance: Which development partners do leaders say are most influential and helpful—and why? | 25 |
| 4.1. China earns a spot among the top 10 influencers, joining the US, UK, and multilaterals with global reach | 26 |
| 4.1.1 Global heavyweights: UN system, US, UK, and China rise to the top as influencers in nearly every sector and region | 26 |
| 4.1.2 Regional hegemony: Middle powers and specialized multilaterals carved out geographic spheres of influence | 27 |
| 4.1.3 Specialized star power: European and Asian bilaterals exert outsized influence in niche focus sectors in alignment with their strategies | 28 |
| 4.2. Influence can be a double-edged sword: leaders most often viewed the influence of their development partners positively, but less so in the case of China, Russia, and fragile state donors | 30 |
| 4.3 Leaders view multilateral organizations and the US as most helpful in implementing reforms | 33 |
| 4.3.1 Best in show: Many of the most influential development partners were also the most helpful, including the WHO, WB, EU, and US, which received consistently high marks across regions and sectors | 33 |
| 4.3.2 Quiet helpers: The Global Fund, UNICEF, and ADB were viewed as very helpful, if less influential | 33 |
| 4.3.3 Vocal promoters: China and the IMF were viewed as relatively less helpful, even if they were highly influential | 34 |
| 4.3.4 Specialized tradecraft: Middle powers and multilaterals garnered the respect of leaders for being helpful in particular sectors and geographies | 34 |
| 4.4 EBRD was the most improved across the board, while China and Japan leapfrogged their peers in relative influence since 2017 | 36 |
| 4.5 Leaders give high marks to donors that embrace locally-led development by working closely with in-country stakeholders to target resources and expertise that advance national priorities | 39 |

| | |
|--|----|
| 5. Conclusion | 41 |
| 5.1 Insight #1: Adaptability, sustainability, inclusivity, reciprocity top the list of cooperation principles to level the playing field | 41 |
| 5.2 Insight #2: The growing prominence of China as an influential force in development cooperation is undeniable, but not inevitable | 41 |
| 5.3 Insight #3: Multilateralism may be imperfect, but the stature of these venues for collective action has proven durable | 42 |
| References | 43 |

Figures and Tables

| | |
|--|----|
| CHAPTER ONE | 1 |
| Figure 1. Geographic coverage of the Listening to Leaders Survey, original vs. expansion countries | 3 |
| Table 1. Distribution of respondents to the 2020 Listening to Leaders Survey | 4 |
| CHAPTER TWO | 6 |
| Figure 2. How frequently does a development goal appear in leaders' top priorities? | 8 |
| Figure 3. Development priorities by region and stakeholder group | 9 |
| Figure 4. Comparison of development priorities between leaders and citizens | 10 |
| Figure 5. Difference in ranking of development priorities between leaders and citizens | 10 |
| Figure 6. Comparison of development priorities between leaders and donors | 11 |
| Figure 7. What did leaders say they valued most in a development partner? | 12 |
| Figure 8. What did leaders say made a development partner adaptable? | 12 |
| Figure 9. What did leaders say made a development partner prioritize long-term planning? | 12 |
| Table 2. Randomized attributes of projects for development assistance survey experiment | 14 |
| Table 3. Randomized attributes of data for decision-making survey experiment | 15 |
| CHAPTER THREE | 16 |
| Figure 10. Which development partners had the largest footprints in 2020? | 18 |
| Figure 11. Footprints by region and sector, 2020 | 19 |
| Figure 12. Footprints by country income groups, 2020 | 21 |
| Figure 13. Comparison in perceived footprints of development partners, 2017 and 2020 | 24 |
| CHAPTER FOUR | 25 |
| Figure 14. Influence rankings by region and sector | 29 |
| Figure 15. Comparison of overall development partner influence versus the positivity of that influence | 31 |
| Figure 16. Positivity-adjusted influence rankings for development partners | 32 |
| Figure 17. Helpfulness rankings by region and sector | 35 |
| Figure 18. Perceived influence of development partners in 2017 versus 2020 | 37 |
| Figure 19. Perceived helpfulness of development partners in 2017 versus 2020 | 38 |
| Figure 20. Why did respondents view development partners as being influential? | 40 |
| Figure 21. Why did leaders view development partners as being helpful? | 40 |
| CHAPTER FIVE | 41 |

Acronyms

| | |
|--------------|--|
| ADB/AsDB: | Asian Development Bank |
| AfDB: | African Development Bank |
| AMF: | Arab Monetary Fund |
| ASEAN: | Association of Southeast Asian Nations |
| BADEA: | Arab Bank for Economic Development in Africa |
| BMGF: | Bill and Melinda Gates Foundation |
| BRI: | Belt and Road Initiative |
| BRICS: | Brazil, Russia, India, China, and South Africa |
| CABEL: | Central American Bank for Economic Integration |
| CAF: | Development Bank of Latin America |
| CDB: | Caribbean Development Bank |
| CIDCA: | China International Development Cooperation Agency |
| CLA: | Collaborating, Learning, Adapting |
| CMKI: | Countering Malign Kremlin Influence |
| CSO: | Civil society organization |
| DAC: | Development Assistance Committee |
| DFID: | Department for International Development |
| EAP: | East Asia and Pacific |
| EBRD: | European Bank for Reconstruction and Development |
| ECA: | Europe and Central Asia |
| EU: | European Union |
| FAO: | Food and Agriculture Organization |
| FCDO: | Foreign Commonwealth and Development Office |
| FIAP: | Feminist International Assistance Policy |
| FOCAC: | Forum on China-Africa Cooperation |
| FOIP: | Free and Open Indo-Pacific |
| GAVI: | Global Alliance for Vaccines and Immunization |
| GCF: | Global Climate Facility |
| GEF: | Global Environment Facility |
| G7: | Group of Seven |
| Global Fund: | Global Fund to Fight AIDS, Tuberculosis, and Malaria |

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|---------|---|
| IATI: | International Aid Transparency Initiative |
| IDB: | Inter-American Development Bank |
| IFAD: | International Fund for Agricultural Development |
| IFC: | International Finance Corporation |
| IMF: | International Monetary Fund |
| ISDB: | Islamic Development Bank |
| LAC: | Latin America and the Caribbean |
| LIC: | Low-income country |
| LTLS: | Listening to Leaders Survey |
| MENA: | Middle East and North Africa |
| MIGA: | Multilateral Investment Guarantee Agency |
| MOFCOM: | Ministry of Commerce, People's Republic of China |
| MOU: | Memorandum of understanding |
| MWS: | MY World Survey |
| NDB: | New Development Bank |
| NGO: | Non-governmental organization |
| NZ: | New Zealand |
| ODA: | Official development assistance |
| OECD: | Organization for Economic Co-operation and Development |
| OFID: | OPEC Fund for International Development |
| OPEC: | Organization for the Petroleum Exporting Countries |
| PDIA: | Problem-driven iterative adaptation |
| RES: | Reform Efforts Survey |
| SA: | South Asia |
| SDGs: | Sustainable Development Goals |
| SSA: | Sub-Saharan Africa |
| UAE: | United Arab Emirates |
| UK: | United Kingdom |
| UN: | United Nations |
| US: | United States |
| UNDP: | United Nations Development Program |
| UNEP: | United Nations Environment Program |
| UNESCO: | United Nations Educational, Scientific, and Cultural Organization |

| | |
|---------|---|
| UNICEF: | United Nations Children's Fund |
| USAID: | US Agency for International Development |
| V-dem: | Varieties of Democracy |
| WB: | World Bank |
| WFP: | World Food Program |
| WHO: | World Health Organization |

1. Introduction

It has been a turbulent few years for development cooperation. COVID-19 was a universal shock to the international system, affecting countries across geographies, ideologies, and income levels. The 2020 arrival of a global pandemic placed in stark relief two countervailing truths about how development assistance is financed, designed, and delivered. In an environment of “thinning multilateralism” (Izmestiev and Klingebiel, 2020), some development partners viewed pandemic response as a new arena for competition and contestation (Benner, 2020; Chaturvedi et al., 2020). On the other hand, the international community demonstrated resilience and commitment to work together to help countries respond to short-term public health crises, while preserving hard-won progress towards the Sustainable Development Goals (SDGs) (OECD, 2020a).

Against this backdrop, we asked public, private, and civil society leaders across 141 countries and semi-autonomous regions¹ to share their most pressing development priorities and experiences working with a wide range of partners. AidData—a research lab at William & Mary—fielded our *2020 Listening to Leaders Survey* at a critical juncture (June to September 2020) for countries grappling with how best to respond to the COVID-19 pandemic and advance longer-term development priorities in tandem. Because we field this survey once every three years, we can also assess how the views of leaders amidst the tumult of the pandemic compare to what we observed in the last survey conducted in 2017.²

In this report, we analyze the survey responses to answer three central questions:

- **Priorities:** Which problems do leaders in low- and middle-income countries most want to solve, and what do they want from their development partners?
- **Footprint:** From which development partners did leaders receive advice or assistance?
- **Performance:** Which development partners do leaders say are most influential and helpful—and why might that be?

Why should you read this report? There is no shortage of news, analysis, or scholarship on the international community's response to the COVID-19 pandemic. Nor is there a dearth of debate on whether the post-World War II development assistance architecture is fit-for-purpose in a world that is far different in 2021 than it was in 1945 (Benner, 2020; Moreland, 2019; Ruland, 2018). Meanwhile, there is a robust and thriving industry of individual evaluations of development inputs and outcomes. Yet, we would argue, there is one persistent blindspot: while bilateral aid agencies and multilateral organizations appreciate the need to “think and work politically” (Booth & Unsworth, 2014), many have woefully inadequate intelligence on how their efforts are perceived by those they seek to influence and support.

If development partners are to architect aid strategies that are responsive to local realities, better information on the priorities and perceptions of the leaders they seek to influence and support is a necessary, though insufficient, part of the equation. As noted by the OECD (2019), this increased clarity about what leaders want from their partners will only be useful if there is willingness among development cooperation providers themselves to rethink, retool, and team up with others to best support countries in charting their own paths to a future that is “fairer, greener, and safer” for everyone.

The *Listening to Leaders 2021* report is an important step forward in closing this evidence gap. It distills the first-hand experiences of 6807 leaders into actionable insights on development cooperation—past, present, and future. These leaders represent a traditionally hard-to-reach population of policymakers and policy influencers who shape the trajectory of their country's development and relations with foreign powers. Not only do they make consequential decisions regarding priorities and programs, but these leaders often have megaphones by virtue of position, network, or reputation that allow them to influence popular perceptions of specific development partners and development cooperation overall.

In the remainder of this introduction, we briefly orient you to the *2020 Listening to Leaders Survey* and this report by answering several context-setting questions: (i) who participated in the survey; (ii) which development partners did leaders evaluate; and (iii) what types of questions did the leaders answer and how did we organize the analysis.

1.1 Leaders: Who participated in the 2020 Listening to Leaders Survey?

AidData is a market leader in fielding large-scale surveys in a consistent and comparable manner to capture the insights of those who influence and make development policy in low- and middle-income countries. Although the true global population of development policymakers and practitioners is, for all intents and purposes, unobservable, we took painstaking efforts to identify a well-defined and observable population of interest. For the *2020 Listening to Leaders Survey* we define this population of interest broadly as: those individuals who are knowledgeable about the formulation and implementation of government policies and programs in low- or middle-income countries at any point between 2016 and 2020.

We further break down this population of interest into six stakeholder groups: (i) mid- and senior-level officials from host government agencies; (ii) representatives of development partners operating in-country; (iii) leaders of civil society organizations (CSOs) and non-governmental organizations

¹ Based on the World Bank's June 2020 classification this includes: 29 low-income countries, 50 lower-middle income countries, 55 upper-middle income countries, and 3 countries that recently graduated to high-income status. In addition, the *2020 Listening to Leaders survey* also includes 5 semi-autonomous regions: Puntland, Kurdistan, Palestine, Somaliland, and Zanzibar.

² The 2020 survey provides a snapshot of perceptions, as leaders were asked about their experiences working with development partners from 2016-2020. It also allows us to examine trends over time in comparison to the 2017 survey, which covered from 2010-2015.

(NGOs); (iv) leaders of private sector companies; (v) independent researchers from universities, think tanks, and media; and (vi) national-level parliamentarians.³ For the 2020 survey, our research team spent nearly two years identifying approximately 100,000 leaders from 141 countries and semi-autonomous territories who met our inclusion criteria.⁴ This represents an expansion from the 126 countries and semi-autonomous territories included in the 2014 and 2017 surveys (see Figure 1). See Appendix A of the Technical Appendix for more information about how AidData identifies who receives an invitation to participate in the survey.⁵

Fielded between June and September 2020, 84,000 individuals successfully received an invitation via email to participate in the *2020 Listening to Leaders Survey*. Of these, 6,807 individuals answered the survey, for a response rate of 8.1 percent.⁶ It is worth noting that individual-level participation rates to email surveys and elite surveys tend to be lower than that of household surveys. AidData mitigates potential bias in our surveys in three ways: (1) developing a robust sampling frame of individuals who represent our target population of interest to ensure there is a large enough set of final respondents to facilitate this analysis; (2) collecting data to monitor the demographics of those who receive an invitation versus those who respond to the survey to assess representativeness; and (3) using non-response weights when computing aggregate statistics (e.g., arithmetic means) from the survey results. See Appendix A and C of the Technical Appendix for more detail on how we design our sampling frame and the weighting procedures for our analysis.

Respondents to the 2020 survey identified the type of organization they worked with for the longest period between 2016 and 2020,⁷ as well as their primary substantive area of focus

from 23 different policy domains (e.g., economic policy, health, education).⁸ For the sake of simplicity and to facilitate meaningful comparisons with the largest number of responses possible, we collapsed the 23 policy domains into 7 larger sector groups for the subsequent analysis in this report. These sectors were economic, environment, governance, infrastructure, rural development, social, and other.⁹ Similarly, we collapsed the country-level responses into 6 larger regional groups: East Asia and the Pacific (EAP), Europe and Central Asia (ECA), Latin America and the Caribbean (LAC), Middle East and North Africa (MENA), South Asia (SA), and sub-Saharan Africa (SSA). Table 1 contains a breakdown by stakeholder group and region of the leaders who received an invitation to participate in the survey and those who responded.

³ In prior survey waves (2014 and 2017), the independent experts stakeholder group was defined more broadly to include experts based outside and within the country. The research team more precisely defined the criteria for the 2020 survey to increasingly focus on domestic voices, such as professors at universities, scholars at think tanks, and journalists. The *2020 Listening to Leaders Survey* included for the first time a sixth stakeholder group: parliamentarians, including all national legislative bodies.

⁴ Our research team identified a list of ideal-type organizations for the six stakeholder groups across all countries that discharge functions relevant to our questions of interest. For the six stakeholder groups in the *2020 Listening to Leaders Survey* sampling frame, we identified 67 ideal-type organizations, each of which was assigned a numeric code. For example, this included 33 organization types for the executive branch officials group, such as a Ministry of Finance, a Supreme Audit Institution, and a National Statistical Office.

⁵ We use publicly available resources, such as organizational websites and directories, international conference records, Who's Who International, and public profiles on LinkedIn, Facebook, and Twitter to help trace the contact information for our leaders. See Appendix A of the Technical Appendix for details on how the sampling frame of the *2020 Listening to Leaders Survey* is constructed.

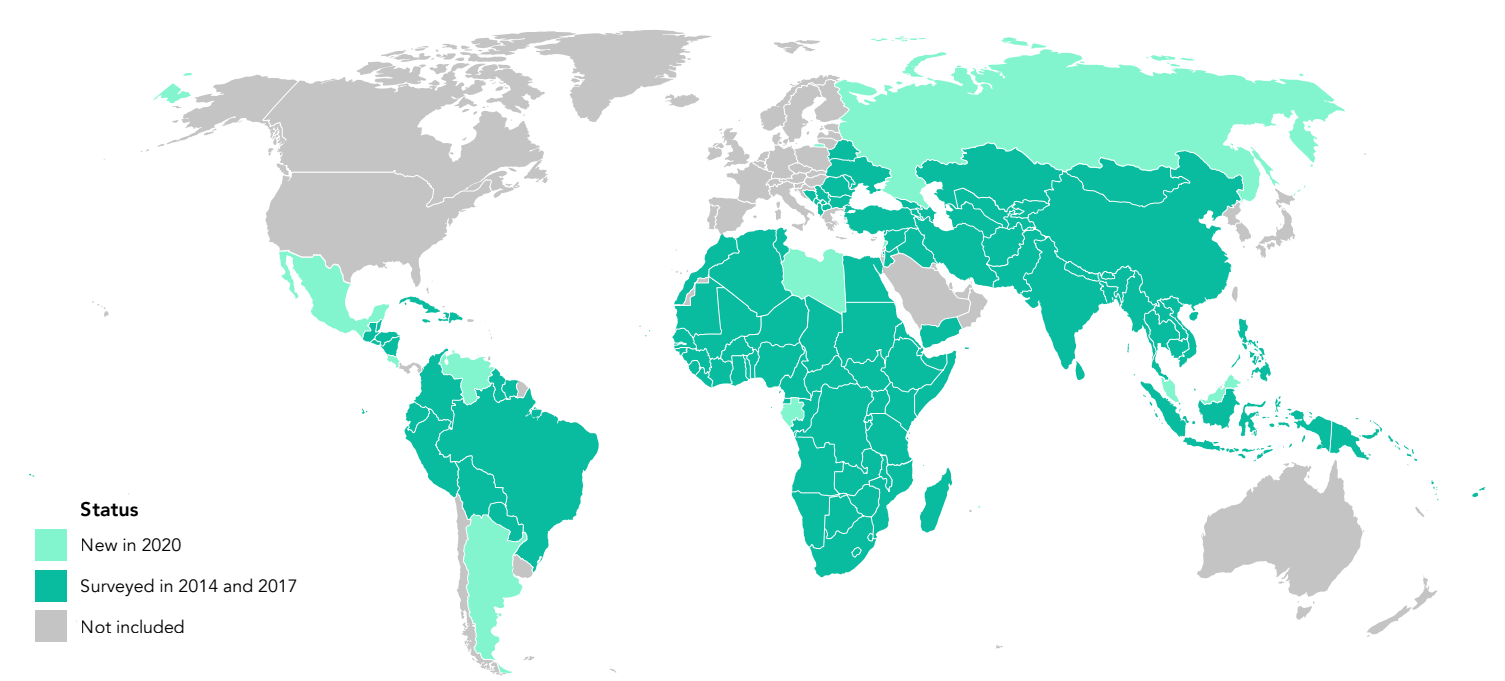
⁶ Some email invitations did not reach their intended recipients because their emails were no longer operational or because of their security settings, which blocked suspected spam emails.

⁷ Respondents selected the organization type in which they had worked with for the longest period between 2016 and 2020. The original question was “*It is our understanding that you worked [in country] between 2016 and 2020. During this period, which type of organization did you work with for the longest?*” Respondents could select from a fixed list of options including: (1) Government agency, ministry or office; (2) Parliament; (3) Development Partner; (4) Non-Governmental Organization or Civil Society Organization; (5) Private Sector; (6) University, Think Tank or Media; (7) I did not work for one of these types of organizations between 2016 and 2020; and (8) I mostly worked in a different country between 2016 and 2020.

⁸ Respondents selected their area of policy focus from a fixed list of 22 different policy domains and an option to select “other” and write in their own answer. The fixed list of 22 policy domains included: (1) agriculture, fishing, and forestry; (2) economic policy; (3) education; (4) energy and mining; (5) environment and natural resource management; (6) finance; (7) health; (8) human development and gender; (9) industry, trade and services; (10) information and communications; (11) labor market policy and programs; (12) nutrition and food security; (13) private sector development; (14) good governance and rule of law; (15) public sector management; (16) rural development; (17) social development and protection; (18) trade; (19) transportation; (20) urban development; (21) water, sewerage and waste management; and (22) foreign policy. The original question was: “*While holding this position, what were your primary areas of focus? (If you worked across multiple areas, please select one area you are most familiar with).*”

⁹ The 23 policy domains were crosswalked to the seven sectors as follows: (i) economic (economic policy; industry, trade, and services; trade); (ii) environment (energy and mining; environment and natural resource management); (iii) governance (good governance and rule of law; public sector management); (iv) infrastructure (transportation; urban development; water, sewage, and wastewater; information communication technologies; general infrastructure); (v) rural development (agriculture, fishing, and forestry; rural development); and (vi) other (foreign policy; other write-in).

Figure 1. Geographic coverage of the *Listening to Leaders Survey*, original vs. expansion countries



Notes: This figure shows *Listening to Leaders Survey* coverage in 2017 versus 2020. Kurdistan, Puntland, and Tuvalu are not shown, but were surveyed in 2014 and 2017.

Sources: AidData’s 2017 and 2020 *Listening to Leaders Surveys*.

Table 1. Distribution of respondents to the 2020 Listening to Leaders Survey

| Stakeholder group | Invitations sent | Invitations received | Responses received |
|--|------------------|----------------------|--------------------|
| Government (executive branch) officials | 45,594 (45.57%) | 36,918 (43.9%) | 2,959 (43.47%) |
| Parliamentarians | 13,474 (13.47%) | 11,485 (13.66%) | 360 (5.29%) |
| Local representatives of development partner | 21,270 (21.26%) | 19,250 (22.89%) | 889 (13.06%) |
| NGO/CSO leaders | 10,162 (10.16%) | 8,607 (10.24%) | 1,287 (18.91%) |
| Private sector leaders | 3,515 (3.51%) | 2,948 (3.51%) | 374 (5.49%) |
| University, think tank, and media leaders | 5,766 (5.76%) | 4,881 (5.8%) | 672 (9.87%) |
| Other | 265 (0.26%) | 1 (0%) | 266 (3.91%) |
| Total | 100,046 | 84,090 | 6,807 |

| Region | Invitations sent | Invitations received | Responses received |
|----------------------------|------------------|----------------------|--------------------|
| East Asia & Pacific | 14,505 (14.5%) | 11,388 (13.54%) | 910 (13.37%) |
| Europe & Central Asia | 17,704 (17.7%) | 14,840 (17.65%) | 1,184 (17.39%) |
| Latin America & Caribbean | 18,292 (18.28%) | 16,351 (19.44%) | 1,341 (19.7%) |
| Middle East & North Africa | 8,071 (8.07%) | 6,551 (7.79%) | 454 (6.67%) |
| South Asia | 10,104 (10.1%) | 8,626 (10.26%) | 612 (8.99%) |
| Sub-Saharan Africa | 31,106 (31.09%) | 26,334 (31.32%) | 2,297 (33.74%) |
| Other | 264 (0.26%) | N/A | 9 (0.13%) |
| Total | 100,046 | 84,090 | 6,807 |

1.2 Partners: Which development partners did leaders evaluate?

In this report, we use development partners as an inclusive term to describe a diverse field of external actors that provide a broad array of assistance to low- and middle-income countries—from financial assistance (e.g., grants and loans at varying degrees of concessionality) to technical assistance (e.g., advisory services and other non-financial support).

We first asked survey respondents to identify a single policy initiative they had directly worked on between 2016 and 2020.¹⁰ Respondents then selected which development partners had provided advice or assistance in support of this initiative out of a list of 130 development partners, including 31 multilateral development banks or intergovernmental organizations, 96 bilateral aid agencies and foreign embassies, and 3 private foundations.¹¹ To ensure that our list was sufficiently representative of the spectrum of development partners who were likely to work with our target population of interest, we added 53 new agencies (9 multilateral, 44 bilateral) to the list in

¹⁰ In the survey, we defined policy initiative as: an organizational action designed to solve a particular problem.

¹¹ Respondents were asked two questions: (i) “Of the following intergovernmental organizations, development banks, and private foundations, which, if any, provided [you] with advice or assistance to support this initiative?”; and (ii) “Of the following foreign embassies and bilateral agencies, which, if any, provided [you] with advice or assistance to support this initiative?” Respondents could also write in responses. For the full list of development partners, please see Appendix B of the Technical Appendix.

the 2020 survey wave. For the full list of development partners, see Appendix B of the Technical Appendix.

In this report, although a bilateral actor may be represented by more than one agency, we collapsed the responses for all agencies flying the same flag into a single, unified picture for our footprint, influence, and helpfulness measures. For example, survey respondents could select up to four Japanese entities from which they had received advice or assistance: the Japan Bank for International Cooperation (JBIC), the Japan International Cooperation Agency (JICA), the Japanese embassy (or consulate-general), and the representative office of Japan.¹² However, for the sake of simplicity, we collapse those responses into a single score for Japan in this report.

We should note that given the spirit of this exercise—learning from what leaders have to say about the external actors who supported them with advice or assistance—we do not artificially impose an eligibility criteria from the outside on the basis of the sectors or regions in which we presumed development partners to operate. Instead, we use the answers of the respondents as the authoritative criteria to determine who worked with whom and calculate the performance ratings of development partners on that basis. In instances where a result appears counterintuitive to what we might expect given the known profile of a development partner, we note it and, when possible, provide additional insight or context for why that might be.

1.3 Topics: What insights did leaders share about their priorities and experiences working with development partners?

The *Listening to Leaders Surveys* capture leader perceptions, priorities, and experiences over time on a series of topics. This offers several advantages: (i) comparability of responses to a common set of questions across survey waves; (ii) comparability between multiple cohorts of interest (e.g., sector, region, stakeholder group); (iii) comparability of perceptions of various government agencies or international development organizations using standardized scales; and (iv) breadth of data on diverse topics captured simultaneously.

In this report, we analyze a subset of the results from the 2020 survey that pertain to leader priorities and development partner performance.¹³ The results are organized in five chapters. In **Chapter 2 (Priorities)**, we analyze what leaders view as the most pressing problems to solve in their countries and what they want from their development partners. In **Chapter 3 (Footprint)**, we analyze the responses of leaders regarding the development partners from whom they had received advice or assistance. In **Chapter 4 (Performance)**, we assess how respondents rate the influence and helpfulness of the development partners with whom they work, as well as how this has evolved since the 2017

survey wave. We also probe deeper to understand why some actors were seen as influential and whether this influence was positive or negative. In **Chapter 5 (Conclusion)**, we reflect on what we can learn from the insights of leaders to inform not only the practices of individual organizations, but also broader public debates on the future of multilateralism, development cooperation reform, and a resurgence of great power competition.

¹² In collecting information at the agency level initially, we hope to reduce the risk that respondents inadvertently mistake interactions with a project implementer (e.g., a private company or NGO) working on behalf of a development partner as interacting directly with that partner. That said, we recognize that these distinctions may sometimes be opaque and difficult for counterparts in other countries to readily internalize.

¹³ The other modules of questions in the survey pertain to countries' capacity to advance reforms in line with their development goals, and what they see as the most desirable role for external assistance. The results from these questions will be analyzed and published in a second report in late 2021.

2. Priorities: Which problems do leaders want to solve, and what do they want from their partners?

Being responsive to leader priorities is not only the right thing to do, from a principles of aid effectiveness perspective (OECD DAC, 2019; GPEDC, 2016), but it is also the smart thing to do for development partners seeking to boost their performance in the eyes of their counterparts in low- and middle-income countries. Previously, we found that the extent to which a donor's aid allocations diverged from what leaders said were the most important problems to solve was negatively associated with a donor's perceived influence and helpfulness (Custer et al., 2018a). Moreover, amidst the rhetoric of aid in the national interest and a growing number of assistance providers, development partners increasingly aim to position themselves not merely as a *valued* partner, but as the *preferred* partner of low- and middle-income countries.

In this chapter, we seek to demystify what leaders want from their development partners in three respects. First, we assess the degree to which development partners are aligned with what leaders and citizens in low- and middle-income countries view as their priorities. Second, we examine what leaders had to say about what they value most in a preferred partner. Third, we analyze the results of two survey experiments that helps us understand how respondents assess the desirability of different types of aid projects and data offered by development partners.¹⁴ Development projects and data are seldom one-size-fits-all, but rather vary along several different attributes. In the real world, it is likely that leaders must make trade-offs in determining which attributes are more or less important to them in selecting the projects and data that are most attractive in advancing their goals.

For our analysis of the priorities of leaders, citizens, and donors, we draw upon three data sources. Our measure of leader priorities used responses to the *2020 Listening to Leaders Survey*, which asked respondents to identify up to six goals from a fixed list of 16 Sustainable Development Goals (excluding SDG 17, "Partnerships for the Goals").¹⁵ Citizen priorities were derived from the United Nations MY World Survey for 2018-2019, where people worldwide voted on their six most important development issues.¹⁶ For our measure of donors' revealed priorities, we employed AidData's Financing to the SDGs methodology to estimate the amount of official development assistance invested in SDG-like goals between 2018-2019, as a rough barometer of donor priorities.¹⁷

Leader priorities = % of leaders who selected a goal as one of the six most important problems for their country to solve (*2020 Listening to Leaders Survey*)

Citizen priorities = % of citizens who selected a goal as one of the six most important development issues for their country (2018-2019 My World Survey)

Donor (revealed) priorities = the relative rank of a goal based upon the approximate dollar value of donor contributions (ODA to SDG-like goals, 2018-2019)

¹⁴ The authors would like to specifically acknowledge and thank our collaborators Phil Roessler (William & Mary) and Rob Blair (Brown University) for their contributions to the design and analysis of the two survey experiments included in this report.

¹⁵ Specifically, we asked respondents the following question: "*Based upon your experience, what are the most important issues for advancing [your country's] development?*" There is one important difference in the profile of the respondents whose answers are included in this analysis. In keeping with the approach used in the *2018 Listening to Leaders* report, which analyzed leader priorities as of 2017, we excluded responses from the independent experts stakeholder group, which was a more disparate group of people with established expertise in a given country, but who might or might not have been resident in that country. For the 2020 survey results, we retained the independent experts group responses in the analysis of leader priorities in 2020, because the sampling frame for this stakeholder group had been refined to better reflect in-country voices from domestic think tanks/universities. See Appendix A of the Technical Appendix for more details about how AidData constructed and updated its sampling frame for the 2020 survey.

¹⁶ The authors would like to thank Anand Kantaria of the United Nations Development Program for his assistance in accessing the raw data for the MY World Survey results. The first phase of the MY World Survey (MWS) was launched in 2012 as part of the MY World 2015 project. A coalition of partners launched the second phase of MY World in 2016, with data collected in a rolling manner and updated daily through 2020 via myworld2030.org. For this analysis, we used data only for the years 2018 and 2019, as it was most proximate to the 2020 survey and also had the best sample size.

¹⁷ The authors would like to acknowledge and thank our collaborator Bryan Burgess (AidData at William & Mary) for his contribution of data on 2018-2019 financing to the Sustainable Development Goals, which we use for the analysis of leader-donor priority alignment. AidData's Financing to the SDGs methodology is based on an analysis of official development assistance (ODA) project descriptions and involves two critical steps: (1) creating a mapping between AidData's activity coding scheme and the 169 SDG targets; and (2) splitting the dollar value of an aid project across the associated SDG targets. These steps allowed us to estimate total financing at both the goal and target level for the SDGs. To create the original dataset, AidData cross-walked over 1.2 million ODA projects committed between 2000 and 2013 to the 17 SDGs. For the purpose of this report, we extended the methodology to look at development partner commitments in the two years prior to the 2020 survey (2018 and 2019).

To approximate real-world trade-offs, we presented respondents in the *2020 Listening to Leaders Survey* with two descriptions of hypothetical aid projects with different attributes and asked them to select which one their government should choose. The details of each project description were randomly assigned and varied along seven attributes: (1) project size; (2) project type; (3) conditionalities; (4) procurement; (5) regulations during implementation; (6) terms of lending; and (7) public disclosure of the terms of lending (see Table 2 in Section 2.3). The exercise was repeated two more times.¹⁸

Using a similar approach, in a second experiment, respondents were asked to choose between two descriptions of hypothetical data with different randomly assigned attributes.¹⁹ Each data description varied along five attributes: (1) accuracy; (2) timeliness; (3) accessibility; (4) actionability; and (5) familiarity and trust (see Table 3 in Section 2.4). The exercise was repeated one more time.²⁰

In the remainder of this chapter, we present **four key takeaways** about what leaders prioritize and want from their development partners:

- Development partners are in step with national priorities in health and good governance, but appear less attuned to education and jobs that leaders see as gateways to growth
- Leaders say that their preferred development partners are those that can best adapt their strategies to local needs and plan for long-term sustainability
- Leaders prefer development projects that are transparent and generous, focused on infrastructure, and provide political cover to lock-in desirable reforms
- Leaders place a premium on timely, accurate data from trusted organizations to guide their decisions, while senior officials are more concerned about the political feasibility of recommendations

2.1 Development partners are in step with national priorities in health and good governance, but appear less attuned to education and jobs that leaders see as gateways to growth

Education (SDG 4), jobs (SDG 8), and peace, justice, and strong institutions (SDG 16) were top of mind as the most important priorities that leaders in low- and middle-income countries wanted to tackle (Figure 2). Over half of the respondents to the *2020 Listening to Leaders Survey* selected these among their top three priorities. These priorities were durable not only over time—they were also the top three in 2017—but highly consistent across respondents, regardless of stakeholder group, region (Figure 3), gender, or level of experience. The only exception was that private sector respondents placed marginally greater emphasis on innovation, industry, and infrastructure over peace, justice, and strong institutions (ranked fourth). This logic likely follows from the private sector's reliance on innovation and industry to develop markets for their goods and services.

Nevertheless, leaders are not monolithic: as we move into the second tier of priorities, their preferences vary, likely reflective of what they see as the most pressing challenges facing their particular contexts. In this second tier of priorities, good health and well-being (SDG 3), identified by 41 percent of respondents overall, was the most consistently present goal in the top six development priorities of respondents, regardless of region, stakeholder group, experience level, and gender.

Parliamentarians, NGOs, development partners, and women were substantially more concerned about gender equality (SDG 5) than other groups. Private sector representatives and men, meanwhile, were more likely to emphasize access to affordable clean energy (SDG 7).

Promoting industry, innovation, and infrastructure (SDG 9) was fairly consistent among the top priorities for leaders in every region and was only marginally lower in Latin America and the Caribbean (LAC). However, there were some noticeable differences based upon local realities. Respondents from South Asia (SA) and East Asia and the Pacific (EAP), for whom rising sea levels and extreme weather events represent imminent threats to their countries' livelihoods, placed greater emphasis on climate change (SDG 13) than eradicating poverty (SDG 1). Reducing inequality (SDG 10) was marginally more important to respondents from Latin America and the Caribbean (LAC)—the

¹⁸ Respondents were given the following prompt: “In the next three questions, please read the descriptions of two hypothetical aid projects for the [Government of country] and indicate your preference between the two.” They were then shown two profiles describing different types of aid that their governments might receive and asked the following question: “Of these two aid projects—Project 1 and Project 2—which do you think the [government of country] should choose?” After reading the first pair of profiles, respondents were asked to select which they preferred. They then repeated this exercise two more times. The profiles varied along seven attributes and each attribute had between two and four possible levels. Attributes were randomized across respondents and profile pairs using the fractional factorial method.

¹⁹ For the purposes of the survey, we included a definition of data for respondents as “a data point, dataset, or analyses that use interpretations of data to provide insight into a particular situation.”

²⁰ Respondents were given the following prompt: “In the next two questions, please read the descriptions of two hypothetical data sources and indicate your preference between the two.” They were then shown two profiles describing different data sources and asked the following question: “In your work in [insert respondent-selected policy domain], imagine that you or your colleagues had to choose between two kinds of data. Which would you choose?” The profiles varied along five attributes and each attribute had two levels.

world's most unequal region (World Bank, 2013)—and the Middle East and North Africa (MENA).

Leaders cannot prioritize everything, so what goal appears most at risk of being out of sight, and therefore, out of mind? Environmental protection is the ultimate collective action challenge that requires leaders to join forces to tackle issues that entail “large upfront costs and uncertain future benefits” (Custer et al., 2018a). This may partly explain why environmental goals—life on land (SDG 15), life below water (SDG 14), and responsible consumption and production (SDG 12)—continued to be an afterthought for leaders. Climate action (SDG 13) received somewhat more attention from leaders in some geographic regions, such as SA and EAP, but not all.

Citizens agreed with leaders on many of their development priorities—particularly related to the importance of good health and education (Figure 4). If anything, it is likely that good health may have even greater importance for citizens today, in the midst of the COVID-19 pandemic response, than in 2018-19, when they answered the MY World Survey. The largest disparities between citizens and leaders may be reinforced by their particular vantage points (Figure 5). Citizens were most concerned with their basic, immediate needs that impact them personally—feeding their families (SDG 2), accessing clean water and sanitation (SDG 6), reducing their vulnerability to economic shocks (SDG 1), and promoting equal opportunities specifically for women and girls (SDG 5).

Leaders, by contrast, emphasized longer-term and macro development issues facing their countries such as the promotion of industry, innovation, and infrastructure (SDG 9), reducing inequalities in general (SDG 10), economic growth (SDG 8), and

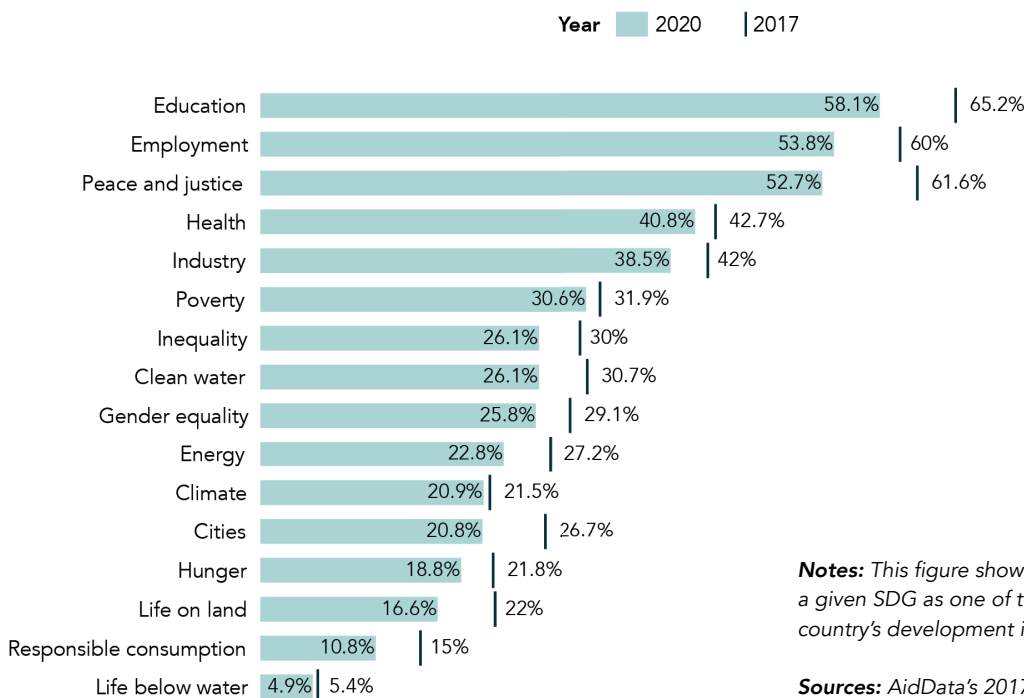
peace, justice, and strong institutions (SDG 16). There is one interesting departure from this trend—citizens appear to be much more attuned to issues of climate change (SDG 13) than their leaders, perhaps indicating that they may already be seeing early symptoms of how a degrading climate may impact their lives and livelihoods.

If you want to gauge a donor's true priorities, a look at how they direct the power of their purse can be quite revealing—as US President Joseph R. Biden, Jr. (then Senator Biden) famously declared in 2008, “Don't tell me what you value. Show me your budget, and I'll tell you what you value” (Biden, 2008). In this vein, we mapped how development partners deployed their official development assistance (ODA) toward the 16 SDGs in 2018-19, the two years most proximate to the 2020 *Listening to Leaders Survey* (Figure 6). Admittedly, the financing picture likely shifted from 2020-21 in light of the COVID-19 pandemic with a greater emphasis on pandemic response; however, the 2018-19 picture is arguably a better view of donors' longer-term priorities.

Donors' top two priorities (based on their aid spending) converged most closely with leaders with regard to investing in peace, justice, and strong institutions (SDG 16) and citizens when it came to good health and wellbeing (SDG 3). In 2020, just as in 2017, development partners may be underinvesting in education (SDG 4) and jobs (SDG 8) relative to the strong emphasis placed on these priorities by leaders (Figure 6). Donors seemed most out of step with citizens on neglecting climate action (SDG 13), gender equality (SDG 5), and eliminating poverty (SDG 1).²¹ Once again, environmental goals such as responsible consumption and production (SDG 12) and life below water (SDG 14) failed to penetrate the top priorities for anyone—be it leaders, citizens, or donors.

Figure 2. How frequently does a development goal appear in leaders' top priorities?

Percentage of respondents who identified a given Sustainable Development Goal (SDG) as one of their top six priorities in 2017 versus 2020.



Notes: This figure shows the percentage of respondents who selected a given SDG as one of their top six priorities for advancing their country's development in 2017 versus 2020.

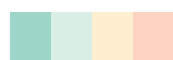
Sources: AidData's 2017 and 2020 *Listening to Leaders Surveys*.

²¹ Figure 6 does not directly show these results. Comparison of the citizen rankings in Figure 4 with the spending in Figure 6 provides the information required to draw these conclusions.

Figure 3. Development priorities by region and stakeholder group

Percentage of respondents by stakeholder group and region who identified a given Sustainable Development Goal (SDG) as one of their top six priorities in 2020.

| SDGs | Stakeholder group | | | | | | | Region | | | | | |
|-------------------------|-------------------|-------|------------|--------------|---------|----------------|----------|--------|-------|-------|-------|-------|-------|
| | Overall Rank | Gov. | Parliament | Dev. Partner | NGO/CSO | Private sector | Academic | EAP | ECA | LAC | MENA | SA | SSA |
| Education | 1 | 59.4% | 51.2% | 55.8% | 56.2% | 69.7% | 70.6% | 53.6% | 61.8% | 53.8% | 60.3% | 47.9% | 63.6% |
| Employment | 2 | 54.2% | 53.7% | 54.7% | 49.9% | 59.1% | 49.3% | 50.4% | 61.1% | 54.7% | 59.1% | 49.3% | 50.4% |
| Peace and justice | 3 | 48.3% | 49.9% | 58.8% | 55.5% | 49.7% | 56.2% | 48.8% | 63.8% | 42.2% | 57.7% | 50.0% | 54.5% |
| Health | 4 | 40.5% | 43.0% | 43.3% | 38.8% | 32.7% | 35.5% | 44.3% | 43.8% | 28.9% | 35.1% | 39.4% | 46.1% |
| Industry | 5 | 45.7% | 27.8% | 30.2% | 28.2% | 57.8% | 38.4% | 35.2% | 43.2% | 27.5% | 39.1% | 38.3% | 40.3% |
| Poverty | 6 | 29.0% | 33.5% | 33.0% | 32.9% | 22.0% | 30.0% | 22.5% | 20.4% | 32.4% | 37.1% | 28.3% | 37.4% |
| Inequality | 7 | 22.3% | 27.2% | 31.0% | 30.7% | 14.8% | 30.2% | 25.7% | 22.7% | 29.7% | 34.8% | 27.2% | 24.8% |
| Gender equality | 8 | 17.7% | 28.2% | 34.4% | 35.1% | 21.3% | 17.9% | 23.2% | 22.1% | 20.5% | 31.3% | 25.2% | 29.4% |
| Clean water | 9 | 27.8% | 25.7% | 26.5% | 21.3% | 22.4% | 23.1% | 28.0% | 13.4% | 17.3% | 23.6% | 23.7% | 36.9% |
| Cities | 10 | 20.5% | 20.8% | 21.7% | 21.3% | 15.8% | 20.8% | 28.2% | 28.0% | 16.8% | 23.2% | 22.6% | 16.1% |
| Energy | 11 | 24.4% | 19.2% | 23.3% | 16.9% | 24.9% | 16.5% | 19.6% | 17.0% | 11.2% | 21.8% | 22.4% | 31.0% |
| Climate | 12 | 18.9% | 17.7% | 24.3% | 22.7% | 12.4% | 16.0% | 36.4% | 13.4% | 15.5% | 12.2% | 28.7% | 19.4% |
| Hunger | 13 | 17.9% | 18.1% | 19.8% | 21.5% | 12.0% | 15.4% | 13.5% | 5.2% | 15.2% | 18.0% | 16.8% | 28.9% |
| Life on land | 14 | 16.2% | 13.9% | 16.7% | 18.3% | 11.9% | 18.9% | 23.9% | 14.4% | 15.9% | 9.2% | 12.8% | 17.8% |
| Responsible consumption | 15 | 11.2% | 5.7% | 8.3% | 13.2% | 14.4% | 13.0% | 14.2% | 11.4% | 9.6% | 13.8% | 12.7% | 7.6% |
| Life below water | 16 | 4.4% | 3.7% | 5.8% | 5.1% | 2.6% | 3.1% | 11.6% | 1.7% | 3.9% | 6.2% | 3.8% | 3.9% |



Cohort quartiles

Stakeholder

Gov. Government
Dev. Partner Development partner

Regions

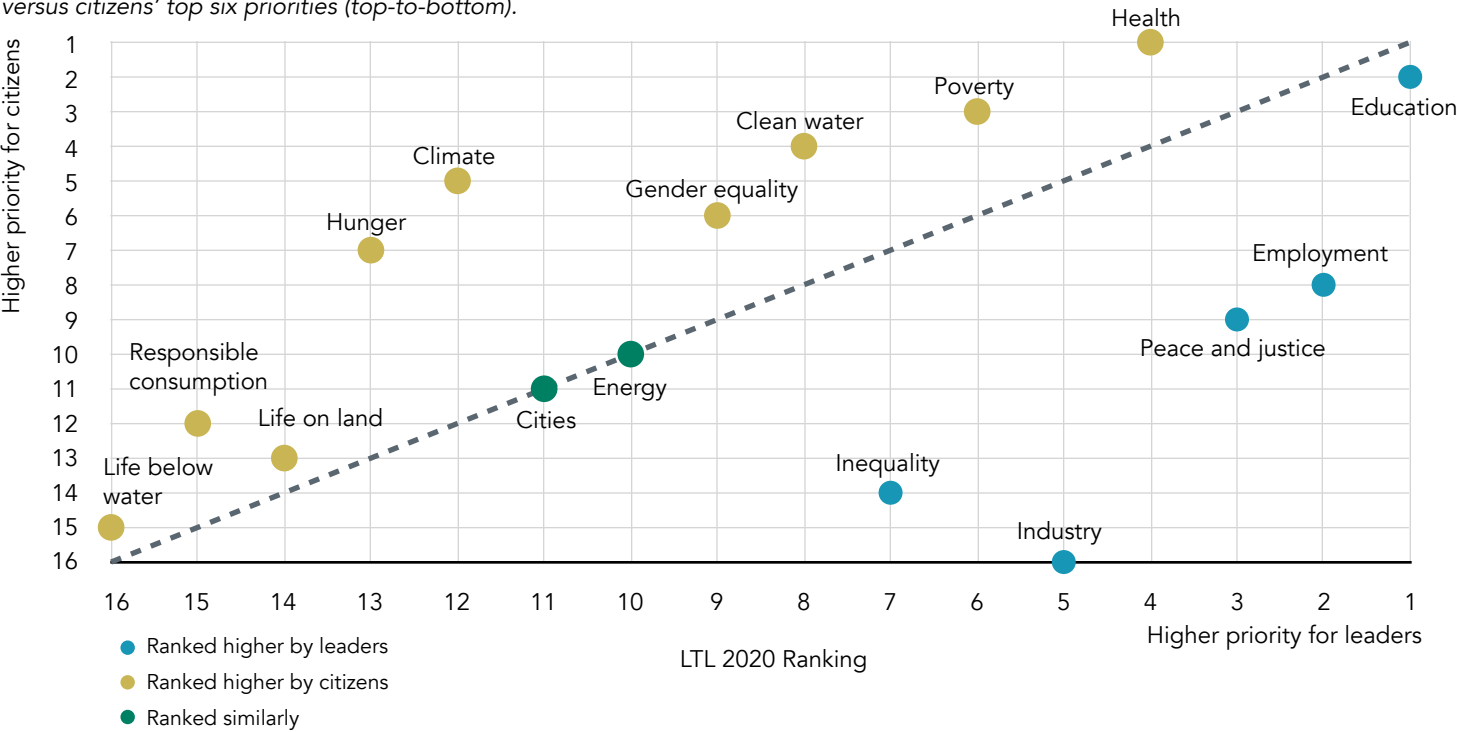
EAP East Asia and Pacific
ECA Europe and Central Asia
LAC Latin America and the Caribbean
MENA Middle East and North Africa
SA South Asia
SSA Sub-Saharan Africa

Notes: This figure shows the percentage of respondents, by occupation (i.e., stakeholder group) and region who selected a given SDG as one of their top 6 priorities for advancing their country's development.

Sources: AidData's 2020 Listening to Leaders Survey.

Figure 4. Comparison of development priorities between leaders and citizens

This chart juxtaposes how frequently a Sustainable Development Goal (SDG) appears amongst leaders’ top six priorities (right-to-left) versus citizens’ top six priorities (top-to-bottom).

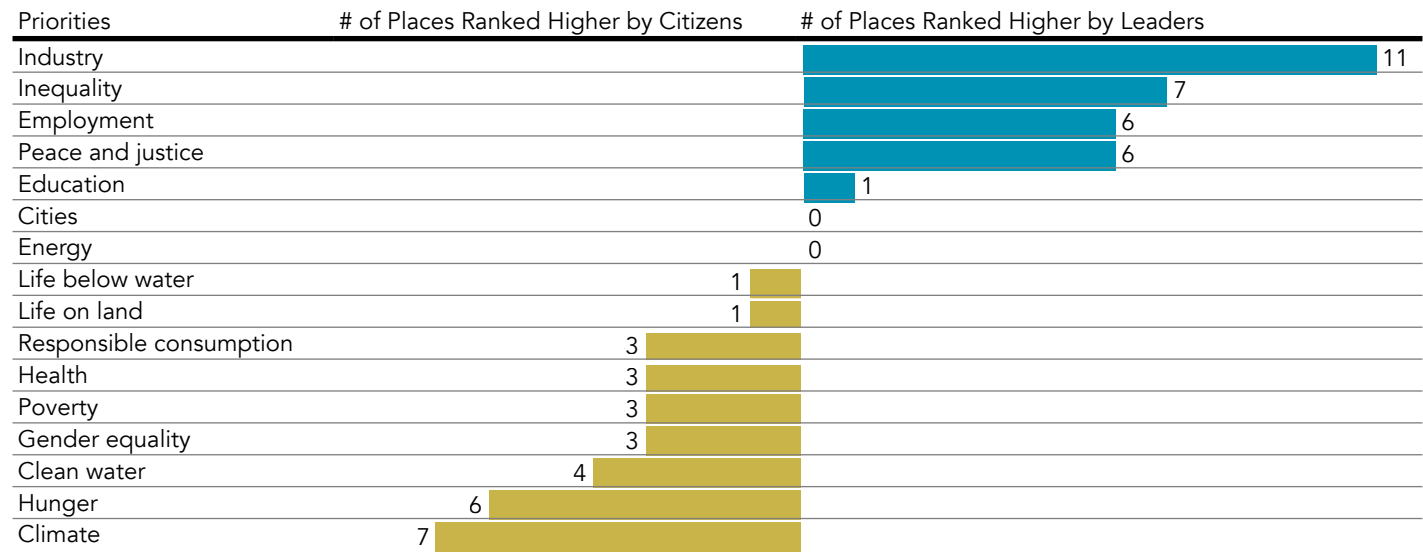


Notes: Based on the proportion of respondents who selected a goal as a top six priority in the UN’s My World Survey 2018-2019, we assigned each goal a rank of 1 (highest priority) to 16 (lowest priority) for citizens. We then did the same for leaders using the 2020 Listening to Leaders Survey results.

Sources: AidData’s 2020 Listening to Leaders Survey and the UN’s MY World Survey 2018-2019.

Figure 5. Difference in ranking of development priorities between leaders and citizens

The chart below shows the difference in the rank that citizens and leaders assigned to a given priority. Goals that were a higher priority for leaders than citizens are displayed to the top right and those that were a higher priority for citizens than leaders are displayed to the bottom left.

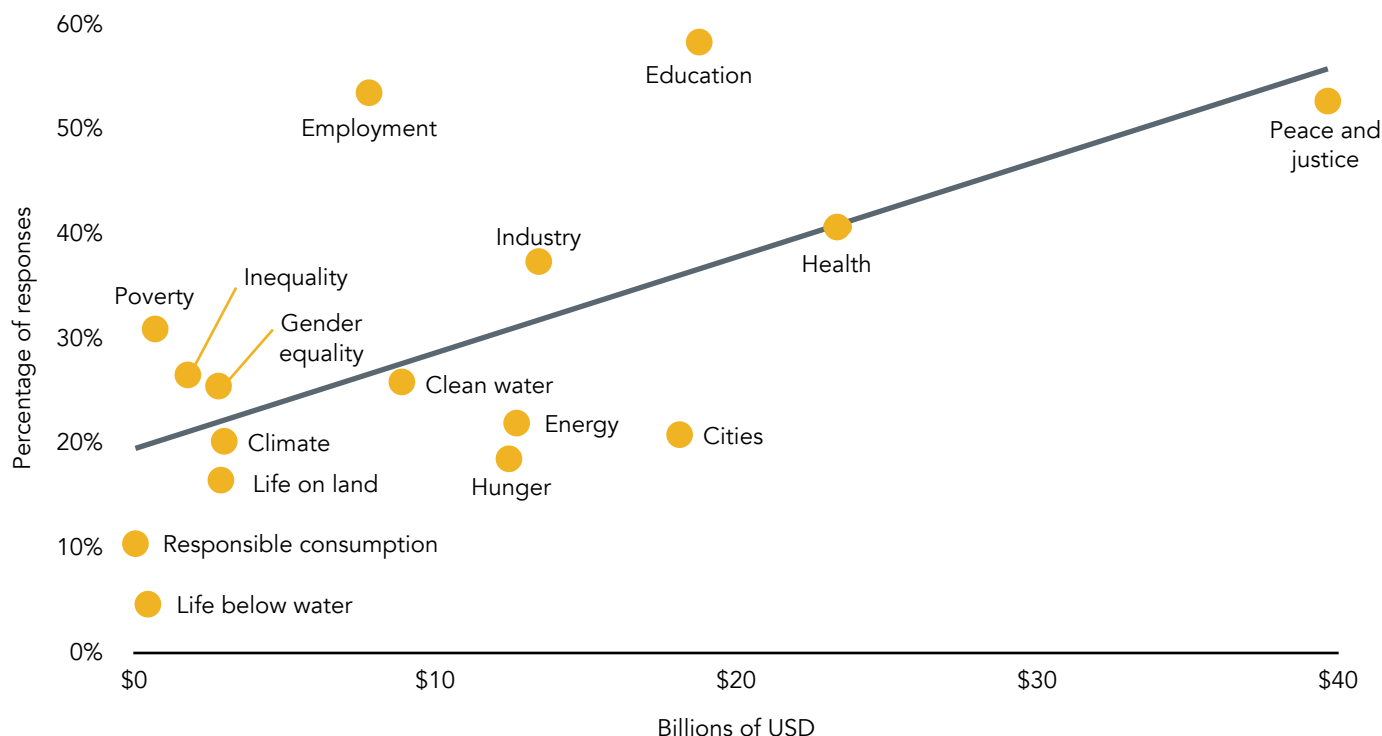


Notes: Based upon the proportion of respondents who selected a goal as a top six priority in the UN’s My World Survey 2018-2019 we assigned each goal a rank of 1 (highest priority) to 16 (lowest priority) for citizens and did the same for leaders using the 2020 Listening to Leaders Survey results.

Sources: AidData’s 2020 Listening to Leaders Survey and the UN’s MY World Survey 2018-2019.

Figure 6. Comparison of development priorities between leaders and donors

This chart juxtaposes how frequently a Sustainable Development Goal (SDG) appears amongst leaders' top six priorities (y-axis), versus the total amount of official development assistance (ODA) allocated to a given goal between 2018-2019 (x-axis).



Sources: AidData's 2020 Listening to Leaders Survey and AidData's Financing to the SDGs Dataset, Version 1.1 (Burgess et al., 2021).

2.2 Leaders say that their preferred development partners are those that can best adapt their strategies to local needs and plan for long-term sustainability

Adaptability was top of mind for leaders when they thought about what they value most in a preferred partner. Forty percent of respondents to the 2020 Listening to Leaders Survey said that they valued development partners that adapted their strategies to the country's needs (see Figure 7). This was far and away the single most desirable quality respondents looked for in their partners, followed by prioritizing long-term planning.²² As respondents answered follow-up questions about what adaptability and long-term planning looked like in practice (see Figures 8 and 9), a clear and compelling theme emerged—leaders want partners who prioritize long-term sustainability, and this manifests in several ways.

One important aspect of sustainability is that proposed development solutions are fit-for-purpose. Respondents placed a premium on development partner efforts to ensure projects were contextually relevant (60 percent), aligned with national priorities

(60 percent), and incorporated feedback from domestic stakeholders (56 percent) (see Figure 8). A second aspect of sustainability is ensuring that development partners help their counterparts in low- and middle-income countries sustain gains beyond the typical 3-5 year planning horizon of a project or program. In the eyes of respondents, this meant planning with the end in mind—building institutionalized capacity (73 percent), planning transitions to ensure countries can continue projects beyond the donor's engagement (50 percent), and prioritizing long-term impacts (53 percent) (see Figure 9).

The volatility of aid has long been a thorn in the side of low- and middle-income countries who must often navigate large and unpredictable fluctuations in the volume and focus of development partner contributions (Kharas, 2008; McKee et al., 2020). This dynamic is compounded as donors face shrinking budgets of their own, as well as increasing scrutiny from taxpayers and shareholders keenly concerned about value for money. In this respect, leaders shrewdly recognize that their best chance to preserve hard-won development gains is to ensure that they have the foresight, capacity, and mandate to independently sustain and build upon the foundation laid with external partners whose engagement is time-limited.

Fortunately, development partners have increasingly embraced the need to be more nimble and inclusive of local voices in defining the problems they want to solve and rapidly iterating together to find solutions that are fit-for-purpose in alleviating key

²² Respondents consistently held adaptability as the most highly desirable quality by far. This held true regardless of their gender or years of experience.

constraints. Andrews et al. (2015) promoted their problem-driven iterative adaptation (PDIA) model, which features structured participatory processes and tight feedback loops, as an antidote to the pitfalls of pre-packaged expert-driven solutions in tackling intractable governance challenges. Over 400 development thinkers and practitioners reiterated their commitment to these ideas in signing a “Doing Development Differently manifesto” (ODI, n.d.).

Adaptive management has since become an integral part of the enlightened development partner’s lexicon, from the UK’s LearnAdapt²³ (Menocal et al., 2021) to the US Agency for International Development’s Collaborating, Learning, and Adapting (CLA) toolkit²⁴ (USAID, n.d.) and many more examples. Development partners who double down on such efforts may be better positioned than their peers to respond to the call of leaders to be more adaptive and focused on designing and delivering development assistance with long-term sustainability in mind.

Figure 7. What did leaders say they valued most in a development partner?

Percentage of respondents who selected a given attribute they valued in a preferred partner.



²³ LearnAdapt was a three-year (2017-2020) collaboration between the Overseas Development Institute, the UK government, and several other international development organizations to “nurture an environment and create systems and processes that enable adaptive programming for greater development effectiveness” (Menocal et al., 2021).

²⁴ Collaborating, Learning, and Adapting (CLA) was USAID’s “framework for ensuring programs are coordinated with others, grounded in a strong evidence base, and iteratively adapted to remain relevant throughout implementation” (USAID, n.d.).

Figure 8. What did leaders say made a development partner adaptable?

Percentage of respondents who selected a given attribute as exemplifying what it meant in practice for a partner to “adapt its strategies to country needs.”

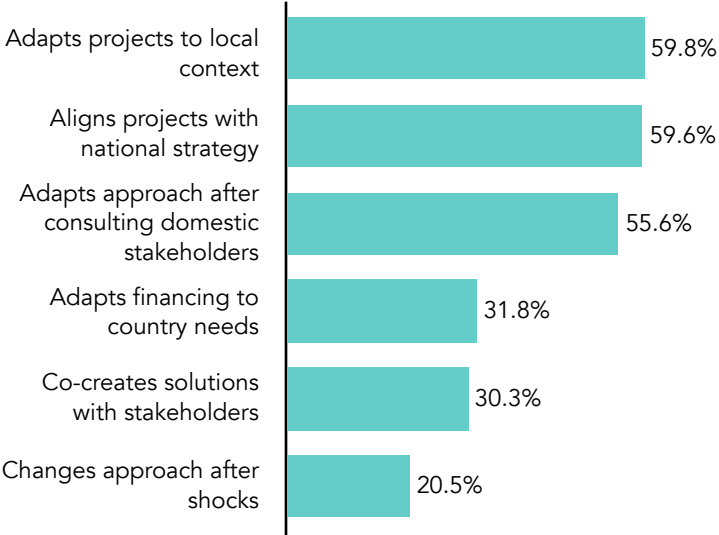
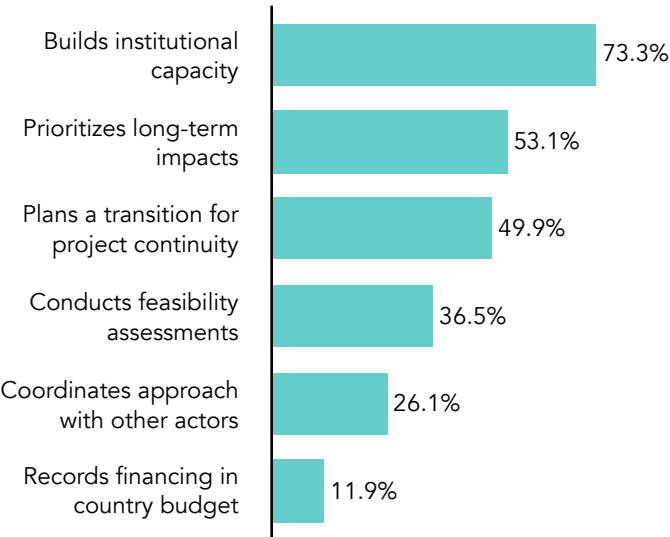


Figure 9. What did leaders say made a development partner prioritize long-term planning?

Percentage of respondents who selected a given attribute as exemplifying what it meant in practice for a partner to “prioritize long-term planning.”



2.3 Leaders prefer development projects that are transparent and generous, focused on infrastructure, and provide political cover to lock in desirable reforms

Leaders pay close attention to the generosity of financing offered by development partners in several respects. When presented with randomized descriptions of hypothetical aid projects and asked which their government should choose, respondents preferred grants (+20 percentage points) and low-interest loans (+13 percentage points) over high-interest rate lending; disliked tied aid (-7 percentage points); and favored large dollar projects (+2 percentage points). We should note, however, that while leaders may not like tied aid—when a “donor requires the recipients of its aid to use those dollars to procure goods or services from itself”—and this runs afoul of best practice, we have not found evidence to indicate that this necessarily undercuts development partner influence (Custer et al., 2015 and 2018a). Respondents were also noticeably more interested in infrastructure projects than those focused on civil society (-6 percentage points) or tax collection capacity (-6 percentage points).

Although there is an extensive literature on the perils and pitfalls of conditionalities, leaders were less opposed to the inclusion of social, economic, or democracy conditions in development projects than one might expect. Respondents were 1-2 percentage points more likely to choose projects with these conditions rather than to choose those with none at all. It could be that leaders view conditionality as relatively toothless, considering that “aid agencies often fail to enforce conditions” (Kilby, 2009), either due to lack of political will in the face of competing geostrategic priorities or limited capacity to follow-through (Li, 2017). Alternatively, leaders may view conditionalities as helping them push forward reforms they were predisposed to support and for which they now can access new resources to galvanize allies or minimize vocal detractors.

Moreover, when it comes to the delivery of assistance projects, leaders gravitated towards projects requiring higher rather than lower standards. Respondents were more likely to choose aid projects with regulations attached, specifically to reduce corruption (+13 percentage points), minimize environmental damage (+10 percentage points), or protect workers from unfair labor practices (+6 percentage points), than those without. Perhaps in a similar vein, respondents preferred projects that required public disclosure of the aid agreement terms over those that did not (+10 percentage points).

This high degree of enthusiasm for regulations and required disclosures does not appear to support the ambivalence argument (i.e., regulations are unlikely to be enforced). Instead, this may lend further credence to the view that reform-minded leaders may sometimes view these external requirements as strengthening their hand to overcome potential domestic

resistance and lock in desirable policy changes. This may be welcome news to development partners, provided that they are thoughtful about ensuring the regulations they propose are well-aligned with what their counterparts hope to achieve.

The willingness of leaders to embrace environmental regulations also gives rise to an important insight to complement our earlier discussion of national priorities. Although environmental issues were not foremost on the list of the most pressing development problems respondents said they wanted to solve, this should not be taken as an indication that leaders are unsympathetic to the importance of safeguarding the Earth’s biodiversity. The survey results do indicate that leaders preferred projects that did not actively harm the environment, even if they may feel the need to prioritize their attention and resources to other concerns.

Somewhat counterintuitively, leaders appear to be more similar, than different, in their preferences for development projects regardless of whether they work inside or outside of government. The one exception to this general rule is that non-government respondents were more likely to prioritize civil society-focused projects (+5 percentage points), while those in government (executive branch and parliamentarians) were more likely to prefer infrastructure projects (+4 percentage points).²⁵ It is also worth noting a rather surprising non-finding where we expected to see a clear difference: government officials and non-governmental officials alike strongly preferred transparent disclosure of the terms of lending. This may indicate that political leaders are not tone-deaf to maintaining the confidence of their colleagues and the public by making these transactions above board, as opposed to hidden from view.

²⁵ The finding on non-government respondents’ preference for civil society projects was statistically significant at conventional levels ($p < 0.01$); so too was the finding on government respondents’ preference for infrastructure projects ($p < 0.05$).

Table 2. Randomized attributes of projects for development assistance survey experiment

| Attribute group | Variations of attribute |
|-----------------------------------|---|
| Size of project | \$500 million |
| | \$100 million |
| Type of project | Improve transportation infrastructure, such as roads and bridges |
| | Strengthen the government's administrative capacity to collect taxes |
| | Strengthen the capacity of civil society organizations to advocate for reforms |
| Conditionalities tied to aid | Governance: protection of human rights and holding of free and fair elections |
| | Economic: favorable macroeconomic policy framework, such as debt sustainability |
| | Social: social policies such as gender equality |
| | No political, economic or social conditions are attached to aid disbursements |
| Procurement requirements | Aid tied to procuring services and inputs from companies in the donor country |
| | Aid not tied to procurement of services and inputs from specific companies or countries |
| Regulations during implementation | Aid agreement includes regulations to minimize environmental damage |
| | Aid agreement includes regulations to reduce corruption |
| | Aid agreement includes regulations to protect workers from unfair labor practices |
| | Aid agreement includes no specific environmental, anti-corruption or labor regulations |
| Terms of lending | Commercial loan at market rates backed by natural resources as collateral |
| | Commercial loan with interest rate of 2% for 20 years |
| | Commercial loan with interest rate of 8% for 10 years |
| | Aid is in the form of a grant (recipient does not need to repay) |
| Reporting on terms of lending | Terms of aid agreement are publicly disclosed |
| | Terms of aid agreement are not publicly disclosed |

2.4 Leaders place a premium on timely, accurate data from trusted organizations to guide their decisions, while senior officials are more concerned about the political feasibility of recommendations

In addition to financing, many development partners serve as information brokers, supplying data and technical advice to support reform-minded leaders. However, in a hyperconnected world, leaders can quickly experience information overload when faced with seemingly unlimited sources of data and analysis from which to choose. In a world of imperfect information, it is unlikely that leaders will encounter ideal data that precisely has all the features they want. So, what trade-offs are they willing to make, and which data will they pay attention to in a sea of imperfect possibilities?

Respondents demonstrated a clear preference for data that was timely (+27 percentage points) and highly accurate (+20 percentage points). The emphasis on timeliness (i.e., inclusion of recent years of data) and accuracy (i.e., the rigor with which data is collected and produced) implies that leaders are thinking critically about the information they need to inform their decision making, as opposed to pro forma reporting. However, sourcing such data is challenging especially in practice, in countries where national statistics organizations and line ministries tasked with collecting crucial administrative data are often resource-constrained to meet demand (SDSN TRenDS, 2019).

This should be a wake-up call for development partners to crowd in additional public and private sector resources to fill an estimated shortfall of US\$700 million per year in national statistics systems (Calleja and Rogerson, 2019) which perpetuate “acute data gaps, data publication delays, insufficient data disaggregation and more” (SDSN TRenDS, 2019). Improving the capacity of countries to sustainably produce and access timely, accurate data is not only a recipe for better information, but also appears as a way for development leaders to be responsive to what leaders want.

In addition to quality, leaders consider the face behind the data, exhibiting a preference for information sourced from organizations that they have dealt with in the past and consider to be trustworthy (+12 percentage points). This raises the importance of information suppliers ensuring that they have either cultivated a strong relationship track record with the target audience for their data or have otherwise mobilized credible “local infomediaries—individuals and organizations who distill key insights as well as package information in a compelling way to their networks” (Masaki et al, 2017). Leaders were also concerned with accessibility (+13 percentage points), as reducing the time and effort to obtain data was top of mind.

Interestingly, while respondents inside and outside of government were fairly consistent in their revealed data preferences, more senior leaders (of any organization type) differed from their mid-level colleagues in one respect—the trade-off between political feasibility versus ease of implementation. Mid-level leaders were more likely to choose

data where the recommendations were easier to implement (+5 percentage points), while senior leaders emphasized political feasibility (+5 percentage points), perhaps indicating greater awareness of the necessity of building consensus and support for any recommendation to be successfully implemented.²⁶

In this chapter, we examined the broad contours of what leaders had to say about the problems they most want to solve, what they value in their preferred partners, and which attributes they prefer in development assistance projects and data. In the next chapters, we increase the specificity of our discussion, turning from leaders’ general aspirations to their experiences working with a diverse set of development partners between 2016 and 2020. In Chapter 3, we compare development partners that have different size footprints in terms of their reach with respondents across geographies, sectors, and stakeholder groups. In Chapter 4, we turn to the question of how leaders assessed the influence and helpfulness of their partners, and why?

Table 3. Randomized attributes of data for decision-making survey experiment

| Attribute group | Variations of attribute |
|-----------------------|---|
| Accuracy | Data meets your minimum threshold for accuracy, but there are some gaps |
| | Data is highly accurate in terms of the rigor with which it was collected and produced |
| Timeliness | Data is not timely (i.e., does not cover recent years) |
| | Data is timely (i.e., shows recent information) |
| Accessibility | Need to spend time and effort to obtain the data point/dataset OR the analysis is not easy to understand (i.e., does not use simple and clear language) |
| | Data point(s)/dataset is easily and quickly accessible OR the analysis is easy to understand (i.e., uses simple and clear language) |
| Actionability | Data provides a recommendation that is easy to implement but may not be politically feasible |
| | Data provides a recommendation that is politically feasible, but will require a long time to implement |
| Familiarity and trust | Organization that produced the data has not had previous interactions with your team |
| | Organization that produced the data is known to your team through previous interactions and is trusted |

²⁶ This difference was statistically significant at the (p<0.05) level.

3. Footprint: From which development partners did leaders receive advice or assistance?

Supply-side concerns, such as shrinking aid budgets, waning multilateralism, and aligning assistance with the national interest can place pressure on development partners to recalibrate who they work with and how. The 2020 *Listening to Leaders Survey* gives us unique insight into the relative **footprints** of development partners from the perspectives of those they seek to support and influence. As described in Chapter 1, respondents selected which development partners (out of a list of 130 agencies) had provided advice or assistance in support of a single policy initiative²⁷ they had directly worked on between 2016 and 2020.²⁸ Using these responses, we calculated the percentage of respondents that reported receiving advice or assistance from each development partner, as a perceptions-based measure of that actor's footprint.

Footprint = % of leaders in low- and middle-income countries who said they received advice or assistance from a bilateral aid agency or multilateral organization between 2016 and 2020

Development partners can have decidedly different footprints—from smaller niche players that focus on specific geographies or sectors to global heavyweights with much broader portfolios. The thirty-two smallest development partners reportedly provided advice or assistance to less than five percent of the survey respondents and worked in a relatively small subset of countries. At the opposite end of the spectrum, the twelve largest players worked with over 20 percent of respondents from nearly all countries and semi-autonomous regions included in the survey. Figure 10 provides a breakdown of 73 development partners for whom 20 or more survey respondents reported receiving advice or assistance between 2016 and 2020.

It is important to underscore that the footprint of a development partner is not a measure of performance in and of itself. Smaller players may receive rave reviews from their narrow constituency base, while larger players whose resources and attention are stretched across many more countries and sectors may find that their efforts fall short in the eyes of their counterparts in low- and middle-income countries.

Instead, this footprint measure illuminates that development partners are not monolithic—they may have divergent mandates, strategies, and resources which lend themselves to different profiles of who they engage and how in low- and middle-income countries. These differences—from the type of assistance

provided and the breadth of focus to the presence or absence of extensive field operations (e.g., country offices)—likely have some bearing on which leaders reported working with a development partner. This provides important context to the later discussion of how leaders rate their development partners' performance in Chapter 4.

In the remainder of this chapter, we present **four key takeaways** from this examination of the differences and similarities in the footprints of development partners.

- The UN system and large OECD donors have the largest footprints, supplying advice and assistance to the most leaders overall
- Middle powers and specialized multilaterals have more concentrated footprints with outsized focus in particular geographies or sectors
- In line with its global ambitions, China eclipsed other emerging donors in working with 15 percent of leaders from 113 countries in 2020
- UNICEF increased its footprint with a much larger percentage of leaders since 2017, while China dramatically expanded by an additional 52 countries

3.1. The UN system and large OECD donors have the largest footprints, supplying advice and assistance to the most leaders overall

Three multilateral organizations—the World Bank (WB), the United Nations Development Program (UNDP), and the European Union (EU)—had the largest footprints, working with at least 40 percent of survey respondents from 137 countries. Members of the OECD's club of the largest providers of development assistance, the development assistance committee (DAC)—such as the United States (US), Germany, Japan, and the United Kingdom (UK)—were also major players.²⁹ Between 20-40 percent of respondents from over 120 countries reportedly received advice or assistance from these development partners.

²⁷ In the survey, we defined policy initiative as: an organizational action designed to solve a particular problem.

²⁸ Specifically, this full list of development partners included 31 multilateral development banks or intergovernmental organizations, 96 bilateral agencies, and 3 private foundations. Respondents were asked two questions: (i) of the following intergovernmental organizations, development banks, and private foundations, which, if any, provided [you] with advice or assistance to support this initiative; and (ii) of the following foreign embassies and bilateral agencies, which, if any, provided [you] with advice or assistance to support this initiative. Respondents could also write in responses. For the full list of development partners, please see Appendix B of the Technical Appendix.

²⁹ As of May 2021, the OECD DAC had 30 members including: Australia, Austria, Belgium, Canada, Czech Republic, Denmark, European Union, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, Korea, Luxembourg, the Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, United Kingdom, and the United States. <https://www.oecd.org/dac/development-assistance-committee/>

Rounding out the list of development partners with the largest footprints were the United Nations Children’s Fund (UNICEF), the International Monetary Fund (IMF), the World Health Organization (WHO),³⁰ the Food and Agriculture Organization (FAO), and the United Nations Education Scientific, and Cultural Organization (UNESCO).

The relative prominence of the WHO may be partly attributed to its role in helping countries navigate the COVID-19 pandemic, as the survey was fielded from late June to mid September 2020.

Twenty-seven percent of respondents from 137 countries reported receiving advice or assistance from the WHO.³¹ Comparatively, health-focused vertical funds such as the Global Fund to Fight AIDS, Tuberculosis, and Malaria (Global Fund) and Global Alliance for Vaccines and Immunization (GAVI) had relatively smaller footprints in terms of the percentage of respondents who reported working with them.³² The WHO’s footprint extended beyond the social sector (including health): it was among the ten largest development partners in 4 out of 6 sectors, with the exception of rural development and the environment.

At first blush, a connection between the FAO’s footprint and the COVID-19 response may not be as apparent; however, it is conceivable that as low- and middle-income countries grappled with pandemic-induced food shortages and import restrictions, food security became of paramount importance of leaders. In line with its mandate, 58 percent of respondents in the rural development sector and 34 percent in the environmental sector reported receiving advice or assistance from the FAO, perhaps illustrating the mutually reinforcing relationship between agricultural practices and environmental protection.

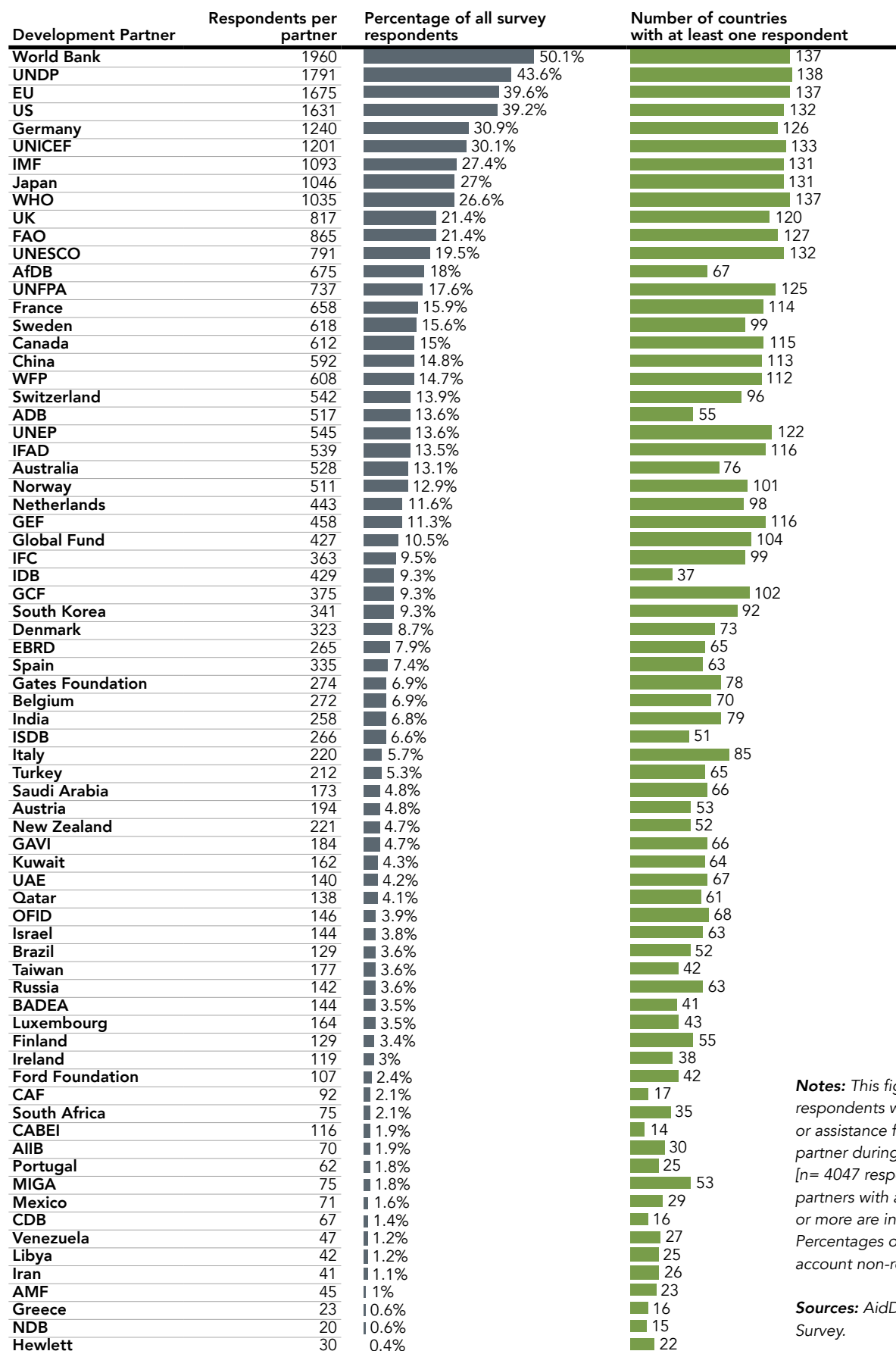
³⁰ Since the WHO was not included in the 2017 survey, it is difficult to say with certainty whether the high levels of engagement reported with the WHO are driven by the pandemic or would have been the case even in the absence of COVID-19.

³¹ The WHO was most frequently mentioned by government officials (34 percent) and parliamentarians (42 percent).

³² Eleven percent of respondents from 104 countries reported receiving advice or assistance from the Global Fund in 2020. GAVI reportedly worked with 5 percent of respondents from 66 countries. This smaller footprint could be due to the fact that these development partners typically do not have offices in the countries with which they work.

Figure 10. Which development partners had the largest footprints in 2020?

Percentage of respondents who reported receiving advice or assistance from a given development partner between 2016 and 2020.



Notes: This figure shows the percentage of respondents who reported receiving advice or assistance from a given development partner during the period of 2016 and 2020 [n= 4047 respondents]. Only development partners with a sample size of 20 respondents or more are included in the figure. Percentages of respondents also take into account non-response weights.

Sources: AidData's 2020 Listening to Leaders Survey.

Figure 11. Footprints by region and sector, 2020

This table shows the top 10 development partners with the largest footprints in each region and sector. Footprints are based on the percentage of respondents from each region and sector who reported receiving advice or assistance from a given development partner between 2016 and 2020.

| Regions | | | | | |
|---------------------|---------------------|--------------------|--------------------|--------------------|--------------------|
| EAP | ECA | LAC | MENA | SA | SSA |
| World Bank (55.5%) | EU (56.2%) | IDB (45.3%) | UNDP (49.1%) | World Bank (54.7%) | World Bank (53.8%) |
| Australia (54.5%) | World Bank (48.6%) | World Bank (39.2%) | World Bank (48.7%) | ADB (47.4%) | AfDB (45.9%) |
| ADB (51.8%) | US (45.8%) | UNDP (37.9%) | EU (48.3%) | UNDP (47.0%) | US (43.0%) |
| UNDP (47.0%) | UNDP (45.3%) | US (30.3%) | US (39.1%) | UNICEF (39.4%) | UNDP (42.6%) |
| Japan (40.4%) | Germany (36.4%) | EU (30.0%) | Germany (34.5%) | Japan (36.9%) | EU (41.2%) |
| US (37.9%) | EBRD (33.9%) | Germany (26.5%) | Japan (30.0%) | WHO (34.8%) | UNICEF (34.8%) |
| EU (36.5%) | Switzerland (26.4%) | IMF (23.3%) | UNICEF (29.7%) | US (34.4%) | Germany (33.5%) |
| UNICEF (34.8%) | Sweden (25.7%) | UNICEF (20.3%) | IMF (27.3%) | IMF (26.8%) | IMF (31.1%) |
| WHO (33.4%) | IMF (25.1%) | Spain (20.3%) | France (26.3%) | Australia (26.3%) | WHO (30.8%) |
| New Zealand (27.6%) | UNICEF (22.1%) | WHO (18.6%) | FAO (24.0%) | Germany (25.0%) | UK (28.6%) |

| Sectors | | | | | | |
|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Econ. | Env. | Gov. | Inf. | Other | Rural | Soc. |
| World Bank (58.5%) | UNDP (53.3%) | UNDP (48.4%) | World Bank (53.5%) | UNDP (55.2%) | FAO (57.8%) | UNICEF (44.2%) |
| IMF (42.9%) | World Bank (53.0%) | World Bank (46.0%) | EU (36.1%) | World Bank (48.0%) | World Bank (55.5%) | World Bank (43.7%) |
| UNDP (38.5%) | Germany (46.7%) | EU (44.4%) | UNDP (33.0%) | EU (47.2%) | EU (52.4%) | UNDP (42.0%) |
| US (38.0%) | GEF (43.8%) | US (41.5%) | US (32.8%) | US (46.6%) | US (42.3%) | US (38.5%) |
| EU (36.6%) | EU (40.1%) | Germany (31.7%) | Germany (26.5%) | IMF (38.4%) | UNDP (41.3%) | WHO (36.1%) |
| Germany (30.4%) | UNEP (38.7%) | IMF (28.8%) | Japan (26.4%) | UNICEF (36.4%) | Japan (41.3%) | EU (35.0%) |
| Japan (26.5%) | US (36.8%) | UK (26.5%) | AfDB (24.7%) | Germany (34.5%) | IFAD (40.2%) | Germany (24.8%) |
| AfDB (22.7%) | FAO (34.2%) | UNICEF (26.4%) | UNICEF (22.7%) | Japan (33.9%) | Germany (35.9%) | UNESCO (23.7%) |
| WHO (22.1%) | GCF (33.4%) | Japan (24.4%) | IMF (21.4%) | WHO (30.5%) | WFP (23.5%) | UNFPA (23.2%) |
| UNICEF (20.6%) | Japan (31.1%) | WHO (23.0%) | WHO (17.5%) | UK (27.0%) | GEF (22.2%) | Japan (23.1%) |

| Regions | |
|---------|---------------------------------|
| EAP | East Asia and Pacific |
| ECA | Europe and Central Asia |
| LAC | Latin America and the Caribbean |
| MENA | Middle East and North Africa |
| SA | South Asia |
| SSA | Sub-Saharan Africa |

| Sectors | |
|---------|----------------|
| Econ. | Economic |
| Env. | Environment |
| Gov. | Governance |
| Infr. | Infrastructure |
| Soc. | Social |

Sources: AidData's 2020 Listening to Leaders Survey.

3.2 Middle powers and specialized multilaterals have more concentrated footprints with outsized focus in particular geographies or sectors

The development partners with the largest footprints in 2020 were fairly consistent across regions, sectors, and income levels; however there were some exceptions worth highlighting. Figure 11 provides a breakdown of the top 10 development partners with the largest footprints by sector and geographic region. Figure 12 shows the percentage of respondents who reported working with a given development partner by country income groups (i.e., low-income, lower-middle income, upper-middle income).

Even if they are smaller players on a global scale, middle powers often have outsized footprints in a specific geographic region, particularly in their backyard. Over 20 percent of respondents reported working with Switzerland and Sweden in Europe and Central Asia (ECA), New Zealand in East Asia and Pacific (EAP), Spain in Latin America and the Caribbean (LAC), and France in Middle East and North Africa (MENA). Notably, Australia was among the top 10 development partners with the largest footprint in both South Asia (SA) (26 percent) and EAP (55 percent).

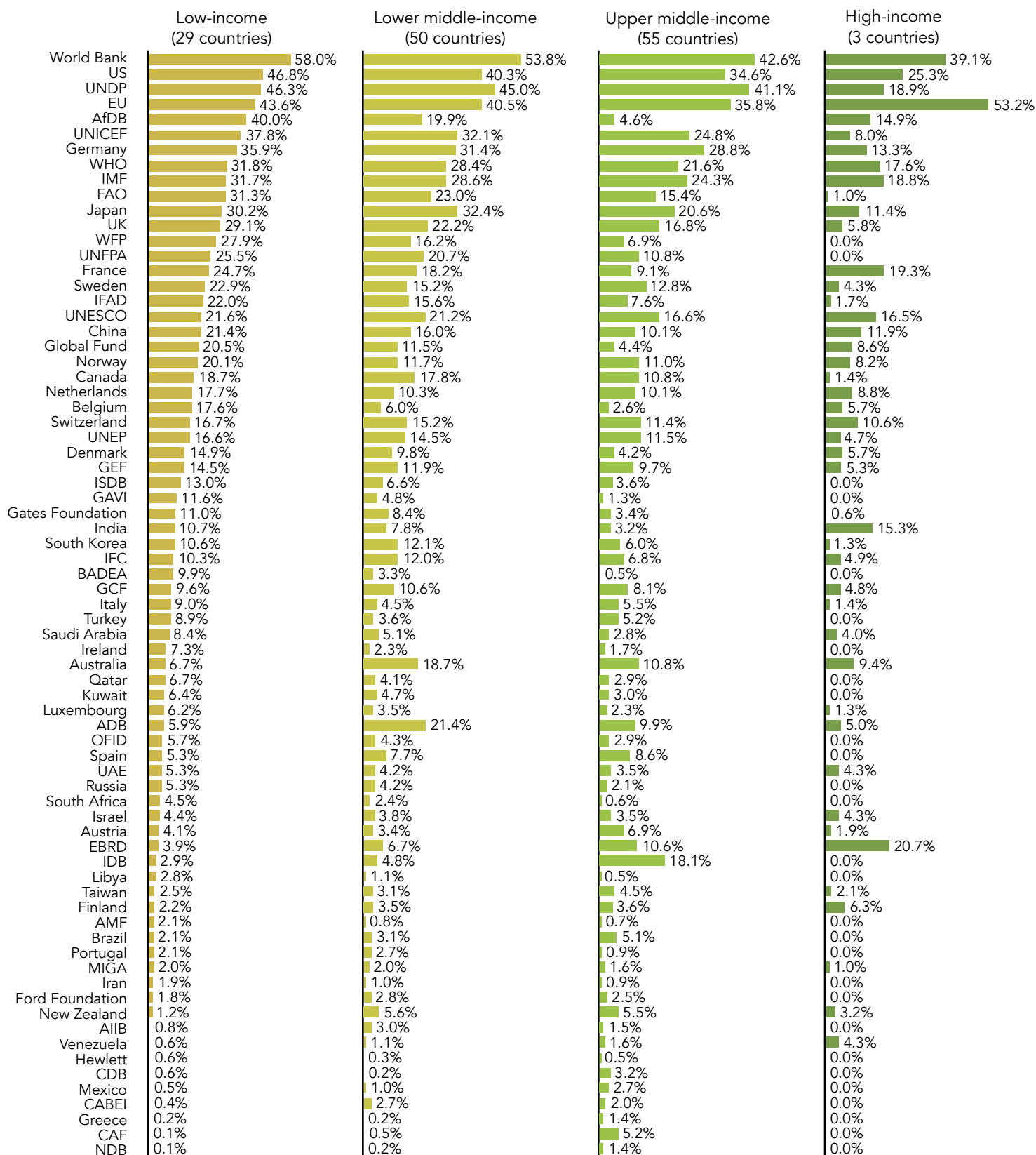
Similarly, regional development banks had larger footprints with respondents from their geographic focus areas including: the African Development Bank (AfDB) in sub-Saharan Africa (SSA) (46 percent), the Asian Development Bank (ADB) in EAP and SA (52 percent and 47 percent, respectively), the European Bank for Reconstruction and Development (EBRD) in ECA (34 percent), and the Inter-American Development Bank in LAC (45 percent).

Specialized UN agencies were among the development partners with the largest footprints in the environment (e.g., Global Environment Facility, Global Climate Fund), rural development (e.g., World Food Program, International Fund for Agricultural Development), and social sectors (e.g., UNESCO).

Generally speaking, the development partners with the largest footprints overall (see Section 3.1) retained that status regardless of the income level of the respondents' country. That said, there were a few subtle differences that emerged between income groups. South Korea had the ninth largest footprint with respondents from upper-middle income countries (18 percent). The footprints of the regional development banks, meanwhile, varied based upon the income profiles of their geographic focus areas. With Africa home to the lion's share of low-income economies, the African Development Bank had the fifth largest footprint with respondents from this group of countries (40 percent). By contrast, the Asian Development Bank had the tenth largest footprint with respondents from lower-middle income countries.

Figure 12. Footprints by country income groups, 2020

Percentage of respondents from a country income group who reported working with a given development partner



Notes: This analysis excludes the five semi-autonomous regions included in the survey. Three of the countries included only recently graduated to high-income status.

Sources: AidData's 2020 Listening to Leaders Survey and World Bank Group's 2020 Country and Lending Groups.

3.3 In line with its global ambitions, China eclipsed other emerging donors in working with 15 percent of leaders from 113 countries in 2020

China far outstripped the footprints of other emerging international donors in two respects—the percentage of respondents (15 percent) and number of countries (113) that reported receiving its advice and assistance. The geographic reach of China's footprint is highly consistent with the global ambition of President Xi Jinping's Belt and Road Initiative (BRI) which now includes 138 participating countries, 76 percent of which are low- or middle-income status (Nolan and Leutert, 2020). Noticeably, China has established itself as a development partner reaching far beyond its immediate neighbors, with 54 percent of respondents from sub-Saharan Africa reportedly receiving its advice or assistance.³³

Comparatively, China's footprint overall is more similar to Canada (15 percent of respondents from 115 countries) and France (16 percent of respondents from 114 countries) than its BRICS counterparts. Only seven percent of respondents from 79 countries reported working with India and less than five percent reported working with South Africa, Brazil, and Russia. Contrary to popular belief, China did not appear to be more likely than traditional OECD donors such as Canada or France to provide advice or assistance to leaders from non-democracies.³⁴ These three development partners—China, Canada, and France—also had a similar breakdown of respondents who worked with them across country income categories (i.e., low-, lower-middle, upper middle).³⁵

³³ Respondents from SSA comprise 34 percent of the entire sample of respondents to the 2020 *Listening to Leaders Survey*. In light of this, we would expect respondents from SSA countries to be a somewhat larger percentage of those reporting that they received advice or assistance from a given donor, as compared to other regional groups. However, it is notable that the percentage of SSA respondents who worked with China is substantially higher (+20 percentage points) than the percentage of SSA respondents in the overall sample. This phenomenon is not as pronounced in the 10 development partners with the largest footprints overall. For a further breakdown of the demographics of the respondents in the sample, see Appendix A of the Technical Appendix.

³⁴ Using the polyarchy democracy index from Varieties of Democracy (V-dem), we classified the surveyed low- and middle-income countries into three categories. For each year between 2014 and 2018, we produced a binary value for each country. If the value was more than .5 it was coded 1 and if less than .5 it was coded 0. We then summed the values across years 2014-2018 so that countries with a score of 5 were classified as always democracy, those with a score of 0 as never democracy, and those between 1 and 4 as sometimes democracy. Thirteen percent of survey respondents in always democracies reported receiving advice or assistance from China, compared to 19 percent in sometimes democracies and 15.5 percent in never democracies. The results for Canada (13 percent always democracy, 17 percent sometimes democracy, 17 percent never democracy) and France (14 percent always democracy, 19 percent sometimes democracy, 19 percent never democracy) are very similar.

³⁵ Using the World Bank's country income categories, we broke down the percentage of respondents from low-, lower-middle, and upper-middle income countries who reported receiving advice or assistance from development partners. Twenty-two percent of respondents from low-income countries worked with China, compared with 16 percent in lower-middle income countries, and 9 percent in upper-middle income countries. The breakdown is similar for France (25 percent low-income, 18 percent lower-middle income, 9 percent upper-middle income) and Canada (19 percent low-income, 18 percent lower-middle income, and 10 percent upper-middle income).

³⁶ Excluding private foundations, executive branch officials comprised between 46 and 82 percent of the leaders who reported working with a given development partner. Parliamentarians accounted for between 2 and 15 percent of the composition of a given development partner's footprint.

³⁷ Host government actors comprise 49 percent of the overall sample of respondents to the 2020 *Listening to Leaders Survey*, including executive branch officials (44 percent) and parliamentarians (5 percent). With that in mind, we would expect host government respondents to be a somewhat larger percentage of those reporting that they received advice or assistance from a given donor as compared to other stakeholder groups. Notably, the percentage of host government respondents (both executive branch officials and parliamentarians) is substantially higher in the sample of those who reported working with China (+33 percentage points) than the percentage of host government respondents in the overall sample. Again, this phenomenon is not as pronounced in the top 10 donors. For a further breakdown of the demographics of the respondents in the sample, see Appendix A of the Technical Appendix.

Nevertheless, China's approach converges with other emerging donors in one respect: the preponderance of those that received its advice or assistance were from host country governments (82 percent), including executive branch officials (75 percent) and parliamentarians (7 percent), rather than non-state actors. Governments are an almost universally important constituency group for most development partners, as they have the power to set the agenda for their countries in terms of priorities, financing, and legislation.³⁶ Yet, some development partners had more government-centric constituencies than others,³⁷ including BRICS donors such as Russia (82 percent), India (81 percent), and South Africa (80 percent). By contrast, civil society leaders comprised a relatively larger share of those who reported working with the largest OECD donors than they did for emerging donors.

3.4 UNICEF increased its footprint with a much larger percentage of leaders since 2017, while China dramatically expanded by an additional 52 countries

Even as the development landscape is continuously evolving, with new entrants offering assistance and status quo donors changing their strategies in response to new realities at home or abroad, the club of development partners with the largest footprints proved fairly durable between the 2017 and 2020 waves of the *Listening to Leaders Survey* (Figure 13). That said, the percentage of respondents who reported receiving advice or assistance from these development partners were not entirely static. Differences between the survey waves could be due to a

combination of supply-side changes (i.e., shifting development partner strategies or priorities), demand-side changes (i.e., shifting preferences of leaders regarding their partners), or an artifact of the respondents who did (and did not) answer the surveys in 2017 versus 2020.

The EU experienced the single largest decline in the percentage of respondents who reported receiving its advice or assistance (-12 percentage points).³⁸ The EU's receding footprint is particularly surprising in light of its leading role in the global COVID-19 response (Kharas, 2020).³⁹ By contrast, UNICEF saw the largest increase in the percentage of respondents who received its advice or assistance (+8 percentage points), followed by the IMF (+5). The IMF's expanded footprint could also be related to the COVID-19 response.

The World Bank⁴⁰ and the US had a more mixed picture—an increase in the percentage of respondents who reported working with them in some regions and a decline in others. The World Bank's footprint expanded between 2017 and 2020 in ECA and EAP, but declined in SSA. This decline in the percentage of SSA leaders who reported working with the World Bank is notable, in that it runs counter to the organization's stated strategy since 2013, which calls for "specific attention" to be placed on the SSA region in a bid to "accelerate the pace of poverty reduction" (World Bank Group, 2013a and b).

The US, meanwhile, supplied advice or assistance to a growing share of respondents in ECA and EAP, but lost ground in LAC. Growing US prominence in ECA is broadly in line with Washington's stated policy priorities during the 2017-2020 period, which included curbing Russia's attempts to "undermine the legitimacy of democracies" in the region (White House, 2017).⁴¹ The increase in footprint in the EAP is consistent with former US President Donald Trump's promotion of a "Free and Open Indo-Pacific" (FOIP) in response to concerns of waning US influence in the face of China's BRI (White House, 2017).⁴²

In comparing the change over time, the banner headline is most likely China's rise as a development partner with a truly global reach. China's increase in its overall footprint (+7 percentage points) obscures a more jaw-dropping observation: respondents from an additional 52 countries reported receiving its advice or assistance in 2020 (113 countries) than in 2017 (61 countries).⁴³ China's footprint expanded across all geographic regions during this time period, with the most notable gains in SSA and EAP (+6), two regions that also account for the largest share of BRI signatories (Nolan and Leutert, 2020).⁴⁴

In this chapter, we leveraged the *2020 Listening to Leaders Survey* to understand which development partners are working with leaders in low- and middle-income countries, how their footprints are shifting over time, and to what extent this seems to correspond with donors' stated priorities. In Chapter 4, we turn from examining who is working with whom, to examining how well these development partners perform from the perspective of those who receive their advice and assistance.

³⁸ This sizable decline largely holds true when we restrict the comparison to the original 126 countries, as opposed to the new countries in the 2020 wave, as well as if we exclude parliamentary respondents, which were not included in the 2017 wave. In each of those cases, there was an 11 percentage point decline between 2017 and 2020.

³⁹ For example, as Kharas (2020) describes, the EU co-sponsored the "Access to COVID-19 Tools Accelerator and seeks to raise \$35 billion to ensure equitable access to vaccines, diagnostics, and therapeutics."

⁴⁰ These trends largely hold true when we restrict the comparison to the original 126 countries, as well as if we exclude the parliamentarians, which were not included in the 2017 wave.

⁴¹ According to the Senate Appropriations Committee (n.d.), the US Congress appropriated a \$290 million fund to "counter Russian influence and its attempts to sow distrust in democratic institutions worldwide" and the US Agency for International Development launched a framework for Countering Malign Kremlin Influence (CMKI), with particular emphasis on curbing Russia's attempts to undercut democratic norms, media resilience, energy independence, and economic independence in Eastern Europe and Eurasia (USAID, 2019).

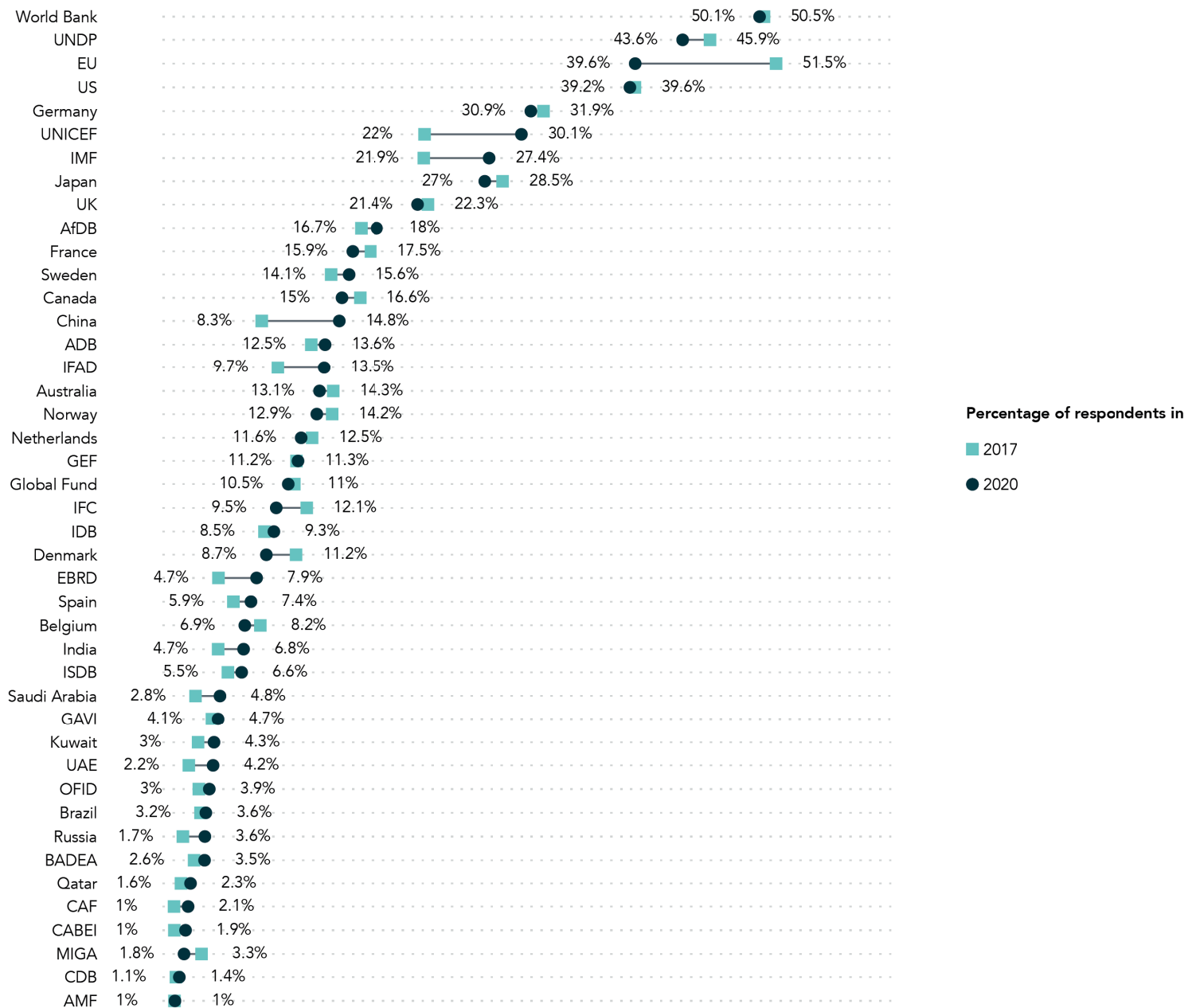
⁴² The US Department of State (2019) implementation report affirmed the prioritization of the region with a \$100 million "Pacific Pledge" in new assistance and an initial grant to the Asian Development Bank's Pacific Region Infrastructure Facility to support infrastructure planning in the Pacific Islands. In addition, the US Senate Appropriations Committee (n.d.) created a \$300 million fund to "combat malign Chinese influence and promote transparency and accountability in projects associated with the People's Republic of China's debt-trap diplomacy and the Belt and Road Initiative."

⁴³ These trends largely hold true when we restrict the comparison to the original 126 countries (+4 percentage points for China), as well as if we exclude the parliamentarians (+3 percentage points for China), which were not included in the 2017 wave. See Appendix D for more information.

⁴⁴ China's growing prominence in SSA is consistent with public pronouncements that this partnership is a priority via the Forum on China-Africa Cooperation (FOCAC). The 2016-2018 FOCAC Johannesburg Action Plan (2015) laid out an expansive set of activities for "beneficial cooperation...under the theme China-Africa Progressing Together: Win-Win Cooperation for Common Development." The 2019-2021 FOCAC Beijing Action Plan sought to build and expand upon this foundation under the theme "China and Africa: Toward an Even Stronger Community with a Shared Future Through Win-Win Cooperation," launching new initiatives related to infrastructure connectivity, green development, capacity building, health care, and peace and security, among others.

Figure 13. Comparison in perceived footprints of development partners, 2017 and 2020

Development partners are ordered from the largest to the smallest overall footprints, according to the percentage of respondents who reported working with them in AidData surveys in 2020 and 2017. Only partners with at least 30 responses in both survey waves are listed.



Sources: AidData's 2017 and 2020 Listening to Leaders Surveys.

4. Performance: Which development partners do leaders say are most influential and helpful—and why?

Effectiveness—the degree to which something works well and produces the result that was intended—is a watchword in international development (Macmillan, n.d.). Yet, most often the arbiters of what is *or is not* effective are professional evaluators examining development assistance at arms-length from a donor perspective (i.e., is aid efficient, pro-poor, harmonized, impactful). The *2020 Listening to Leaders Survey* gives us a unique opportunity to hear how those who make, shape, or implement development policy in low- and middle-income countries assess the effectiveness of their relationships with external partners in this enterprise.

For each of the development partners from whom they received advice or assistance (see Chapter 3), leaders were asked a series of performance questions. Using their responses, we calculated three perception-based measures of development partner performance: (1) *influence* in shaping how leaders prioritize which problems to solve;⁴⁵ (2) whether that influence was seen as *positive* (or *negative*);⁴⁶ and (3) *helpfulness* in supporting leaders to implement policy changes (i.e., reforms).⁴⁷ Leaders rated the influence and helpfulness of the institutions they had worked with on a scale of 1 (not at all influential/not at all helpful) to 4 (very influential/very helpful). They also rated positivity on a 4-point bipolar scale of 1 (very negative) to 4 (very positive). In this chapter, we report results on which development partners were assessed by leaders as most influential, most positive, and most helpful in 2020. In this analysis, we only include a development partner if they were rated by at least 30 respondents.⁴⁸

Influence = % of leaders in low- and middle-income countries who said a development partner was quite (3) or very influential (4) in shaping domestic policy priorities

Positivity = The average positivity score leaders gave a development partner's influence, ranging from "very negative" (1) to "very positive" (4)

Helpfulness = % of leaders who said a development partner was quite (3) or very helpful (4) in implementing policy changes

In assessing the influence and helpfulness of development partners, it is useful to think about this in two respects. First, in absolute terms, how well is a single development partner performing against a standardized scale (i.e., the percentage of respondents that rated an actor as quite or very influential/helpful)? Second, in relative terms, where does a development partner's influence or helpfulness score place it in relation to its peers using a ranking system? (Here, the first-ranked actor garnered the highest percentage of respondents who said it was quite or very influential/helpful.)

Why does this matter? Although there is substantial variability between the highest and lowest performers on our two perception-based measures of influence and helpfulness, there may be smaller differences in percentage point terms between a development partner and those partners immediately surrounding it. Taken together, this means that a lower rank could imply one of two things: either there is a competitive field with many strong performers that are clustered closely together, or there is quite substantial divergence in performance between two closely ranked actors. For this reason, seeing the numbers in context is essential, such that we report on the absolute and relative performance of development partners on both measures, as well as providing a color-coded scorecard that breaks down the full list of partners into quintiles.

In fact, there is quite a lot of variability in the perceived influence and helpfulness of individual development partners. The top quintile of development partners were rated as quite or very influential by between 71 and 89 percent of leaders who received their advice or assistance (Figure 14). The field contracts somewhat for helpfulness, where the top quintile of development partners were viewed as quite or very helpful by between 83 and 89 percent of leaders (Figure 17). At the opposite end of the spectrum, the development partners in the bottom quintile were rated as influential by between 33 and 53 percent of leaders and helpful by between 37 and 67 percent of leaders.

Another important facet of this discussion of performance is that the ability of external actors to influence a country's domestic policy priorities can be a double-edged sword. Development

⁴⁵ For those development partners from whom they reported receiving advice or assistance, respondents were asked the following question: "You indicated that the foreign and international organizations below provided [organization] with advice or assistance. How influential were they on [organization] decision to pursue this initiative? Influence here is defined as the power to change or affect the policy agenda." Respondents select among "not at all influential," "only slightly influential," "quite influential," "very influential," "don't know/not sure," and "prefer not to say." For simplicity, we combine the first two response options to imply no influence and the third and fourth options to imply influence.

⁴⁶ For those development partners they identified as being quite or very influential, respondents were asked the following question: "For the donors listed below, do you think their influence [on country] is generally positive or negative?" Respondents could select among "very negative," "somewhat negative," "somewhat positive," "very positive," "don't know/not sure," and "prefer not to say."

⁴⁷ For those development partners from whom they reported receiving advice or assistance, respondents were asked the following question: "In your opinion, how helpful were each of the following organizations to the implementation of this initiative? Helpful here is defined as being of assistance in implementing policy changes." Respondents select among "not at all helpful," "only slightly helpful," "quite helpful," "very helpful," "don't know/not sure," and "prefer not to say." For simplicity, we combine the first two response options to imply not helpful and the third and fourth options to imply helpfulness.

⁴⁸ The effect of this decision is that we are not taking into consideration the performance of smaller DAC bilaterals that were rated by less than 30 respondents. This is the same threshold used in the *2018 Listening to Leaders* report.

cooperation can be a venue for contestation, or even outright competition, between states and organizations over ideas, status, and alliances (Chaturvedi, 2020). Leaders may view external influence positively if it helps them advance policy agendas that domestic constituencies care about or adopt a model of development to which they think their country should aspire. On the other hand, external influence may be viewed negatively by leaders if it is seen as coercive in extracting concessions in return for assistance or working at cross-purposes with their interests.⁴⁹ With this in mind, we used a positivity score for each development partner to create a positivity-adjusted influence ranking to account for this normative view of influence.

As important as it is to understand the current state of play in how leaders rate the influence and helpfulness of their development partners, this static picture can obscure the broader trajectory of how things may be changing over time. Fortunately, we can compare the 2020 results against the prior survey conducted in 2017 to pinpoint whether and how leader attitudes are evolving with regard to the performance of their development partners. Since we did not include the question about whether a development partner's influence was positive or negative in 2017, we only focus on changes in relative influence and helpfulness rankings.

Finally, if influence and helpfulness are dynamic concepts, not static, then past performance need not be deterministic of future success. In this vein, we asked leaders why certain development partners were influential and helpful. Leaders also identified the particular ways in which the most influential partners exerted their influence. In synthesizing their responses, we can derive lessons learned that development partners can use to boost their future preferred partner status with leaders in low- and middle-income countries.

In the remainder of this chapter, we present **five key takeaways** from this 360-degree feedback on how leaders rate the performance of their development partners:

- China earns a spot among the top 10 influencers, joining the US, UK, and multilaterals with global reach
- Influence is a double-edged sword: leaders most often viewed the influence of their partners positively, but less so in the case of China, Russia, and fragile state donors
- The most influential development partners were also the most helpful, including the WHO, World Bank, EU, and US, which received high marks across regions and sectors
- EBRD was the most improved across the board, while China and Japan leapfrogged their peers in relative influence since 2017
- Leaders give high marks to donors that embrace locally-led development by working closely with in-country stakeholders to target resources and expertise that advance national priorities

4.1. China earns a spot among the top 10 influencers, joining the US, UK, and multilaterals with global reach

Multilaterals with a global reach such as the IMF, WB, EU, UNDP, and WHO, along with bilateral development partners like the US and UK dominate the list of the top 10 influencers (Figure 14). However, rising powers such as China are making their mark, while other development partners have carved out spheres of influence in particular sectors or regions. In the remainder of this section, we breakdown which development partners are: (i) **global heavyweights** as top influencers in nearly every sector and region, (ii) those that function as **regional hegemony** in exerting concentrated influence in particular geographies, and (iii) those that have earned **specialized star power** with respondents in niche sectors.

4.1.1 Global heavyweights: UN system, US, UK, and China rise to the top as influencers in nearly every sector and region

Three multilateral organizations—the IMF (89% of responses, 1st ranked), WB (86%, 2nd ranked), and EU (83%, 4th ranked)—garnered universal acclaim as top 10 influencers with respondents from every sector and region. The EU's inclusion in this group indicates that while it may be working with fewer leaders (see Chapter 3), it was quite influential in the eyes of those who received its advice or assistance. One possible explanation for why this might be is the modality of its assistance: the EU is the world's largest provider of budget support (EC, n.d.), a form of aid which scholars Swedlund and Lieri (2019) argue is associated with countries being willing to trade greater access and influence in domestic decision-making processes in exchange for “credible commitments” that donors will exert less pressure on them to be “politically inclusive.”

The WHO (82%, 5th ranked) joined the club of top 10 influencers in almost every sector and region, with two exceptions: respondents working in the economic sector and those from ECA. The breadth of the WHO's perceived influence in the eyes of respondents across such a diversity of sectors may be indicative of the institution's outsized importance in the context of the response to the current COVID-19 pandemic, which has disrupted all manner of work and life since its global onset in early 2020. It remains to be seen whether this influence will prove durable as economies and societies recover from this public health crisis.

UNDP (76%, 9th ranked) was a formidable presence in the lists of top 10 influencers overall and for respondents from four regions: LAC, MENA, SA, and SSA. It was joined by its sister agency, UNICEF, in three of these regions (excluding sub-Saharan Africa). Both agencies performed well with respondents in the

⁴⁹ Although nationally representative surveys have previously asked about whether a specific actor's influence is positive or whether they approve of another country's leadership, these questions are most often directed to the general public, as opposed to decision-makers, and are limited to assessing a small group of major bilateral powers. The 2020 *Listening to Leaders Survey* was the first time that leaders in 141 countries and semi-autonomous territories had the opportunity to answer such questions about an expanded set of the partners with whom they work.

environment and infrastructure sectors, who rated the two multilaterals as highly influential. Governance sector respondents also gave UNICEF high marks: over three-quarters of leaders who worked with the partner in the policy domains of public sector management and good governance viewed it as influential.⁵⁰

The US (83%, 3rd ranked) and UK (76%, 10th ranked) earned spots in the top 10 influencers overall. The US retained this status with respondents inside and outside of government,⁵¹ as well as in almost every sector and region, other than the environment and in South Asia. The absence of the US in the top 10 environmental influencers may be symptomatic of the deprioritization of the sector within the joint US State Department and USAID (2018) strategy for fiscal years 2018-2021.⁵² Although 70 percent of South Asian respondents identified the US as quite or very influential, its relatively lower ranking in this region is out of step with the fanfare of the US Indo-Pacific Strategy, which emphasized “increasing bilateral engagement” with partners such as Bangladesh, India, the Maldives, Nepal, and Sri Lanka (US State Department, 2019).

Respondents in five regions and three sectors identified the UK as a top 10 influencer, even as the donor navigated criticism at home for shifts in its development cooperation strategy (Krutikova and Warwick, 2017; Worley, 2020).⁵³ LAC was the sole geographic holdout—this is perhaps explained by the UK’s emphasis on assisting the poorest countries⁵⁴ and sub-Saharan Africa (DonorTracker, 2021b). Despite its intention to focus where its development, security, and economic interests align, the UK was not particularly influential among respondents in the economic and infrastructure sectors. It remains to be seen if this changes in future surveys, as the UK’s new strategic framework of November 2020 sought to elevate the importance of infrastructure as a gateway to economic growth in partner countries (ibid).

For the first time in 2020, China joined the ranks of the top 10 most influential development partners (76%, 8th ranked) overall and with respondents from three regions and two sectors. Although China is clearly increasing its geographic footprint (Chapter 3), it was most influential with respondents closest to

home: EAP, ECA, and SA. The rising power was among the top 10 influencers in governance and rural development, though surprisingly not with respondents working in the economic and infrastructure sectors. Although it appears to work almost exclusively with government respondents, non-governmental actors from the private, civil society, and academic sectors were equally likely as their public sector counterparts to view China as influential.⁵⁵

4.1.2 Regional hegemony: Middle powers and specialized multilaterals carved out geographic spheres of influence

Regionally focused multilateral development banks were quite influential, in spite of their more limited geographic focus. The European Bank for Reconstruction and Development (EBRD) (78%, 6th ranked) and the Inter-American Development Bank (IDB) (77%, 7th ranked) both placed within the top 10 influencers overall, as well as within their home regions (ECA and LAC, respectively). Both development partners carved out niche areas of influence with respondents in the economic sector and, in the case of EBRD, the social sector.

Nevertheless, regional focus was not necessarily a reliable predictor of influence. The Asian Development Bank broke into the top 10 influencers with respondents in the ECA region and with those from the infrastructure sector overall. However, it was the Global Environment Facility that caught the attention of respondents in EAP and SA. Similarly, it was not the African Development Bank (AfDB) but the World Food Programme (WFP) that was top-of-mind for respondents from sub-Saharan Africa. The influence of the WFP as a top influencer in Africa could be amplified by “severe and widespread increases in food insecurity” as COVID-19 disruptions strained already vulnerable supply chains and the purchasing power of households (World Bank, 2021).

⁵⁰ One possible explanation for this influence is UNICEF’s explicit strategy to emphasize strengthening local government ability to deliver services and child rights (UNICEF, 2019). For example, UNICEF (2019) emphasizes a local governance approach to programming as a means of securing children’s rights and responding to their needs. Its strategic plan for 2018-2021 highlights the importance of building a better evidence base that puts disaggregated data in the hands of communities and local decision makers, along with enhanced capacity of local governments and communities to be responsive to children’s needs. See also: <https://www.unicef.org/social-policy/local-governance>

⁵¹ The US is also the only bilateral donor in the top ten most influential donors among both government and non-government stakeholders. Government respondents were somewhat more likely to view the US as influential (85 percent) than their non-government counterparts (82 percent), but the gap is small.

⁵² As a case in point: the words “climate” and “environment” were mentioned only three and thirty-two times respectively, most often as generic terms unrelated to the sector. Two of the three mentions of “climate” related to annual investment climate statements produced by the US Department of Commerce. The most frequent mentions of “environment” had to do with the broader legal and regulatory environments within countries, and/or the enabling environment for US engagement.

⁵³ The last few years have been a turbulent time for the UK’s international aid, as the government has taken steps to better align its development, defense, and diplomacy strategies under a newly formed Foreign, Commonwealth, and Development Office (FCDO) and instituted further reductions to its aid budget (DonorTracker, 2021b). The UK’s 2015 Aid Strategy, “UK aid: tackling global challenges in the national interest,” jointly produced by the Treasury Department and the then Department for International Development (DFID), has been identified by UK international aid watchers as an important harbinger of this shift (Worley, 2020). Its implementation initiated an incremental clawing back of DFID’s budget and mandate, as the UK government allocated an increasing share of its development assistance budget via other agencies (Krutikova and Warwick, 2017).

⁵⁴ According to the World Bank’s country income groups, Haiti is the only low-income country in the Latin America and Caribbean region. <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups>

⁵⁵ Nearly 75 percent of both government and non-government stakeholders that worked with China reported it to be influential.

Several bilateral development partners parlayed strong regional ties to become top 10 influencers within their own backyards. Although China was the clear front runner among the BRICS as a top influencer on a global scale, India and Brazil were recognized as highly influential by their closest neighbors in SA and LAC, respectively. Japan, with its traditional emphasis on supporting ASEAN countries in areas such as infrastructure and sustainable economic development (DonorTracker, 2021e), and New Zealand, with its focus on small island developing states in the Pacific (OECD, 2020f), were recognized as highly influential by their peers in EAP. Germany and Sweden similarly carved out a regional sphere of influence in ECA.

In other cases, development partners were able to exert substantial influence far from home in line with focused strategic priorities. Respondents in MENA identified Germany, which emphasizes addressing the root causes of displacement in the region (DonorTracker, 2021c), and Norway, which has directed substantial humanitarian assistance dollars to the region since 2013 (DonorTracker, 2021d), as highly influential. Portugal, a top 10 influencer in sub-Saharan Africa (and 16th overall), shares a common language and history via its colonial ties with the region's Portuguese-speaking countries, who receive the highest concentration of its assistance (OECD, 2020d). It also devotes a high share of its bilateral development assistance to least developed countries (*ibid*), the vast majority of which are in SSA (UNCTAD, n.d.).

Somewhat more perplexing is the case of Switzerland, whose sole breakthrough in the influence rankings was with respondents from LAC. Switzerland does not have an evident affinity to the LAC region by virtue of geographic proximity, shared language, or past colonial ties. Nor does it appear to explicitly prioritize the region, as the majority of its bilateral assistance was directed to Africa and Asia as of 2018, with only Colombia among its top 10 recipients (OECD, 2020e). Moreover, the development partner announced its intent to redeploy assistance resources away from Latin America to other priority regions as part of its 2021-24 strategy, though Switzerland will still promote its economic interests there (EDA, 2020).

4.1.3 Specialized star power: European and Asian bilaterals exert outsized influence in niche focus sectors in alignment with their strategies

In line with its emphasis on agriculture in its 2016-2020 development cooperation strategy, South Korea was a top 10 influencer among respondents from the rural development sector (DonorTracker, 2021f). Australia was also singled out as a top influencer in rural development, which was among the top sectoral priorities of its bilateral assistance, particularly in the realm of agricultural research (DonorTracker, 2021g).⁵⁶ Perhaps recognizing the important linkages between sustainable agriculture and environmental protection, respondents also gave

high marks to the Green Climate Fund as a top 10 influencer in rural development.

In the social sector, the Central American Bank for Economic Integration (CABEI) and Taiwan were surprising top 10 influencers on the surface, but this recognition is well aligned with their strategies. CABEI embraces its role as a “social bank” which pursues “balanced social well-being” and inclusion via equitable housing and poverty reduction programs (CABEI, n.d.). Its 2020 launch of a “social bonds framework” enables CABEI to raise funds in international capital markets to benefit social programs, from service delivery and affordable housing to socio-economic empowerment and food security (CABEI, 2021). Taiwan, meanwhile, devoted the lion's share of its assistance dollars in 2018 to the social sector—from support for social infrastructure and services (49 percent) to education⁵⁷ (15 percent) and healthcare (6 percent), among other areas (Taiwan MOFA, 2019).

Nordic countries received high marks in several sectors. Sweden placed within the top 10 influencers with respondents from the environment, infrastructure, and social sectors. It has made climate change, sustainable use of natural resources, and gender equality central to its development cooperation since 2016 (DonorTracker, 2021h). Sweden followed through on this commitment as a major contributor to the Green Climate Fund and the Global Environment Facility, as well as deploying substantial funds via bilateral channels to environmental and gender equality programs for 2018-2022. In a similar vein, respondents rewarded Norway with a spot in the top 10 influencers in the environment sector for its strong commitment to environmental issues in both its rhetoric—climate, environment, and oceans was a stated priority in its 2016 Ministry of Foreign Affairs white paper—and action in committing substantial amounts of its bilateral and multilateral funding to this area (MoFA Norway, 2016).

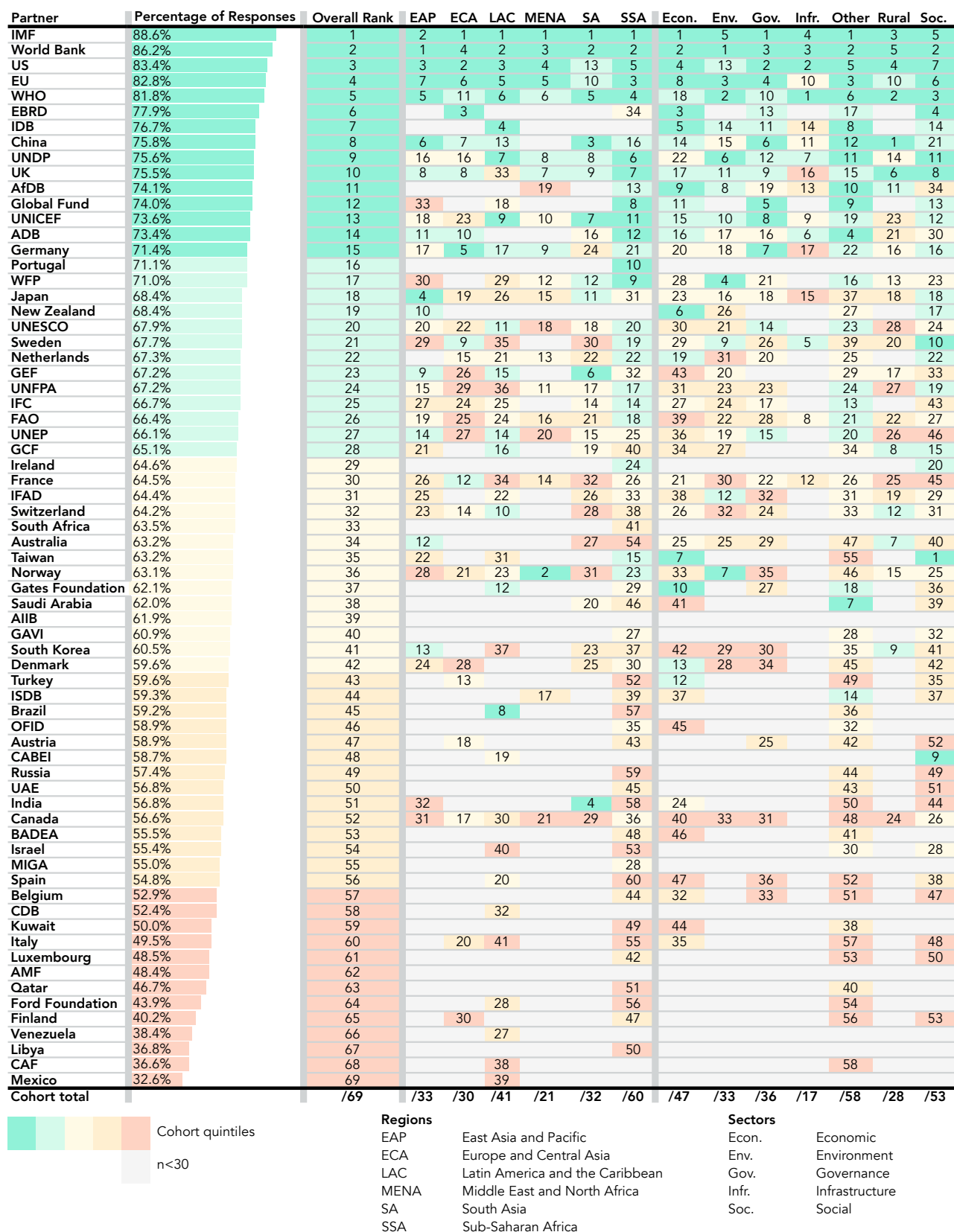
Comparatively smaller economies, such as Taiwan (the 21st largest by GDP) and New Zealand (the 53rd largest), stood alongside the US (the world's largest economy) among the top 10 influencers in the economic sector. Survey respondents may have taken into account Taiwan's emphasis since 2012 on promoting strong bilateral economic ties (PreventionWeb, n.d.), and New Zealand's focus on sustainable economic development and private-sector led growth underscored in its 2015-19 aid strategy (MFAT NZ, 2015). The African Development Bank (AfDB) also performed well with respondents in both the economic and environment sectors.

Respondents working in the governance sector rated Germany as a top 10 influencer, reflective of its development cooperation priority for the 2017-2021 period of helping partner countries “fight the root causes of displacement” and the centrality of “peace and societal cohesion” within its new BMZ 2030 strategy (DonorTracker, 2021c). Perhaps illustrative of the cross-cutting importance of public health in the midst of a global pandemic, traditionally health-focused donors such as the WHO and Global Fund joined Germany among the top 10 influencers with respondents in the governance sector.

⁵⁶ In 2019 alone, an estimated 43 percent of Australia's bilateral official development assistance for agriculture was focused on agricultural research via ACIAR, based upon estimates from DonorTracker (2021g).

⁵⁷ This includes a general category of education (4 percent), along with more specialized contributions related to scholarships (9 percent) and vocational education (2 percent).

Figure 14. Influence rankings by region and sector



Notes: Rankings are based on the percentage of responses evaluating a given partner as “quite” or “very influential” in 2020. Partners must have received 30 or more responses overall and 25 or more responses in a sub-cohort (i.e., rank in a given region or sector) to be displayed. Shading represents the quintile within the respective cohort.

Sources: AidData’s 2020 Listening to Leaders Survey.

4.2. Influence can be a double-edged sword: leaders most often viewed the influence of their development partners positively, but less so in the case of China, Russia, and fragile state donors

In absolute terms, respondents generally reported that all the development partners they worked with had a “somewhat” or “very positive” influence on their countries (see Figure 15).⁵⁸ There may be some self-selection bias here, as leaders may elect to work with donors that they view more positively. Nevertheless, some donors were viewed less positively than others in relative terms, indicating that leaders do differentiate between their partners.

Respondents rated the regional or sector-focused multilaterals and smaller bilateral donors they worked with most positively, as opposed to the larger players that typically dominated the overall rankings (see Section 4.1). Japan was the sole representative of the G7 economies among the top 10 development partners viewed most positively. It was joined at the top of the positivity rankings instead by smaller bilaterals such as Ireland, Luxembourg, and Taiwan, health-focused vertical funds such as GAVI and the Global Fund, as well as multilaterals with niche areas of focus by region (e.g., IDB) or sector (e.g., WHO).

Comparatively, the bottom 10 donors were viewed somewhat less positively. Why might this be? One possible explanation is that leaders view the development cooperation activities of these donors as more controversial in light of their focus, terms, or intent. The IMF’s mandate is the promotion of global macroeconomic and financial stability, which often involves stepping into the wake of financial crises (IMF, 2021). Meanwhile, respondents may have more mixed feelings on the opacity and less concessional terms of China’s development assistance (Horn et al., 2019)⁵⁹ and Russia’s explicit interest in bolstering breakaway regions in post Soviet states (Cooley, 2017).

Seven of these actors in the bottom 10 on positivity—Belgium, France, Kuwait, Qatar, Saudi Arabia, Turkey, and the United Arab Emirates—share a common emphasis in working with fragile states, which may provoke mixed feelings amongst partner countries regarding their role (OECD, 2020b, 2020g-l;

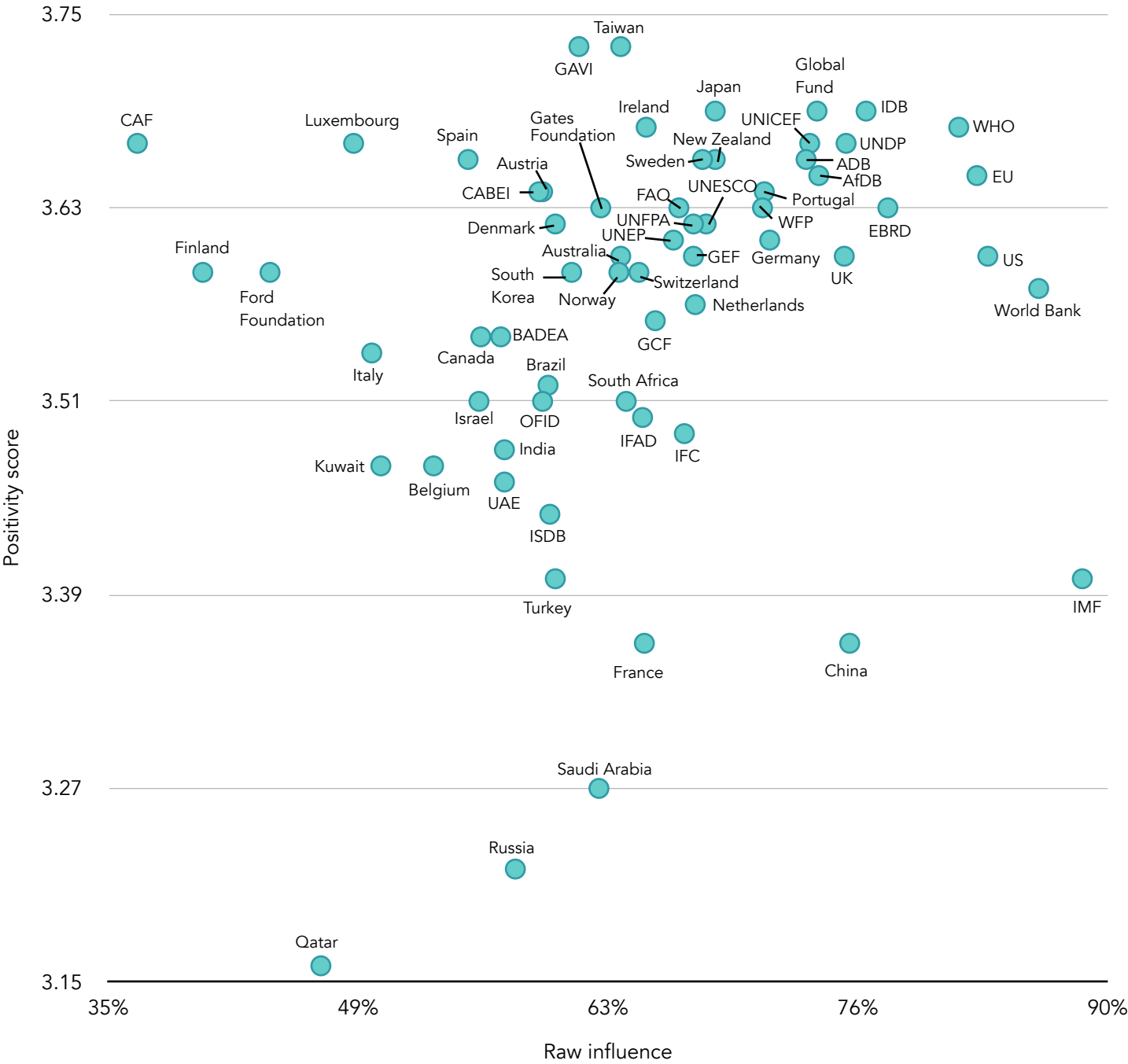
International Crisis Group, 2019). On balance, this explanation is not entirely satisfying, as the UN and the WB also focus on fragile states and did not experience similar pushback to their influence.

Adjusting the raw influence scores from Section 4.1 to take into account the perceived “positivity” or “negativity” of development partners, there is little change in the top ten donors, with two exceptions (see Figure 16). China slipped nine positions (from 8th to 17th ranked) due to its relatively less positive influence compared to other donors, dropping out of the top 10 influencers. This implies that China must overcome a perception challenge if it is to live up to its positioning as a development partner who seeks to promote a “community of common destiny...based upon mutual respect and win-win cooperation” (Watts et al., 2020). The Global Fund, meanwhile, benefited from a modest positivity boost to join the top 10 influencers in the adjusted ranking (9th ranked).

⁵⁸ We acknowledge that there could be an element of social desirability bias buoying these responses, if respondents were reluctant to speak poorly of development partners who they worked with and relied upon to deliver advice and assistance. However, we do not believe that this is entirely the case, as there was indeed a range of scores indicating that attitudes towards specific development partners fluctuated and that the survey was fielded by an independent third party (a respected public university) as opposed to any one development partner directly.

⁵⁹ For two thoughtful primers that take a data-driven approach to understanding the volumes, terms, and conditions of Chinese official finance, see “China’s Overseas Lending” by Horn et al. (2019) and “How China Lends: A Rare Look into 100 Debt Contracts with Foreign Governments” by Gelpern et al. (2021).

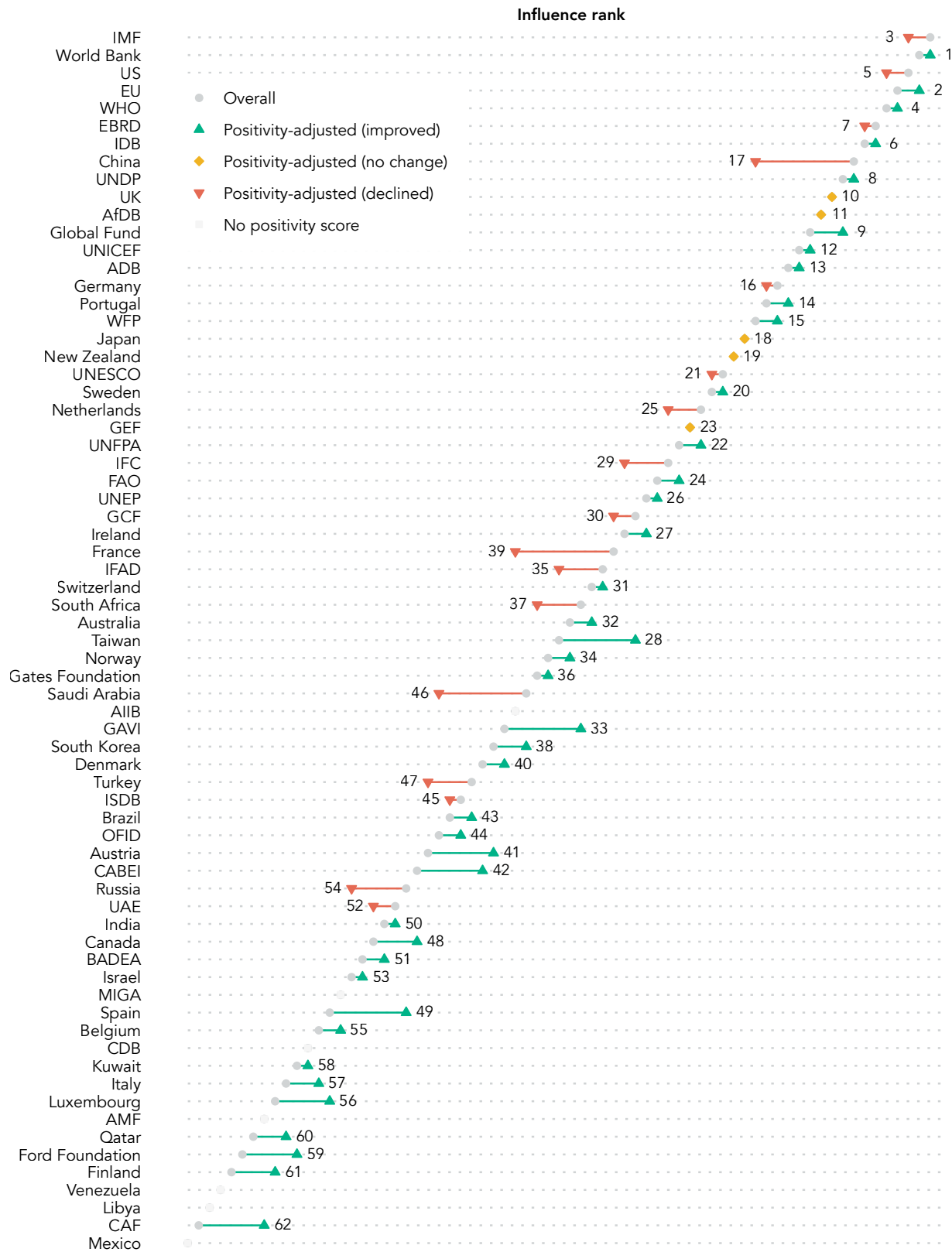
Figure 15. Comparison of overall development partner influence versus the positivity of that influence



Notes: Raw influence is based on the percentage of respondents that rated a given partner as “quite” or “very” influential in 2020 (x-axis). The Positivity Score is based upon the average response of respondents in terms of how positively or negatively they viewed a development partner’s influence (y-axis) on a scale of 1 (very negative) to 4 (very positive).

Sources: AidData’s 2020 Listening to Leaders Survey.

Figure 16. Positivity-adjusted influence rankings for development partners



Notes: For each development partner, we adjusted their raw influence scores to take into account the extent to which respondents viewed that partner's influence as negative or positive on a scale of 1 to 4 (i.e., their positivity score). Using the positivity-adjusted influence scores, we calculated new influence rankings. The figure shows the change in influence rankings when we take into account respondents' views regarding the degree to which a given development partner's influence is viewed positively or negatively. Only partners with at least 30 responses in the 2020 survey are listed.

Sources: AidData's 2020 Listening to Leaders Survey.

4.3 Leaders view multilateral organizations and the US as most helpful in implementing reforms

Multilateral organizations and the US (86%, ranked 7th) dominate the market when it comes to helpfulness in implementation of policy initiatives (Figure 17). Two health-focused organizations—the WHO (81%, ranked 2nd) and the Global Fund (87%, ranked 1st)—were perceived as the most helpful partners overall. While this might be partly due to the survey coinciding with the peak of the COVID-19 crisis, the Global Fund and GAVI were also among the most helpful donors in 2017 (the WHO was not included in the 2017 survey).

Development partners that were influential (see Section 4.1) also tended to be helpful and vice versa. In cases where there was a divergence, this could be an unintentional byproduct of limited resources that makes it difficult to perform well on both measures or may be an indication of differing institutional mandates and functions (see Chapter 3). Some development partners may not be interested in influencing a country's policy priorities and instead may focus on supporting leaders in implementing the policy changes they have already self-identified. The opposite could also be true for partners that view their mandate as advocating for particular policy priorities or reforms, but relying on others to support leaders in implementing these ideas.

In the remainder of this section, we break down which development partners are: (i) **best in show** as partners seen as both very influential and helpful; (ii) **quiet helpers** that are more helpful than they are influential; (iii) **vocal promoters** that are more influential than they are helpful; and (iv) those that have earned **specialized star power** for being particularly helpful in the eyes of respondents in niche sectors or regions (Figure 17).

4.3.1 Best in show: Many of the most influential development partners were also the most helpful, including the WHO, WB, EU, and US, which received consistently high marks across regions and sectors

In comparing the top 10 actors on our two performance measures, seven of the most helpful development partners are also shown to be the most influential (Section 4.1). This includes multilaterals such as the WHO, WB, EU, EBRD, IDB, and the UNDP, as well as the US, which achieved the distinction of being the sole bilateral development actor to chart in the top 10 on both performance measures.⁶⁰

Four of the top 10 helpers—the WHO (88%, 2nd ranked), WB (87%, 5th ranked), EU (87%, 4th ranked), and US (86%, 7th ranked)—also deserve special commendation for receiving consistently high marks from the majority of regions and sectors (at least four out of six each). Their relative areas of weakness were highly similar to their influence scores, with a few exceptions. The US was a highly influential player in the economic sector but was only ranked 20th in terms of its perceived helpfulness. Respondents in the governance sector considered the WHO to be substantially more influential than helpful. Meanwhile, the EU and the WB were seen as less helpful than influential by respondents in the rural development sector, as well as those from the EAP region.

The regionally-focused EBRD (85%, 8th ranked) and IDB (84%, 10th ranked) were among the top 10 most helpful development partners overall and within their respective geographic constituencies, ECA and LAC. UNDP was among the top 10 ranked donors (86%, 6th ranked) in helpfulness in four of six regions. All three donors also carved out sectoral areas of strength in perceived helpfulness: EBRD in governance and economic sectors, IDB in the social and infrastructure sectors, and UNDP in the environment and infrastructure sectors.

4.3.2 Quiet helpers: The Global Fund, UNICEF, and ADB were viewed as very helpful, if less influential

Some development partners were relatively more helpful than influential in the eyes of the leaders with whom they worked. This group of quiet helpers was dominated by multilateral organizations such as the Global Fund (1st in helpfulness, 12th in influence), UNICEF (3rd in helpfulness, 13th in influence), and the Asian Development Bank (9th in helpfulness, 14th in influence). UNICEF was among the top 10 most helpful development partners (88%, 3rd ranked overall) in every region except ECA, and all but the rural development and economic sectors. ADB (85%, 9th ranked overall) received the highest marks in helpfulness from respondents in South Asia and those working in the infrastructure and governance sectors.

Among multilaterals specializing in health, the Global Fund (89%, 1st ranked in helpfulness) had high appeal across both government and non-government decision-makers, as compared to GAVI and the WHO, who were viewed as more helpful by government officials. Although the Global Fund did not always receive sufficient responses for us to produce a disaggregated rank, in the three sectors and three regions where it did, the development partner consistently was among the top 10 most helpful actors.⁶¹

⁶⁰ The top 10 most helpful partners in the eyes of government officials are all multilaterals, except for the US. However, among non-government decision-makers, three bilaterals rank among the top 10—the US, Norway, and Ireland.

⁶¹ In presenting disaggregated results by sector and region, we only ranked development partners in the sectors and regions for which they had a minimum of 25 responses. In the case of the Global Fund, we did not separately rank its performance on helpfulness in the three regions and three sectors where it received fewer than 25 responses, though these evaluations were included in its overall helpfulness score and rank.

4.3.3 Vocal promoters: China and the IMF were viewed as relatively less helpful, even if they were highly influential

Just as some development partners were more helpful than influential, the opposite was also true. The sharpest distinction is the case of China, which was the 8th most influential development partner overall in 2020, but lagged behind in perceived helpfulness in implementing policy changes (77%, 32nd ranked). When compared to its relatively consistent presence in the top 10 influencers by region and sector, China was noticeably absent from the club of most helpful donors in all regions and sectors.

One possible explanation for this divergence may stem from how China derives its influence in the eyes of leaders. In this respect, the survey affords a revealing answer: 36 percent of respondents said that China's influence was best described as "indirectly influential due to its economic or political importance globally," as opposed to any direct action it had undertaken in the context of its development cooperation.⁶² The second most frequent answer (28 percent) was that China was able to "influence the resourcing for programs or policies."

In other words, the main source of China's strength as a top influencer seems to be highly connected to the power of its purse, in both general terms as the world's second largest economy (in nominal GDP) and its specific ability to affect discrete resourcing decisions. This economic clout certainly affords China a seat at the table when leaders are setting the development agenda and determining their policy priorities. However, this capacity may be insufficient for it to be perceived as a helpful partner.

This rationale does not neatly extend to the case of the IMF, which, despite being the single most influential development partner in 2020, lagged behind in respondents' assessments of its helpfulness (83%, 14th ranked). The IMF is neither a sovereign economy like China, nor is it among the largest financiers of development, so it is unlikely that the power of its purse is necessarily the source of its influence. Instead, 37 percent of respondents said that the IMF was influential because it was able to influence the formulation of new policies in their country.

If that is the case, then this may imply one of two things. Leaders may view the IMF as primarily operating further upstream when policies are being made (which corresponds to our measure of agenda-setting influence) as opposed to downstream during the implementation of said policies (which corresponds to our measure of helpfulness). Alternatively, this may be more of an assessment of whether leaders like or appreciate these policies which the IMF is able to influence, which may be controversial as they are often in response to the macroeconomic pressures of financial crises. In fairness, the IMF still performed well on our

measure of helpfulness in absolute terms, but its relatively lower rank indicates that there is a high degree of convergence among many strong performers jockeying for position among the top quintile.

4.3.4 Specialized tradecraft: Middle powers and multilaterals garnered the respect of leaders for being helpful in particular sectors and geographies

In several cases, development partners were able to pair strong performance as a top influencer in a particular sector with high marks on helpfulness in the same areas. This included the AfDB (economic), Australia (rural development), Germany (governance), New Zealand (economic), Taiwan (economic and social), Sweden (infrastructure), the UK (governance, rural development, social), and the World Food Program (environment).

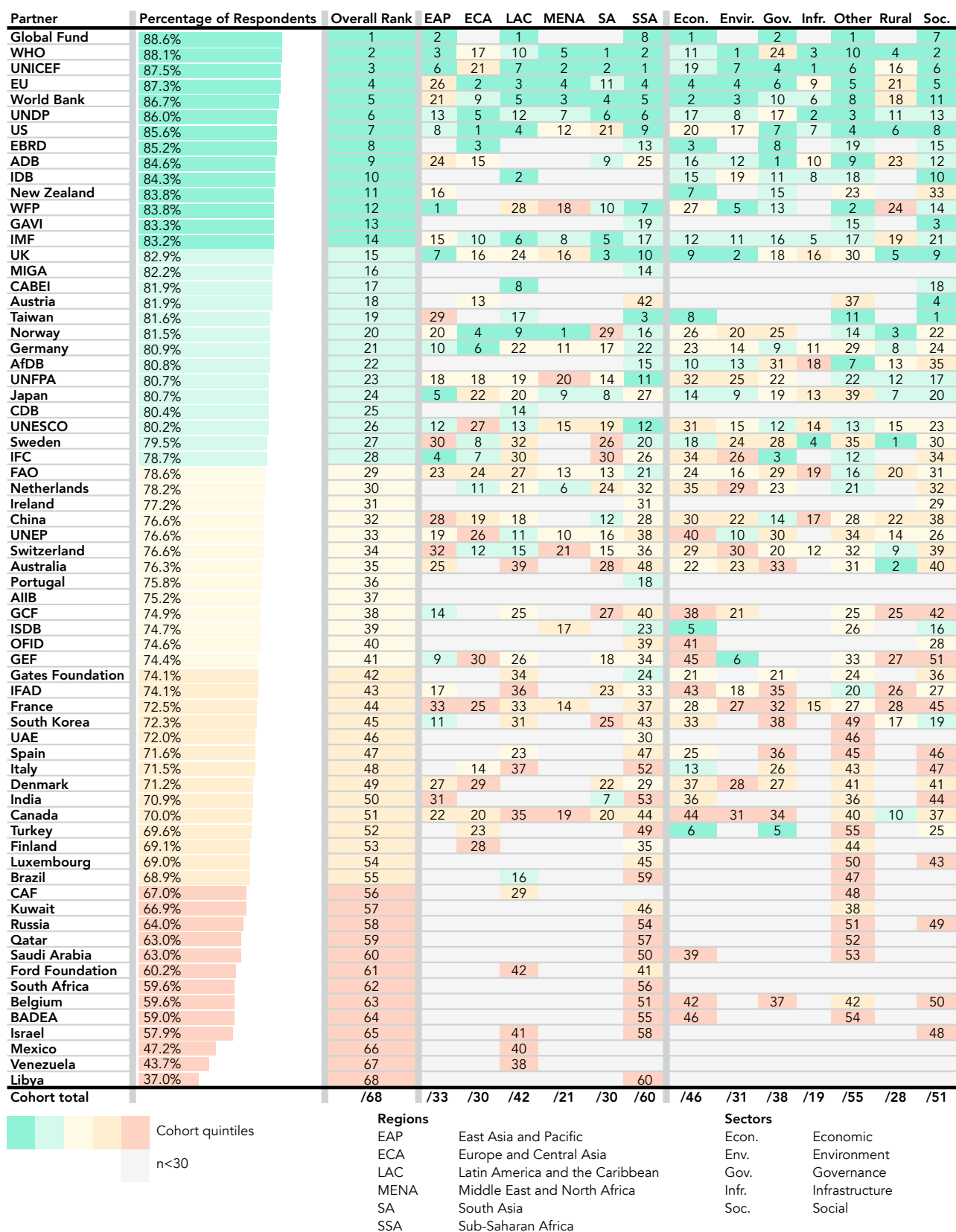
However, additional actors emerged that were rated among the most helpful development partners in certain sectors, even if they were not overly influential, such as: the Islamic Development Bank and Turkey (economic), the Global Environment Facility and the UN Environmental Program (environmental), Canada and Switzerland (rural development), Austria (social), the International Finance Corporation (IFC) and Turkey (governance), and GAVI (social).

Some donors—CABEI in Latin America and the Caribbean and India in South Asia—translated strong regional networks into comparative advantages with respondents in their backyards who viewed them as among their most helpful partners. Nevertheless, other development partners stretched farther afield to the benefit of respondents who rated them as very helpful, including Germany in the East Asia and Pacific, the Netherlands in the Middle East and North Africa, Norway in Latin America and the Caribbean, and Taiwan in sub-Saharan Africa. The WFP and the IFC demonstrated considerable reach in winning over respondents from three and two regions, respectively.

Finally, it is worth noting Japan as an interesting case where its respectable but middle-of-the-road performance overall (18th in influence, 24th in helpfulness) obscures a development partner that respondents deemed to be among the top 10 most helpful in three out of six regions (EAP, SA, and MENA) and two out of six sectors (environment and rural development).

⁶² Respondents that selected a given development partner as quite or very influential were asked a follow-up question: "Which of the following best describes the influence of [aid organization]? (Please select the option that is closest to your view.)" Respondents could choose from the following response options: "it was able to convene the right people to jointly discuss or solve a development challenge"; "it was able to exert enough pressure to change the government's action plans"; "it was able to influence the decision to enforce an existing law"; "it was able to influence the formulation of new policies"; "it was able to influence the implementation of new or existing policies"; it was able to influence the repeal or modification of an existing law"; "it was able to influence the resourcing for programs or policies"; and "it was indirectly influential due to its economic or political importance globally."

Figure 17. Helpfulness rankings by region and sector



Notes: Rankings are based on the percentage of responses evaluating a given partner as “quite” or “very helpful” in 2020. Partners must have received 30 or more responses overall and 25 or more responses in a sub-cohort (i.e., a given region or sector) to be displayed. Shading represents the quintile within the respective cohort.

Sources: AidData’s 2020 Listening to Leaders Survey.

4.4 EBRD was the most improved across the board, while China and Japan leapfrogged their peers in relative influence since 2017

In this section, we compare the relative performance of partners between the two survey waves on our two measures of performance: influence (Figure 18) and helpfulness (Figure 19). Differences between the survey waves could be due to a combination of supply-side changes (i.e., shifting development partner strategies or priorities), demand-side changes (i.e., shifting preferences of leaders regarding their partners), or an artifact of the respondents who did (and did not) answer the surveys in 2017 versus 2020. We also included new development partners in the performance rankings for the first time in 2020 which, while providing a more comprehensive picture of the development cooperation field, may have in some cases triggered a decline in rank among mid- and lower-tier actors for no action of their own.⁶³ For this reason, we will restrict the focus of our discussion to examining gains in relative performance between 2017 and 2020 that appear to be sufficiently sizable and, in light of the expanding field of partners we are now able to cover, are truly noteworthy indeed.

The single largest breakthrough by a multilateral organization was made by EBRD which moved up dramatically in the rankings on both influence (+10) and helpfulness (+18). This change is worth paying attention to, especially in light of deliberations about the future of the European development finance system and the role of the EBRD in particular.⁶⁴ The EBRD has evolved substantially in both geographic scope and sectoral focus from its original mandate to “support democracy and transition to open market-oriented economies in Central and Eastern Europe” (Gavas, 2019). This evolution has not been without controversy: there has been a splintering of interests between the EBRD’s “original stakeholders,” with Europe focused on climate change and Africa and the US on competition with China (Runde, 2019).

China made great strides in increasing its relative influence (+13) since 2017.⁶⁵ Notably, in February 2017, the Chinese government, via its Central Leading Group for Comprehensively Deepening Reforms, identified foreign aid “as one of nine major areas that would undergo reform...to improve [its] overall effectiveness” (Rudyak, 2019). In March 2018, China charged the newly created China International Development Cooperation Agency (CIDCA) with a mandate to professionalize the country’s aid apparatus—ensuring strategic alignment, reducing fragmentation, increasing accountability, and improving the overall quality of aid programs (ibid). China’s rising relative performance might partly be aided by these changes; however, this is certainly not straightforward.⁶⁶ More likely, as survey respondents alluded to (Section 3.3), China’s growing economic and political clout also amplifies its perceived influence.

Japan also put forth a strong showing, netting substantial increases in relative influence (+7) in recent years.⁶⁷ Former Prime Minister Shinzo Abe laid the groundwork for development cooperation to play a central role as part of a more assertive foreign policy, which sought to bolster Japan’s influence and counter a rising China (Hosoya, 2020a; Ravelo and Cornish, 2020).⁶⁸ Its 2015 Development Cooperation Chart explicitly linked Japan’s aid program as instrumental to Japan’s ability to advance its national security and economic interests for the first time, emphasizing themes of quality growth and win-win cooperation (OECD, 2020m; Ravelo and Cornish, 2020). Survey respondents gravitated to three reasons to explain Japan’s influence: resourcing for programs or policies (32 percent), implementation of new or existing policies (20 percent), and overall economic or political importance globally (19 percent).

⁶³ Some had insufficient responses in 2017, while others were new additions to the survey in 2020.

⁶⁴ An October 2019 report by the “High-Level Group of Wise Persons” proposed three options to reimagine European development finance to eliminate redundancy between multiple institutions, crowd-in private sector finance, and respond to priority EU concerns such as climate change and inclusive growth in Africa (Wise Persons Group, 2019; Gavas, 2019). While these intentions are good, the report triggered alarm bells as two of the three options proposed involved “a fundamental change in the future impact and role of the EBRD” (Runde, 2019). Deliberating the results of a feasibility study, the European Council ultimately opted to retain the “status quo” (Chauvin, 2021), but it is likely that the conversation about reducing “fragmentation, duplication, and competition” in Europe’s development finance architecture is far from over (Gavas, 2021).

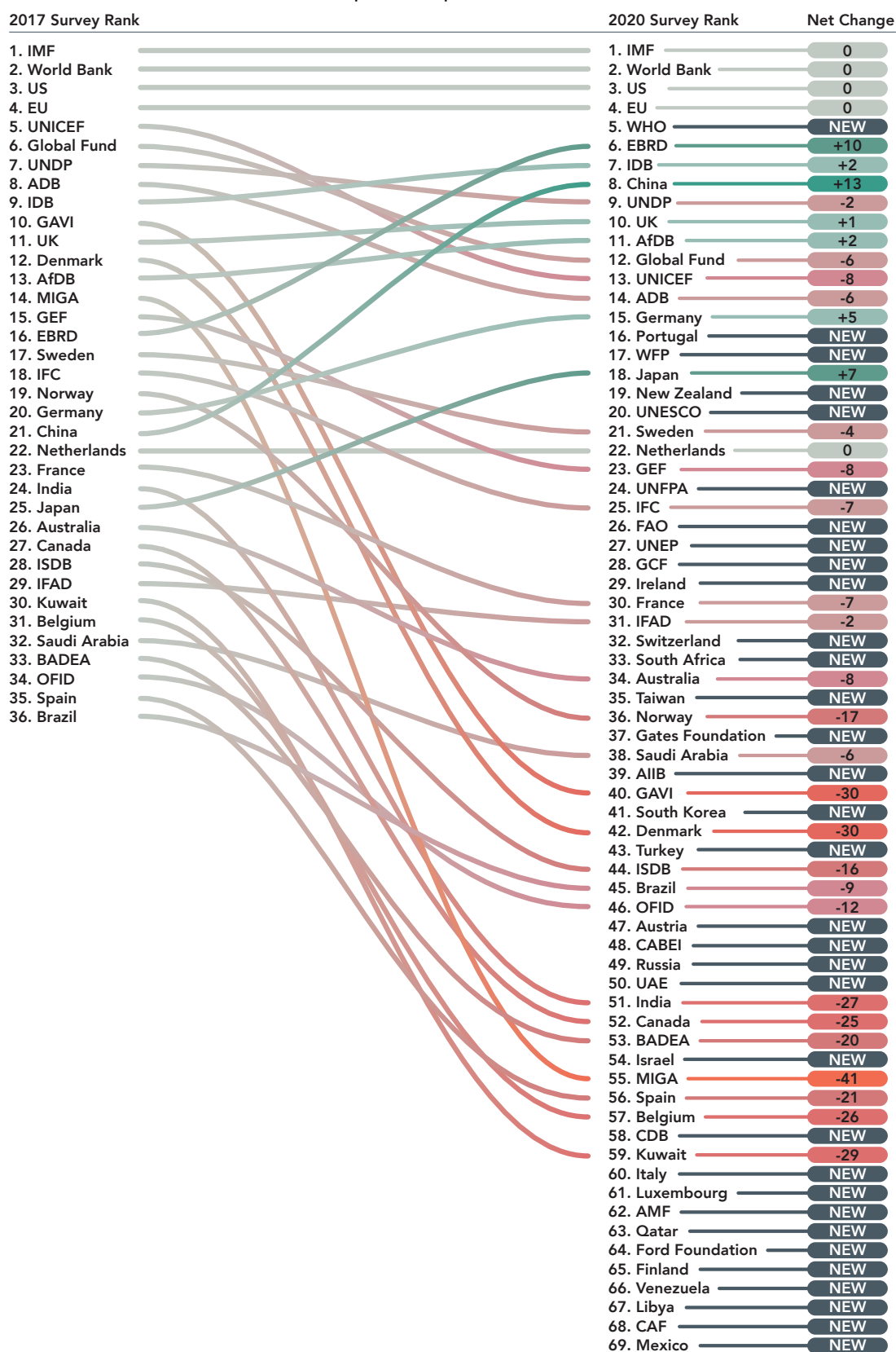
⁶⁵ In terms of the percentage of respondents who rated China as influential and helpful, this corresponds to a 13 and 14 percentage point increase, respectively.

⁶⁶ CIDCA’s mandate is limited to planning and coordination, not direct implementation of development projects, which is still fragmented across 20+ federal and provincial level agencies, along with Chinese companies on the ground in other countries (ibid). Moreover, CIDCA’s power of the purse is constrained—its budget in 2019 was a mere 1 percent of that of the Ministry of Commerce (MOFCOM), which has historically managed the country’s aid portfolio (Sun, 2019). That said, CIDCA’s mandate—to develop specific country strategies, negotiate and sign agreements with partner countries, and draft aid regulations to ensure effective delivery of assistance—may still bolster China’s stature in the eyes of leaders (Rudyak, 2019).

⁶⁷ In terms of the percentage of respondents who rated Japan as influential and helpful, this corresponds to a 7 and 13 percentage point increase, respectively.

⁶⁸ Prime Minister Abe, in addition to providing an animating vision for Japan’s development cooperation under the rubric of the 2016 “free and open Indo-Pacific” strategy, consolidated Japan’s foreign policy decision-making to streamline coordination via the National Security Council (Hosoya, 2020a and 2020b). Japan also flexed its diplomatic muscle to win allies and promote an emphasis on “quality infrastructure” as a means to “counterbalance China’s growing role in infrastructure financing” (Ravelo and Cornish, 2020).

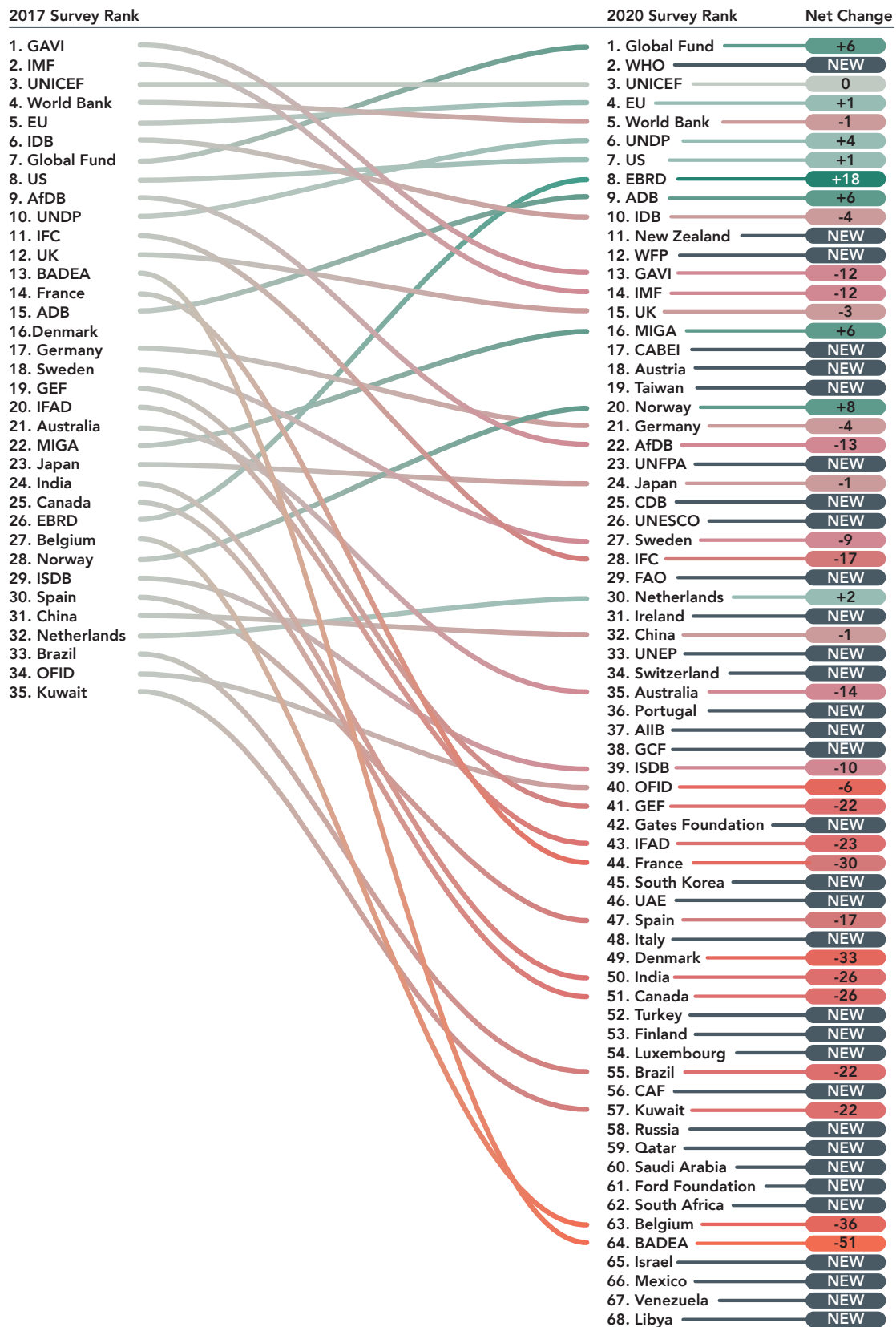
Figure 18. Perceived influence of development partners in 2017 versus 2020



Notes: Partners are ranked from more to less influential, according to the percentage of respondents who reported working with them in AidData's 2017 and 2020 Listening to Leaders Surveys. Only partners with at least 30 responses in both survey waves are listed. Partners new to the 2020 survey are labeled as such.

Sources: AidData's 2020 Listening to Leaders Survey.

Figure 19. Perceived helpfulness of development partners in 2017 versus 2020



Notes: Partners are ranked from more to less influential, according to the percentage of respondents who reported working with them in AidData's 2017 and 2020 Listening to Leaders Surveys. Only partners with at least 30 responses in both survey waves are listed. Partners new to the 2020 survey are labeled as such.

Sources: AidData's 2020 Listening to Leaders Survey.

4.5 Leaders give high marks to donors that embrace locally-led development by working closely with in-country stakeholders to target resources and expertise that advance national priorities

What makes a development partner influential in the eyes of leaders? Two reasons were top of mind for survey respondents—bringing to bear financial and material resources (40 percent) and advancing the country's national development strategy (35 percent). These sources of development partner influence have proved durable, as they were also the top two reasons respondents selected in 2017 (see Figure 20). However, financing was not the only currency of value in these partnerships. Approximately a quarter of respondents emphasized that influential donors built close working relationships with government counterparts and contributed substantive expertise in the form of high-quality advice or access to individual experts.

Respondents in 2020 (Figure 20) placed a greater premium than respondents in 2017 on the nimbleness of development partners when it comes to choosing the right time to provide advice or assistance (+10 percentage points), expanding their reach to work closely with groups outside of government (+8 percentage points), and aligning with national priorities (+7 percentage points). Taken together, these trends suggest that donors garner an influence dividend when they focus their attention on supporting reform efforts that are locally-identified, rather than externally-imposed.

Interestingly, respondents in 2020 were decidedly less convinced that the provision of important evidence related to the policy initiative on which they worked was among the top reasons for a development partner's influence (-13 percentage points) (Figure 20). So, how should we interpret this, especially in light of the discussion in Chapter 2 on what type of data leaders say they want from their development partners? One possible explanation is that there is a sufficiently large gap between the data leaders want (e.g., timely, accurate, from a trustworthy source) and what they get, such that the influence a development partner can derive is diluted. Alternatively, this could indicate that, while leaders may value useful information to support their decision-making, they do not view the act of providing this data as positioning a development partner to more readily influence their country's priorities.

Why do leaders think some development partners are more helpful than others? The reasons follow similar themes to what we observed above with influence. Respondents heavily emphasized the deep working relationships—both with host government counterparts (49 percent), as well as with non-government stakeholders and local communities more broadly (31 percent) (Figure 21). A development partner's abilities to mobilize financial resources and expertise (39 and 26 percent, respectively) were also highly prized. Leaders were more adamant in 2020 that a helpful donor was one that made the effort to align their implementation of policies, programs, and projects with the activities of others (+7 percent).

In this respect, the sources of development partner influence and helpfulness appear to be mutually reinforcing and highly aligned with the aid effectiveness principles donors have set out for themselves (OECD DAC, 2019; GPEDC, 2016),⁶⁹ though they sometimes struggle to achieve them in practice (Brown, 2020; McKee et al., 2020). The highest performing donors in the eyes of leaders are those that respect the self-determination of countries to set their own priorities (i.e., ownership) and ensure their efforts are in step with those of other actors on the ground (i.e., alignment, harmonization, inclusive partnerships).

In this chapter, we leveraged the *2020 Listening to Leaders Survey* to understand how leaders in low- and middle-income countries rate their development partners on three measures of performance: influence in shaping policy priorities, whether that influence is positive or negative, and helpfulness in implementing policy changes (i.e., reforms). We examined this as both a static picture in 2020, as well as in comparison to the 2017 survey wave, to identify whether and how attitudes appear to be shifting over time. In the next chapter, we reflect on the implications of the key findings from this study for individual development partners who seek to improve their performance, as well as for the future of development assistance in an era of contested cooperation.

⁶⁹ For example, this includes international agreements on aid effectiveness endorsed by countries in Rome (2003), Paris (2005), Accra (2008), Busan (2011), and Nairobi (2016), among others.

Figure 20. Why did respondents view development partners as being influential?

Percentage of respondents who gave specific reasons development partners were influential in 2020 versus 2017.



Sources: AidData's 2017 and 2020 Listening to Leaders Surveys.

Figure 21. Why did leaders view development partners as being helpful?

Percentage of respondents who gave specific reasons development partners were helpful in 2020 versus 2017.



Sources: AidData's 2017 and 2020 Listening to Leaders Surveys.

5. Conclusion

Once every three years, AidData conducts its *Listening to Leaders Survey* with one end in mind—to learn from, and amplify, the invaluable insights of a diverse cross-section of public, private, and civil society leaders spanning 141 countries and 23 areas of development policy. One might ask, why should development partners listen to what in-country counterparts have to say about their priorities, experiences, and assessments of those who provide them with advice or assistance? There are two reasons why we should all heed and act upon this 360-degree feedback. Not only is it the right thing to do from an aid effectiveness perspective, but it is also the smart thing to do for bilateral and multilateral actors who want to maximize their standing with the leaders who have an inside track to shape how their countries engage with foreign powers and multilateral institutions.

In this report, we analyzed the results of the 2020 *Listening to Leaders Survey* to learn from 6,807 leaders and answer: who was working with whom, how did they rate their partners, and what were their priorities? The 2020 survey was fielded at an extraordinary time, between June and September 2020, as countries irrespective of income, politics or geography grappled with how to simultaneously respond to a devastating pandemic, while guarding hard-won gains in their longer-term development. In this respect, the 2020 survey provides a unique window into the mindset of leaders at a time when effective cooperation with trusted development partners was arguably more, not less critical to “build back better” (White House, 2021).

Beyond the pandemic, the field of development cooperation has been indelibly marked (if not entirely altered) by three tectonic shifts in the global conversation about how countries relate to one another: calls for the decolonization of aid, the resurgence of great power competition, and fraying (or thinning) multilateralism. Since our respondents are often in positions that determine how their countries engage with other powers, or can influence attitudes and norms about these relationships in other ways, this broader discourse may have factored into respondents’ answers to questions about what they wanted from their development partners. In taking a step back from intricacies of footprints and rankings, there are three broader insights we can learn from how leaders articulated what they prioritize and value in their interactions with external actors.

5.1 Insight #1: Adaptability, sustainability, inclusivity, reciprocity top the list of cooperation principles to level the playing field

Calls for the decolonization of aid are certainly not new, but they have arguably become more mainstream and prominent in recent years. This has provoked introspection on the part of the world’s advanced economies, as well as multilateral development cooperation providers, to identify philosophical blindspots and structural inequities that perpetuate asymmetries between those that have traditionally supplied aid and those that received it. Even this notion has become decidedly antiquated in light of the growth and maturation of South-South Cooperation.

Development partners would do well to heed the insights from leaders in this survey on how best to level the playing field for countries to work together on equal footing for a more peaceful, just, and prosperous world. Leaders want development cooperation to be more adaptive to local needs and more mindful about planning ahead for long-term sustainability. They value development processes that are locally-led in setting priorities and inclusive of a diverse set of government and non-governmental stakeholders in iterating on politically feasible and contextually appropriate solutions. Finally, leaders want to see development cooperation to be transparent and generous-spirited, not imposing undue burdens on poorer countries, while strengthening their hand to lock in desirable reforms.

5.2 Insight #2: The growing prominence of China as an influential force in development cooperation is undeniable, but not inevitable

Competition between development partners is certainly not new: organizational rivalries and divergent philosophies about the ends and means of development are long-standing sources of friction between bilateral and multilateral development partners alike. Nevertheless, the overlay of geostrategic posturing with the competition narrative between the US and China, in particular, has raised the stakes for status powers concerned about ceding influence and rising powers proposing alternate models and conceptions of what effective development looks like.

In the midst of this, China was an undeniable force in the 2020 *Listening to Leaders Survey* results: the eighth most influential development partner overall, with a formidable footprint across 113 countries. China now matches G7 economies such as Canada and France in terms of the percentage of leaders who receive its advice and assistance.

Nevertheless, the ability of China to reshape prevailing international norms or displace global heavyweights such as the US and the UN system is not a fait accompli. China must overcome a mixed reception to its influence, which leaders felt was comparatively less positive for their countries than other development partners. Moreover, while influential development partners are often the most helpful, that was not the case for China, which is arguably still finding its footing. In the near-term, it seems unlikely that China is on the cusp of displacing top multilaterals or the US in the eyes of leaders of low- and middle-income countries; however, middle powers may increasingly find their voices most vulnerable to being displaced or diluted by intensifying great power competition rhetoric.

5.3 Insight #3: Multilateralism may be imperfect, but the stature of these venues for collective action has proven durable

The twin pressures of rising discontent with status quo institutions and a heightened atmosphere of competition have contributed to the third tectonic shift in the phenomenon of “thinning multilateralism” (Izmestiev and Klingebiel, 2020). The strong performance of multilateral development banks and inter-governmental organizations in the survey results is a good reminder that though multilateralism may be “contested”—in that venues for collective action can be rife with “competing coalitions and shifting institutional arrangements”—multilateral organizations are durable and powerful levers to influence policy change in low- and middle-income countries (Morse and Keohane, 2014).

There is every indication that if intergovernmental organizations and multilateral development banks embrace much needed reforms to be more responsive to local realities and inclusive of a broader set of voices, they will continue to have staying power as desirable partners to leaders in low- and middle-income countries. This makes investing in the continued capacity and position of multilaterals worthwhile for nation states for two reasons. First, multilaterals are highly regarded by the leaders they seek to influence and support. Leaders identified a core group of multilaterals among the top-performing developing partners across three survey waves (2014, 2017, 2020) to date—a powerful validation from the bottom-up that these actors are doing something right. Second, the value proposition of these multilateral partners may become even more pronounced as competition rhetoric intensifies and leaders in developing countries grow wary of having to choose between great powers and increasingly look for comparatively neutral players they consider to be trustworthy.

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About AidData

AidData is a research lab at William & Mary's Global Research Institute. We equip policymakers and practitioners with better evidence to improve how sustainable development investments are targeted, monitored, and evaluated. We use rigorous methods, cutting-edge tools and granular data to answer the question: who is doing what, where, for whom, and to what effect?

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