

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

Samantha Custer, Tanya Sethi, Rodney Knight,
Amber Hutchinson, Vera Choo, and Mengfan Cheng

Executive Summary



AIDDATA

A Research Lab at William & Mary

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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. In this report, we analyzed the results of our most recent survey conducted June to September 2020 to learn from 6,807 leaders: who was working with whom, how did they rate their partners, and what were their priorities?

Priorities: Which problems do leaders want to solve? What do they want from their partners?

In the report, we demystified what leaders want from their development partners in three respects: (1) the degree of convergence or divergence between what leaders, citizens, and donors prioritize as the most important problems to solve; (2) which attributes leaders valued most in a preferred partner; (3) the desirability of different types of aid projects and data offered by development partners.

Four key takeaways about what leaders prioritize:

- 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.

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

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

The 32 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 12 largest players

worked with over 20 percent of respondents from nearly all countries and semi-autonomous regions included in the survey. Leaders could select anyone from whom they received advice or assistance between 2016 and 2020 out of 130 agencies (including 31 multilateral development banks or inter-governmental organizations, 96 bilateral agencies, and 3 private foundations). In the 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 number.

Four key takeaways about who is working with whom:

- The UN system and large OECD donors (the US, the UK, Japan, and Germany) 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, on par with G7 donors Canada and France.
- UNICEF increased its footprint with a much larger percentage of leaders than in 2017, while China dramatically expanded its reach by an additional 52 countries.

Performance: Which development partners are most influential and helpful—and why?

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

Leaders were asked to rate the performance of the development partners from whom they received advice or assistance in the following areas: (1) *influence* in shaping how leaders prioritize which problems to solve; (2) whether that influence was seen as *positive* (or *negative*); and (3) *helpfulness* in supporting leaders to implement policy changes (i.e., reforms). They rated the influence, positivity, and helpfulness of the institutions they had worked with on a scale of 1 to 4. The absolute performance of a

development partner is presented as a percentage of leaders who saw them as quite or very influential, positive, or helpful. The relative performance is presented using a ranking system where the first ranked actor garnered the highest percentage of respondents who said it was quite or very influential, positive, or helpful. We also produced an adjusted influence ranking to take into account how positively or negatively a development partner's influence was viewed by the leaders that worked with them.

Five key takeaways about how leaders rate their development partners:

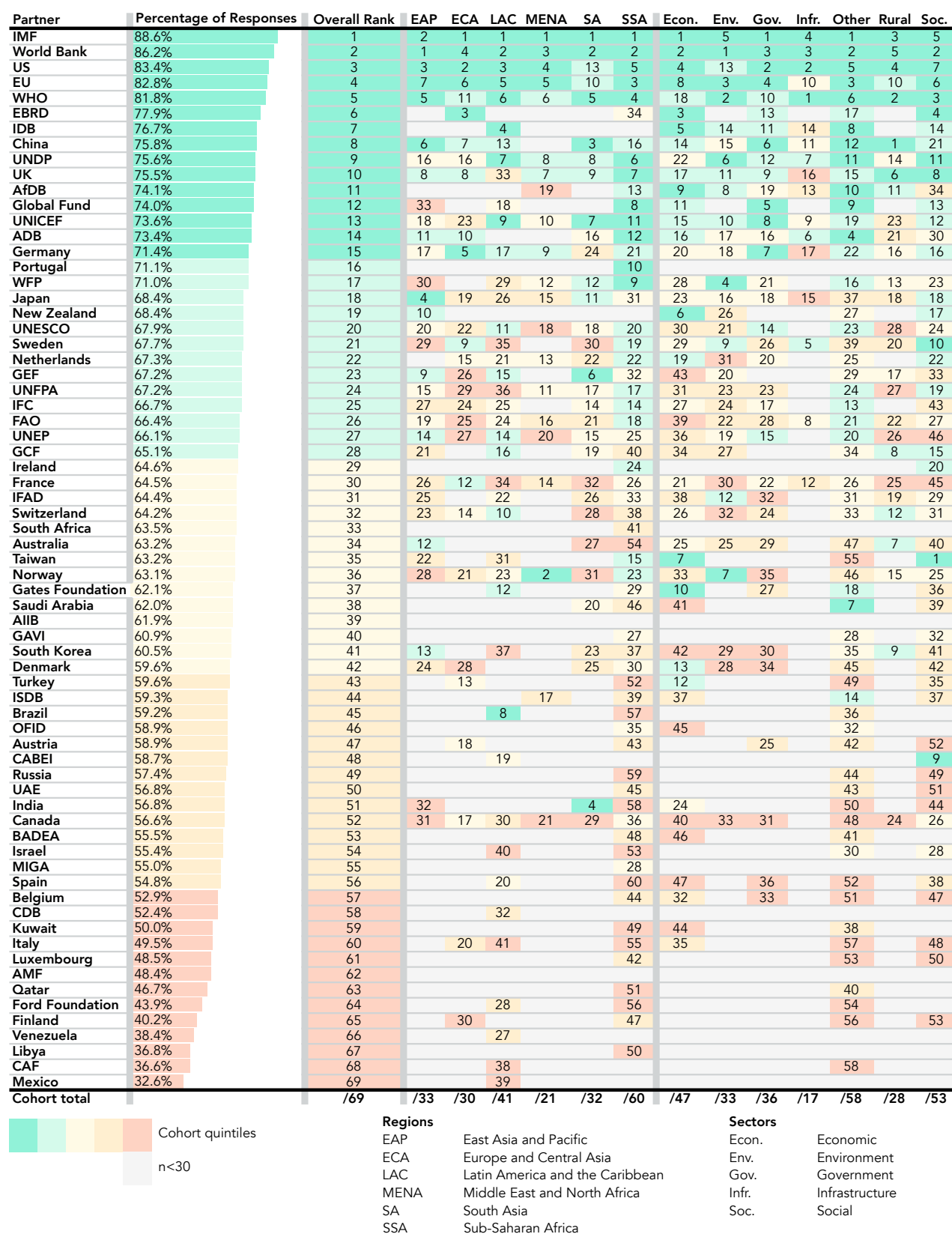
- China earned a spot among the top 10 influencers overall, joining the US, the UK, and major multilaterals.
- Influence is a double-edged sword: leaders most often viewed the influence of their partners positively, but less so in the case of China, Russia, and fragile state donors.
- The most influential development partners were also the most helpful, including the WHO, World Bank, EU, and US, which received high marks across regions and sectors.
- The EBRD was the most improved across the board, while China and Japan leapfrogged their peers in relative influence since 2017.
- Leaders gave 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.

Conclusion: Beyond footprints and rankings, what broader insights can we learn?

Beyond the pandemic, the field of development cooperation has been indelibly marked 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 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 development partners. In taking a step back from the intricacies of footprints and rankings, there are three broader insights from how leaders articulated what they prioritize and value in their interactions with external actors.

- Adaptability, sustainability, inclusivity, and reciprocity top the list of cooperation principles to level the playing field.
- The growing prominence of China as an influential force is undeniable, but not inevitable.
- Multilateralism may be imperfect, but the stature of these venues for collective action has proven durable.

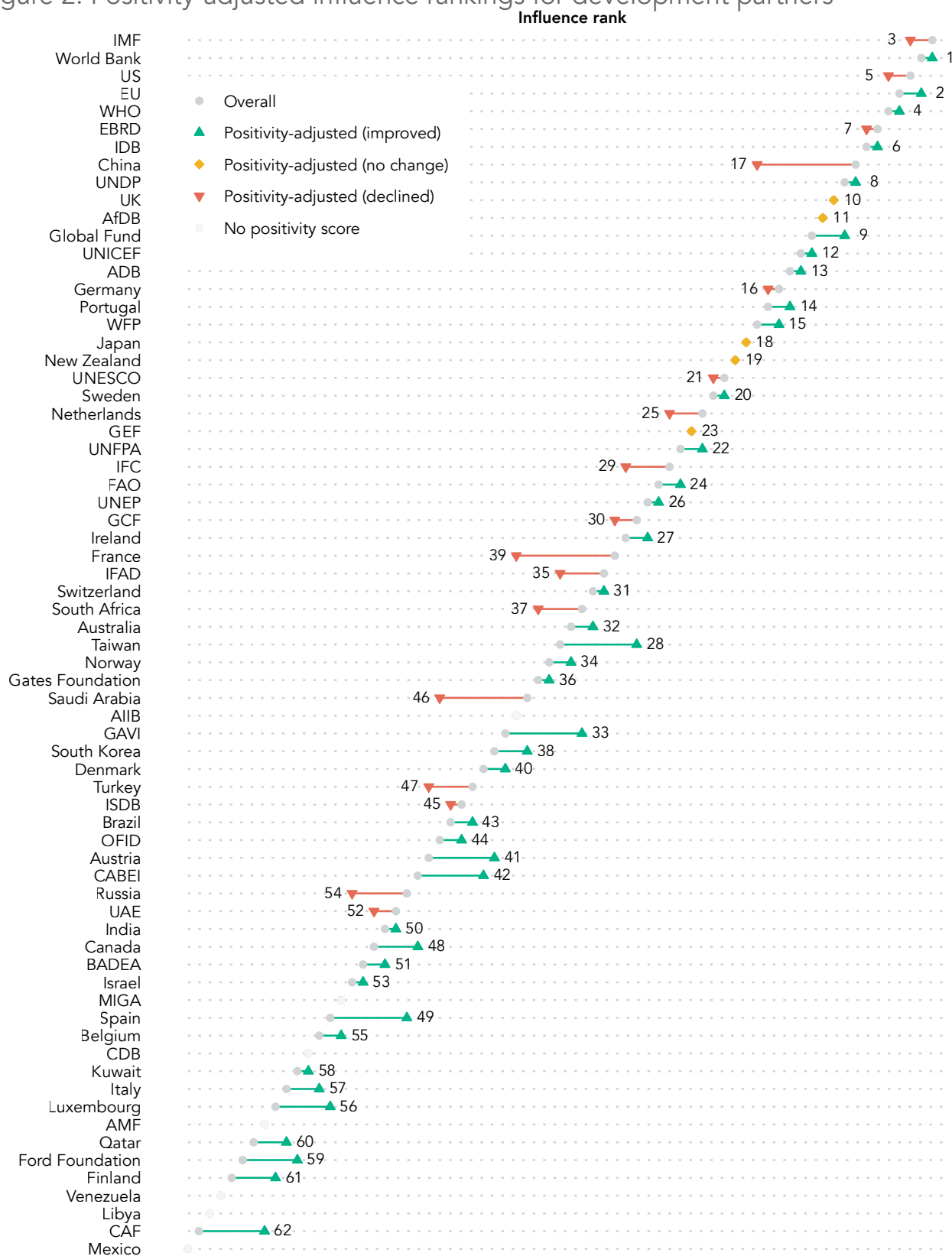
Figure 1. Influence rankings by region and sector



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.

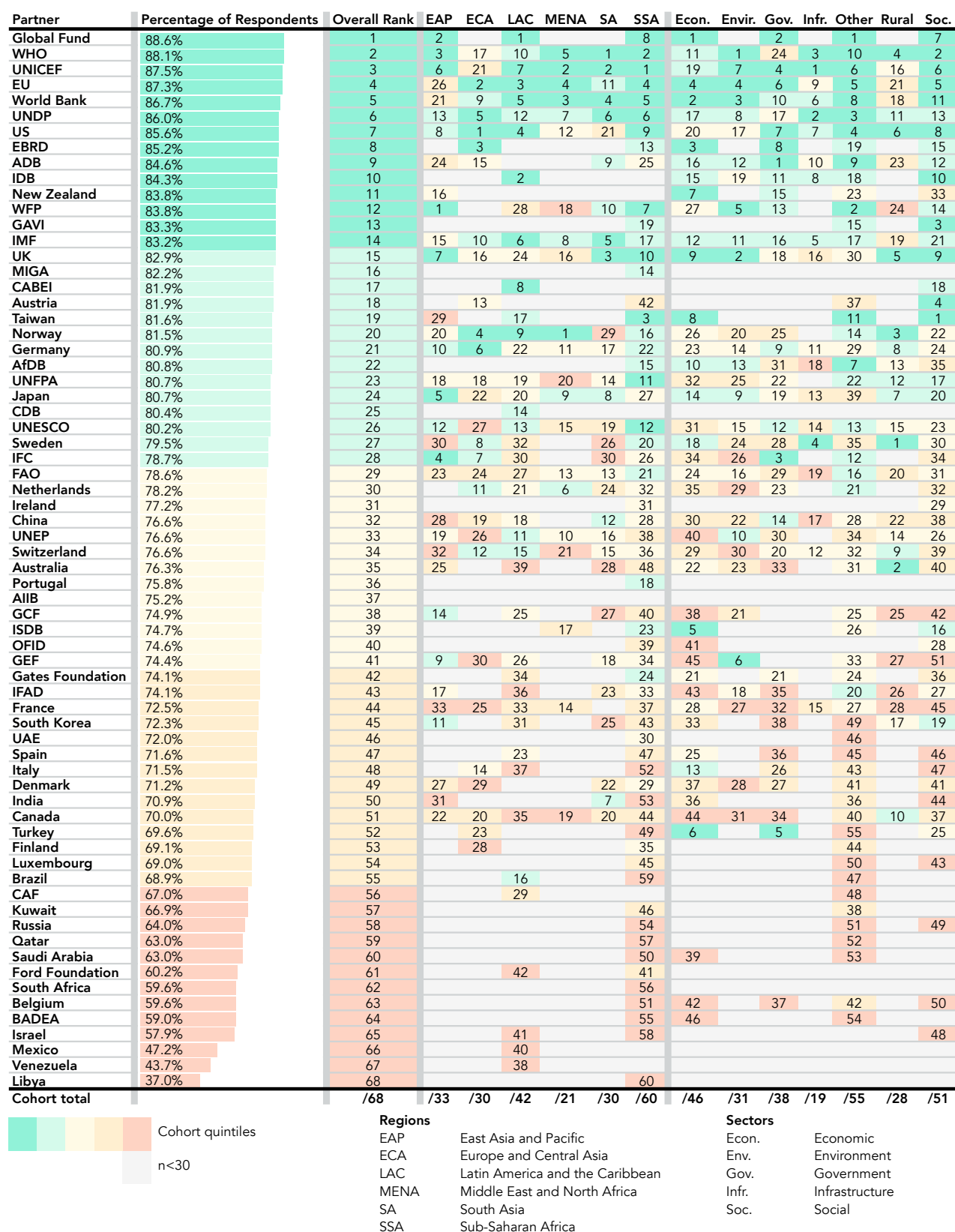
Figure 2. Positivity-adjusted influence rankings for development partners



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.

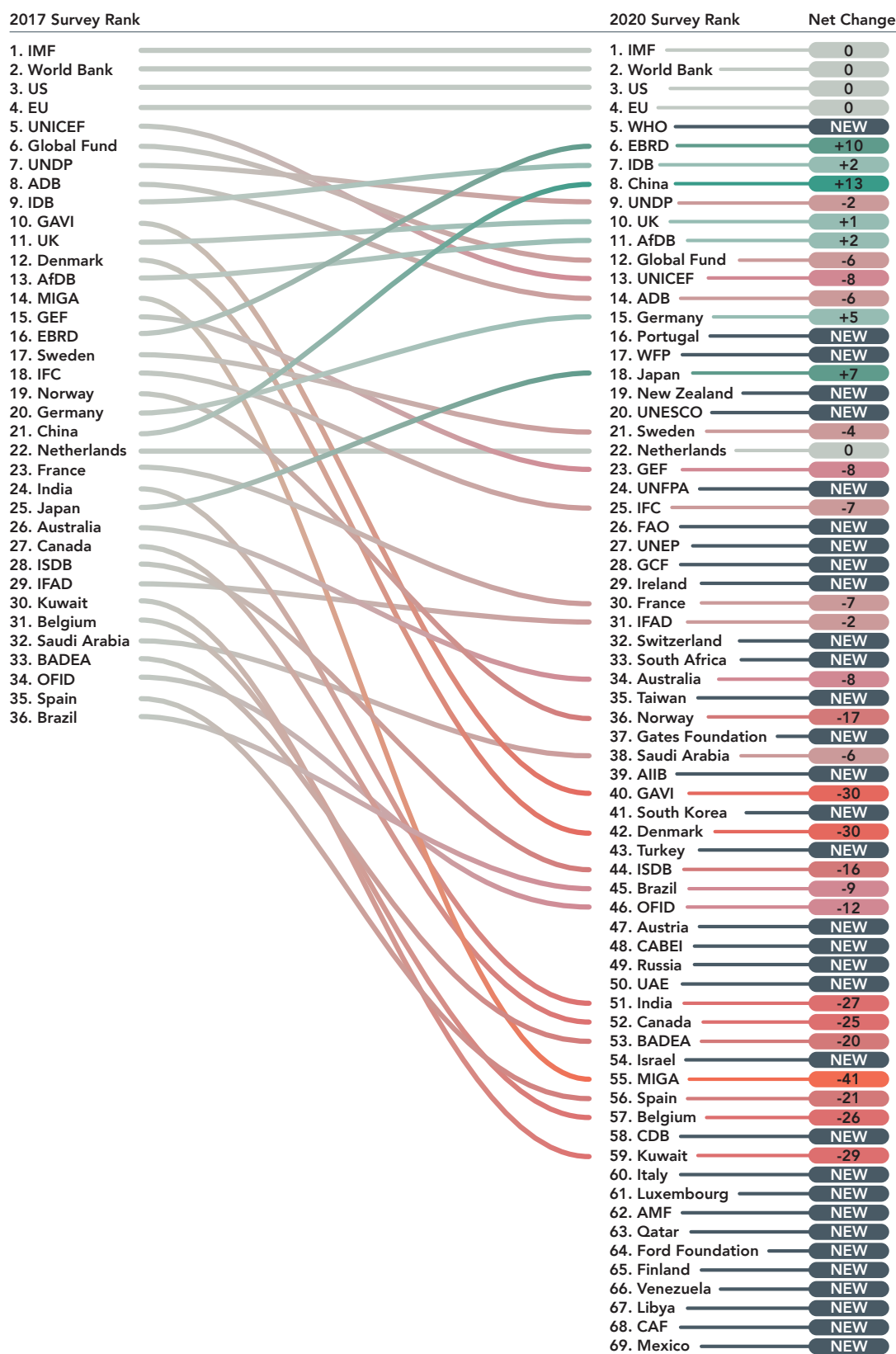
Figure 3. Helpfulness rankings by region and sector



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.

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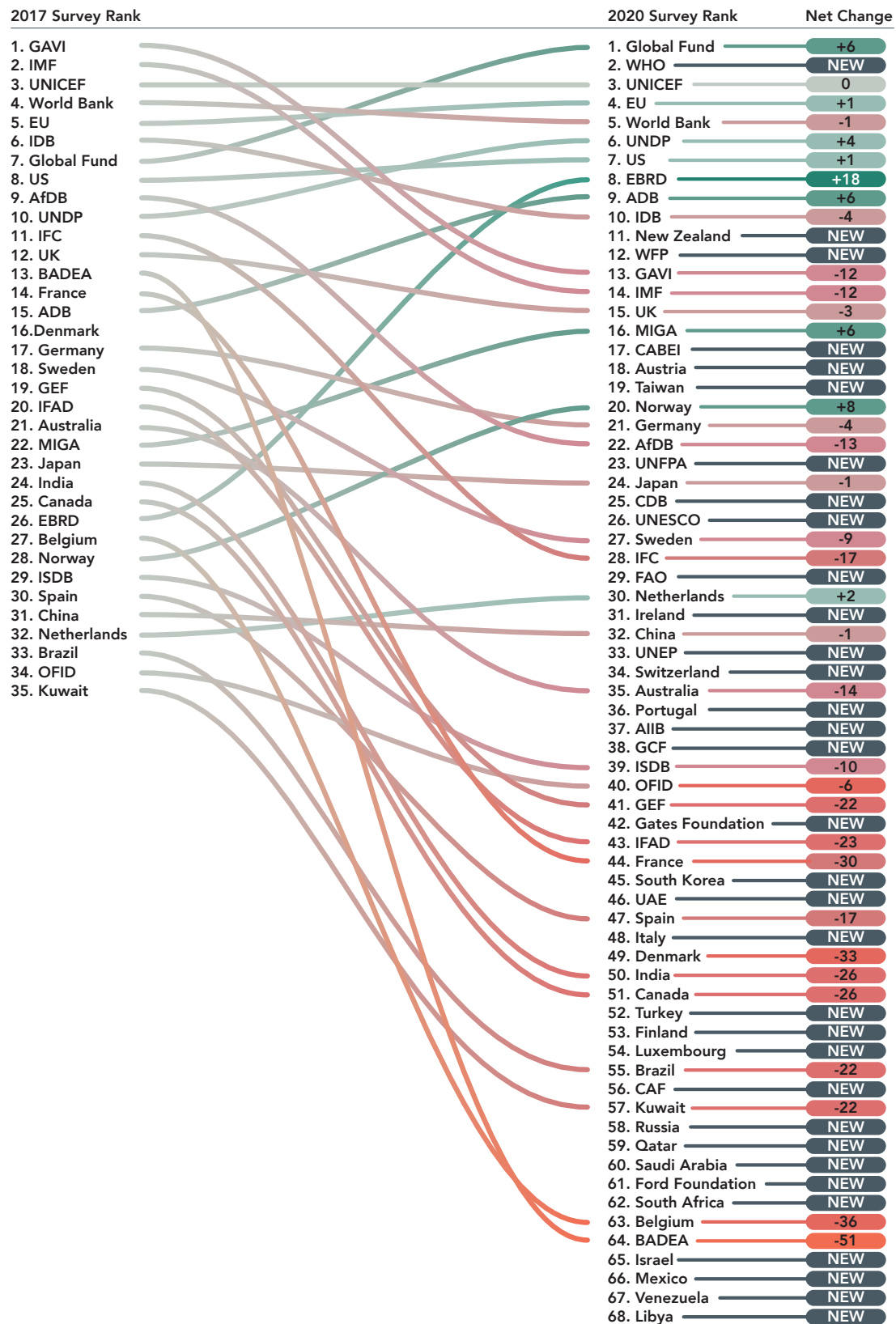
Figure 4. Perceived influence of development partners in 2017 versus 2020



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 5. 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.

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?

AidData
Global Research Institute
William & Mary
427 Scotland St.
Williamsburg, VA 23185



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