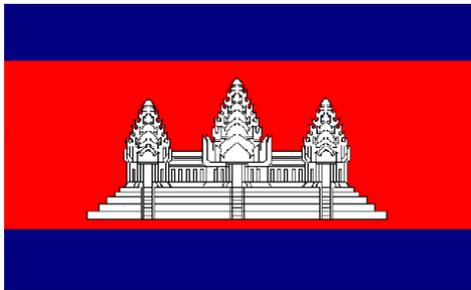




Kingdom of Cambodia
Nation – Religion – King

ព្រះរាជាណាចក្រកម្ពុជា

Royal Government of Cambodia



DEVELOPMENT COOPERATION AND PARTNERSHIPS REPORT

Prepared by
Cambodian Rehabilitation and Development Board
Council for the Development of Cambodia

March 2020



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ACRONYMS

BSP	Budget Strategic Plan
CDC	Council for the Development of Cambodia
CRDB	Cambodian Rehabilitation and Development Board
CSDGs	Cambodia Sustainable Development Goals
DCPS	Development Cooperation and Partnerships Strategy
DPs	Development Partners
EBA	Everything But Arms
EIF	Enhanced Integrated Framework
EVI	Economic Vulnerability Index
FTA	Free Trade Agreement
GDP	Gross Domestic Product
GNI	Gross National Product
GPEDC	Global Partnership for Effective Development Cooperation
GSP	Generalised System of Preferences
HAI	Human Assets Index
IDP	Industrial Development Policy
ISMs	International Support Measures
JMIs	Joint Monitoring Indicators
KPIs	Key Performance Indicators
LDC	Least Developed Country
LMIC	Lower-Middle Income Country
MEF	Ministry of Economic and Finance
MFAIC	Ministry of Foreign Affairs and International Cooperation
MfDR	Managing for Development Results
MFN	Most Favored Nation
MfSDR	Managing for Sustainable Development Results
MOI	Ministry of Interior
MOP	Ministry of Planning
NIS	National Institute of Statistics
NGOs	Non-Governmental Organisations
NSDP	National Strategic Development Plan
ODA	Official Development Assistance
PAR	Public Administration Reform
PB	Programme Budgeting
PFM	Public Financial Management
PIMSRS	Public Investment Management System Reform Strategy
PSD	Private Sector Development
RGC	Royal Government of Cambodia
RS	Rectangular Strategy
SDGs	Sustainable Development Goals
SMEs	Small and Medium-sized Enterprises
SNDD	Sub-National Democratic Development
TFAF	Trade Facilitation Agreement Facility
TRIMs	Trade-Related Investment Measures
TRIPS	Trade Related Aspects of Intellectual Property Rights
TVET	Technical and Vocational Education and Training
TWGs	Technical Working Groups
UNCDP	United Nations Committee for Development Policy

Foreword

Under the wise and long-term visionary leadership of **Samdech Akka Moha Sena Padei Techo HUN SEN, Prime Minister of the Kingdom of Cambodia**, the Royal Government of Cambodia has demonstrated a concerted effort and commitment to deliver effective development results. Remarkable successes include ensuring full peace, security, political stability, prudent macro-economic management and sound governance reforms – notably in PFM, PAR and SNDD – which provide better services and ultimately distribute the dividends of robust and inclusive economic development to all Cambodians. Such significant achievements have been reflected through increased ownership and capacity, and strong political leadership of the Royal Government in guiding development partnerships towards achieving national development objectives.

To build on these outstanding achievements, the Royal Government of the Sixth Legislature of the National Assembly has put forward a “Political Platform”, which sets out clear strategic goals, prioritized policies and specific measures to be implemented from 2019 onwards. The Rectangular Strategy-Phase IV for Growth, Employment, Equity and Efficiency, the Socio-economic Policy Agenda of the Royal Government, has been developed and implemented with an aim to transform Cambodia and to build a solid foundation for realizing Cambodia Vision 2030 and 2050. The RS-IV has been operationalized through the National Strategic Development Plan (2019-2023), which also fully integrates the Cambodia Sustainable Development Goals (CSDGs).

Towards achieving Cambodia Vision 2030 and 2050, the Royal Government of Cambodia has been implementing the Industrial Development Policy (2015-2025). This will promote high levels of sustainable and inclusive economic growth through economic diversification, strengthening competitiveness and promoting productivity that links the Cambodian economy to global and regional value chains.

Attaining these ambitious goals emphasizes the continued need to strengthen effective partnerships with all stakeholders. This will ensure readiness as Cambodia consolidates progress, confronts emerging challenges and seizes new opportunities in a new regional and global dynamic. Accordingly, the Royal Government has endorsed and implemented the Development and Cooperation and Partnerships Strategy (2019-2023) to continue promoting development effectiveness and implementing partnership principles within the Cambodian context and applying global commitments and norms.

The core objective of the 2018-2019 Development Cooperation and Partnerships Report (DCPR), prepared by the Cambodian Rehabilitation and Development Board of the Council for the Development of Cambodia (CRDB/CDC), is to monitor progress in development effectiveness partnerships and to provide evidence-based analysis of trends in development cooperation. This will further guide the Royal Government’s efforts to strengthen partnerships to support the RS-IV implementation in the context of the 2030 Sustainable Development Agenda. It will also ensure readiness for graduation from the Least Developed Country grouping in the coming years.

I would like to acknowledge the outstanding work of **H.E. Chhieng Yanara, Minister Attached to the Prime Minister, Secretary General of CRDB/CDC**, and his staff for this important analytical report. I trust that the analysis presented in this report provides great insights for all policy makers and development actors and serves as a reference to further strengthen their development partnerships.

Phnom Penh, 09 March, 2020



CHIN BUN SEAN

Senior Minister in Charge of Special Missions
Vice Chairman, Council for the Development of Cambodia

Executive Summary

Cambodia's development has attained many significant milestones over more than two decades. Progress has been made in line with ensuring peace, security and political stability, promoting sustainable and resilient growth, poverty reduction and job creation, as well as strengthening the capacity of public institutions. The economic growth rate reached 7.5% in 2018, the highest rate in the last ten years, and 7.1% in 2019. This has dramatically reduced the poverty incidence to less than 10% and increased GDP per capita to an estimated USD 1,548 in 2018 and USD 1,674 in 2019.

Confronting newly-emerging challenges and realizing Vision 2030 and 2050, the Royal Government of Cambodia (RGC) is responsive to the rapidly evolving global context. The Rectangular Strategy (RS-IV), the RGC's socio-economic development agenda, ensures strong leadership and provides a roadmap to confront new development opportunities and challenges. The NSDP (2019-2023), which fully integrates the CSDGs, operationalizes the RS-IV and associated reforms that increase the RGC's capacity to mobilize and manage resources to support the implementation of RS-IV and national development goals.

Progress on Development Partnerships

Cambodia has made significant progress in implementing development effectiveness and global partnership commitments agreed in Busan in 2011. Through the Development Cooperation and Partnership Strategy's (DCPS) results framework, the RGC has institutionalized global and national development effectiveness commitments linked with global partnership principles, the CSDGs and RS-IV and NSDP monitoring frameworks. In response to the evolving development cooperation context and to promote results-based partnerships envisaged in the DCPS, the Guidelines on TWGs and JMIs have been revised in an inclusive process. CRDB/CDC has taken a leading role in formulating a new set of JMIs to align and support the implementation of the RS-IV and the NSDP.

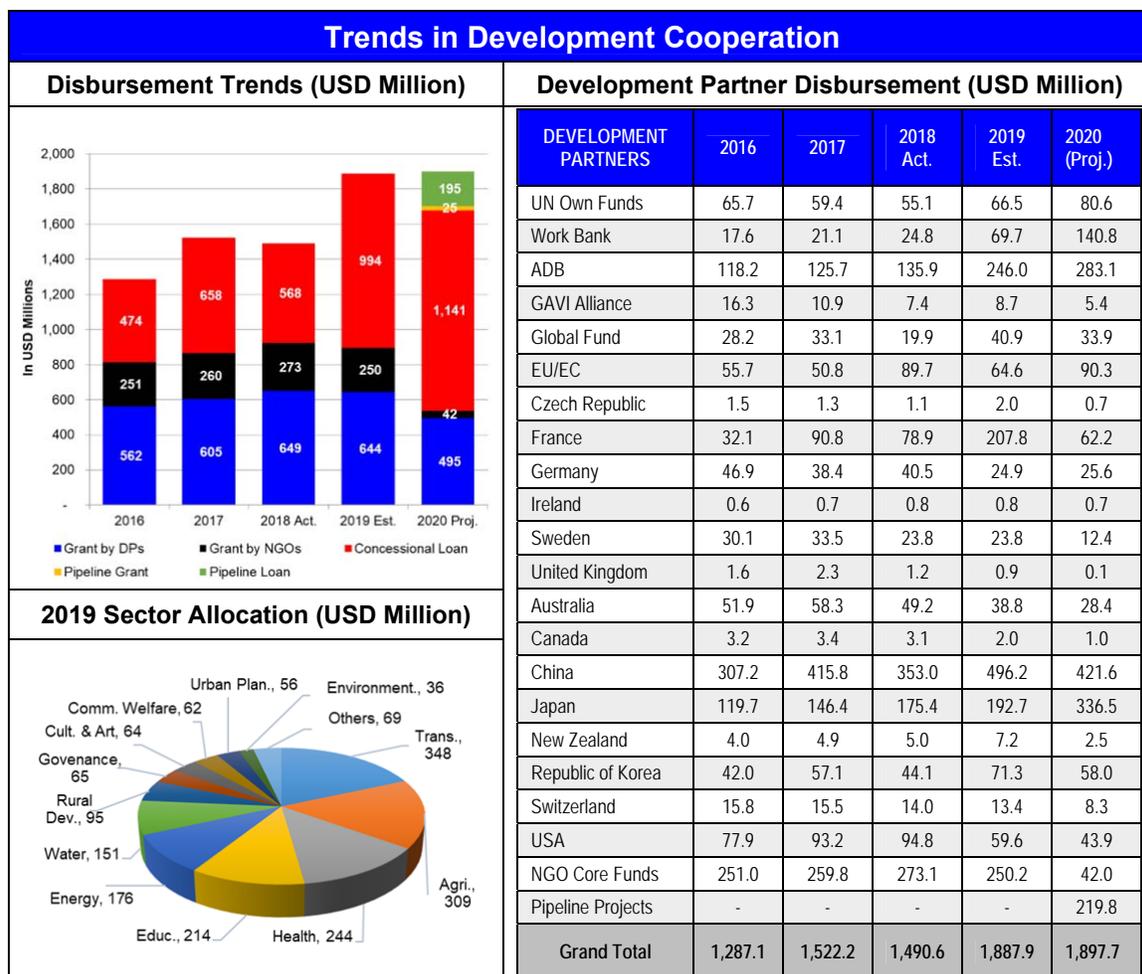
There are encouraging signs of progress toward realizing global commitments to development effectiveness at country level. Aid on budget has increased significantly, rising from 83% in 2017 to 92% in both 2018 and 2019. Aid predictability performed well at 119% in 2018 and 122% in 2019. The use of the PFM system was 81% in 2019, increased from 75% in 2018. Alongside these significant achievements, some challenges were identified: the use of government's results frameworks and procurement systems have made little progress at 63% and 50% of 2019 disbursements to the public sector respectively. Despite improvements to the government procurement system, it is not widely used by development partners. Further efforts to achieve DCPS commitments will be made through wider use of the existing RGC's results frameworks, especially within the TWGs, the effective implementation of JMIs and promotion of partnership dialogue at all levels.

Trends in Development Cooperation

ODA is estimated at USD 1.89 billion in 2019. This represents an increase over the USD 1.5 billion received in 2018. Grant assistance remains relatively stable at around USD 800 per annum, with a slight increase recently from USD 813 million in 2016 to an estimated USD 893 million in 2019. Annual changes in total disbursements are largely driven by loans (having accounted for 25% of total disbursements in 2010, the loan share rose to 53% in 2019 with increased programs from France, China, Japan and ADB).

China continues to be the largest development cooperation provider. Its disbursement increased to almost USD 500 million in 2019. Multilateral partners are expanding their support, where World Bank and ADB are multiplying their disbursement from USD 17 million and USD 118 million in 2016 to almost USD 70 million and USD 246 million in 2019, respectively. Disbursement by the EU is declining, with the exception of the Commission and France, which increased disbursement to USD 65 million and USD 207 million in 2019, respectively. Combined disbursements by the six largest development partners – China, ADB, Japan, France, Korea and World Bank – rose to 68% of total support in 2019,

compared to 49% in 2016. China and the Republic of Korea are increasing their grant assistance in tandem with rising loan disbursement.



In terms of sector trends, the social sectors received USD 500 million per annum over 2011-2019, representing a declining share from 35% of total ODA in 2014 to 28% in 2019. Significant growth is found in infrastructure and economic sectors as disbursement increases almost twofold, while support to cross-cutting sector remains stable over the same period.

In 2017-2019, total resources by NGOs averaged USD 371 per annum. In 2018, there was a slight growth from a year earlier, which is attributed to higher NGO funding from their own sources. Development partner funding to NGOs remains relatively stable as they disburse approximately USD 100 million annually to support NGOs activities.

Cross-cutting Thematic Profiles

The analysis focuses on three selected thematic markers, namely gender equality, private sector development and climate change.

ODA Support to the Promotion of Gender Equality: Total development cooperation funding to gender as a principal sector is estimated at USD 5.2 million (0.28% of total ODA in 2019). However, projects with a further value of USD 82.7 million have made some contributions to gender equality, a 32% increase compared to 2018. This highlights that gender is more often mainstreamed in wider programmes that it is funded directly. Increased efforts must be made to coordinate these mainstreamed activities.

ODA Support to Private Sector Development: In 2019, projects with a value of USD 209 million have made some contribution to private sector development (a 48% increase from

2018). Energy and transportation sectors are the most commonly-cited channel for private sector mainstreaming.

ODA Support to Climate Change: Total development cooperation funding to climate change as a principal sector amounted to USD 11.6 million in 2018 and USD 13.3 million in 2019. Total mainstreaming funds are estimated at around USD 79 million in 2019, a 39% increase from 2018. The urban planning sector has mainstreamed climate change to the greatest share of its sector 2019 disbursement (19%), followed by environment & sustainability (13%), agriculture (12%), rural development (8%) and water & sanitation (3%).

ODA Support to Industrial Development

Under the RGC's leadership, significant progress in the Industrial Development Policy (IDP) implementation has been made. The IDP Progress Report 2017-2018 revealed that the GDP share of the industrial sector has increased from 27.7% in 2015 to 32.6% in 2018, already surpassing the 2025 target of 30%.

In 2018 approximately USD 157 million of ODA, 13% of total external funding, was disbursed to support the IDP's Four Key Concrete Measures, Policy Measures and Action Plans. The disbursement is estimated to have increased to USD 265.7 million in 2019. Transportation, energy, power and electricity, and agriculture sectors are major sectors that received the largest mainstreaming funds.

Cambodia's Progress towards LDC Graduation

Cambodia's strong record of economic growth and poverty reduction has pushed the country beyond the Human Assets Index threshold for LDC graduation. It is now fast approaching the Economic Vulnerability Index lower bound. GNI per capita is also expected to increase to exceed the graduation requirement. In this graduation scenario, it is expected that Cambodia will be included in the graduation list at the next CDP review in 2021.

LDC graduation will affect privileges and concessions mostly in trade, development cooperation and other technical support. However, the RGC is actively reviewing graduation requirements, implications and readiness. Policy interventions will be concentrated in the following areas:

- *Reduced economic vulnerability:* the effective implementation of the Industrial Development Policy and other strategic policies, especially the expansion of manufacturing, SMEs and services sectors, enhancement of industrialization, export diversification, agriculture modernization and disaster preparedness are keys to accelerate further reduction of economic vulnerability.
- *Development cooperation:* decreasing ODA grant volumes and shifting to loan financing will be mitigated by the RGC's effort in domestic resource mobilization. Continuing to effectively implement the Revenue Mobilization Strategy 2019-2023 and the Public Debt Management Strategy 2019-2023 is significant.
- *Trade:* continued engagement with trading partners to maintain preferential access, or to secure a favorable transition, is essential.
- *Infrastructure, logistics, and investment policy:* IDP will be a critical tool to transform Cambodia's industrial structure from a labor-intensive industry to a skill-based industry. Further improvements will be made to infrastructure, logistics, and investment policy to attract more investment in high-valued added, technology, and capital-intensive industries.

Managing for Sustainable Development Results

A results-based approach, based on evidence and the principles of development effectiveness and sustainability, will guide cooperation between Cambodia and its development partners. This will be based on the establishment and implementation of monitoring, evaluation and reporting systems that enhance results-based development cooperation.

Development cooperation in the Cambodian context has progressively taken a result-based approach. The Rectangular Strategy is a more comprehensive framework for achieving development results. The CSDG framework has been integrated with the NSDP. Budget Strategic Plans (BSP) provide a framework of linkages between resources and results while development cooperation will be gradually integrated into the national budget as part of the ongoing PFM reform.

Conclusion

The RGC will continue to operationalize key policies that transform and modernize the economy. LDC graduation will represent an additional milestone towards achieving Vision 2030 and 2050. As the RGC's own budget increases in size and scope, external resources must increasingly complement domestic financing and other sources of development finance, including the private sector, to promote inclusive growth and sustainable development. The overall level of ODA disbursement reflects the RGC's dedication to working with all partners and ensuring alignment with national priorities. The RGC is committed to continue to strengthen inclusive partnership with all development actors in order to mobilize resources that deliver sustainable development results.

1. Introduction: Partnerships in Context

Cambodia's development trajectory over more than two decades has achieved many significant milestones. The top priority of the RGC's development agenda is ensuring peace, security and political stability, promoting sustainable and resilient growth, poverty reduction and job creation, as well as strengthening the capacity of public institutions.

In line with the fast-changing global development context, Cambodia has achieved impressive progress on its socio-economic development agenda. Due to the rapid development of the private sector, along with continued RGC efforts in improving the business environment, economic growth in 2018 reached 7.5%, the highest rate in the last ten years. GDP per capita was estimated to increase to USD 1,548 in 2018 and USD 1,674 in 2019, and it is projected to further increase to USD 1,807 in 2020. Poverty incidence has been reduced dramatically to less than 10%. These tremendous achievements reflect the effective ownership and leadership of the RGC over Cambodia's inclusive, sustainable and equitable economic development processes.

Cambodia continues to confront newly-emerging challenges. As a Lower-Middle Income Country and with the approaching prospect of graduation from the Least Developed Country group in the coming years, Cambodia is seeking to consolidate and maintain its impressive track record of socio-economic progress. This requires a focus on strengthening public institutions, systems and capacities that will underpin the country's long-term economic growth and competitiveness. Realizing the ambition to reach Upper-Middle Income Country status and to fully implement the Sustainable Development Agenda by 2030, and ultimately become a High-Income Country by 2050, will require coherent policies, financing and partnerships that boost economic competitiveness, trade and cooperation.

When leading and directing the national development effort, the RGC is fully aware of the rapidly evolving global context, which has resulted in changing development dynamics and partnerships. The 2030 Sustainable Development Agenda provides a framework for common action and collaboration, but there are a number of global headwinds that make for a challenging environment. These include uncertainties related to international trade, climate change and security.

The RGC leadership is ready to seize new opportunities and address these challenges. The Rectangular Strategy - Phase IV (RS-IV), as the socio-economic development agenda for the Sixth Legislature of the National Assembly, builds on previous progress and lessons learned.

The RS-IV has focused its priorities on: (1) Human resources development; (2) Economic diversification; (3) Private sector development; and (4) Inclusive and sustainable development. The NSDP (2019-2023), which fully integrates the Cambodia Sustainable Development Goals (CSDGs), serves as an operational instrument to implement the RS-IV. It clearly identifies concrete actions and measurable indicators as part of an ambitious agenda for reform and modernization. The RGC has also introduced Key Performance Indicators (KPIs) as a rigorous results-based M&E framework for implementing RS-IV.

The continued effort in governance reforms – especially PFM, PAR and SNDD – includes vigorous PFM-related national policies, such as the Revenue Mobilization Strategy (2019-2023), the Public Debt Management Strategy (2019-2023) and the Public Investment Management System Reform Strategy (PIMSRS) 2019-2025. These have increased the RGC's capacity to mobilize and manage national revenue to support the implementation of RS-IV and the national development agenda.

To ensure a redistributive policy, the National Social Protection Policy Framework (2016-2025) promotes income security for all citizens, increases their welfare, strengthens social solidarity and maximizes poverty alleviation impacts for reducing poverty, vulnerability and inequality.

The future direction of socio-economic transformation includes the effective implementation of the Industrial Development Policy (2015-2025). This will promote the modernization of Cambodia's industrial structure from a labor-intensive to a skill-based industry that contributes to sustainable and inclusive economic growth. It prioritises accelerating economic diversification, strengthening competitiveness and promoting productivity.

Achieving national development objectives and the CSDGs, together with the prospect of LDC graduation, requires a significantly increased level of resources. It is also necessary to consider increased complexity in terms of international relations, financing structures and the on-going change in ODA support modalities. On this basis, the RGC recognizes the important role of ODA as a catalyst in leveraging other sources of development finance, both private and public. In this regard, the RGC has formulated and implemented the Development Cooperation and Partnerships Strategy (DCPS) for the period 2019-2023 to further promote the global development effectiveness and partnership commitments in Cambodia.

Building on the previous DCPS achievements, this new iteration continues to coordinate partnership arrangements, mobilize development resources and strengthen partnerships with all development actors to support the implementation of the RS-IV and the NSDP (2019-2023). Under its principles and objectives, a number of tools and mechanisms were established, informed by their respective Guidelines, to promote inclusive partnerships and development effectiveness at all levels of development.

This Development Cooperation and Partnerships Report (DCPR) for 2018-2019 reviews ODA provision and its contribution to national development priorities. The Report employs data provided by development partners to the Cambodia ODA Database to highlight trends in development cooperation and reflect partnership commitments.

This Report provides important insights for all policy makers on ODA flows and its alignment with the national development agenda. Results of this analysis will therefore be used to improve development cooperation policies and will serve as evidence-based inputs for enhancing dialogue and effective partnership between the RGC its development partners. This underlines the RGC's commitment to ensure mutual accountability and transparency in the use of development cooperation resources, which in turn contributes to effective development results.

2. Development Partnerships

Progress on Development Partnerships

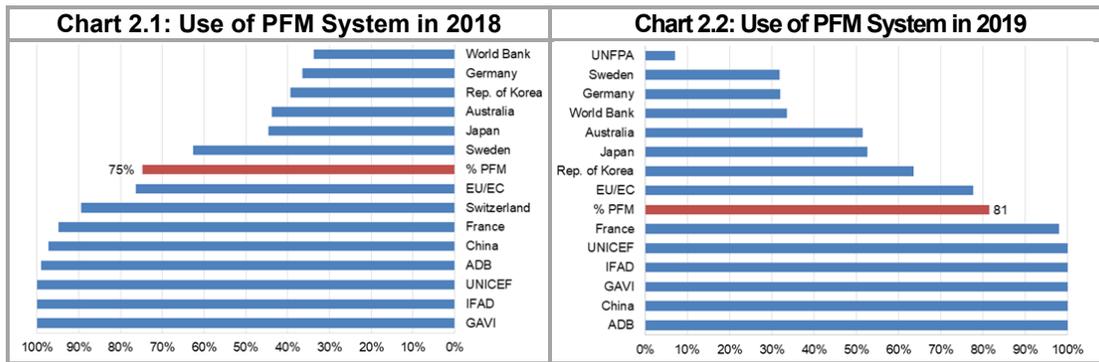
The RGC has fully committed to global partnership commitments. This commitment and long-standing effort is reflected in the encouraging 2018 Busan survey results. Furthermore, the most relevant development effectiveness indicators have been institutionalized in the DCPS results framework. Many indicators have also been integrated into the CSDG Framework and operationalized through the NSDP 2019-2023. These indicators are also incorporated into the result-based KPI monitoring framework of the RS-IV. This chapter will, therefore, not only serve as a reference for partnership work but is also a concrete measure for assessing partnerships against the targets set in the RS-IV, the NSDP and the CSDG Framework.

Solid progress has been made in implementing development effectiveness and global partnership commitments agreed in Busan in 2011. Efforts to achieve commitments in implementing the DCPS and to promote results-based partnerships include on-going work to strengthen TWGs and promote the effective use of JMIs. To ensure the effective performance and impact of TWGs and JMIs, flexibility and responsiveness in the application of Guidelines on TWGs and JMIs is essential. Both sets of Guidelines were therefore revised in 2019 as part of an inclusive, deliberative and consultative process.

Based upon these newly revised Guidelines, CRDB/CDC will continue to take a leading role in formulating and monitoring the JMIs. As the PFM reform progresses, and program budgeting becomes more results-based, the new JMIs, which are aligned with RS-IV, the NSDP and sector strategies, were discussed within the TWGs and increasingly embedded in the programming and budgeting processes. New JMIs are therefore directly driven from the existing sector and reform strategies/plans and feed into respective budget strategic plans of the RGC ministries and agencies. These new JMIs (2019 - 2023) were endorsed by **Samdech Akka Moha Sena Padei Techo HUN SEN, Prime Minister of the Kingdom of Cambodia** in September 2019.

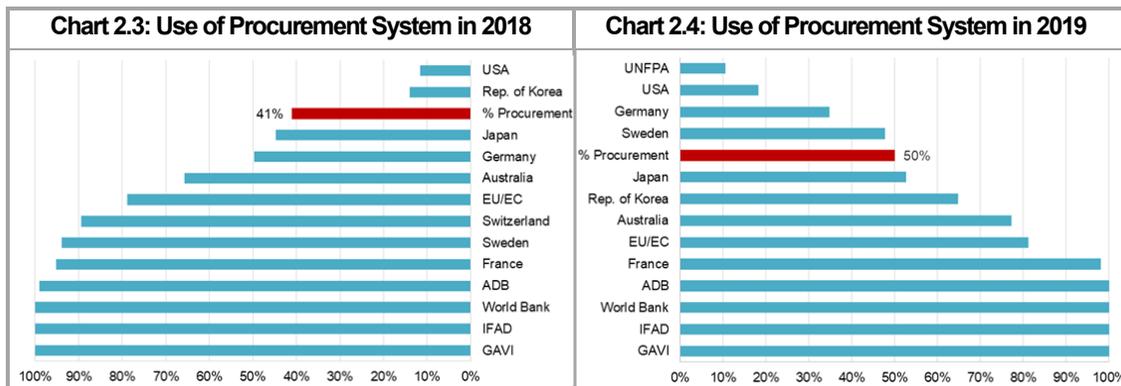
Alongside these achievements, some challenges were identified. Of particular importance is the need for development partners to make use of government's results frameworks and country systems, particularly the procurement system. Little progress has been made toward these indicators. With respect to the use of country systems, in 2018, 75% of ODA disbursed to the public sector was reported to be included in the PFM system. This increased to 81% in 2019. Although concessional loans have been increasing gradually, and the use of the PFM system is progressing, some multilateral partners still use their own budgeting systems, especially budget reporting and auditing systems.

As part of the PFM and budget reform, further efforts from development partners and the RGC will focus on increasing use of the PFM system in order to achieve the DCPS's target (85% by 2023). In 2018, multilateral partners such as GAVI, IFAD, UNICEF, ADB and EU/EC used the PFM system for more than 75% of their portfolio, whereas China, France, Switzerland were bilateral partners that were reported to use the PFM system to cover 90% of their disbursements to the public sector. Noting that loan financing uses PFM systems by default, in 2019, China and France were bilateral partners who used the PFM system for almost 100% of their disbursements together with multilateral partners such as ADB, IFAD, GAVI and UNICEF.



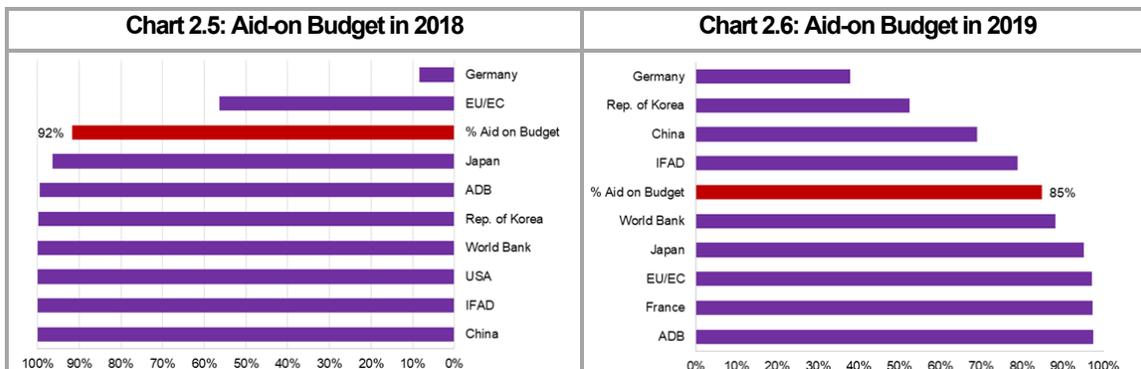
* As % of Funding to Public Sector

The use of the procurement system is a challenging issue. In 2018, only 41% of disbursements to the public sector are recorded as using the RGC's procurement system. The percentage of the use of the procurement system was estimated to increase to 50% in 2019. Although the use of the PFM system by development partners has gradually increased, promoting the increasing use of the government's procurement system is of significance. Further RGC engagement with development partners, especially loan providers, is required so that the target (60%) can be reached by 2023.



* As % of Funding to Public Sector

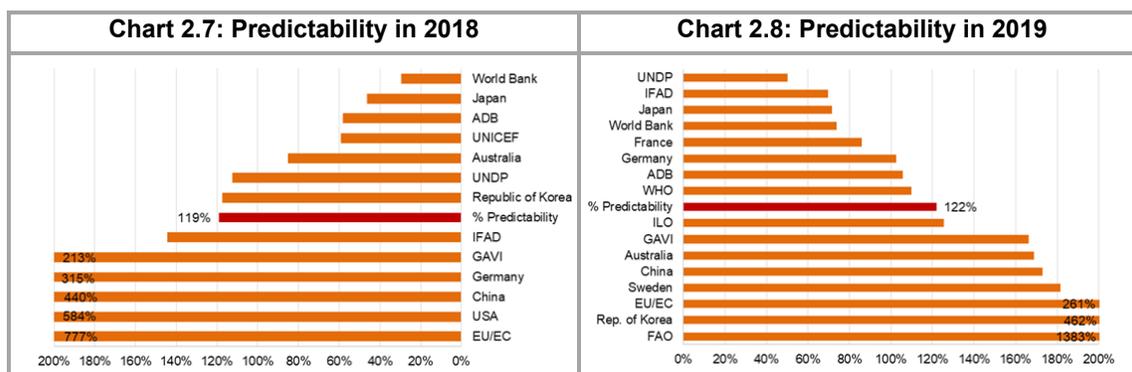
Aid-on budget has significantly improved from 83% in 2017 to 92% in 2018 and 2019. Once again, this is partially a result of increased loan funding that is routinely recorded in the budget. Keeping the progress on track is imperative to achieve the DCPS's target of 95% by 2023. In addition, ODA grants provided to budget support and investment project/program were included in the budgeting system and recorded as on-budget.



* As % of Funding to Public Sector

At the aggregate level, Cambodia performed well against its aid predictability indicator. Actual disbursements accounted for 119% of projected levels in 2018 and 122% in 2019. In 2018, development partners including IFAD, Republic of Korea, UNDP and Australia were close to the 100% benchmark. ODA from EC/EU, USA, China, Germany and GAVI was under-predicted as actual disbursements were well above those originally indicated. For 2019, development cooperation from WHO, ADB, Germany and France became more predictable, clustering around the mean. As the budget is a primary means for the RGC to implement its policy and achieve its development objectives articulated in the RS-IV, NSDP, and CSDGs, the provision of predictable funding is highly desirable.

For partners who appear to struggle with predictability (both over and under predictability), three things should be taken into account: 1) a lack of attention to providing accurate forecasts especially during the planning phase; 2) implementation differs radically from the plan; or 3) mis-recording of data at either planning or reporting stage. Accurate programming, data recording and disbursement reporting are of significance for predictability.



* As % of Funding to Public Sector

Further attention should be placed on the increased use of the existing RGC's results-frameworks. Only 60% of total disbursements to the public sector in 2018 were reported to use the government's results frameworks. This increased slightly to 63% in 2019. Promoting the use of government's results frameworks by development partners is critical to achieve the set target of 80% in the DCPS.

Development partners should engage with various initiatives of the RGC toward establishing results-based management. The RGC officially endorsed the CSDG Framework with relevant and realistic targets and indicators that serve as a results-oriented framework for fully implementing the CSDGs. All development actors are expected to gradually use this results framework in their planning process. Moreover, Key Performance Indicators (KPIs) have also been introduced as a results-based monitoring framework for assessing the progress of the RS-IV implementation. For the NSDP 2019-2023 and at the sector level, line ministries and government agencies have updated their sector/reform strategy/plan to inform the budget. Development partners should therefore take these initiatives into account in devising their own results-frameworks and supporting RGC-led monitoring efforts.

With respect to the CSDGs, the RGC has demonstrated commitment and effort to deliver effective development results. Impressive successes include resource mobilization and its alignment with the national priorities, inclusive partnerships in the development process and improved coordination with development partners through continuous capacity development to implement key policies and mechanisms. In particular, the DCPS 2019-2023 continues to coordinate partnership arrangements and take the advantage of opportunities to mobilize development cooperation and strengthen partnerships with stakeholders to support the implementation of the CSDGs. Of such achievements, all localized indicators of Goal 17 under CRDB/CDC mandate (table 2.2), are on-track or ahead of the set targets.

Table 2.1: Development Effectiveness Indicators by Development Partners

	Use of Results Framework (%)		Use of PFM Systems (%)		Use of Procurement Systems (%)		Aid on Budget (%)		Annual Predictability (%)		1-year Plan Shared with Counterpart		3-year Plan Shared with Counterpart	
	2018 (act.)	2019 (est.)	2018 (act.)	2019 (est.)	2018 (act.)	2019 (est.)	2018	2019	2018	2019	2018	2019	2018	2019
UN Agencies														
FAO	0	0	0	0	0	0	0	0	0	1383	Yes	Yes	No	Yes
ILO	100	100	0	0	0	0	0	0	0	125	Yes	Yes	Yes	Yes
UN Women	100	100	0	0	0	0	0	0	0	0	Yes	Yes	Yes	Yes
UN AIDS	100	100	0	0	0	0	0	0	0	0	No	No	No	No
UNDP	100	100	0	0	0	0	0	0	112	50	Yes	Yes	Yes	Yes
UNESCO	76	90	0	0	0	0	0	0	0	0	Yes	Yes	Yes	Yes
UNFPA	100	100	0	7	0	11	0	0	0	0	Yes	Yes	Yes	Yes
UNICEF	100	100	100	100	0	0	0	0	59	0	No	Yes	No	Yes
UNIDO	0	0	0	0	0	0	0	0	0	0	Yes	Yes	Yes	Yes
WFP	100	100	0	0	0	0	0	0	0	0	No	Yes	No	Yes
WHO	100	100	0	0	0	0	0	0	0	110	No	No	No	No
IFAD	100	100	100	100	100	100	100	79	144	69	Yes	Yes	Yes	Yes
Multilateral														
ADB	100	100	99	100	99	100	100	98	58	106	Yes	Yes	Yes	Yes
World Bank	100	100	34	34	100	100	100	88	29	74	Yes	Yes	Yes	Yes
Global Fund	100	100	0	0	0	0	0	0	0	0	Yes	Yes	No	No
GAVI	100	100	100	100	100	100	0	0	213	166	Yes	Yes	No	No
European Union														
EU/EC	100	100	76	78	79	81	56	97	777	261	Yes	Yes	Yes	Yes
Czech Rep	0	0	0	0	0	0	0	0	0	0	Yes	Yes	No	Yes
France	95	98	95	98	95	98	0	97	0	86	Yes	Yes	Yes	Yes
Germany	100	100	36	32	50	35	8	38	315	102	Yes	Yes	Yes	Yes
Ireland	0	0	0	0	0	0	0	0	0	0	Yes	Yes	No	No
Sweden	100	49	63	32	94	48	0	0	0	182	Yes	Yes	Yes	Yes
UK	0	0	0	0	0	0	0	0	0	0	No	Yes	No	No
Bilateral														
Australia	80	83	44	51	66	77	0	0	85	169	Yes	Yes	Yes	Yes
Canada	0	0	0	0	0	0	0	0	0	0	Yes	Yes	Yes	Yes
China	0	0	97	100	0	0	100	100	440	173	Yes	Yes	Yes	Yes
Japan	90	93	45	53	45	53	96	95	46	71	Yes	Yes	Yes	Yes
New Zealand	0	0	0	0	0	0	0	0	0	0	Yes	Yes	Yes	Yes
Rep of Korea	49	72	39	64	14	65	100	52	118	462	Yes	Yes	Yes	Yes
Switzerland	100	82	89	0	89	0	0	0	0	0	Yes	Yes	Yes	Yes
USA	59	78	0	12	18	100	0	584	0	0	Yes	Yes	Yes	Yes
Total	60	63	75	81	41	50	92	92	119	122	98	99	91	98

Table 2.2: CSDG 17: Strengthen the Means of Implementation and Revitalize the Global Partnership for Sustainable Development

Targets and Indicators	Unit	CSDG targets					Actual				Progress	
		2015	2016	2017	2018	2019	2016	2017	2018	2019		
17.3	Mobilise additional financial resources for developing countries from multiples sources											On track
17.3.1	Official Development Assistance as % of GDP	% of GDP	7.4	7.4	6.9	6.4	6.0	6.42	6.48	5.74	7.05	Ahead
17.9	Enhance international support for implementing effective and targeted capacity building in developing countries to support national plans to implement all the Sustainable Development Goals, including through North-South, South- South and triangular cooperation											On track
17.9.1	Total financial and technical assistance (including through North-South, South-South and Triangular cooperation) committed to Cambodia	% of GDP	1.31	1.31	1.23	1.15	1.07	1.86	1.88	1.15	1.85	Ahead
17.9.2	Amount of ODA to Economic and Development Policy/ Planning committed to Cambodia	% of GDP	0.03	0.03	0.02	0.02	0.02	0.04	0.05	0.04	0.04	Ahead
17.10	Promote a universal, rules-based, open, non-discriminatory and equitable multilateral trading system under the World Trade Organization, including through the conclusion of negotiations under its Doha Development Agenda											(MOC)
17.10.1	The number of commercial legal norms and standard set up to facilitate local investors and investors trading (MOC)	Number	7	7	7	8	NA	7	7	7	NA	(MOC)
17.17.1	Amount of ODA disbursed to civil society partnership	% of GDP	0.01	0.01	0.01	0.01	0.01	0.03	0.03	0.02	0.05	Ahead

New Partnership Arrangements

The RGC promotes multi-stakeholder dialogue at all levels. The DCPS identifies three new partnership arrangements: the Sectoral Multi-stakeholder Dialogue; the RGC-NGO Consultative Meeting; and Sub-National Partnership Dialogue. The Guidelines on these respective mechanisms were formulated and approved by the RGC in May 2019. The RGC-NGO Consultative Meeting has been regularly convened at both ministerial and sub-national level. At ministerial level, MFAIC convened a consultation with international NGOs while MOI facilitated a series of consultations with local NGOs.

At the sub-national level, provincial administrations have conducted a consultation forum between the provincial authority and NGOs/local communities. Civil Society Alliance Forum has worked with Provincial administrations to ensure that consultations with NGOs/local communities is inclusive, purposeful and informative. Consultations have been focused on the operation and challenges of NGOs in executing their activities at the local level.

With respect to Sub-national Partnership Dialogue, CRDB/CDC has coordinated with relevant ministries and sub-national authorities to manage the organization of this partnership mechanism. The workshop on dissemination of the Guideline on Sub-national Partnership Dialogue was rolled out across 25 capital/provinces. The first round of the Sub-national Partnership Dialogue is expected to be convened in 2020 together with the Forum on three-year capital/ provincial investment program.

In summary, it is expected that, by publishing these figures and analysis that were principally used for the global and national monitoring frameworks, all development partners will work closely with the RGC to strengthen partnership practices. There are encouraging signs of

progress toward realizing the global commitment to development effectiveness and implementing the CSDGs. The use of the RGC's results-frameworks, which are linked to the government planning and monitoring systems, have become a central part of the development effectiveness effort and must be fully integrated into development partner programming, implementation and monitoring.

3. Trends in Development Cooperation

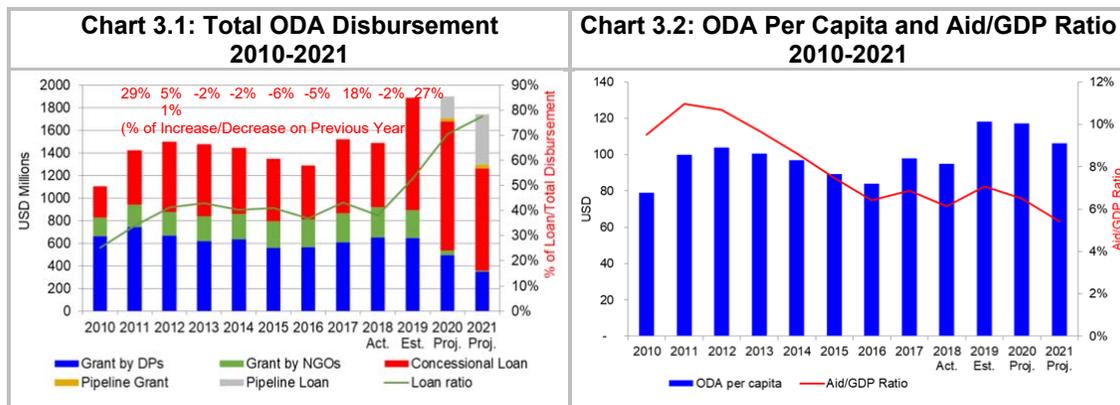
To visualize the evolution of Cambodia’s development cooperation, this section provides an analysis of ODA disbursements. It is based on ODA data extracted on 05 December 2019. Emphasis is given to 2018 (actual) and 2019 (estimated) disbursements while illustrating trends across the preceding decade. The data disaggregation and comparison is intended to provide insights that inform policy, management efforts and dialogue to coordinate development partnerships.

Trends of ODA Disbursements

ODA in 2019 is estimated to be USD 1.89 billion, a significant increase from the level of USD 1.49 billion recorded in 2018. This increase is largely driven by increased loan disbursements; the loan/grant ratio has increased over the decade from 25% in 2010 to 53% in 2019.

ODA flows to Cambodia reflect significant changes in the last decade. Total ODA disbursements (as in Chart 3.1) have begun to increase from 2017 after appearing to have peaked in 2012. Grant disbursement remains relatively stable at around USD 800 per annum, with a slight increase recently from USD 813 million in 2016 to an estimated USD 893 million in 2019. Increased loan support from France, China, Japan and ADB drives the rapid growth in the loan/grant ratio. The projection for the year 2020 and 2021 indicates continued support by development partners, albeit with a much higher projected loan share and a changed donor profile.

As shown in Chart 3.2, a generally rising trend in ODA per capita since 2010 has occurred at the same time as the aid/GDP ratio has declined. This is a reflection of sustained high rates of growth in GDP. ODA reinforces growth and is an important resource for supporting the delivery of public services.



The attainment of LMIC status in some partner countries has resulted in a reduction of ODA. This is evidently not the case for Cambodia, at least so far, perhaps due to its continued status as an LDC and its ability to mobilize concessional loans.

Table 3.1: Total ODA Disbursement by Development Partners (USD Million)

Development Partners	2011	2012	2013	2014	2015	2016	2017	2018 Act.	2019 Est.	2020 Proj.	2021 Proj.
UN Agencies											
Total Program Delivered	89.5	88.1	100.6	107.2	93.7	91.7	87.4	79.0	98.5	-	-
Total Own Funds Disbursed	56.5	54.3	50.0	53.9	47.2	65.7	59.4	55.1	66.5	80.6	56.2
Other Multilaterals											
Work Bank	73.8	66.0	35.5	50.6	17.6	17.6	21.1	24.8	69.7	140.8	124.4
Asian Development Bank	126.9	82.0	171.4	129.8	137.2	118.2	125.7	135.9	246.0	283.1	259.3
GAVI Alliance	6.7	4.9	10.7	5.5	19.0	16.3	10.9	7.4	8.7	5.4	-
Global Fund	60.2	20.1	45.4	54.6	33.3	28.2	33.1	19.9	40.9	33.9	-
Sub-Total:	324.1	227.3	313.0	294.4	254.3	246.0	250.1	243.1	431.8	543.7	440.0
EUROPEAN UNION											
European Commission	61.0	41.6	36.6	70.3	55.8	55.7	50.8	89.7	64.6	90.3	75.5
Czech Republic	-	-	1.0	1.2	1.2	1.5	1.3	1.1	2.0	0.7	0.1
France	19.5	24.8	17.8	59.5	63.3	32.1	90.8	78.9	207.8	62.2	12.5
Germany	43.7	44.6	34.3	29.8	25.8	46.9	38.4	40.5	24.9	25.6	21.0
Ireland	0.7	0.3	1.2	0.7	0.6	0.6	0.7	0.8	0.8	0.7	-
Sweden	28.6	30.2	33.8	33.0	21.8	30.1	33.5	23.8	23.8	12.4	3.0
United Kingdom	34.2	28.2	13.7	0.1	0.2	1.6	2.3	1.2	0.9	0.1	-
Other EU Member States	48.3	18.2	9.9	6.0	-	-	-	-	-	-	-
Sub-Total:	236.1	187.9	148.3	200.6	168.7	168.6	217.8	235.8	324.7	192.0	112.1
Other Bilateral Partners											
Australia	78.2	79.5	59.3	64.9	55.9	51.9	58.3	49.2	38.8	28.4	26.7
Canada	18.5	20.5	11.8	5.7	3.8	3.2	3.4	3.1	2.0	1.0	1.1
China	332.0	460.7	436.6	347.8	339.4	307.2	415.8	353.0	496.2	421.6	257.4
Japan	114.4	172.3	130.8	111.4	110.4	119.7	146.4	175.4	192.7	336.5	298.3
New Zealand	4.4	3.8	3.2	6.0	4.9	4.0	4.9	5.0	7.2	2.5	2.3
Republic of Korea	45.3	46.2	50.1	80.3	61.7	42.0	57.1	44.1	71.3	58.0	72.5
Switzerland	4.5	4.3	7.8	11.8	13.0	15.8	15.5	14.0	13.4	8.3	6.7
United States of America	64.4	85.0	93.5	91.6	101.0	77.9	93.2	94.8	59.6	43.9	31.0
Sub-Total:	661.8	872.3	793.1	719.6	690.0	621.6	794.5	738.6	881.2	900.2	696.1
NGO Core Funds	200.7	212.3	220.8	228.9	237.0	251.0	259.8	273.1	250.2	42.0	10.7
Pipeline Projects	-	-	-	-	-	-	-	-	-	219.8	483.4
Grand Total	1,422.6	1,499.7	1,475.1	1,443.4	1,350.1	1,287.1	1,522.2	1,490.6	1,887.9	1,897.7	1,742.3

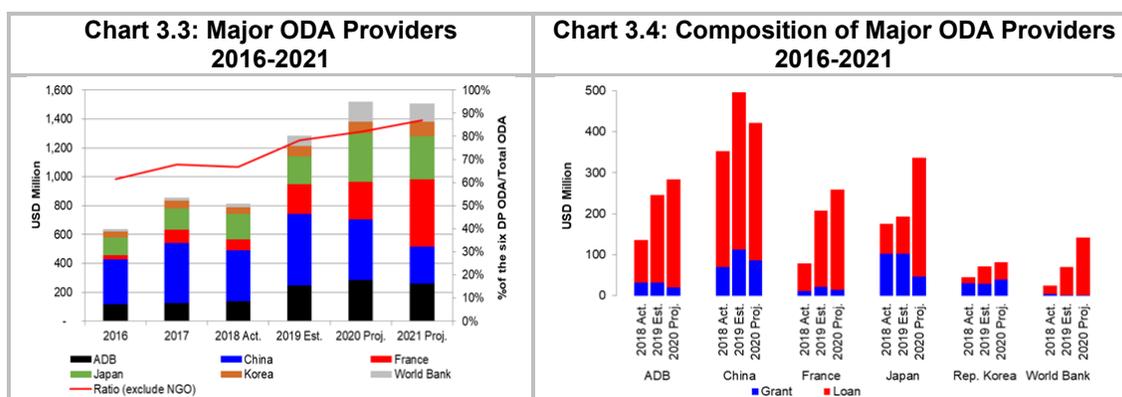
Development partner trends, shown in Table 3.1, demonstrate continued support while there have also been fluctuations over the period and changes in the relative contributions of partners:

- Multilateral partners are expanding their support. The expansion is noteworthy among the international financial institutions as World Bank and Asian Development Bank (ADB) are increasing their disbursement from USD 17 million and USD 118 million in 2016 to almost USD 70 million and USD 246 million in 2019, respectively. Their portfolios are projected to continue expanding in 2020 and 2021.
- Much fluctuation is observed among bilateral partners. China continues as the largest development cooperation provider with disbursement increasing from USD 353 million in 2018 to almost USD 500 million in 2019.
- Disbursement by EU individual member states is declining, except for France which increased disbursement of USD 207 million in 2019 and plans USD 258 million in 2020 and USD 464 in 2021, via its pipeline projects. However, the European Commission in Cambodia is disbursing more assistance after an agreement was forged on joint programming with 10 other member states. Germany's and Sweden's resources are also decreasing while a portion of their assistance is delivered through delegated cooperation arrangements that form part of the EU Joint Programming initiative.
- Disbursements by USA fell in 2019 due to programming delays while Australian support has experienced a longer-term decline based on Canberra-based policy

decisions. Both remain dedicated to supporting areas of their competitive advantage (e.g. agricultural value chain, rural infrastructure, health, etc.).

Significant Changes in ODA Provision

Recent ODA fluctuations require further insight. Chart 3.3 shows China is the largest provider, and its disbursement fluctuates around a level of USD 400 million per year. In 2019, disbursements by France and the World Bank increased dramatically, the increases are three times higher than their 2016 disbursement. Over the same period, ADB doubled its disbursement from USD 118 million to USD 246 million while disbursements by China, Korea and Japan increase by 62%, 70% and 61%, respectively. Together, the ratio of combined disbursement by the six major development partners – China, ADB, Japan, France, Korea and World Bank – increases from approximately 49% of total disbursement in 2016 to 68% in 2019. Chart 3.4 shows China and Korea are increasing their grant assistance in tandem with rising loan disbursement.



Trends in Sector Disbursements

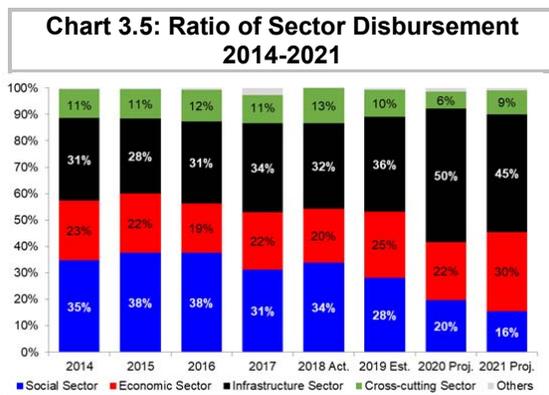
Sector analysis indicates that overall ODA disbursements are well aligned with the RGC priorities. As RS-IV increasingly focuses on transforming the economy to a new growth model based on sustainable and inclusive development approaches, ODA disbursement has been shifting toward pro-growth programs. Actual and estimated disbursements in Table 3.2 indicate that, in absolute terms, the social sector is highly supported (USD 532 million in 2019). Significant growth is found in infrastructure and economic sectors as disbursement increases almost twofold since 2011, while support to cross-cutting sector remains stable over the same period.

Table 3.2: ODA Disbursement by Sectors (USD Million)

Sectors	2011	2012	2013	2014	2015	2016	2017	2018 Act.	2019 Est.	2020 Proj.	2021 Proj.
Social Sector											
Health	205.3	203.0	203.5	204.8	204.0	217.0	187.6	221.0	244.2	156.2	114.1
HIV/AIDS	69.4	33.5	34.7	45.8	30.2	23.9	23.9	13.5	11.7	1.1	-
Education	154.6	135.3	140.6	167.1	174.1	177.8	194.6	199.6	213.8	192.9	141.6
Community and Social Welfare	138.2	136.4	81.1	82.9	98.2	66.3	70.3	70.1	61.8	24.3	14.6
Sub-Total:	567.5	508.2	459.9	500.6	506.5	485.0	476.4	504.2	531.5	374.5	270.3
Economic Sector											
Agriculture	144.9	185.4	184.6	218.1	171.1	145.3	184.3	183.2	309.2	209.6	309.1
Rural Development	48.6	81.3	77.0	85.5	93.6	68.1	105.7	93.6	94.7	109.6	75.4
Industrialization & Trade	13.4	11.4	11.1	3.2	4.5	5.9	22.9	7.2	10.1	7.7	7.1
Banking and Business Services	73.1	4.0	43.8	14.3	27.0	13.6	11.6	8.5	2.8	0.9	0.1
Urban Planning & Management	2.7	11.9	0.3	6.6	7.4	6.0	4.2	11.3	55.9	88.9	129.2

Sectors	2011	2012	2013	2014	2015	2016	2017	2018 Act.	2019 Est.	2020 Proj.	2021 Proj.
Sub-Total:	282.7	294.0	316.8	327.7	303.6	238.9	328.7	303.8	472.7	416.7	520.9
Infrastructrue Sector											
Transportation	271.2	383.6	379.0	309.4	286.8	190.8	267.9	303.1	348.2	488.1	495.3
Water and Sanitation	36.1	52.3	59.3	63.7	37.8	39.0	86.1	77.5	151.4	177.5	98.8
Energy, Power & Electricity	57.3	66.7	60.1	66.5	54.8	158.5	157.8	101.1	175.5	289.5	175.2
Technology, Info. & Communications	0.2	1.3	3.0	10.8	5.0	12.5	0.3	0.9	1.1	2.2	7.9
Sub-Total:	364.8	503.9	501.4	450.4	384.4	400.8	512.1	482.6	676.2	957.3	777.2
Cross-cutting Sector											
Gender	6.4	9.3	10.0	8.5	6.1	6.7	4.2	6.5	5.2	4.9	3.8
Tourism	2.2	0.8	0.7	0.6	1.8	1.4	15.0	2.8	7.1	8.7	0.4
Environment & Conservation	18.1	14.2	24.3	26.8	33.1	30.1	27.7	43.0	36.1	17.3	13.7
Climate Change	5.9	7.3	8.8	7.0	7.7	7.5	7.9	11.6	13.3	4.8	31.9
Culture & Arts	4.3	4.6	4.6	5.5	6.2	3.9	34.1	42.6	63.8	26.1	4.2
Governance & Administration	111.9	100.7	117.7	84.3	77.8	103.6	76.2	91.2	64.7	60.8	48.7
Budget & BoP Support	0.3	14.8	-	-	-	-	-	-	-	-	55.9
Emergency & Food Aid	25.5	25.0	19.3	25.2	14.8	1.3	0.2	0.2	3.2	0.2	0.3
Sub-Total:	174.6	176.7	185.4	157.9	147.5	154.5	165.3	197.9	193.4	122.8	158.9
Others	32.9	17.0	11.6	7.0	7.8	8.0	39.8	2.0	14.1	26.5	15.0
Grand Total	1,422.6	1,499.7	1,475.1	1,443.4	1,350.1	1,287.1	1,522.2	1,490.6	1,887.9	1,897.7	1,742.3

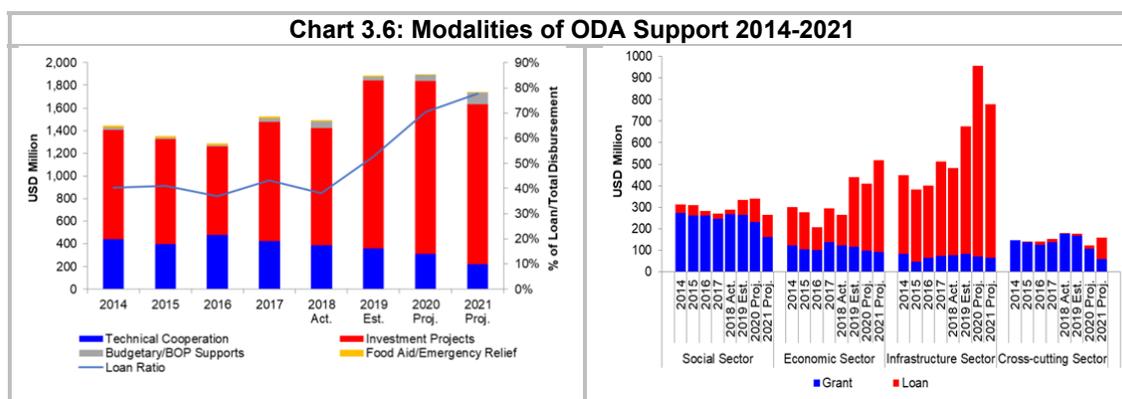
In relative terms, Chart 3.5 demonstrates that as a share of total disbursement, social sector has declined from 35% in 2014 to 28% in 2019. Over the same period, infrastructure and economic sectors increased from 31% to 36% and from 23% to 25%, respectively. The projection for 2020 and 2021 shows broader expansion in infrastructure sectors. A continued decline in the social sector share is off-set by increased subventions from the Government budget.



Modalities of Support and Disaggregation of Loan Composition 2014-2021

Recent increases in total ODA disbursement, as elaborated above, are driven by loan disbursement to support economic transformation and infrastructure development. This section presents disaggregated ODA data by modalities and priorities of loan programs.

Chart 3.6 demonstrates a long-term trend of increasing investment projects while technical cooperation is falling. This trend (left axis) is reflective of the contemporary context in which the RGC has prioritized infrastructure investment and economic transformation. This drives rising loan disbursement (right axis) by development partners to enhance transportation networks, electricity and water supplies, and to boost economic production and trade.



Between 2014 and 2018, changes in volume of disbursement and loan growth in infrastructure and economic sectors were less substantial than in 2019, when loan disbursements increased across all sectors. Totals amount to almost USD 600 million in the infrastructure sector in 2019 and USD 320 million in the economic sector. Projections for the outer years indicate a rising trend. Loan growth is also observed in social and cross-cutting sectors in both nominal and relative terms.

Development Partner Engagement in TWGs

Technical Working Groups (TWGs) are a technical dialogue mechanism used to coordinate development partnerships for inclusive and mutually accountable development results. As indicated in Table 3.3, there are 784 on-going projects over the period 2017-2021 subject to TWG dialogue and oversight. This represents USD 1.2 billion of funding, on average. TWGs therefore cover 85% of the annual average disbursement.

Table 3.3: Average Funding 2017-2021 (USD Million) and DPs Activities in TWGs

Major TWGs	# of On-going Projects in TWG	# of DPs	Average Disbursement 2017-2021	Average Project Size
Social Sector				
Health	48	16	83.07	1.7
HIV/AIDS	5	3	3.03	0.6
Education	47	13	71.93	1.5
Food Security and Nutrition	11	6	8.08	0.7
Rural Water & Sanitation	15	4	25.22	1.7
Technical and Vocational Education and Training	6	3	1.90	0.3
Sub-Total:	132	45	193.23	6.6
Economic Sector				
Agriculture and Water	78	15	172.23	2.2
Fisheries	17	7	23.76	1.4
Forestry	14	8	8.58	0.6
Land	2	2	0.44	0.2
Mine Action	11	7	11.77	1.1
Private Sector Development	3	3	7.79	2.6
Sub-Total:	125	42	224.57	8.1
Infrastructure Sector				
Infrastructure Regional Integration	87	8	564.33	6.5
Sub-Total:	87	8	564.33	6.5
Cross-cutting and Administrative Sector				
Climate Change	9	5	0.91	0.1
Decentralization and Deconcentration	16	9	16.24	1.0
Gender	14	9	7.95	0.6

Major TWGs	# of On-going Projects in TWG	# of DPs	Average Disbursement 2017-2021	Average Project Size
Legal and Judicial Reform	4	3	2.65	0.7
Partnership and Harmonization	4	4	3.24	0.8
Planning and Poverty Reduction	7	6	6.80	1.0
Public Administrative Reform	3	2	2.47	0.8
Public Financial Management	20	8	12.95	0.6
Sub-Total:	77	46	53.21	5.6
No TWGs	363	21	169.83	0.5
Grand Total	784	162	1,205.16	27.3

TWG-Infrastructure Regional Integration managed the largest on-going projects and funds, while Health, Agriculture and Water and Education engaged the highest numbers of development partners (16, 15 and 13 respectively). The Private Sector Development TWG coordinated only 3 projects with only 3 development partners participating. There is a need to further concentrate on Legal and Judicial Reform and Public Administration, which coordinated only 4 and 3 projects respectively.

Table 3.4 reveals that ADB is a leading development partner in engaging in TWGs activities. Currently, it has 81 projects coordinated under TWGs, followed by Japan (50 projects) and FAO (31 projects). In 2019, ADB disbursed about USD 225 million to sectors managed by TWGs, double the sum of USD 120 million in 2018. In 2018 and 2019, Japan has disbursed around USD 120 million annually to sectors under TWGs coordination.

Table 3.4: Major Development Partners in TWGs (USD Million)

Major Development Partners In TWGs	# of Projects	Disbursement by Years				
		2017	2018 Act.	2019 Est.	2020 Proj.	2021 Proj.
ADB	81	90.2	120.1	245.8	283.1	259.3
Japan	50	74.2	118.1	126.1	232.6	232.8
FAO	31	1.1	1.4	3.3	10.5	0.1
Germany	26	27.1	36.8	26.5	23.1	19.7
EU/EC	24	41.3	54.4	30.9	40.0	36.0
Republic of Korea	21	20.1	23.8	49.9	48.2	64.2
China	19	290.0	267.4	397.3	357.6	220.2
Switzerland	18	15.9	14.4	14.4	9.8	8.1
USA	17	23.0	31.4	15.9	9.3	8.1
France	16	37.1	47.3	161.3	9.8	11.4
Sweden	16	18.9	9.9	8.2	5.3	0.8
World Bank	16	13.3	22.6	69.2	84.3	101.0
UNDP	14	1.6	3.2	4.1	3.8	1.1
UNICEF	13	-	-	43.7	36.5	33.0
Australia	12	36.3	28.6	23.6	15.8	22.3
Others	46	20.9	43.2	83.9	97.0	48.2
Grand Total	421	710.9	822.4	1,304.1	1,266.8	1,066.4

Provincial Distribution of ODA Disbursement 2017-2019

Provincial disaggregation of data illustrates the response to each province's economic, social, environmental and demographical needs. Analysis will also encourage major development partners to advance their spatial collaboration and provide evidence-based information of strengthened sub-national partnerships in line with DCPS's Guideline on Sub-National Partnership Dialogue.

Table 3.5 shows that between 2017 and 2019, 25% of average annual ODA disbursement aimed for a nationwide impact, for example support to central government and reform

programs, while the other 75% is area-based. Phnom Penh receives the highest share over the period, followed by Battambang, Siem Reap, Kampong Cham, Banteay Meanchey and Kandal. The share of other individual provinces is less than 3% each with a combined disbursement accounting for 35% of the total.

Table 3.5: ODA Disbursement by Provinces 2017-2019 (USD Million)

Provinces	2017	2018 Act.	2019 Est.	Average Share
Nationwide	420	414	392	25%
Phnom Penh	238	222	369	17%
Battambang	86	102	116	6%
Siem Reap	90	83	108	6%
Kampong Cham	48	87	79	4%
Banteay Meanchey	58	49	59	3%
Kandal	38	39	76	3%
Others	545	494	689	35%
Total	1,522	1,491	1,888	100%

Table 3.6 identifies major development partners in the six largest ODA-receiving provinces in 2019. Notably, in 2019 China is the largest provider that disbursed USD 152.6 million in Phnom Penh, followed by France (USD 80 million) and Japan (USD 32 million). While Japan is a major provider in Battambang province amounted to USD 40 million, France notably disbursed USD 34 million to Kandal province.

Table 3.6: 2019 Major Development Partners in Selected Provinces (USD Million)

Development Partners	Phnom Penh	Battambang	Siem Reap	Kampong Cham	Banteay Meanchey	Kandal	Total
China	152.6	1.8	2.1	46.5	9.7	19.5	232.2
France	80.0	10.3	10.6	12.7	0.0	33.9	147.5
Japan	32.0	40.4	12.7	0.4	19.5	0.7	105.6
ADB	15.7	24.8	17.5	6.8	8.1	0.2	73.1
Rep. Korea	11.2	12.2	0.4	1.0	5.6	5.9	36.4
World Bank	0.5	0.9	4.8	4.7	0.1	3.5	14.5
Germany	0.7	2.1	0.1	-	5.9	0.3	9.0
NGOs	61.8	15.8	48.0	4.9	7.9	7.4	145.8
Others	14.4	7.5	12.1	1.9	2.3	4.5	42.9
Total	368.9	115.8	108.3	78.9	59.1	76.0	806.9

NGO Support to National Development

As a development actor, Non-Governmental Organizations operate across Cambodia, working with communities to improve living conditions, especially for poor families and vulnerable groups. Their operation has been financed by 1) resources mobilized by the organization (NGO own fund) and 2) delegated resources from development partners (DP fund), which are together recorded in the Cambodia NGO Database.

Table 3.7 shows that total operating resources by NGOs between 2017 and 2019 averaged USD 371 per annum. In 2018, there was a slight growth from a year earlier, which is attributed to higher NGO own funds. DP funds remain relatively stable, disbursing approximately USD 100 million for NGOs to implement their project activities.

Table 3.7: NGO Funding by Sectors 2017-2019 (USD Million)

Sectors	2017			2018			2019 Est.		
	NGO Own Fund	DP Fund	Total	NGO Own Fund	DP Fund	Total	NGO Own Fund	DP Fund	Total
Health	83.9	36.5	120.4	86.5	35.4	121.9	85.0	30.0	115.0
Education	66.0	13.0	79.0	65.2	8.0	73.3	59.7	9.9	69.6
Community Welfare	59.0	7.0	66.0	58.2	5.8	64.0	48.1	6.8	54.9
Rural Development	22.2	14.5	36.7	25.8	18.9	44.7	24.9	19.1	44.0
Agriculture	11.3	9.0	20.2	13.3	8.5	21.8	10.2	7.7	18.0
Governance	3.6	15.3	18.8	3.7	16.3	20.0	3.7	12.3	15.9
HIV/AIDS	5.5	10.4	15.9	6.9	6.6	13.5	7.6	7.6	15.2
Environment	6.3	5.4	11.8	10.4	2.6	13.0	7.8	4.0	11.8
Others	2.1	6.9	8.9	3.1	7.2	10.3	3.3	5.5	8.8
Total	259.8	117.9	377.7	273.1	109.3	382.4	250.3	102.8	353.1

Between 2017 and 2019 (Chart 3.7), 85% of NGO total operating resources were directed to health, education, community welfare, rural development and agriculture. Disaggregation of the total funding sources (Chart 3.8) shows that DP funds represent 30% of total operating resources, although the profile across sectors varies; only 11% of community welfare spending but 80% of the governance share.

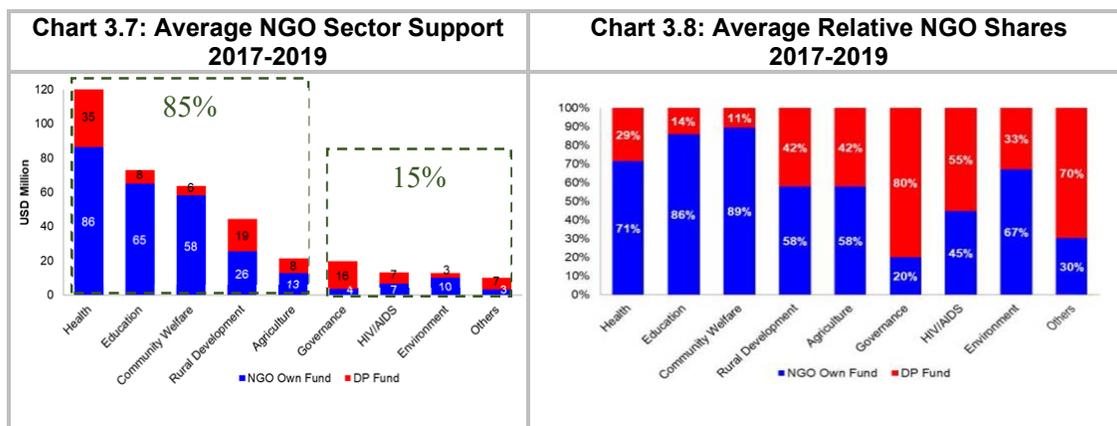


Table 3.8 illustrates that the 391 NGOs submitted their activity reports to CRDB/CDC in 2018, the 28 largest NGOs are ranked. The combined support in 2018 (USD 205 million) represents 54% of total NGO funding. Over the period 2017-2019, Kantha Bopha remained a top contributor in healthcare service (averaging USD 32.5 million, 9% of total NGO fund).

Table 3.8: Major NGOs by Funding 2017-2019 (USD Million)

NGO Names	2017			2018			2019 Est.		
	NGO Own Fund	DP Fund	Total	NGO Own Fund	DP Fund	Total	NGO Own Fund	DP Fund	Total
Foundation Children's Hospital Kantha Bopha Dr. Beat Richner	26.9	4.3	31.2	24.7	4.6	29.3	32.7	4.3	37.0
World Vision Cambodia	24.1	2.7	26.8	22.6	3.0	25.6	22.6	3.3	25.9
Save the Children International	3.0	7.6	10.6	2.9	7.6	10.5	2.3	6.0	8.3
Population Services International	7.8	2.1	9.9	8.0	2.2	10.2	10.0	5.7	15.8
University Research Co., LLC	0.0	7.9	7.9	0.0	9.0	9.0	0.0	3.2	3.2
Plan International	3.6	10.5	14.2	4.0	4.4	8.4	3.6	7.4	11.0
Cambodian Children's Fund	7.1	0.0	7.1	7.8	0.0	7.8	7.3	0.0	7.3

NGO Names	2017			2018			2019 Est.		
	NGO Own Fund	DP Fund	Total	NGO Own Fund	DP Fund	Total	NGO Own Fund	DP Fund	Total
Pour un Sourire d'Enfant	7.1	0.0	7.1	6.6	0.0	6.6	7.0	0.0	7.0
Sos Children's Villages of Cambodia	4.7	0.0	4.7	6.4	0.0	6.4	4.1	0.0	4.1
Reproductive Health Association of Cambodia	3.4	0.3	3.7	5.4	0.9	6.3	0.7	1.2	1.9
Family Health International	0.0	0.0	0.0	0.0	6.1	6.1	0.0	6.3	6.3
Japan Relief for Cambodia and World Assistance for Cambodia	5.4	0.3	5.7	5.4	0.7	6.1	4.5	0.1	4.6
Hope Worldwide	6.1	0.0	6.1	5.9	0.0	5.9	4.2	0.0	4.2
Angkor Hospital for Children	5.5	0.0	5.5	5.8	0.0	5.8	6.7	0.1	6.8
Norwegian People's Aid	1.3	3.6	4.9	1.4	3.9	5.3	2.9	2.2	5.1
Hazardous Area Life Support Organisation Trust	0.1	4.5	4.6	0.1	5.1	5.2	0.1	6.0	6.2
World Wide Fund for Nature Cambodia	0.7	0.8	1.5	3.1	2.0	5.1	3.0	2.8	5.8
Medecins Sans Frontieres - France	2.8	0.0	2.8	4.9	0.0	4.9	3.5	0.0	3.5
International Development Enterprises Cambodia	2.2	2.0	4.2	1.5	3.2	4.7	0.0	4.6	4.6
Child Fund Cambodia	4.1	0.3	4.4	4.2	0.5	4.7	0.0	0.0	0.0
CARE International in Cambodia	1.1	3.1	4.2	1.3	3.1	4.4	1.4	1.5	2.9
Don Bosco Foundation of Cambodia	3.5	0.2	3.7	4.4	0.0	4.4	4.4	0.0	4.4
SNV Netherlands Development Organization	0.6	4.1	4.7	0.2	4.1	4.3	0.2	3.6	3.9
Mines Advisory Group	1.3	1.2	2.5	1.6	2.3	4.0	1.9	2.4	4.3
Jay Pritzker Academy	3.7	0.0	3.7	3.9	0.0	3.9	3.9	0.0	3.9
Heifer International Cambodia	1.7	0.0	1.7	3.8	0.0	3.8	0.5	0.0	0.5
Room to Read	2.9	0.0	2.9	3.4	0.0	3.4	3.6	0.0	3.6
DanChurchAid	0.5	1.5	2.1	0.7	2.4	3.2	0.7	1.4	2.2
Total 28 Largest NGOs	131.2	56.9	188.2	140.0	65.1	205.1	132.1	62.1	194.1
Total 363 other NGOs	128.6	60.9	189.5	133.1	44.3	177.3	118.2	40.7	159.0
Grand Total	259.8	117.9	377.7	273.1	109.3	382.4	250.3	102.8	353.1

4. Cross-cutting Thematic Profiles

Efforts to drive development require cross-sectoral collaboration. CRDB/CDC has reflected this by customizing the Cambodia ODA database to record the cross-cutting contribution of the development partners' assistance. Since 2015, thematic markers have been used to gauge indirect support beyond the principal sector of project activity.

Table 4.1: 18 Thematic Markers

1	Builds and strengthens government capacity/systems
2	Support public financial management reform implementation
3	Support public admin reform implementation
4	Support decentralization reform implementation
5	Support legal and judicial reform implementation
6	Gender equality and women's empowerment
7	Environmental protection (not climate change-related)
8	Climate change
9	HIV/AIDS (awareness, prevention, and treatment)
10	Industrial development policy (non-sector support)
11	Income and employment generation
12	Private sector development
13	South-south and/or triangular cooperation
14	Community-based project
15	Engagement with civil society or non-state actors
16	Food security
17	Social protection
18	Youth support and development

Note: Markers are categorized as making "significant", "moderate", or "minor" contribution

In the Cambodia ODA database, there are 18 markers for development partners to tag their indirect support (Table 4.1). This chapter provides analysis to three selected thematic markers, namely gender equality, private sector development and climate change.

ODA Support to the Promotion of Gender Equality

Gender equality is a key driver of change. As gender equality is prioritised in the RGC's policies, much support has been devoted to empower women. In 2019, total development cooperation funding to gender as a principal sector, including NGO own funds, is estimated at USD 5.2 million. This represents 0.28% of total ODA in 2019.

From a coordination perspective, the key to promoting gender equality is to work with partners that purposely and effectively mainstream support across their entire portfolio. Table 4.2 shows that projects with an additional value of USD 82.7 million are recorded to have made some contribution to gender equality in 2019. This represents a 32% increase compared to 2018. Education and urban planning & management sectors are the main sources of increase with mainstreaming funds increasing by around 6 million USD.

Table 4.2: Sectors Mainstreaming of Gender Equality in 2018-2019 (USD Million)

Sectors	2018 (Total)	2019				Total ODA Disbursement 2019 by Sector	Gender as % of Total ODA Disbursement 2019
		Minor	Moderate	Significant	Total		
Urban Planning & Management	1.11	3.10	4.00	-	7.10	55.85	13%
Governance & Administration	8.49	3.02	3.54	1.12	7.68	64.67	12%
Rural Development	6.51	1.56	6.03	-	7.58	94.69	8%
Education	10.76	2.15	9.02	5.55	16.73	213.79	8%
Tourism	0.14	-	0.56	-	0.56	7.13	8%
Climate Change	0.85	0.73	0.14	0.08	0.95	13.33	7%
Water and Sanitation	5.76	0.88	6.25	-	7.12	151.40	5%

Sectors	2018 (Total)	2019				Total ODA Disbursement 2019 by Sector	Gender as % of Total ODA Disbursement 2019
		Minor	Moderate	Significant	Total		
Agriculture	8.22	1.74	8.05	4.34	14.13	309.24	5%
Technology, Information and Communications	0.05	0.01	0.04	-	0.05	1.12	4%
Business & Financial Services	0.18	0.09	0.03	0.00	0.11	2.79	4%
Health	8.64	3.27	4.73	0.95	8.95	244.22	4%
Industrialization & Trade	0.31	0.08	0.14	0.09	0.32	10.13	3%
Transportation	5.00	0.22	7.62	-	7.84	348.16	2%
Community and Social Welfare	1.19	0.32	1.01	0.01	1.34	61.80	2%
Environment and Sustainability	0.97	0.23	0.30	-	0.53	36.06	1%
Energy, Power & Electricity	2.89	0.70	0.36	-	1.06	175.45	1%
Culture, Arts & Sports	0.15	0.12	0.02	-	0.14	63.80	0%
HIV/AIDS	0.86	-	0.02	-	0.02	11.72	0%
Emergency & Food Aid	0.02	-	0.00	-	0.00	3.24	0%
Others	0.30	0.42	0.01	0.00	0.43	19.38	2%
Total	62.40	18.62	51.88	12.15	82.65	1887.95	4%

Table 4.3 identifies 29 development partners mainstreaming gender equality into their portfolio. The share of funds that have been gender mainstreamed is less than one third for all partners except for New Zealand (37%). This highlights the potential to promote gender equality through improved mainstreaming.

Table 4.3: Development Partners Mainstreaming of Gender Equality in 2018-2019 (USD Million)

Development Partners	2018 (Total)	2019				Total ODA Disbursement 2019 by DPs	Gender as % of Total Disbursement 2019
		Minor	Moderate	Significant	Total		
New Zealand	2.26	0.12	0.47	2.07	2.66	7.17	37%
UNESCO	0.40	1.48	0.01	0.06	1.54	5.46	28%
UNCOHCHR	0.02	0.02	-	-	0.02	0.06	25%
Ireland	0.16	0.10	0.06	-	0.16	0.76	21%
UK	0.14	0.15	0.02	0.01	0.18	0.93	19%
World Bank	4.15	0.55	12.56	-	13.11	69.74	19%
Sweden	4.21	1.75	1.18	0.92	3.85	23.76	16%
Canada	0.25	0.06	0.21	0.03	0.30	1.99	15%
Switzerland	1.70	0.02	1.72	-	1.74	13.41	13%
Australia	6.82	2.13	1.58	1.25	4.96	38.80	13%
ADB	15.75	5.10	23.42	0.05	28.56	245.99	12%
Czech Republic	0.06	0.06	0.17	-	0.23	1.99	11%
ILO	0.43	-	0.34	0.06	0.40	3.88	10%
UN Women	0.05	-	-	0.08	0.08	0.85	10%
Germany	3.37	0.66	1.62	0.09	2.37	24.87	10%
WFP	1.13	-	0.76	-	0.76	8.33	9%
UNAIDS	0.01	-	0.02	-	0.02	0.21	9%
UNDP	0.94	0.33	0.58	-	0.91	10.33	9%
UNFPA	0.24	-	0.18	0.03	0.21	2.43	9%
EU/EC	6.00	0.96	1.37	3.07	5.41	64.63	8%
FAO	0.17	0.03	0.27	0.00	0.29	3.55	8%
USA	6.33	2.50	2.30	0.13	4.93	59.63	8%
WHO	0.12	0.11	-	-	0.11	1.65	7%
UNICEF	0.51	0.21	0.70	-	0.91	15.80	6%

Development Partners	2018 (Total)	2019				Total ODA Disbursement 2019 by DPs	Gender as % of Total Disbursement 2019
		Minor	Moderate	Significant	Total		
France	3.44	-	0.96	4.31	5.28	207.80	3%
GAVI	0.92	1.01	-	-	1.01	40.85	2%
IFAD	0.22	0.30	-	-	0.30	12.40	2%
Republic of Korea	1.21	0.07	1.20	-	1.27	71.32	2%
Japan	0.75	0.92	0.18	-	1.11	192.73	1%
Others	0.63	-	-	-	-	756.66	0%
Total	62.40	18.62	51.88	12.15	82.65	1887.95	4%

ODA Support to Private Sector Development

In Cambodia, the RGC has focused on creating a conducive environment to attract investment, including through the implementation of the Industrial Development Policy (IDP). In 2019, projects with a value of USD 209 million are recorded to have made some contribution to private sector development (PSD). Compared to 2018, this represents a 48% annual increase. Energy and transportation top the list: China mainstreams its funding to interconnecting transportation infrastructure and developing the energy sector. Table 4.4 shows that other sectors that have mainstreamed PSD to a great extent are industrialization & trade, urban planning and management, and tourism.

Table 4.4: Sectors Mainstreaming of PSD in 2018-2019 (USD Million)

Sectors	2018 (Total)	2019				Total ODA Disbursement 2019 by Sectors	PSD as % of Total ODA Disbursement 2019
		Minor	Moderate	Significant	Total		
Energy, Power & Electricity	23.61	0.00	50.69	0.95	51.64	175.45	29%
Transportation	82.12	0.22	96.27	-	96.49	348.16	28%
Industrialization & Trade	0.81	-	0.60	0.88	1.48	10.13	15%
Urban Planning & Management	0.96	5.03	1.63	-	6.66	55.85	12%
Tourism	0.24	0.01	0.65	0.04	0.70	7.13	10%
Rural Development	5.74	0.75	7.62	0.30	8.67	94.69	9%
Water and Sanitation	5.78	0.20	2.90	9.52	12.62	151.40	8%
Agriculture	12.45	5.58	14.18	1.62	21.38	309.24	7%
Technology, Information and Communications	0.00	0.02	0.04	-	0.05	1.12	5%
Business & Financial Services	0.73	0.01	0.01	0.09	0.12	2.79	4%
Gender	0.03	0.09	0.02	-	0.11	5.25	2%
Environment and Sustainability	1.03	0.32	0.14	0.21	0.67	36.06	2%
Community and Social Welfare	0.85	0.24	0.53	0.34	1.11	61.80	2%
Education	2.99	0.11	2.69	0.40	3.19	213.79	1%
Culture, Arts & Sports	0.88	0.19	0.74	-	0.93	63.80	1%
Governance & Administration	0.89	0.35	0.54	0.03	0.92	64.67	1%
Climate Change	0.11	0.10	0.00	-	0.10	13.33	1%
Health	2.04	0.72	0.22	-	0.94	244.22	0%
Emergency & Food Aid	-	-	0.00	-	0.00	3.24	0%
HIV/AIDS	-	-	-	-	-	11.72	0%
Others	0.19	1.37	-	-	1.37	14.13	10%
Total	141.45	15.30	179.46	14.38	209.15	1887.95	11%

Table 4.5 shows that China, Japan, IFAD, France, and ILO are amongst the most successful in integrating PSD into their projects. Even though 25 development partners have mainstreamed PSD into their projects, their individual mainstream fund is less than a quarter of their total 2019 disbursement.

Table 4.5: Development Partners Mainstreaming of PSD in 2018-2019 (USD Million)

Development Partners	2018 (Total)	2019				Total ODA Disbursement 2019 by DPs	PSD as % of Total Disbursement 2019
		Minor	Moderate	Significant	Total		
China	76.53	-	117.08	-	117.08	496.18	24%
Japan	23.51	1.54	24.80	0.25	26.60	192.73	14%
IFAD	1.02	-	1.22	0.30	1.52	12.40	12%
France	10.11	4.69	10.72	9.50	24.92	207.80	12%
ILO	0.38	-	0.06	0.34	0.40	3.88	10%
UK	0.08	0.06	0.03	-	0.09	0.93	10%
WFP	-	-	0.76	-	0.76	8.33	9%
Republic of Korea	1.89	0.07	5.69	0.44	6.20	71.32	9%
ADB	13.67	5.36	14.56	-	19.92	245.99	8%
Australia	4.44	0.33	0.70	2.05	3.07	38.80	8%
New Zealand	0.42	-	0.39	0.16	0.55	7.17	8%
WHO	0.12	0.11	-	-	0.11	1.65	7%
Germany	2.74	1.18	0.15	0.26	1.58	24.87	6%
UNIDO	0.01	-	-	0.10	0.10	1.62	6%
Czech Republic	0.08	0.07	0.04	-	0.11	1.99	6%
UNICEF	0.98	0.17	0.70	-	0.87	15.80	5%
Switzerland	0.56	0.11	0.53	-	0.64	13.41	5%
EU/EC	1.64	0.99	0.58	0.69	2.27	64.63	4%
Canada	0.09	-	-	0.06	0.06	1.99	3%
UNESCO	0.05	0.10	0.06	-	0.16	5.46	3%
UNDP	0.28	0.18	0.03	0.07	0.28	10.33	3%
USA	2.33	0.15	1.02	0.17	1.33	59.63	2%
Sweden	0.52	0.16	0.26	-	0.42	23.76	2%
UNFPA	-	0.02	-	-	0.02	2.43	1%
World Bank	-	-	0.07	-	0.07	69.74	0%
Others	-	-	-	-	-	305.14	0%
Total	141.45	15.30	179.46	14.38	209.15	1887.95	11%

ODA Support to Climate Change

By implementing the Cambodia Climate Change Strategic Plan, the National Council for Sustainable Development (NCSA) supports mainstreaming of climate change adaptation and mitigation measures into sectoral and sub-national development plans. This ensures that the negative impacts of climate change are reduced and national development can therefore proceed on a sustainable path.

Total development cooperation funding to climate change (as the principal sector), including NGOs own funds, was USD 13.3 million in 2019 (11.6 million USD in 2018). Total projects in other sectors that incorporate climate change mainstreaming, however, is an additional USD 79 million. The annual increase in mainstreaming climate change was around 22 million USD, a 39% increase compared to 2018. According to Table 4.6, ODA to the urban planning & management sector (19%) has mainstreamed climate change to a greatest share of its 2019 sector disbursement, followed by environment & sustainability (13%), agriculture (12%), rural development (8%) and water & sanitation (3%). However, some key sectors of the climate change response such as Health and Energy, Power & Electricity still receive a

small amount of climate change mainstreaming support. There is still unmet potential to effectively mainstream climate change in all areas of national development work.

Table 4.6: Sectors Mainstreaming of Climate Change in 2018-2019 (USD Million)

Sectors	2018 (Total)	2019				Total ODA Disbursement 2019 by Sectors	Climate Change as % of Total ODA Disbursement 2019
		Minor	Moderate	Significant	Total		
Urban Planning & Management	1.13	3.59	6.74	0.34	10.67	55.85	19%
Environment and Sustainability	5.64	0.69	1.35	2.64	4.68	36.06	13%
Agriculture	27.01	4.70	25.91	6.42	37.03	309.24	12%
Rural Development	4.01	0.09	0.97	6.31	7.36	94.69	8%
Water and Sanitation	3.52	0.07	5.13	0.08	5.29	151.40	3%
Transportation	7.13	1.64	7.62	0.08	9.34	348.16	3%
Gender	0.14	0.09	-	-	0.09	5.25	2%
Health	3.08	1.23	1.44	-	2.67	244.22	1%
Business & Financial Services	0.52	-	0.03	-	0.03	2.79	1%
Governance & Administration	0.48	0.02	0.03	0.24	0.29	64.67	0%
Education	1.89	0.66	0.25	-	0.92	213.79	0%
Community and Social Welfare	0.06	0.02	0.02	0.18	0.23	61.80	0%
Energy, Power & Electricity	1.95	-	0.48	-	0.48	175.45	0%
Culture, Arts & Sports	0.03	-	0.02	-	0.02	63.80	0%
Tourism	-	-	-	-	-	7.13	0%
Others	0.30	-	-	-	-	27.46	0%
HIV/AIDS	-	-	-	-	-	11.72	0%
Industrialisation & Trade	-	-	-	-	-	10.13	0%
Emergency & Food Aid	0.01	-	-	-	-	3.24	0%
Technology, Information and Communications	0.05	-	-	-	-	1.12	0%
Total	56.95	12.80	50.01	16.28	79.09	1887.95	4%

22 development partners have mainstreamed climate change into their development projects, but they have dedicated less than 20% of their 2019 support to this activity. Table 4.7 shows that World Bank, ADB and IFAD top the list and have mainstreamed climate change into their individual portfolio by 17%, 11% and 10%, respectively.

Table 4.7: Development Partners Mainstreaming of Climate Change in 2018-2019 (USD Million)

Development Partners	2018 (Total)	2019				Total ODA Disbursement 2019 by DPs	Climate Change as % of Total Disbursement 2019
		Minor	Moderate	Significant	Total		
World Bank	4.00	0.21	7.17	4.73	12.11	69.74	17%
ADB	14.89	0.18	21.42	4.50	26.10	245.99	11%
IFAD	0.89	-	-	1.22	1.22	12.40	10%
FAO	0.19	-	0.22	0.04	0.26	3.55	7%
WHO	0.12	0.11	-	-	0.11	1.65	7%
UNDP	0.61	0.03	0.01	0.58	0.61	10.33	6%
Australia	2.30	0.97	0.12	0.87	1.97	38.80	5%
Germany	1.81	0.50	0.23	0.51	1.25	24.87	5%

Development Partners	2018 (Total)	2019				Total ODA Disbursement 2019 by DPs	Climate Change as % of Total Disbursement 2019
		Minor	Moderate	Significant	Total		
Republic of Korea	3.61	0.53	2.64	0.07	3.23	71.32	5%
Japan	5.55	5.19	0.10	2.94	8.23	192.73	4%
EU/EC	1.38	0.59	1.27	0.74	2.60	64.63	4%
Sweden	0.50	0.70	0.11	-	0.81	23.76	3%
USA	4.10	0.23	1.67	0.08	1.98	59.63	3%
France	4.00	0.07	5.26	-	5.33	207.80	3%
China	11.10	3.36	9.10	-	12.47	496.18	3%
Switzerland	0.40	0.06	0.27	-	0.32	13.41	2%
UNICEF	-	-	0.29	-	0.29	15.80	2%
New Zealand	-	-	0.12	-	0.12	7.17	2%
Czech Republic	0.04	0.02	0.01	-	0.03	1.99	2%
UNFPA	-	0.02	-	-	0.02	2.43	1%
ILO	0.02	0.02	-	-	0.02	3.88	0%
UNESCO	0.01	-	0.01	-	0.01	5.46	0%
Others	1.42	-	-	-	-	250.16	0%
Total	56.95	12.80	50.01	16.28	79.09	1887.95	4%

Measures to Improve Thematic ODA Record of Cross-cutting Sectors

The concept of “mainstreaming” has been generally understood as a strategy of making a cross-cutting issue an integral dimension of an organization’s design, implementation, monitoring and evaluation of development policies and programs. Some development partners mainstream selected themes/issues in a limited numbers of their priority sectors. Others make the themes/issues an integral part of their overall cooperation strategy and address the themes/issues across all programs/projects.

CRDB/CDC has worked with development partners to develop guidelines and has engaged their focal points in trainings on gauging the mainstreaming supports. It is also fully acknowledged that mainstreaming may entail non-financial activities that cannot be represented in analysis such as that presented here. These efforts will be maintained to make further progress on reflecting the efforts of development partners, both financial and non-financial to mainstream cross-cutting priorities in their work and in the activities of the TWGs.

5. ODA Support to Cambodia Industrial Development

The Cambodia Industrial Development Policy (IDP 2015-2025) is conceived as a new growth strategy. It serves as a critical multi-sectoral policy to promote inclusive and sustainable economic development through economic diversification, strengthening competitiveness and promoting productivity. The IDP sets out strategies, policy measures, and action plans that are linked to objectives and targets to be achieved by 2025 in order to elevate Cambodia's economy to a higher level in the regional and global value chain.

Under the RGC's ownership and leadership, significant progress has been made against the IDP's main targets, the Policy Measures and Action plans as well as the Four Key Concrete Measures. There has been a remarkable structural transformation in Cambodia's economy. Based on the IDP Progress Report 2017-2018, the GDP share of the industrial sector has increased from 27.7% in 2015 to 32.6% in 2018, surpassing the 2025 target of 30%.

The Role of ODA in Supporting Cambodia Industrial Development Policy

ODA has provided a significant source of support for Cambodia's IDP. Cooperation has been provided across all main areas: public infrastructure and logistic development, direct partnership with private sector, support for strategic investment for trade facilitation and economic competitiveness promotion, leveraging other sources of development finance, and supporting the government efforts in ensuring an enabling environment and investment promotion.

The Cambodia ODA Database, configured by the CRDB/CDC, identifies ODA support to IDP by recording the contributions provided by development partners for supporting the acceleration of IDP implementation.

An Analysis of ODA Provision to the IDP in 2018-2019

Using the mapping approach, Table 5.1 shows that approximately USD 157 million of ODA, accounting for 13% of total external funding (excluding NGO's fund), was disbursed in 2018 to support the implementation of IDP's Four Key Concrete Measures, and Policy Measures and Action Plans.

Compared to 2018, the disbursement in 2019 is expected to increase by 59% to USD 266 million. Almost 70% of total disbursements to the IDP in 2019 was directed to the Four Key Concrete Measures of IDP, in which USD 176 million is directed to energy sector (of which China contributed USD 119 million).

Among development partners, China, ADB, Japan, France, and Australia are the major contributors. Between 2018 and 2019, approximately USD 136 million and USD 238.9 million were disbursed respectively by this group to support the IDP. The Investment Promotion Sector and Coordination of Supporting Policies continue to be the main areas of support.

Table 5.1: ODA Support to the IDP in 2018-2019 (USD Million)

Development Partners	2018 (Total)	2019 (Est.)					
		Investment Promotion	Expanding SMEs	Regulatory Environment	Supporting Policies	4 Key Concrete Measures	Total
China	54.7	-	-	-	-	119.2	119.2
ADB	26.7	43.1	-	-	4.6	1.3	49
France	18.3	-	-	-	0.8	42.8	43.6
Japan	24.7	1.8	2.3	-	5.4	8.7	18.2
Australia	11.6	-	-	-	5.9	3.0	8.9
Republic of Korea	6.0	-	1.8	1.9	1.9	0.9	6.5
World Bank	-	-	-	-	4.8	-	4.8
New Zealand	3.4	-	-	-	3.4	-	3.4

Development Partners	2018 (Total)	2019 (Est.)					
		Investment Promotion	Expanding SMEs	Regulatory Environment	Supporting Policies	4 Key Concrete Measures	Total
Germany	1.9	-	0.9	1.8	-	-	2.7
Switzerland	2.5	-	-	0.03	2.3	0.02	2.4
EU/EC	2.5	-	-	2.1	-	-	2.1
IFAD	0.6	-	1.5	-	-	-	1.5
Sweden	1.2	-	-	-	1.1	-	1.1
Canada	0.6	-	0.2	-	0.3	-	0.5
UNIDO	0.1	0.4	-	-	-	-	0.4
UNDP	0.2	-	-	0.2	0.05	-	0.3
UK	0.3	-	-	0.05	0.1	-	0.2
UNESCO	0.2	-	-	-	0.2	-	0.2
ILO	0.1	-	-	-	0.2	-	0.2
Others	0.3	-	-	-	-	-	-
Grand Total	156.7	45.3	6.7	6.1	31.0	175.9	265.7

Table 5.2 indicates that USD 917.2 million of total ODA was disbursed in the 2015-2019 period to support the IDP's implementation, averaging USD 180 million per annum. The Four Key Concrete Measures of IDP received significant support, totalling USD 651.3 million, whereas support to SMEs expansion remains marginal. Similar to the 2018-19 analysis presented in Table 5.1, Table 5.3 also shows that China, ADB, France, Japan, and Australia are the top five development partners, which so far contribute USD 827 million to the implementation of IDP. In 2019, China continued to be the largest development partner with an estimated disbursement of USD 119.2 million to IDP through its four biggest infrastructure projects – Construction of Transmission lines in South Western and Eastern part of Cambodia.

Table 5.2: Medium Term Resourcing of the IDP in 2015-2019 (USD Million)

IDP Policy Measures and Four Key Concrete Measures	2015	2016	2017	2018	2019 (Est.)	Total
Investment Promotion	0.2	3.3	1.8	2.5	45.4	53.2
Expanding SMEs	1.1	1.7	3.6	3.9	6.7	17
Regulatory Environment	4.3	9.0	25.9	8.7	6.1	54.0
Supporting Policies	27.4	22.2	28.2	31.9	31.5	141.2
4 Key Concrete Measures	55.9	148.0	162.0	109.5	175.9	651.3
Grand Total	88.8	184.2	221.8	156.7	265.7	917.2

Table 5.3: Medium Term Resourcing of the IDP in 2015-2019 (USD Million)

Development Partners	2015	2016	2017	2018	2019 (Est.)	Total
China	45.1	122.2	133.2	54.6	119.2	474.3
ADB	11.1	9.8	19.0	26.8	49.0	115.7
France	1.2	13.0	21.4	18.3	43.6	97.5
Japan	12.8	19.0	16.5	24.8	18.2	91.3
Australia	7.3	9.5	11.4	11.7	8.8	48.7
Republic of Korea	-	1.1	6.3	6.0	6.5	19.9
New Zealand	2.6	1.9	3.1	3.4	3.4	14.4
EU/EC	2.8	1.7	1.3	2.4	2.0	10.2
Switzerland	0.5	0.8	2.0	2.5	2.3	8.1
Germany	0.0	1.1	2.0	1.9	2.7	7.7
Sweden	1.1	1.3	1.2	1.2	1.0	5.8
USA	1.2	0.8	1.0	0.2	0.3	3.5

Development Partners	2015	2016	2017	2018	2019 (Est.)	Total
ILO	0.9	1.0	1.0	0.2	0.1	3.2
World Bank	1.8	-	-	-	4.8	6.6
Canada	0.1	0.4	0.5	0.6	0.6	2.2
Czech Republic	0.3	0.4	0.3	-	0.4	1.4
UNDP	0.0	0.1	0.6	0.2	0.2	1.1
IFAD	-	-	0.01	0.6	1.5	2.11
UNIDO	0.1	0.1	0.2	0.05	0.4	0.85
UK	0.0	0.0	0.05	0.3	0.2	0.55
UNESCO	0.0	-	0.1	0.2	0.1	0.4
Grand Total	88.8	184.2	221.8	156.7	265.7	917.2

Using the thematic marker approach, Table 5.4 lists 16 development partners which mainstream the IDP in their projects/programme's implementation. In 2018, 15 development partners mainstreamed the IDP into their projects, which together accounted for USD 160 million. Estimates for 2019 show this amount increased by USD 78 million in 2019, driven mainly by China and Japan. The 2019 ODA disbursement shows China (26.8% of funding) and Japan (25.4%) rank highest in their efforts to mainstream the IDP. On mainstreaming intensity, however, China has disbursed USD 120.9 million to "significantly" provide indirect supports to the implementation of IDP.

Table 5.4: Development Partners Mainstreaming of the IDP in 2018-2019 (USD Million)

Development Partners	2018 (Total)	2019 (Est.)				Total ODA Disbursement 2019 by Donors	IDP as % of Total ODA Disbursement 2019
		Minor	Moderate	Significant	Total		
China	87.6	3.3	9.1	120.9	133.4	496.1	26.8%
Japan	39.6	7.5	11.8	29.7	49	192.7	25.4%
Switzerland	0.5	0.1	2.0	-	2.1	13.4	15.6%
Germany	2.1	0.3	2.8	0.1	3.2	24.8	12.9%
France	7.4	4.4	18.8	0.07	23.3	207.8	11.2%
ILO	0.4	0.01	0.4	-	0.4	3.8	10.5%
ADB	14.5	2.8	15.6	1.4	20.0	245.9	8.1%
World Bank	0.9	4.7	-	-	4.7	69.7	6.7%
Australia	3.4	0.06	2.0	-	2.06	38.7	5.3%
EU/EC	2.9	1.9	0.5	0.06	2.46	64.6	3.8%
UNDP	0.4	0.4	0.0	-	0.4	10.3	3.8%
Canada	0.06	-	0.06	-	0.06	1.9	3.1%
UNICEF	-	0.1	-	-	0.1	12.8	0.7%
Sweden	0.07	0.1	-	-	0.1	23.7	0.4%
Republic of Korea	0.3	-	0.07	0.1	0.17	71.3	0.2%
USA	0.1	-	-	-	-	59.6	0%
Total (Exclude Pipeline Projects)	160.6	26.2	59.4	152.8	238.4	1887.9	12.6%

As illustrated in Table 5.5, the transportation, energy, power and electricity, and agriculture sectors were the largest recipients. Compared with 2018, there is an increase in education support (from USD 2.8 million to USD 8.9 million) to develop capacity and skills in the industrial sector.

Table 5.5: Sectors Mainstreaming of the IDP in 2018-2019 (USD Million)

Sectors	2018 (Total)	2019 (Est.)				Total ODA Disbursement 2019 by Sectors	IDP as % of Total ODA Disbursement 2019
		Minor	Moderate	Significant	Total		
Energy, Power & Electricity	25.7	0.4	12.3	41.0	53.8	175.5	30.6%
Transportation	88.0	0.7	4.4	98.9	103.3	348.2	29.6%

Sectors	2018 (Total)	2019 (Est.)				Total ODA Disbursement 2019 by Sectors	IDP as % of Total ODA Disbursement 2019
		Minor	Moderate	Significant	Total		
Water and Sanitation	9.1	-	19.1	0.07	19.2	151.4	12.6%
Agriculture	23.7	14.5	14.9	7.0	36.3	309.2	11.8%
Industrialization & Trade	0.4	0.08	0.1	0.9	1.1	10.1	10.9%
Tourism	0.2	-	0.7	-	0.7	7.1	9.8%
Others		0.9	0.3	-	1.2	14.1	8.5%
Rural Development	5.2	5.0	2.0	-	7.0	94.7	7.4%
Urban Planning & Management	1.0	-	4.0	-	4.0	55.9	7.1%
Education	2.8	3.6	0.5	4.7	8.9	213.8	4.1%
Business & Financial Services	0.2	-	-	0.1	0.1	2.8	3.6%
Governance & Administration	2.8	1.3	0.03	0.18	1.5	64.7	2.3%
Climate Change	0.1	0.08	-	-	0.08	13.3	0.6%
Community and Social Welfare	0.4	0.1	0.3	-	0.4	61.8	0.6%
Gender	0.02	-	0.1	-	0.02	5.2	0.3%
Environment and Sustainability	0.2	0.1	-	-	0.1	36.1	0.2%
Culture, Arts & Sports	0.02	0.01	-	-	0.01	63.8	0.02%
Health	0.3	2.6	-	-	0.03	244.2	0%
Emergency & Food Aid	-	-	-	-	-	3.2	0%
HIV/AIDS	-	-	-	-	-	11.7	0%
Technology, Info. and Communications	0.04	-	-	-	-	1.1	0%
Total (Exclude Pipeline Projects)	160.6	26.2	59.4	152.8	238.4	1887.9	12.6%

ODA Support to Technical and Vocational Education and Training (TVET) in Cambodia

The IDP recognizes the importance of promoting TVET through the reform of the education curriculum. Table 5.6 illustrates that between 2017 and 2019 there are 17 development partners averaging support of USD 30.5 million per annum to the higher education and TVET sector. In 2019, approximately 85% of total estimated funding was provided by 5 development partners: Australia (USD 5.9 million), Japan (USD 5.4 million), World Bank (USD 4.8 million), ADB (USD 4.6 million), and New Zealand (USD 3.4 million).

Table 5.6: DPs Support to TVET and Higher Education in 2017-2019 (USD Million)

Development Partners	2017	2018	2019 (Est.)
Australia	7.2	6.9	5.9
Japan	5.8	5.9	5.4
World Bank	-	-	4.8
ADB	2.1	7.9	4.6
New Zealand	3.1	3.4	3.4
Switzerland	2.1	2.5	2.3
Republic of Korea	4.2	1.6	1.7
Sweden	1.1	1.2	1
France	0.9	1	0.8
Canada	0.2	0.3	0.3
Czech Republic	-	-	0.3
ILO	0.5	0.2	0.2
UNESCO	0.1	0.3	0.2
UK	0.1	0.3	0.1
UNDP	-	-	0.05
EU/EC	0.2	0.07	-
USA	0.2	0.2	-
Grand Total	28.0	31.9	31.3

6. LDC Graduation – Cambodia

In July 2016 Cambodia was reclassified by the World Bank as a Lower-Middle Income Country. This is based on its 2015's Gross National Income (GNI) per capita exceeding USD 1,025. Least Developed Countries (LDCs) – distinct from the World Bank income classification - are classified according to three criteria that provide a deeper understanding of development: income (GNI per capita), human assets and economic vulnerability.

With continuous rapid socio-economic development, Cambodia is now expecting to move towards graduation from the LDC category, a process that is overseen by the United Nations Committee for Development Policy (UN CDP). This section of the DCPR reviews preferential arrangements granted to Cambodia due to its LDC status and considers the transition towards graduation that is expected to begin in 2021.

Support and Preferential Arrangements for Cambodia as an LDC

LDCs are eligible to access a range of support including preferential market access, special and differential treatment provisions, trade-related technical assistance and facilitated accession to the WTO.

Examples of the support available to LDCs under the WTO's Trade Facilitation Agreement Facility (TFAF) and preferential trade arrangements include:

- TFAF benefits - include tariff and quota-free access to markets, streamlined customs formalities and the secured exemptions based on compliance capacity including expediting the movement, release and clearance of goods and measures for effective cooperation on trade facilitation and customs compliance.
- Preferential trade arrangements - , particularly exemptions related to Agreements on Trade-Related Aspects of Intellectual Property Rights (TRIPS)¹ and Trade-Related Investment Measures (TRIMs)² which are preferential agreements that permit relaxation of rules and practices related to intellectual property rights and investment in LDC WTO members.

Regarding intellectual property protections, Cambodia has been granted an extended transition until 2021 to protect intellectual property under WTO's TRIPS. Regardless of economic, financial, technological and administrative constraints for LDC graduation, Cambodia must fully comply with the TRIPS Agreement after 2021 in order to facilitate trade in knowledge and creativity over intellectual property patents and protection of undisclosed information. In this sense, the RGC's effort to establish a TRIPS-consistent regime in Intellectual Property Rights (IPR), especially in the critical areas of copyrights, patents, and industrial designs is significant.

On investment promotion, Cambodia is similarly expected to adhere to all measures in conformity with the TRIMs Agreement after 2021 unless a new extension is negotiated. Limitations imposed by alignment with TRIMs would be the restrictions on the use of policy instruments such as domestic content, export performance and standards on government procurement, widely used by developed countries and successful industrializers in the developing world. The RGC will consider flexibility in implementing its legislation and can request for necessary technical assistance, either bilateral or multilateral, to speed up the adoption process of various key legislation and regulations after TRIPS and TRIMs phased out.

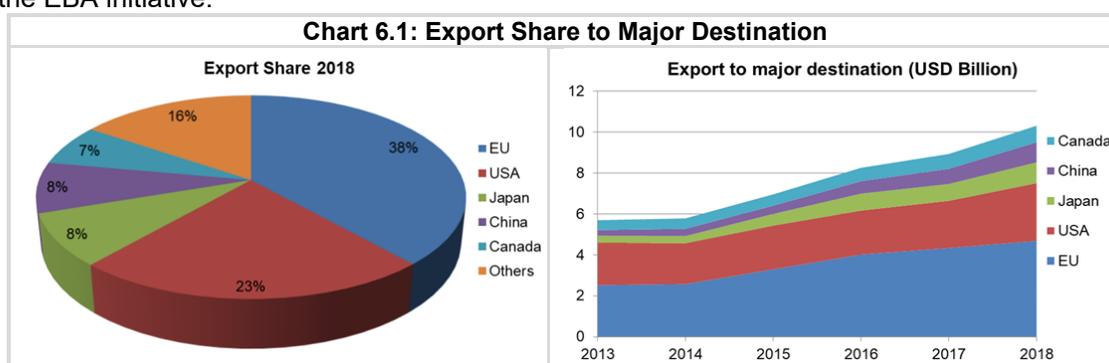
ODA is an important source of development finance for all LDCs. Development Assistance-related Support Measures consists of ODA volume, modalities and climate finance. LDCs are also entitled to other technical assistance and general International Support Measures

¹ <https://www.un.org/ldcportal/provisions-for-ldcs-in-the-agreement-on-trade-related-aspects-of-intellectual-property-rights-trips-agreement/>

² <https://www.un.org/ldcportal/trims-agreement-provisions-for-ldcs-in-the-agreement-on-trade-related-investment-measures/>

(ISMs) such as Enhanced Integrated Framework (EIF); Aid for Trade; UN’s Technology Bank for LDCs; WTO legal advisory support and arrangement for meeting participation, etc. In addition, LDCs have access to the LDC Programme of Action, which emphasized productive capacity and structural transformation, including building physical, human and social capital.

For Cambodia, privileged trade access is seen as the most important concession as an LDC. The EU is the largest destination for Cambodia’s exports, accounting for USD 4.7 billion (38% of total in 2018), follow by the USA, China, Japan and Canada. As an LDC, Cambodia has access to the EU’s Everything But Arms (EBA) scheme, which provides duty-free-quota-free access to all exports, except armaments. After graduation, this will be withdrawn over a transition period and replaced by a less-concessional, though still favorable, Generalized System of Preferences (GSP) arrangement. Other developed countries also offer transition arrangements for LDCs that graduate. Thus, Cambodia, while graduating, retains access to a different but still highly-concessional trading arrangement. It should be noted, however, that the EU’s GSP+ is available to countries based on non-economic eligibility criteria including commitments to human rights and labour standards, which is similar to the terms of the EBA initiative.



Source: IMF Direction of Trade statistics and WB data

Cambodia accesses LDC duty-free trade preferences agreed at the WTO and other preferential trade agreements, for example with the US under its GSP. Since 1994, all US bilateral trade agreements have included provisions on labour standards. Bilateral Textile Agreements with Cambodia also link improved quota-related trade concessions to labour standards. Another Cambodia-US specific trade framework is a Bilateral Trade and Investment Framework Agreement signed in 2006. Other discussions of potential bilateral investment treaty between the US and Cambodia began in 2012, for example the recent initiative on travel goods that has been of significant benefit to Cambodia. Hence, as an LDC, Cambodia continues to engage development actors and explore access to additional preferential arrangements.

Cambodia’s Pathway to LDC Graduation

A country must meet at least two of three criteria thresholds (Gross National Income-GNI per capita; Human Assets Index-HAI, and Economic Vulnerability Index-EVI or on surpassing double the income threshold) at two consecutive triennial reviews to graduate.

Cambodia’s strong economic growth, poverty reduction and the successful implementation of the Rectangular Strategy have paved the way toward surpassing the HAI threshold. It is now fast approaching the EVI criteria. Cambodia’s HAI was 68.9 in 2018, which exceeded the threshold (≥ 66). Its EVI has improved from 50.5 in 2012 to 34.8 in 2018 although a 2.8 point reduction is still needed to reduce to reach the threshold ≤ 32 (the lower bound). However, Cambodia’s 2018 GNI per capita (UN measurement) of approximately USD 1,075 remains only USD 155 distant from the graduation threshold but is expected to increase to USD 1,353 in 2021, which will surpass the requirement (USD 1,292).

Against this graduation pathway, it is expected that Cambodia will be added to the graduation list at the next CDP review in 2021. After being reviewed again in 2024 and then confirmed by the UN General Assembly in the following year, a 3-year period is required for

transition. Graduation is then confirmed. Another 3 years will be provided to ensure entitlements to LDCs are not withdrawn abruptly. In this scenario, Cambodia's graduation could be achieved in 2027 and transition may extend to perhaps 2030.

Table 6.1: Cambodia's LDC Criteria Data

Triennial Review Year		2006	2009	2012	2015	2018	2021 Projected
1	GNI Threshold for graduation	900	1,086	1,190	1,242	1,230	1,292
	Cambodia's GNI	303	490	707	852	1,075	1,353
	Gap* to the threshold for graduation	-597	-596	-483	-390	-155	+61
		<i>Not met</i>	<i>Meet</i>				
2	HAI threshold for graduation	64	66	66	66	66	66
	Cambodia's HAI	46	58	58	67	69	78
	Gap* to the threshold for graduation	-18	-8	-8	+1	+3	+12
		<i>Not met</i>	<i>Not met</i>	<i>Not met</i>	<i>Met</i>	<i>Met</i>	<i>Meet</i>
3	EVI threshold for graduation	38	38	32	32	32	32
	Cambodia's EVI	52	56	50	38	35	29
	Gap* to the threshold for graduation	-14	-18	-18	-6	-3	+3
		<i>Not met</i>	<i>Meet</i>				

Source: Estimations calculated from UN Committee for Development Policy Secretariat, Triennial Review 2018

* Minus (-) indicates 'remaining'; Plus (+) indicates 'exceeding'

As the recent pandemic outbreak and other emerging issues have occurred in Cambodia after the completion of this DCPR report, it seems too early to make the rigorous assessment of its impact on Cambodia's socio-economic development in 2020 and beyond that will affect the performance of the 3 criteria for Cambodia graduation from the LDC group. We expect to closely monitor the impact and will reflect in the next DCPR report.

Impact of Graduating from the LDC Group

Graduation from the LDC group is the recognition of achievements in areas covered by LDC criteria (income per capita, human assets and economic vulnerability). This leads to the improvement of the country's image of progress and can be seen as validation of the sustainability of a country's development progress. This, in turn, may attract new investments if accompanied by associated reforms that make the investment climate more attractive.

Conversely, some loss of privileges and concessions is inevitable after graduation. The International Support Measures (ISMs), mostly in the areas of trade, development cooperation and support for participation in the UN and other international processes, provided to LDCs under UN's supported initiatives would be wound down. Cambodia's LDC graduation may bring a progressive decline in donor grant financing and/or a fundamental shift from highly concessional borrowing to less concessional or even commercial terms over the long term. Cambodia would lose access to duty-free and quota-free arrangements for LDCs and to simplified rules of origin reserved for LDCs. This will have with important ramifications for garments and bicycles in Cambodia's main markets, namely the EU, the US and Canada.

Regardless of the final outcome of the negotiations, Brexit implies fundamental changes in the British trade regime with its trading partners. The UK will no longer be part of the European GSP or the EBA preference. As the UK is an important trading partner for Cambodia, Brexit will have significant implications on Cambodia-UK bilateral trade. Based on preliminary negotiation, it is expected that the UK will continue applying benefits in line with the EU's EBA preference that grants duty-free and quota-free access for Cambodia.

After graduation from the LDC group, the average tariff will apply the standard GSP, a preferential differential tariff rate imposed by a nation on various products from particular countries. Otherwise, the Most Favored Nation (MFN) tariff rate as a non-discriminating equal tariff treatment among WTO members will be applied. The potential loss of trade preferences after graduation is shown in Table 6.2 below. Average tariffs are projected to increase from zero under EU's EBA to 8.5% under standard GSP, and about 11% under MFN rates for garments, textiles, and footwear; 10.5% and 14.5% for bicycles. The exports

of bicycles to Canada could also face 8.5% and 13% tariff, and to the US 7.3% and 8%, respectively.

Table 6.2: Potential Average Rise of Tariffs after Graduation

Products	Export Markets*		Average Tariff		
			Current Tariff	After LDC Graduation	
				Standard GSP	MFN
1. Garment, textiles, and footwear	EU	(43%)	0%	8.5%	11%
	Canada	(8%)	0%	10.7%	15%
	US	(24%)	9.5%	9.5%	10.05%
2. Bicycles	EU	(86%)	0%	10.5%	14.5%
	US	(5%)	0%	7.3%	8%
	Canada	(3%)	0%	8.5%	13%
3. Rice	EU	(48%)	EURO150/ton**	EURO175/ton	EURO175/ton
	US	(0.4%)	0%	USD140/ton	11.2% or USD140/ton
	Canada	(0.1%)	0%	0%	0%
4. All other products	EU	(4%)	0%	2.9%	5.9%
	US	(24%)	0.5%	1.8%	4.9%
	Canada	(2%)	0%	1.2%	1.7%

Source: Calculated from UNCTAD and WTO Tariff Database (2019), * percentage in the brackets are market shares. **Three years safeguard tariff ends in 2021.

Therefore, trade policy needs to be managed in the context of on-going trade agreements, for example to negotiate considered duty- and quota-free access on some exports or to engage in discussion on the Free Trade Agreement (FTA) with the EU that provides the non-LDCs with similar access to European markets (and the UK after Brexit).

It is noted that the RGC has already begun to prepare for addressing bottlenecks in the trade-relevant sectors by strengthening trade facilitation, improving the enabling environment for export and promoting trade competitiveness. The loss of free-trade access could also be managed by bilateral free-trade negotiations and partnership cooperation agreements for the access to be further extended, (at least) for the transition period and beyond. Capacity to negotiate these kinds of trade agreements, on both a bilateral and multilateral basis, will be essential.

Key Policy Considerations

While graduation from LDC status is to be welcomed, the RGC will pro-actively develop its transition roadmap and appropriate policy interventions as follows:

1. Graduation Roadmap

There is an increasing need to leverage RGC's capacity to undertake preliminary planning prior to final graduation, to map out the likely trajectory, the graduation requirements, the key issues and implications. Such early preparations could serve as a roadmap for responding to the CDP on listing for graduation, and for the development of its "Smooth Transition Strategy" later in the process. A lead RGC focal point is required, together with bringing together all other RGC ministries and agencies that will need to be involved in graduation preparations.

Considering the merits and composition of establishment of a national task force and a core group of government entities involved with LDC graduation is therefore fundamental. The formation will designate focal points in various ministries to conduct assessments of impacts within their areas of work and discuss graduation in various forums. The RGC will deploy efforts in disseminating Cambodia's prospect of graduation as a milestone in its development process to raise public readiness for a shift in development paradigm based on ownership, leadership, and analytical capacity while still requiring external financial and technical support. It is also significant to include the strategy for smooth and sustainable transitioning out of LDCs, to be embedded in National and Sectoral Development Strategies. This is in line with the RGC's goal of becoming a Higher-Middle income country by 2030. The RGC is also expected to be ready for active engagement with the lead UN institutions, namely UNDESA and UNCTAD, with support from UNDP and UNESCAP. The coordination

with these organizations enables the RGC to raise any key issue, while the Transition Strategy is a vehicle for identifying and resolving policy and financing issues. Engaging stakeholders' interests on challenges; opportunities and significantly on development of transition pathway is critical. Engagement of DP's support, perhaps by a one-off injection of funds or a series of funding modalities, including the establishment of a unified dedicated fund for LDC graduation, is encouraged to ensure graduation is achieved effectively and sustainably.

2. Policy Interventions

As described earlier, a number of policy initiatives will need to be simultaneously established to guide the graduation process and its aftermath:

Economic transformation - economic vulnerability is the criteria that will likely determine Cambodia's eligibility to progress on the path to graduation. The effective implementation of the Industrial Development Policy (IDP) and other strategic policies, especially related to the expansion of manufacturing, SME and services sectors, enhancement of industrialization, export diversification, agriculture modernization and disaster preparedness are keys to accelerate further reduction of economic vulnerability that must continue even after the completion of the LDC graduation process.

Public finance - LDC graduation also has significant implications for public finance. Sound macroeconomic and prudent fiscal policies would support capacity expansion and increase economic resilience. Developing more effective and efficient monetary policy (including gradual de-dollarization) and financial markets would enable Cambodia to autonomy over interest rates that drive the cost of capital. This would encourage more investment in the productive sectors.

ODA mobilisation - For development cooperation, development partners will likely review their support, modality and plans. Decreasing ODA grant volumes and shifting to loan financing will likely occur (albeit alongside the strengthening effort in domestic resource mobilization). In this sense, the RGC will seek to maintain its current level of ODA grant while mobilizing additional loans. The RGC will continue to effectively implement its Revenue Mobilization Strategy 2019-2023. Also, the Public Debt Management Strategy 2019-2023 becomes a critical policy instrument to mobilize both external and domestic development finance. In the meantime, Cambodia's LDC status and benefits should be exploited to maximize impact of available preferences and prepare for the future milestones.

Trade policy and capacity - In the area of trade, continued engagement with trading partners to seek alternatives for the preferential access and concessions is essential for Cambodia. The RGC has been proactively negotiating with potential bilateral and multilateral trading partners that could extend benefits beyond graduation and transition periods. Negotiations on bilateral Free Trade Agreement (FTA) have been initiated with some important trading partners. The RGC signed an agreement with South Korea to launch a joint feasibility study into the creation of a FTA between the two countries. Negotiations for a FTA between Cambodia and China have also been conducted in late 2019. The Ministries of Commerce of both countries have officially established a mechanism at the working level to maintain close communication.

The RGC will consider strengthening future trade negotiation capabilities towards regional FTAs, in order to diversify both export products and markets. It is imperative to explore bilateral agreements with other key trading partners such as Japan, India, Australia, and New Zealand, building on the existing ASEAN+1 Free Trade Agreements, and Regional Comprehensive Economic Partnership (RCEP). Seeking to secure other trading partnerships, such as Eurasian Economic Union (EAEU) and other bilateral partners, is also worthwhile.

Infrastructure and logistics - In addition, further improving infrastructure, logistics, and investment policy is vital to further promote and attract investment in new industries. The transport and logistics costs should be minimized through continuous construction and the

improvement of roads, express ways, rail transport systems, port facilities and efficiency, e-custom and speedy border clearances, better national and regional connectivity, and facilitative regional Cross-Border Transport Agreement (CBTA). Enhancing trade facilitation, business environment, and administrative reforms are also critical to reduce cost and increase competitiveness of the productive sectors.

Investment promotion - It is significant to rebrand Cambodia to attract more investment in high-valued added, technology, and capital-intensive industries. This can be done through revisiting the Law on Investment and Law on Special Economic Zone to improve investment climate, broaden the investment incentives beyond tax holidays, strengthen competitiveness and improve productivity. The new laws would bring more effort in improving governance including regulatory quality, provision of investment protection, transparent and speedy approval, and compliance processes.

Skills and productivity - Incentives should be linked with firms' skill training, domestic procurement as required in a more stringent rule of origin for non-LDCs. It is also critical that the IDP as a comprehensive policy should be implemented more effectively to transform Cambodia's industrial structure from a labor-intensive industry to a skill-based industry. The improvement in productivity can be attributed to the combined outcomes of effective skill trainings, application of e-commerce, more mechanized agriculture and agro-industry, enhanced business start-ups, firm's innovative technological upgrading, and incentives for technology transfers. Additionally, Human Resource Development and Research & Development are strategic priorities for imparting competencies to people and knowledge in Cambodian society in order to improve organizational as well as national capacity, performance and productivity as a whole.

In summary, the key for Cambodia is to boost productivity and competitiveness in the remaining interval, and beyond, as it is critical to expand productive capacity and enhance synergy between productive capacity, social and economic development. Developing productive capacity requires integrated policies in governance reforms, prudent macroeconomic and fiscal policies, coherent social policies, and sound industrial and sectoral policies. The advent of LDC graduation gives these priorities a new impetus.

7. Managing for Sustainable Development Results

Moving beyond the Managing for Development Results Approach

Driven by the realignment with the Sustainable Development Goals (SDGs), the international community has refined the Principles on Managing for Development Results (MfDR) and reinvigorated Results-Based Management (RBM) approaches through the resulting Principles on Managing for Sustainable Development Results (MfSDR). The MfSDR sits alongside the development effectiveness principles as they mutually reinforce each other.

MfSDR, based on evidence and the principles of development effectiveness and sustainability, is intended to guide a sound change management process of agencies in development partners and partner countries. MfSDR can inform the establishment and implementation of monitoring, evaluation and reporting systems that harness quantitative and qualitative evidence of development cooperation. The principles also foster management and leadership to promote a results-focused culture, and they enhance national ownership and mutual accountability through strengthening the use of partner country's monitoring, statistical system and mechanisms for stakeholder engagement (Table 7.1).

Table 7.1: Principles for Results-based Development Cooperation

Managing for Development Results (2004)	Aid Effectiveness (2005)
<ol style="list-style-type: none"> 1. Focus the dialogue on Results at all phases 2. Align programming, monitoring and evaluation with Results 3. Keep measurement and reporting simple 4. Manage for, not by Results 5. Use Results information for learning and decision making 	<ol style="list-style-type: none"> 1. Ownership 2. Alignment 3. Harmonization 4. Managing for Development Result 5. Mutual Accountability
Development Effectiveness (2011)	Managing for Sustainable Development Results (2019)
<ol style="list-style-type: none"> 1. Focus on results 2. Ownership of development priorities by developing countries 3. Inclusive development partnerships 4. Transparency and accountability to each other 	<ol style="list-style-type: none"> 1. Ensure that result-based management approaches support development goals and desired change 2. Adapt to context 3. Enhance national ownership and foster mutual accountability 4. Maximize the use of results information for learning decision making 5. Foster a culture of results and learning 6. Keep the results system manageable

Under the RGC's strong leadership, policy frameworks and institutional arrangements have been established and implemented to guide and assess the effectiveness of development cooperation. The Development Cooperation and Partnerships Strategy (DCPS) embraces and adapts the global Development Effectiveness Principles and builds on applicable initiatives to promote result-based development cooperation in Cambodia.

A greater attention has been placed to ensure that all available resources are used for the wider impact and ultimately deliver broader results-based development. The Budget Strategic Plan (BSP) has been used to structure development programming and reflect the linkage between program activities, resources and results. Development cooperation has been focused on specific priorities which are aligned with government results frameworks to be monitored through the JMIs. Overall, there needs to be a strengthening and promotion of greater use of government results framework.

Operationalization of MfSDR within the DCPS framework could complement PFM reform. This would guide all development cooperation agencies to reinforce the RGC's results-oriented reform programs, and gear development cooperation toward achieving the RS-IV and NSDP objectives as well as the 2030 Sustainable Development Agenda.

Application of Results-based Approach in Cambodia

Under the government's strong leadership and ownership, development cooperation in Cambodia's context has been consistent with government's public sector management reforms and contributing to achieving progressive development results. As the PFM reforms progress, the RGC has been promoting a functional role of national budget in delivery of development policies. In addition to national and sector development strategies, government is improving medium term fiscal frameworks for budget and investment management. Key Performance Indicators (KPIs) have been set and disaggregated as a results-based monitoring framework to enable performance review and assess the progress of the RS-IV implementation. Statistical systems are also being strengthened to promote regular performance reporting and enable performance-informed budgeting.

Recognizing the RGC's aspiration, CRDB/CDC is cooperating with development actors to align their practices with the RGC's results-based approach. DCPS (2019-2023) sets up development cooperation architecture which aims to mobilize and manage all development resources for maximum impacts through enhanced government ownership, partnership, coordination and promoting the use of national systems. The strategy creates partnership dialogue mechanisms for the RGC agencies to lead development actors, and development cooperation is gradually integrated into national budget law and annually allocated through the Program Budgeting. It identifies joint monitoring indicators and the need to enhance quality of information on development cooperation through Cambodia ODA database system to monitor the progress of cooperation and assess on partnership performance as well as development results.

Operationalization of MfSDR in Cambodia

1- *MfSDR will guide the establishment of national statistics system which is an on-going priority of the RGC.* NIS/MOP is leading a national exercise on consolidating and sharing national development statistics. CRDB/CDC will update the Cambodia ODA database so that information of all development cooperation projects could be fed into the national statistics system. Results of development cooperation could be manifested through aligning with national results frameworks.

2- *MfSDR will help improve the link between resources and results framework and gradually incorporated ODA into the national budget.* Integration of ODA to the budgeting exercises including program budgeting and budget strategic plan is part of PFM reform. Performance-informed budgeting will assess results-based on development outcomes.

MfSDR concepts have already been adopted in Cambodia's PFM reforms. The sustainability dimension has been recently incorporated via the CSDGs. Implementation, and integration of ODA resources, is the next step.

8. Conclusion

Under the RGC's strong ownership and leadership, with the support of all development actors, Cambodia has made impressive achievements towards national socio-economic development. Consolidating and extending these major accomplishments requires the successful implementation of the governance reforms such as PFM, PAR and SNDD, and national and sector programmes that bolster economic transformation and socio-economic development.

In this way, the RGC has continued to successfully implement the Rectangular Strategy phase IV for Growth, Employment, Equity and Efficiency, operationalized by the NSDP (2019-2023) to continue addressing strategic and effective socio-economic priorities and guide the national development agenda over the medium-term.

This report has provided a strong evidence of the RGC's commitment in maximizing ODA resource mobilization and continued collaboration with its development partners to deliver results. Major ODA trends documented in this report have showed that:

- The overall volume of ODA in 2019 increased to USD 1.9 billion. Grant levels have remained relatively stable while the loan share of ODA has increased to 53%.
- The aid/GDP ratio in 2019 has declined to around 7% and is expected to further decline to 5.3% in 2021. This reflects the RGC commitment to transform the economy based on a new growth model while meeting more of its development expenditures from the national budget.
- Significant ODA disbursement growth is seen in the infrastructure and economic sectors. This is in line with RS-IV priorities that, through the IDP, focus increasingly on managing the economic transformation and modernization programme.
- The development effectiveness agenda has recorded some major successes, however more work is needed to strengthen and use national systems as well as to formulate and deploy results frameworks across all forms of development cooperation.
- The RGC's work to mobilize ODA and partnerships through the new DCPS will promote a results-based approach linked to the JMIs and PFM reforms. It also anticipates the commencement of LDC graduation.

Building on development effectiveness principles and a solid track record of progress, the RGC will continue to guide the RS-IV towards the attainment of the 2030 development agenda. Now that the NSDP and DCPS are in place for the current planning period, emphasis must now turn fully towards effective implementation of national policies and plans. This effort to lead on implementation and the achievement of results will require that the DCPS be utilized for impact, sustainability and accountability in the use of external resources.

CRDB/CDC is therefore fully committed to continue to take a leadership role in the mobilisation and management of external cooperation, working closely with development partners through the coordination of all partnerships at all levels.

ANNEX 1

Disbursements by Development Partners and Sectors 2017 (USD Thousand)

Major Donors	Term of Assist.	Health	Edu	Agri	Indus & Trad	Rural Dev.	Bank & Biz	Urban. Plan	Inf. & Com	Ene. & Pos.	Trans.	Water & Sani.	Comm. & Soci	Culture & Art	Enviro. & Cons.	Climate Change	Gender	HIV/AIDS	Gov. & Admin	Tourism	Budget/BoP	Emer. & Food aid	Others	Total	
UN own Funds	Grant	8,219	16,085	8,866	1,395	2,682							6,248	618	3,767	2,317	1,519	264	2,280						54,262
	Loan			5,133																					5,133
World Bank	Grant	200	3,242																1,810				2,047	7,299	
	Loan	3,258	9,099	1,109		149					188														13,803
ADB	Grant	1,836	56	6,653		155	381	445			6,076	734			4,676				1,922				100	23,034	
	Loan	1,504	8,957	34,329		13,121		1,617		15,721	25,737	267							411	1,015				102,678	
GAVI Alliance	Grant	10,865																							10,865
Global Fund	Grant	20,761																12,305							33,066
EU/EC	Grant	339	23,218	6,726		1,123	877	314		225		168	683		294	1,699			15,089						50,756
Czech Republic	Grant	467	277	42						339		83							85						1,293
France	Grant	570	1,185	2,090		1,013	125			735			277	2,653	707				1,009	112					10,477
	Loan			1,123	14,830		5,000					47,019									12,348				80,319
Germany	Grant	5,037	227	1,820	2,088	18,034						112	528		337		1,279		5,761			23	3,133	38,377	
Ireland	Grant	182				561																			744
Sweden	Grant		17,705	117	35	50										2,873	151		12,616						33,549
United Kingdom	Grant		250			1,669									256		109						2	2,286	
Australia	Grant	14,692	11,095	14,790		4,580		1,556		2,638		4,765	344				77		3,723						58,257
Canada	Grant	867	238	794	182		86								242	81			796			102	46	3,434	
China	Grant		825								8,400			29,473											38,698
	Loan			60,971						133,185	146,348	11,676											24,899	377,079	
Japan	Grant	9,612	10,658	4,824	3,958	18,266	84	299	127	1,353	25,703	14,688	728	53	2,079	153	508		3,117	81			698	96,989	
	Loan			7,909						2,336	37,626	1,534													49,405
New Zealand	Grant		3,125	1,641											96										4,861
Republic of Korea	Grant	4,559	11,658	1,386	328	2,131	1,826			178	1,872		47	957	81		289		505				1,925	27,743	
	Loan			943		12,542					15,914														29,399
Switzerland	Grant	4,074	2,091	2,993		1,067	71							1			257		3,665	1,247					15,466
USA	Grant	20,001	8,504	8,841	65	6,417	3,050		218	731		5,008	5,903		7,482	185		6,978	19,800						93,183
SUB TOTAL: ALL DONORS:	Grant	102,281	110,438	61,583	8,052	57,749	6,501	2,614	346	6,199	42,051	25,558	14,758	33,756	20,017	7,310	4,189	19,547	72,176	1,440		125	7,950	604,639	
	Loan	4,761	18,057	111,515	14,830	25,813	5,000	1,617		151,242	225,813	60,495							411	13,363			24,899	657,817	
	Total	107,042	128,495	173,098	22,882	83,562	11,501	4,230	346	157,441	267,865	86,054	14,758	33,756	20,017	7,310	4,189	19,547	72,588	14,803		125	32,849	1,262,456	
NGO own fund	Grant	80,601	66,065	11,220		22,117	134		0	312	46		55,493	318	7,652	628		4,373	3,589	160		96	6,987	259,792	
GRAND TOTAL	TOTAL	187,643	194,560	184,318	22,882	105,679	11,635	4,230	346	157,753	267,910	86,054	70,250	34,074	27,669	7,938	4,189	23,920	76,177	14,963		221	39,836	1,522,248	

ANNEX 2

Disbursements by Development Partners and Sectors 2018 (USD Thousand)

Major Donors	Term of Assist.	Health	Edu	Agri	Indus & Trad	Rural Dev.	Bank & Biz	Urban. Plan	Inf. & Com	Ene. & Pos.	Trans.	Water & Sani.	Comm. & Soci	Culture & Art	Enviro. & Cons.	Climate Change	Gender	HIV/AIDS	Gov. & Admin	Tourism	Budget/BoP	Emer. & Food aid	Others	Total
UN Own Funds	Grant	8,474	13,668	4,694	478	552			466				7,233	627	4,344	4,991	1,154	227	2,812			105	50	49,876
	Loan		5,178																					5,178
World Bank	Grant	300	1,032			300													1,666					3,298
	Loan	3,544	3,160	5,346		4,545					4,866													21,461
ADB	Grant		586	8,521		1,177	256	2,289		1,000	6,957	892			8,251				2,144				100	32,173
	Loan	1,574	11,261	29,248		19,414		6,670		13,820	17,161	2,931							504	1,178				103,762
GAVI Alliance	Grant	7,440																						7,440
Global Fund	Grant	19,863																						19,863
EU/EC	Grant	196	48,062	9,965	1,867		556	331				977	1,562	171	908	1,214	474		23,401					89,683
Czech Republic	Grant	68	299	211								48	23			271			156					1,077
France	Grant	2,371	1,280	837		1,100	125			856			245	2,997	636				192	344				10,982
	Loan						3,000			16,438		48,473												
Germany	Grant	13,810	399	2,470	1,618	14,038	283					118	177		803		1,093		5,613			40		40,463
Ireland	Grant	192				591																		782
Sweden	Grant	312	8,440	145									288		461	2,839	380		10,904					23,769
United Kingdom	Grant		409			41	11								212		86		395					1,155
Australia	Grant	10,355	8,738	14,782		1,500		225		4,697		4,697	361				136		3,677					49,168
Canada	Grant	1,698	371	156	183		87									20	84		447				20	3,068
China	Grant	16,644				2,500					2,723			37,826					10,470					70,164
	Loan			49,381						51,948	178,860	2,677												
Japan	Grant	7,302	11,014	5,162	2,771	8,212	381	913	102	4,633	33,150	10,410	118		1,230	533	2,298		13,694	109			405	102,436
	Loan			11,495						7,385	53,186	913												
New Zealand	Grant		3,456	1,336											225									5,016
Republic of Korea	Grant	8,595	8,962	2,993	250	1,275	3,805	900	250	134	443		260	849	85		161		680				240	29,881
	Loan			6,454		2,287					5,437													
Switzerland	Grant	4,638	2,529	2,668		1,078							37	20			192		1,837	993				13,993
USA	Grant	27,736	8,799	9,562	50	9,381						5,318	3,863		13,875			6,358	8,917				975	94,836
SUB TOTAL: ALL DONORS:	Grant	129,994	118,044	63,503	7,217	41,746	5,503	4,657	818	11,319	43,274	22,459	14,167	42,491	31,029	9,868	6,060	6,584	87,007	1,446		145	1,791	649,123
	Loan	5,118	14,421	107,103		26,246	3,000	6,670		89,590	259,510	54,994							504	1,178				568,334
	Total	135,112	132,465	170,606	7,217	67,991	8,503	11,327	818	100,909	302,784	77,454	14,167	42,491	31,029	9,868	6,060	6,584	87,512	2,624		145	1,791	1,217,457
NGO own fund	Grand	85,858	67,165	12,572		25,632			77	236	363		55,968	108	11,984	1,771	411	6,876	3,707	168		22	177	273,098
GRAND TOTAL	TOTAL	220,970	199,630	183,179	7,217	93,624	8,503	11,327	896	101,145	303,148	77,454	70,135	42,598	43,013	11,639	6,471	13,461	91,219	2,792		167	1,968	1,490,555

ANNEX 3

Disbursements by Development Partners and Sectors 2019 (USD Thousand)

Major Donors	Term of Assist.	Health	Edu	Agri	Indus & Trad	Rural Dev.	Bank & Biz	Urban. Plan	Inf. & Com	Ene. & Pos.	Trans.	Water & Sani.	Comm. & Soci	Culture & Art	Enviro. & Cons.	Climate Change	Gender	HIV/AIDS	Gov. & Admin	Tourism	Budget/BoP	Emer. & Food aid	Others	Total	
UN own Funds	Grant	6,550	14,264	7,954	696	3,451			390				9,905	1,019	4,494	4,256	1,293	214	4,321			39	45	58,890	
	Loan			7,657																					7,657
World Bank	Grant	400	636			16													328						1,379
	Loan	4,657	15,667	7,801		23,236					16,695	309													68,365
ADB	Grant			12,044		1,070		3,766			2,640	1,123			10,468										31,110
	Loan	4,410	31,631	61,240		12,081		44,508		883	15,010	33,863							5,890	5,361					214,877
GAVI Alliance	Grant	8,694																							8,694
Global Fund	Grant	40,854																							40,854
EU/EC	Grant		26,850	17,476	1,613	671	472	404				1,925	132		237	1,041	354		13,457						64,632
Belgium	Grant																								
Czech Republic	Grant	671	754	218								87				256									1,985
France	Grant	1,711	1,033	2,752		890				4,784		5,118	163	3,171	634				1,044	537					21,838
	Loan			61,504						38,021		86,441													185,966
Germany	Grant	5,587		3,452	2,343	6,681	403					56	84		1,118		533		4,610						24,867
Ireland	Grant	182	20			559																			761
Sweden	Grant		10,890										793		1,322	2,958	286		7,513						23,762
United Kingdom	Grant		158				76		130				336	50	53		115		13						930
Australia	Grant	9,362	8,686	9,622		695				2,933		2,933	858				649		3,060						38,798
Canada	Grant	784	307	1	178												120		584				13	1,987	
China	Grant	31,814	3,880								17,708			59,291											112,692
	Loan			67,888						119,248	196,354														383,490
Japan	Grant	4,256	14,567	3,360	4,799	5,728		7,174		4,466	28,062	6,519	914		1,371	2,743	686		2,057			3,200	11,473	101,373	
	Loan			11,407						3,968	64,249	11,733													91,357
New Zealand	Grant		3,429	3,467												276									7,171
Republic of Korea	Grant	7,007	10,272	2,693	495	415	1,818		596	900	346		400	182	696				3,200						29,019
	Loan	10,674		9,574		14,024					6,784	264											979		42,300
Switzerland	Grant	4,267	2,299	2,510		502	24			21			14				201		2,483	1,086					13,407
USA	Grant	18,075	7,600	7,429		65						1,031	2,215		6,437		350	3,946	12,478						59,626
SUB TOTAL: ALL DONORS:	Grant	140,214	105,645	72,977	10,125	20,742	2,792	11,344	1,116	13,104	48,756	18,790	15,814	63,713	26,831	11,530	4,586	4,160	55,147	1,623		3,238	11,531	643,776	
	Loan	19,741	47,298	227,071		49,341		44,508		162,121	299,092	132,611							5,890	5,361			979	994,013	
	Total	159,954	152,942	300,048	10,125	70,083	2,792	55,852	1,116	175,225	347,848	151,401	15,814	63,713	26,831	11,530	4,586	4,160	61,037	6,984		3,238	12,510	1,637,789	
NGO own fund	Grand	84,263	60,843	9,187		24,602				230	313		45,983	89	9,227	1,803	661	7,562	3,628	148			1,618	250,158	
GRAND TOTAL	TOTAL	244,217	213,786	309,235	10,125	94,685	2,792	55,852	1,116	175,454	348,161	151,401	61,797	63,802	36,058	13,333	5,248	11,722	64,665	7,133		3,238	14,128	1,887,947	

ANNEX 4

Disbursements & Projections by Development Partners 2010-2021 (USD Thousand)

Major Donors	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
										Estimate	Projection	Projection
UN Own Funds	73,872	56,511	54,268	50,015	53,907	47,191	65,708	59,395	55,054	66,548	80,567	56,247
World Bank	56,918	73,796	65,979	35,473	50,615	17,623	17,572	21,102	24,759	69,744	140,842	124,398
Asian Development Bank	75,368	126,873	82,026	171,405	129,782	137,234	118,212	125,713	135,935	245,987	283,097	259,317
GAVI Alliance	3,563	6,714	4,892	10,688	5,483	18,951	16,265	10,865	7,440	8,694	5,359	
Global Fund	61,220	60,199	20,131	45,431	54,593	33,347	28,194	33,066	19,863	40,854	33,869	
European Commission	32,940	60,996	41,595	36,606	70,317	55,796	55,706	50,756	89,683	64,632	90,337	75,472
Belgium	2,155	2,067	143	415								
Czech Republic				992	1,167	1,232	1,510	1,293	1,077	1,985	733	131
Denmark	15,716	5,700	4,900									
Finland	6,682	6,872	4,405	5,376	4,400							
France	22,385	19,524	24,795	17,760	59,454	63,314	32,136	90,796	78,894	207,804	258,470	464,310
Germany	35,261	43,687	44,558	34,254	29,804	25,790	46,939	38,377	40,463	24,867	25,552	20,957
Ireland	663	698	276	1,247	733	556	631	744	782	761	741	
Netherlands	1,131	56	11									
Spain	26,268	33,614	8,771	4,105	1,567							
Sweden	24,736	28,609	30,182	33,818	33,037	21,803	30,102	33,549	23,769	23,762	12,360	3,012
United Kingdom	24,734	34,234	28,221	13,678	72	169	1,596	2,286	1,155	930	102	
Australia	63,428	78,238	79,461	59,265	64,945	55,942	51,850	58,257	49,168	38,798	29,133	27,485
Canada	12,761	18,516	20,525	11,839	5,694	3,754	3,166	3,434	3,068	1,987	968	1,093
China	154,130	331,985	460,720	436,616	347,790	339,385	307,198	415,777	353,029	496,183	421,560	257,387
Japan	140,027	114,376	172,264	130,759	111,420	110,363	119,678	146,394	175,415	192,730	336,521	298,334
New Zealand	5,177	4,436	3,752	3,230	5,974	4,897	4,015	4,861	5,016	7,171	2,832	2,581
Republic of Korea	35,158	45,304	46,199	50,129	80,326	61,714	41,989	57,142	44,059	71,320	80,472	103,097
Switzerland	3,139	4,525	4,311	7,772	11,810	13,021	15,802	15,466	13,993	13,407	8,320	6,746
United States of America	63,333	64,391	85,041	93,457	91,606	100,966	77,867	93,183	94,836	59,626	43,926	30,991
SUB TOTAL: ALL DONORS:	940,762	1,221,922	1,287,426	1,254,330	1,214,496	1,113,048	1,036,137	1,262,456	1,217,457	1,637,789	1,855,761	1,731,558
NGO own funds	165,037	200,686	212,293	220,764	228,865	237,007	250,955	259,792	273,098	250,158	41,983	10,728
TOTAL DISBURSEMENTS	1,105,799	1,422,608	1,499,719	1,475,094	1,443,361	1,350,055	1,287,092	1,522,248	1,490,555	1,887,947	1,897,744	1,742,286

ANNEX 5

Disbursements & Projections by Sectors 2010-2021 (USD Thousand)

Sectors	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Health	211,384	205,314	203,044	203,483	204,794	204,034	216,955	187,643	220,970	244,217	156,180	114,095
Education	115,599	154,585	135,325	140,603	167,111	174,107	177,762	194,560	199,630	213,786	192,855	141,578
Agriculture	90,405	144,852	185,360	184,578	218,057	171,118	145,350	184,318	183,179	309,235	209,606	309,073
Manufacturing, Mining Trade	8,980	13,422	11,386	11,125	3,199	4,504	5,891	22,882	7,217	10,125	7,674	7,100
Rural Development	67,793	48,645	81,348	77,029	85,490	93,551	68,149	105,679	93,624	94,685	109,632	75,384
Banking and Business Services	30,860	73,139	3,978	43,780	14,280	26,971	13,585	11,635	8,503	2,792	886	117
Urban Planning & Management	10,878	2,679	11,934	252	6,560	7,448	5,970	4,230	11,327	55,852	88,939	129,241
Information and Communications	1,842	155	1,262	3,026	10,803	4,975	12,468	346	896	1,116	2,194	7,861
Energy, Power & Electricity	41,462	57,348	66,731	60,109	66,540	54,826	158,481	157,753	101,145	175,454	289,455	175,211
Transportation	184,722	271,173	383,567	378,950	309,414	286,813	190,814	267,910	303,148	348,161	488,108	495,257
Water and Sanitation	24,446	36,123	52,304	59,320	63,694	37,818	38,994	86,054	77,454	151,401	177,524	98,842
Community and Social Welfare	58,941	138,218	136,431	81,087	82,929	98,223	66,321	70,250	70,135	61,797	24,299	14,573
Culture & Arts	6,226	4,271	4,558	4,624	5,535	6,232	3,878	34,074	42,598	63,802	26,104	4,231
Environment and Conservation	36,805	18,132	14,155	24,264	26,765	33,132	30,075	27,669	43,013	36,058	17,325	13,687
Climate Change (adaptation & mitigation)	5,280	5,915	7,255	8,808	6,963	7,662	7,534	7,938	11,639	13,333	4,770	31,929
Gender	6,041	6,385	9,252	10,017	8,483	6,139	6,687	4,189	6,471	5,248	4,873	3,767
HIV/AIDS	46,397	69,389	33,533	34,668	45,754	30,186	23,855	23,920	13,461	11,722	1,132	
Governance & Administration	113,516	111,945	100,743	117,748	84,264	77,822	103,564	76,177	91,219	64,665	60,812	48,726
Tourism	3,980	2,166	775	737	605	1,834	1,407	14,963	2,792	7,133	8,732	401
Budget & BoP Support	319	322	14,766									55,913
Emergency & Food Aid	14,796	25,533	25,045	19,307	25,158	14,822	1,308	221	167	3,238	150	280
Others	25,126	32,897	16,969	11,577	6,964	7,837	8,044	39,836	1,968	14,128	26,493	15,019
TOTAL	1,105,799	1,422,608	1,499,719	1,475,094	1,443,361	1,350,055	1,287,092	1,522,248	1,490,555	1,887,947	1,897,744	1,742,286

ANNEX 6

Disbursements to Provinces 2017-2020 (USD Thousand)

No	Provinces	Donor	2017	2018	2019	2020
1	Banteay Meanchey	UNs	1,134	737	279	452
		IFIs	11,027	9,960	8,195	16,936
		European Union	5,805	7,215	6,052	1,537
		Bilateral	29,468	21,726	36,688	43,973
		NGO	10,187	9,631	7,909	2,467
		TOTAL	57,621	49,269	59,123	65,366
2	Battambang	UNs	1,618	1,294	2,591	4,548
		IFIs	17,457	17,504	25,659	29,343
		European Union	5,094	24,533	14,026	16,085
		Bilateral	46,075	39,610	57,700	76,913
		NGO	15,764	18,995	15,779	3,633
		TOTAL	86,009	101,936	115,755	130,521
3	Kampong Cham	UNs	2,006	1,621	858	2,983
		IFIs	9,733	8,946	11,463	15,774
		European Union	512	26,292	12,925	6,971
		Bilateral	30,731	44,535	48,756	61,812
		NGO	4,800	5,922	4,923	834
		TOTAL	47,782	87,317	78,925	88,374
4	Kampong Chhnang	UNs	2,069	1,494	2,122	2,249
		IFIs	4,931	7,594	13,133	14,721
		European Union	2,027	858	1,223	1,113
		Bilateral	15,468	31,395	19,040	40,878
		NGO	6,730	6,993	6,743	1,398
		TOTAL	31,225	48,334	42,261	60,358
5	Kampong Speu	UNs	1,669	1,581	1,630	1,275
		IFIs	4,447	6,144	4,082	6,512
		European Union	1,798	1,308	796	379
		Bilateral	38,215	21,520	19,683	27,873
		NGO	9,435	9,950	7,898	1,099
		TOTAL	55,563	40,504	34,089	37,137
6	Kampong Thom	UNs	3,203	2,764	3,639	2,594
		IFIs	17,287	17,698	20,271	23,372
		European Union	5,543	3,411	12,781	13,940
		Bilateral	19,706	8,718	12,567	13,612
		NGO	6,363	6,479	5,192	602
		TOTAL	52,101	39,070	54,450	54,120
7	Kampot	UNs	1,809	1,138	1,009	1,060
		IFIs	574	2,435	13,570	22,046
		European Union	3,127	2,209	2,667	1,557
		Bilateral	12,339	28,330	33,039	30,300
		NGO	5,795	7,231	6,235	806
		TOTAL	23,643	41,344	56,519	55,770
8	Kandal	UNs	1,600	1,084	2,152	2,030
		IFIs	3,167	3,691	3,706	2,865
		European Union	2,105	1,106	34,845	24,260
		Bilateral	22,486	24,673	27,807	37,260
		NGO	8,454	8,195	7,449	1,336
		TOTAL	37,812	38,748	75,959	67,752
9	Koh Kong	UNs	111	1		
		IFIs	1,945	3,252	6,862	2,975
		European Union	325	5,677	13,235	7,452
		Bilateral	865	2,909	12,094	11,662
		NGO	2,121	2,220	1,995	326
		TOTAL	5,367	14,060	34,186	22,415
10	Kratie	UNs	841	713	1,231	1,532
		IFIs	473	3,034	9,857	10,482
		European Union	2,472	6,706	13,530	7,675
		Bilateral	2,719	8,606	15,602	16,964
		NGO	6,282	7,095	4,456	1,627
		TOTAL	12,786	26,154	44,676	38,281
11	Mondul Kiri	UNs	166	159	255	456
		IFIs	1,734	3,127	5,813	2,472
		European Union	1,600	1,261	935	2,128
		Bilateral	14,134	411	8,178	14,426
		NGO	3,782	5,529	5,112	705
		TOTAL	21,416	10,487	20,292	20,187
12	Phnom Penh	UNs	1,022	1,108	4,589	4,917
		IFIs	2,071	3,395	16,206	1,511
		European Union	51,372	4,359	82,125	103,061

		Bilateral	118,564	150,404	204,171	246,343
		NGO	64,842	63,068	61,780	8,062
		TOTAL	237,870	222,334	368,870	363,895
13	Preah Vihear	UNs	1,201	997	1,379	1,319
		IFIs	455	273	126	718
		European Union	2,726	3,388	11,653	13,966
		Bilateral	6,096	4,254	21,299	24,418
		NGO	6,332	7,708	6,380	522
		TOTAL	16,811	16,620	40,837	40,942
14	Prey Veng	UNs	2,937	2,001	1,009	1,060
		IFIs	8,980	10,294	17,460	19,850
		European Union	2,225	1,211	919	889
		Bilateral	20,680	24,709	18,925	12,604
		NGO	5,711	6,395	3,954	518
		TOTAL	40,534	44,611	42,267	34,921
15	Pursat	UNs	1,574	1,201	1,673	1,860
		IFIs	4,675	6,980	25,834	10,503
		European Union	718	523	407	162
		Bilateral	42,920	25,463	42,855	30,443
		NGO	5,473	5,271	4,885	1,426
		TOTAL	55,359	39,438	75,655	44,393
16	Ratanak Kiri	UNs	318	367	1,127	850
		IFIs	439	351	501	1,843
		European Union	1,024	478	515	448
		Bilateral	68,459	17,277	16,302	13,469
		NGO	3,665	5,128	5,499	465
		TOTAL	73,906	23,601	23,944	17,074
17	Siem Reap	UNs	4,130	3,965	5,140	3,717
		IFIs	8,094	10,451	22,373	27,855
		European Union	11,614	9,573	11,358	12,256
		Bilateral	19,690	12,684	21,448	35,755
		NGO	46,179	45,941	47,958	9,033
		TOTAL	89,707	82,614	108,277	88,617
18	Preah Sihanouk	UNs	199	87	1,393	960
		IFIs	200	1,471	12,955	18,953
		European Union	1,872	570	610	847
		Bilateral	15,107	10,345	25,697	34,806
		NGO	5,311	5,680	5,103	936
		TOTAL	22,690	18,153	45,758	56,502
19	Stung Treng	UNs	946	764	776	1,025
		IFIs	795	2,504	14,110	10,078
		European Union	336	468	697	1,130
		Bilateral	11,280	3,757	18,255	25,309
		NGO	3,050	4,138	3,768	215
		TOTAL	16,407	11,631	37,606	37,758
20	Svay Rieng	UNs	2,038	1,354	1,664	1,518
		IFIs	3,616	5,649	6,830	21,731
		European Union	26	68	30	
		Bilateral	38,796	27,690	30,271	18,556
		NGO	4,486	4,913	2,019	205
		TOTAL	48,962	39,675	40,814	42,010
21	Takeo	UNs	1,647	1,247	1,738	3,563
		IFIs	1,149	2,004	2,010	3,508
		European Union	431	300	178	45
		Bilateral	6,616	5,798	4,146	5,215
		NGO	6,079	8,175	7,276	1,866
		TOTAL	15,921	17,524	15,348	14,196
22	Otdar Meanchey	UNs	716	588	457	394
		IFIs				
		European Union	3,157	3,278	1,160	1,523
		Bilateral	11,932	9,670	11,734	814
		NGO	3,738	3,817	2,706	1,298
		TOTAL	19,543	17,355	16,058	4,028
23	Kep	UNs	111		84	
		IFIs	355	412	1,876	2,809
		European Union	698		53	39
		Bilateral	12,738	25,487	28,648	
		NGO	707	917	704	96
		TOTAL	14,609	26,816	31,365	2,945