



Kingdom of Cambodia
Nation – Religion – King

Royal Government of Cambodia



DEVELOPMENT COOPERATION AND PARTNERSHIPS REPORT

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

March 2022



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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 achieved impressive milestones in ensuring inclusive and sustainable economic development. The economic growth rate was averaged a robust 7.7% for more than 2 decades, reflected by a well-performing track record of socio-economic progress, evident to reclassification of a Lower-Middle Income Country (LMIC) status in 2016 and the inclusion in the Least Developed Country (LDC) graduation list in 2021. However, the annual growth rate was contracted by 3.1% in 2020, which was merely attributed to the pandemic before resuming modest growth of 3% in 2021.

After circulated in late 2019, the COVID-19 pandemic has presented existential challenges to public health and the global economy. While COVID-19 has hit different countries with varying intensity, the ability to subdue the pandemic is an indicative benchmark for the government across the world. Cambodia is no exception to the unprecedented impacts unleashed by COVID-19. Given the high possibility of being heavily affected by COVID-19 with limited resources as a developing country, Cambodia has surprised the international community by effectively controlling the pandemic.

In response to the ramification of COVID-19, the RGC has deployed a systematic and a-whole-of-society approach to containing the outbreak and mitigating collateral damage in the most affected sectors. Acknowledging vaccines as a prominent tool to invert the pandemic situation and circumvent the underlying social and economic stagnation, the RGC has launched a nation-wide vaccination program in early February 2021, which has then been quickly accelerated, followed by a booster shot campaign. Cambodia's inoculation rate is outpacing most of Southeast Asian countries and many of the world's wealthiest nations.

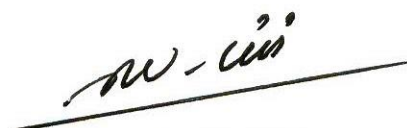
Despite change in financing modalities due to LMIC status and LDC graduation in conjunction with public resource competition among recipient countries and constraints on resource availability among donor countries in the last few years, the aggregate development cooperation inflow was robust. While grant provision has been stable, loan financing keeps increasing in both absolute and relative terms, which is associated with creditworthiness under the precautionous implementation of Public Debt Management Strategy. Development partner community has reinforced their commitment in supporting the RGC during the pandemic, accredited to important contribution to the vaccination campaign, support to COVID-19 emergency response, and dedicated finance directed to socio-economic recovery. The significant amount of ODA disbursement in 2020-2021 indicates a trusted partnership and development partner's joint effort with the RGC in the unanticipated circumstance.

Such tremendous achievements have precisely mirrored the political credential of the RGC with steadfast confidence and unwavering support from the public coupled with an overwhelming buy-in from the international community. The ample justification underpins the RGC to formulate a long-term national policy to re-capture the development momentum as Cambodia strives to achieve a resilient recovery.

To jumpstart a prudent and resilient recovery, the RGC has officially endorsed the Strategic Framework and Programmes for Economic Recovery in the Context of Living with COVID-19 in a New Normal 2021-2023 for gradually revitalizing and progressively regaining the impetus in advancing socio-economic development. The successful implementation of this strategic framework requires strengthening inclusive partnerships with and accumulating substantial support from all relevant stakeholders while addressing newly emerging challenges and transforming them into indispensable opportunities with a rigorously forward-looking approach to fast-evolving regional and global dynamics.

The overarching objective of the Development Cooperation and Partnerships Report is to monitor progress in development partnerships and provide an empirically evidence-based analysis of trends in development cooperation including the support to national development priorities, CSDGs, COVID-19 response, and social protection. This analytical work will also serve as an integral part of partnership assessment, which is used to guide the discussion and a reference point of entry for partnership dialogues. This comprehensive report will also help Cambodia ensure readiness for sustained graduation from the LDC grouping in the coming years. I am firmly confident that the analysis presented in this report offers profound insights to all policy makers, development partners, and relevant stakeholders. I would also like to acknowledge the outstanding work of the management and staff at the Cambodian Rehabilitation and Development Board of the Council for the Development of Cambodia who have devoted to this important exercise.

Phnom Penh, 29 March 2022

A handwritten signature in black ink, appearing to read 'Chhieng Yanara', is written above a solid black horizontal line.

CHHIENG YANARA

Minister Attached to the Prime Minister
Secretary General, CRDB/CDC

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Acronyms

3Rs	Recovery, Reform, and Resilience
ADB	Asian Development Bank
CCFTA	Cambodia-China Free Trade Agreement
CKFTA	Cambodia-Korea Free Trade Agreement
CSDGs	Cambodian Sustainable Development Goals
DCPR	Development Cooperation and Partnerships Report
DCPS	Development Cooperation and Partnerships Strategy
DPs	Development Partners
DPoA	Doha Program of Action
ECOSOC	Economic and Social Council
EU/EC	European Union/European Commission
EVI	Environmental Vulnerability Index
FDI	Foreign Direct Investment
FTAs	Free Trade Agreements
GAVI	Global Alliance for Vaccines and Immunizations
GDP	Gross Domestic Product
GNI	Gross National Income
GPEDC	Global Partnership for Effective Development Cooperation
HAI	Human Assets Index
IAEA	International Atomic Energy Agency
IDP	Industrial Development Policy
IFAD	International Fund for Agricultural Development
ILO	International Labour Organization
ISM	International Support Measure
KPIs	Key Performance Indicators
LDC	Least Developed Country
LMIC	Low-to-Middle-Income Country
M&E	Monitoring and Evaluation
MEF	Ministry of Economy and Finance
MoP	Ministry of Planning
MoWA	Ministry of Women's Affairs
MSMEs	Micro, Small and Medium Enterprises
MTR	Mid-Term Review
NCSD	National Council for Sustainable Development
NSDP	National Strategic Development Plan
NSPPF	National Social Protection Policy Framework
ODA	Official Development Assistance
PFM	Public Financial Management
PSD	Private Sector Development
RCEP	Regional Comprehensive Economic Partnership
RGC	Royal Government of Cambodia
RS-IV	Rectangular Strategy Phase-IV
SDGs	Sustainable Development Goals
SEZ	Special Economic Zone
SMEs	Small and Medium-Sized Enterprises
TVET	Technical and Vocational Education and Training
TWGs	Technical Working Groups
UNAIDS	Joint United Nations Programme on HIV/AIDS
UNCDP	UN Committee for Development Policy
UNDP	United Nations Development Program
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNFPA	United Nations Population Fund
UNICEF	United Nations International Children's Emergency Fund
UNIDO	United Nations Industrial Development Organization
VNR	Voluntary National Review
WB	World Bank
WHO	World Health Organization
WTO	World Trade Organization

Executive Summary

Under the wise and visionary leadership of **Samdech Akka Moha Sena Padei Techo HUN SEN, Prime Minister of the Kingdom of Cambodia**, Cambodia has maintained peace, stability, social order, prudent macro-economic management and sound governance reforms as the foundation for inclusive and sustainable development. Such significant achievements have been reflected through increased ownership and capacity, and strong political leadership of the RGC towards achieving national development objectives. At the same time, the RGC acknowledges the significant roles of the ODA and other sources of development finance, including the private sector, in the development process in order to build a solid foundation for realizing Cambodia Vision 2030 and 2050, especially the transition to LDC graduation.

Cambodia is among the countries that have been impacted by the fast-evolving context and challenges, especially the COVID-19 pandemic. Nevertheless, the RGC, in collaboration with its development partners, acted swiftly in response to the challenges by implementing a number of policy interventions. With the National Vaccination Campaign, the NSPPF 2016-2025, the Strategic Framework and Program for Economic Recovery in the Context of Living with COVID-19 in a New Normal (2021-2023), and the Digital Economy and Society Policy Framework (2021-2035), Cambodia was able to control the pandemic while witnessing a positive growth of 3% in 2021, and the growth is expected to increase by 5.6% in 2022 and 6.5% in 2023.

Development Partnerships

With reference to the NSDP and the RS-IV, the RGC implements the Development Cooperation and Partnerships Strategy (2019-2023) that sets out principles, mechanisms and tools for promoting effective development cooperation and result-based partnerships while monitoring the development effectiveness indicators against the global partnership principles.

In regard to partnership performance, the use of government's results framework was almost 10% ahead of the 2023 target of 80% in 2021. In the meantime, both aid on budget and predictability were recorded on-track at 86% and 96% in 2021, respectively. For untied aid, it accounted for 77%, a slight increase from 74% in 2020. However, for the use of country systems, only 74% and 38% of ODA is being disbursed by using the PFM and the procurement system.

Trends in Development Cooperation

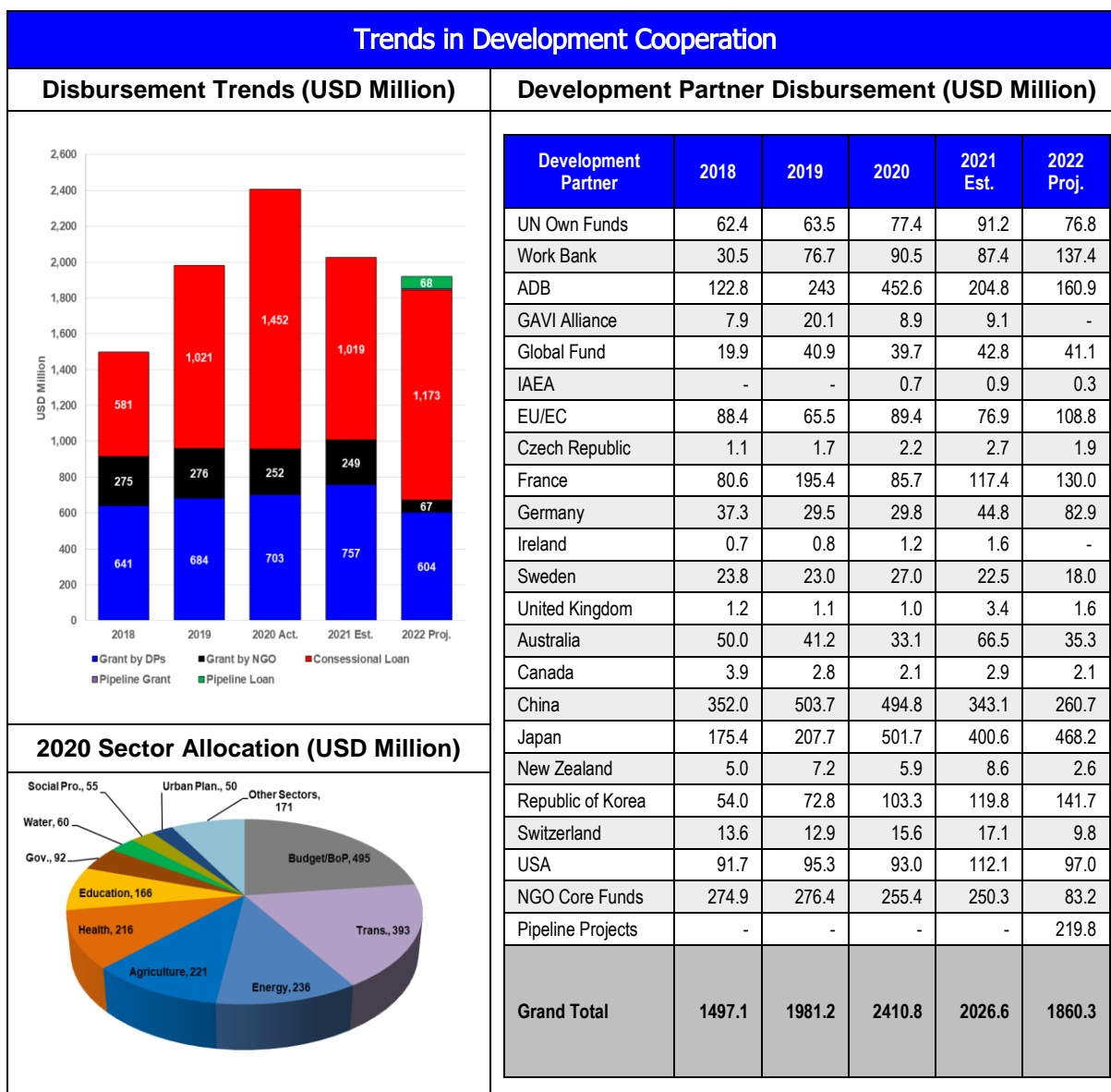
Despite the public resource competitions among the recipient countries and the constraints on availability among donor countries, from 2019 to 2021, total disbursement was roughly USD 2 billion per annum. In 2020, there was a significant increase to USD 2.4 billion, with an increment of 22% from 2019, due to the provision of two projects with large single-disbursements to combat COVID-19 and support Government's recovery effort. However, it is estimated to decrease around 16% in 2021. In proportion to total ODA 2020, grant assistance went up to USD 959 million, which shared 40% of total ODA (9% decrease from 2019). Loan, which peaked at USD 1,452 million and shared 60% of total ODA (9% increase from 2019), was immensely contributed by China, Japan, ADB, WB, Republic of Korea, and France.

Aid/GDP ratio has declined between 2013 and 2018, which reflected a relatively higher GDP growth compared to the increase of ODA volume. However, this ratio picked up to 9% due to the increase in loan disbursements coupled with the negative GDP growth caused by the COVID-19 pandemic. From 2021 to 2022, the economy has begun to bounce back, and total ODA disbursement leveled off while aid/GDP ratio is expected to decrease significantly to around 6% in 2022.

Between 2018 and 2022, China, Japan, Korea, and France were the biggest bilateral partners, whereby ADB and WB were the largest providers as international financial institutions. China, Japan, and Korea largely increased their disbursements from USD 784

million in 2019, approximately 40% of total ODA, to USD 1,100 million in 2020, about 46% of total ODA.

Trends in sectoral allocations of development assistance in 2018-2022 are well-aligned with the RGC's priorities as articulated in the RS-IV. Significant funds were allocated to health, education, agriculture, transportation and energy, all of which shared 57% and 70% of all assistance in 2020 and 2021. These investments highlighted government's priorities for social and economic development and enabling growth in line with the RGC's progress in implementing the IDP 2015-2025, and the government's effort to COVID-19 social and economic response and recovery.



ODA Support to COVID-19 Response and National Social Protection Policy Framework

The emergence of COVID-19 pandemic has battered the global economy to recession since early 2020. Cambodia also experienced the slowdown of economy and the reduction of social welfare. Nevertheless, under the RGC's strong leadership and collaborative efforts, the country was able to effectively contain the pandemic and was quick to recover the economy. Of all the interventions, noticeable responses are as follows: the vaccination and booster shot campaigns, the emergency response, and the socio-economic recovery.

Approximately 15.3 million doses of vaccines, equivalent to USD 108 million, have been donated to Cambodia, thanks to the RGC's extensive partnerships with all stakeholders. China remains the biggest vaccine donor providing 8.3 million doses, whereby the COVAX facility provided 3 million doses. A large portion of the government's budget was also allocated to purchase 28 million doses. Aside from the provision of vaccine, the total ODA of USD 162 million in 2020 and USD 812.75 million in 2021 were disbursed to support

emergency response, especially health sector, and socio-economic recovery, respectively. In the social protection sector, health insurance scheme of social security received most of disbursements, about USD 50 million in 2020. For support outside the social protection sector yet has certain contribution to NSPPF, only social assistance was focused, especially human capital development with USD 9 million of support.

Cross-Cutting Thematic Profiles

Total ODA to the gender sector increased from USD 5.94 million in 2020 to USD 6.60 million in 2021, whereby gender mainstreaming accounted for USD 465.08 million in 2021. Nevertheless, total disbursement to the climate change sector decreased from USD 9.01 million in 2020 to USD 8.28 million in 2021 despite the development partners' commitment. In the meantime, climate change mainstreaming had a small portion of approximately 18% of total disbursement.

Private sector development remains a priority for the RGC to promote national growth. In 2021, ODA amounted to USD 693 million, accounting for 34.25 % of total ODA disbursement, contributed to private sector development mainstreaming, with a 13% average increase from the previous year. The top sectors to mainstreaming private sector development are follows: 1). transportation, 2). energy, power and electricity, 3). manufacturing, mining trade, 4). tourism, and 5). banking and business services.

ODA Support to Cambodia Industrial Development

The effective implementation of the IDP 2015-2025 leads to the simultaneous Cambodia's industrial development and sustainable growth. ODA plays a catalytic role in leveraging other forms of development finance to support the IDP implementation and its priorities.

In 2019, support to the IDP amounted to USD 300.3 million, which accounted for 17.6% of total ODA (excluding NGO funds), targeting the IDP's four key concrete measures, policy measures and action plans. This disbursement increased by 6% in 2020, reaching USD 318.3 million. In 2021, the amount was estimated around USD 306.1 million, of which two-third of the support was provided to the four key concrete measures where USD 190.7 million was directed to the energy sector (mainly contributed by China and Japan).

ODA Support to the Cambodian Sustainable Development Goals

There has been notable progress in ODA Support to the CSDGs. CSDG Goal 3 "Good Health and Well-Being" and CSDG Goal 9 "Industry, Innovation, and Infrastructure" were the most-receiving-support goals. Goal 3 received USD 151 million and USD 562 million while Goal 9 received USD 557 million and USD 540 million, in 2019 and 2020 respectively. This reflects the alignment of development partners' support with national priorities areas of human capital, infrastructure development, and COVID-19 health response.

Least Developed Country (LDC) Graduation – Cambodia

In 2021 CDP's triennial review, Cambodia was listed in the LDC graduation list. The LDC graduation brings about a strong signal of good international image and recognition of achievements in maintaining peace, political stability, social order, macroeconomic and sustainable development. This, in turn, creates a conducive environment for private investment, including FDI. However, the prospect of LDC graduation will result in the loss of the preferential treatment, the possible reduction of ODA grants and less concessionality on loans. In this meantime, the RGC has already contemplated the measures. With a number of FTAs like the CCFTA, the CKFTA and the RCEP already being concluded, the remaining tasks are the preparation and readiness for opportunities. To achieve the sustained LDC graduation, a range of policy recommendations and priority areas are as follows:

- ***Human Capital Investment:*** The enhancement of education, public health, and social protection, particularly the NSPPF embedded in the socio-economic recovery plan, is the focal point for human capital investment.
- ***Industrial Policy:*** The empowerment of the MSMEs is the way forward for enabling business environment, alongside job creation. Whereas, the establishment of SEZs paves the way for structural transformation.

- **Infrastructure and Logistics:** The development of quality bridges, roads, communication, and other facilities is essential for economic mobility with the aim of strengthening economic competitiveness.
- **Economic Diversification:** The attraction of FDI, through the bilateral and regional free trade agreements like the CCFTA, CKFTA and RCEP, is the foundation of industrialization, which in turn creates competitiveness and diversification with the purpose of exporting manufactured products and reducing poverty.
- **New Skills Development:** The continuation of Digital Economy and Society Policy Framework 2021-2035 is the necessity for developing digital-related skills in order to adapt and be relevant to the world's current trend, of which it is the digital economy.
- **Resource Mobilization:** Both domestic and external development finance assume a distinct yet supportive role in bridging LDC graduation. CSDG 17: Partnership for the Goals highlights its substantially meaningful role and can be undertaken through strengthening global partnerships to mobilize additional ISMs and actions in favor of LDCs.

In conclusion, external resources continue to play an important role in Cambodia's socio-economic development, especially in the context of the pandemic. These resources continue to complement domestic finance and other sources of development finance, including those from the public and private sector and south-south cooperation, to achieve national development goals. In this sense, the RGC is highly committed to strengthening effective development cooperation and inclusive partnerships with all development actors for the effective mobilization, coordination and management of such important development finance.

1. Introduction: Development Cooperation in Context

The Royal Government of Cambodia (RGC) has endeavored to consolidate peace, stability, social order, solidarity, harmony, and decent livelihood that laid a foundation of inclusive and sustainable development more than two decades. Undergone a series of major milestones, the country has navigated through a successful developmental path that maximizes socio-economic welfare and prosperity for its people. This remarkable socio-economic development enabled Cambodia to attain a Lower-Middle Income Country (LMIC) threshold in 2016 and aspires to graduate from the Least Developed Country (LDC) group after being firstly listed in the 2021 graduation list.

These tremendous achievements are attributed to the visionary leadership of **Samdech Akka Moha Sena Padei Techo HUN SEN, Prime Minister of the Kingdom of Cambodia** toward Cambodia's dynamic, inclusive, and resilient economic development processes. The government efforts in combination with the supports from development partners, alongside other resources including those from the private sector to implement the national development agenda have accelerated Cambodia's economic development to date. The RGC therefore recognizes the central role of ODA in development, transition to LDC graduation and in the realization of Cambodia's ambition to become an Upper-Middle Income Country by 2030, and High-Income Country by 2050.

Cambodia's economic performance is marked by notable progress. However, such gradual economic transformation has encountered formidable challenges, especially given global headwinds. The shrunken global public goods, increased complexity in global economy, the growing economic interdependence, the rise of digital economy and technological revolution, the growing concern over environmental issues, and the high level of pressing social security needs are all demanding collaborative efforts.

The trend of contemporary globalization continues to intensify and the development contexts are fast-evolving. The trade-related aspect has potentially impacted development cooperation landscape. As Cambodia gradually integrated into the international market through various FTAs (with China and Korea, for example) and the recent ratified RCEP, development cooperation partnerships among countries in the South, a so called South-South Cooperation model, will be increasingly promoted.

In addition, the COVID-19 pandemic has shaped the development cooperation and partnership practices. The COVID-19 outbreak, conceived as a transnational issue, reversed years of development progress and put key SDG targets at risk, shifting global attention to the principle of building resilience and better together. Therefore, the new challenge demanded that Global Partnership for Effective Development Cooperation (GPEDC)'s development effectiveness principles to be revisited.

The COVID-19 impact reinforced the shift of development cooperation objectives from economic growth and good governance to human security in terms of global health, climate change, and food security which will become the focus of post-COVID-19 development cooperation. The cooperation for COVID-19 vaccine is indicative of the need for global public goods provision shaping new global development architecture. In this sense, beyond donor-recipient model, the new development cooperation model in the pandemic context entails more active roles of fast-growing economies such as the People Republic of China, Japan and the Republic of Korea in the development assistance system forging a convergence of global efforts in conquering COVID-19 and achieving economic recovery.

Like many other developing countries, Cambodia and its economy is devastated by the detrimental effects of the COVID-19 pandemic, adding further burden to its health facilities and other sectors in 2020. As the pandemic unfolds, the negative impact causes in falling domestic revenues, reductions in private investment including foreign direct investment, a loss of income generated by tourism on a large scale, a significant fall in remittances, declining SMEs' activities, and the overall economy contracted owing to export demand shock and supply chain disruption in international trade. All leads up to rising poverty rate that hinders Cambodia progress towards achieving national development agenda, the Cambodian Sustainable Development Goals (CSDGs) and has implications on progress towards LDC graduation.

To manage the crisis, the RGC, with the wise and pragmatic leadership, has mounted an impressive successful control over the pandemic. The government has taken swift robust response through a series of key interventions on public health to contain COVID-19. The RGC has also launched a series of intervention measures to effectively implement the National Social Protection Policy Framework (2016-2025) with an aim to maintain macroeconomic stability and mitigate the collateral damage in the COVID-affected sectors as well as to secure income and welfare of the most vulnerable groups. All is significant RGC's effort in deploying "a whole of government" approach for imposing timely policy measures and strengthening the collaboration with relevant stakeholders adhered to "the whole of society" approach to address the COVID-19 pandemic.

As a result, the support measures initiated by the RGC have seen the economy registered a positive growth rate at 3% in 2021 after experiencing the negative growth of 3.1% in 2020. This positive leap reinforced by the COVID-19 National Vaccination Campaign based on the "Blossom" approach suggests that the economic prospect will increase by 5.6% in 2022 and 6.5% in 2023. As a reflection of the RGC's all-embracing vaccination campaign, together with continued support from development partners, Cambodia is celebrated for quickly vaccinating its population at almost 90% rate placing Cambodia in one of the top vaccinated countries. Despite good progress, the current outlook is full of uncertainties shaped by the emerging COVID-19 new variants.

The pandemic brings new opportunity for Cambodia to advance its socio-economic development to be more inclusive, sustainable and resilient. To facilitate a robust transformation and recovery, the RGC has therefore introduced "The Strategic Framework and Programmes for Economic Recovery in the Context of Living with COVID-19 in a New Normal 2021-2023", as an integral national framework which identifies the focus on 3Rs pillars: Recovery, Reform, and Resilience. Adoption of technology, particularly the Industry 4.0 technologies, plays an important role in navigating Cambodia through the disruptions caused by COVID-19. In this sense, the RGC endorsed "Digital Economy and Society Policy Framework 2021-2035" to take advantage of digital technology as a value-added potential to increase productivity and economic efficiency and promote economic diversification.

The effective implementation of the Industrial Development Policy (IDP) 2015-2025 marks the direction of socio-economic transformation on Cambodia's industrial structure to a skill-driven industry. The IDP assumes a critical role to promote economic diversification, competitiveness, productivity, and technological knowledge. The first phase of IDP's implementation and its impact on Cambodia's socio-economic was assessed in the Mid-Term Review that outlines key policy recommendations to expedite its implementation in the second phase 2021-2025 and beyond. The new Law on Investment has been promulgated as the legal instrument to promote investment and enhance the effective implementation of IDP.

In the meantime, the RGC is strongly committed to the RS-IV to guide the national development agenda operationalized by the NSDP that incorporates the CSDGs. The NSDP has been mid-term reviewed to identify priorities to guide the next step of its implementation while taking stock of COVID-19 context that influences the reprioritization.

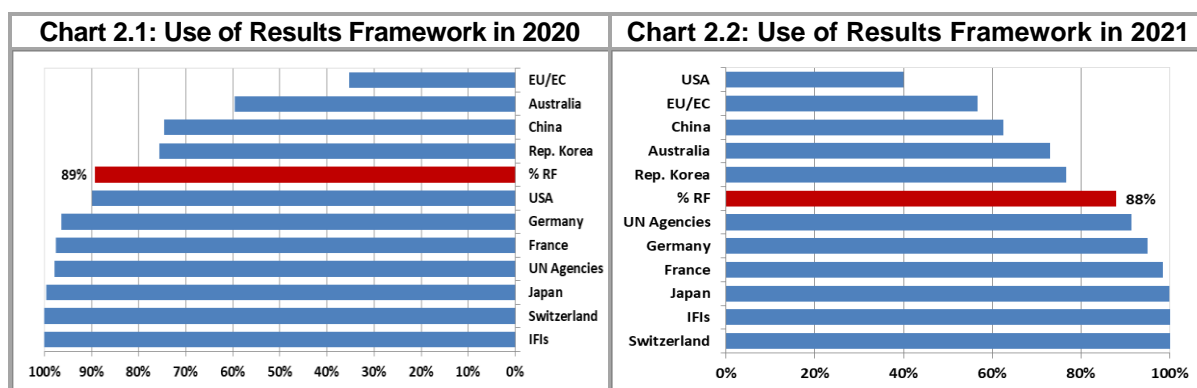
In this respect, effective development cooperation is increasingly significant, especially in this pressing context. The RGC therefore reaffirms the importance of ODA as a catalyst combined with domestic resource and other forms of development finances, contributing to the socio-economic development of Cambodia, especially to support the COVID-19 response and recovery and smooth pathway to LDC graduation.

CRDB/CDC, as the RGC's coordinating agency, takes its leading role to promote development effectiveness through the implementation of the Development Cooperation and Partnerships Strategy (DCPS) 2019-2023 which has established principles, tools, mechanisms, and guidelines to ensure the RGC's ownership and strengthen development cooperation and partnerships to attain the national development goals and priorities. The Development Cooperation and Partnerships Report (DCPR) for 2020-2021 has been prepared to inform the trends of ODA. The analysis will be used as inputs to inform the policy decision-making process concerning the use of development cooperation resources in the most effective manner and to further strengthen development partnership, especially in the wake of the COVID-19.

2. Development Partnerships

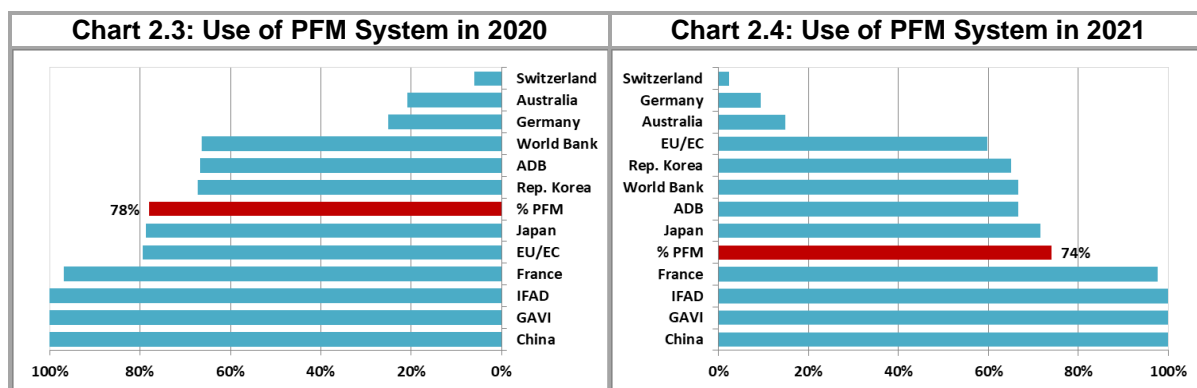
Progress on Development Partnerships

The RGC has fully committed to the global partnership principles as articulated in the Busan declaration. The firm commitment and concerted effort were well reflected by the continued engagement in the Global Partnership Initiatives as well as the incorporation of partnership principles in the result-based KPI monitoring framework of the RS-IV. These partnership commitments were operationalized through the NSDP 2019-2023 and fully implemented by the DCPS 2019-2023. All development effectiveness indicators were used as references for formulating the results framework of the DCPS and regularly monitored by the annual DCPR. This chapter will, therefore, assess partnership performance against the targets set in the RS-IV, NSDP, and DCPS. This analysis will also serve as an integral part of partnership assessment, which is used to guide the discussion for Action Dialogue as well as a reference point of entry for other partnership dialogues.



* As % of Funding to Public Sector

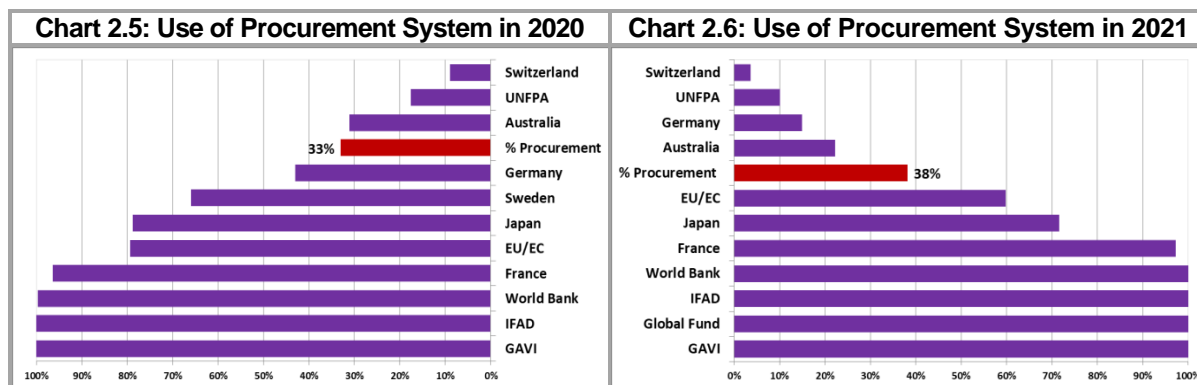
The RGC has effectively promoted the use of results framework. The performance was indicated by overly achieving nearly 90% in 2021 compared to the target of 80% by 2023. The accomplishment was derived by the effort of the RGC in enabling policy coherence at national planning particularly in the NSDP and at sectoral level. In the meantime, most government ministries and agencies formulated their respective sector results framework. The results frameworks were widely used by development partners. All International Financial Institutions including ADB and World Bank fully used the country results framework. UN agencies in average achieved more than 90% in both 2020 and 2021. EU/EC slightly increased from 35% in 2020 to 57% in 2021. However, for USA, the percentage declined from 90% in 2020 to only 40% in 2021. Other development partners aligned their results framework for more than 60%.



* As % of Funding to Public Sector

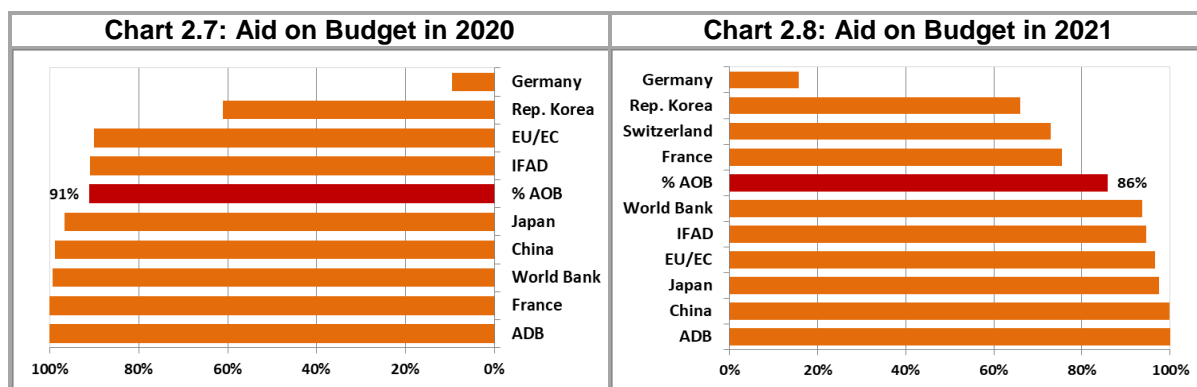
For the use of country systems, 78% of ODA disbursed to the public sector in 2020 was reported to be included in the national PFM system. This percentage, however, decreased to only 74% in 2021, which below the DCPS's baseline of 76%. Although concessional loans gradually increased, some partners still use their own budgeting systems, especially budget reporting and auditing systems. GAVI and IFAD are multilateral partners who used the PFM system for fully 100% of their portfolio along with bilateral partners including China and

France as loan financing uses PFM systems by its default. Other bilateral partners show mixed performance toward the use of the PFM system. The use of PFM system by Australia went down from 21% in 2020 to only 15% in 2021. Meanwhile, Germany's portfolio recorded the decreased from 25% to 9% in the same period.



* As % of Funding to Public Sector

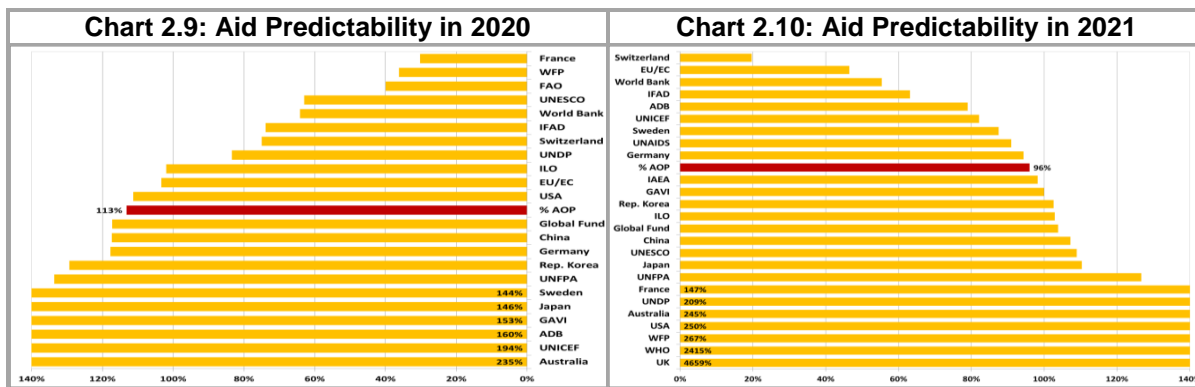
The second component of country systems is the use of a national procurement system. Using country procurement system remained a challenging issue for many development partners. In 2020, only 33% of disbursements to the public sector were recorded as using the RGC procurement system (45% less than the use of PFM system). The percentage increased to 38% in 2021, which informed limited progress as it was below the DCPS's baseline of 44%. This result mainly caused by the change in recording method of ADB's projects. IFAD, GAVI, World Bank reported the full use of national procurement system of their assistance whereas EU/EC and Japan showed modest performance, which accounted for 60% and 70% respectively of their portfolio. UNFPA and Switzerland reported their use of the procurement system but with a limited amount to less than 10% and 4% respectively. 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 slightly declined from 91% in 2020 to 86% in 2021. The percentage of ODA recorded on the national budget slightly declined as the performance of most development partners fell behind the average of aid on budget (86%). World Bank decreased their on-budget portfolio from almost 99% in 2020 to 94% in 2021. IFAD recorded a minimally increase from 91% to 95% in the same reporting years. All development cooperation from China, Japan, and ADB were reported on-budget.

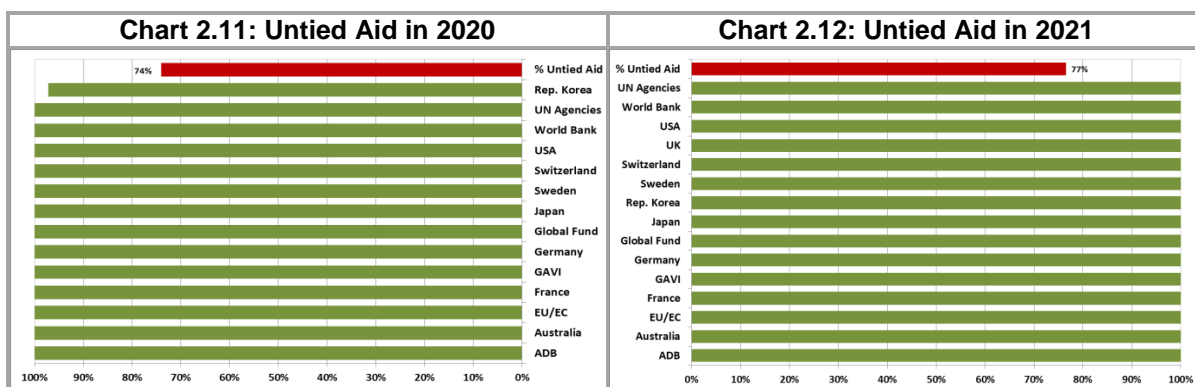
Since on-budget ODA was almost at the saturation point, further efforts should be paid particularly to major loan providers as their concessional loans were systematically under the supervision and management of the MEF and inevitably included in the budget law. In addition, ODA grants provided to budget support and investment project/program were included in the budgeting system and recorded as on-budget. Keeping the progress on track is imperative to achieve the DCPS's target of 95% by 2023.



* As % of Funding to Public Sector

At the aggregate level, Cambodia performed well against its aid predictability indicator. Annual predictability accounted for 113% in 2020 and 96% in 2021, which were practically at a preferable rate of $\pm 15\%$. In 2020, partners including ILO, EU/EC, and USA reported their plan and disbursement in a predictable manner, roughly 100% of their portfolio. China, Germany, and Global Fund disbursed their ODA to the public sector at a predictable rate of $\pm 17\%$. Development cooperation from Australia (235%) and UNICEF (194%) was recorded unpredictable while several partners did not provide any indicative plan of disbursement for calculating predictability. Moreover, aid predictability of ADB and Japan increased to 160% and 146% since these two partners provided a single disbursement of their project to support the national response to fight against COVID-19 pandemic in 2020.

In 2021, ODA from some development partners including WHO, UK, USA, Australia, and UNDP were still unpredictable reaching twofold to fortyfold difference between their planned and actual disbursements. China, Japan, Republic of Korea, and Germany reported their development cooperation in a predictable manner. 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) inaccurate 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

The level of untied aid has improved minimally, which increased from 74% in 2020 to 77% in 2021. Although the percentage of untied aid was moderate, most development partners show remarkable achievements in fully or partially untying their development cooperation, moving over the average rate. However, development assistance from Southern partners particularly from China was not counted as untied aid due to its definition. The aggregate level of the untied aid was, therefore, associated with the proportion of development cooperation from China since China is one of the largest providers in Cambodia.

Table 2.1: Development Effectiveness Indicators by Development Partner

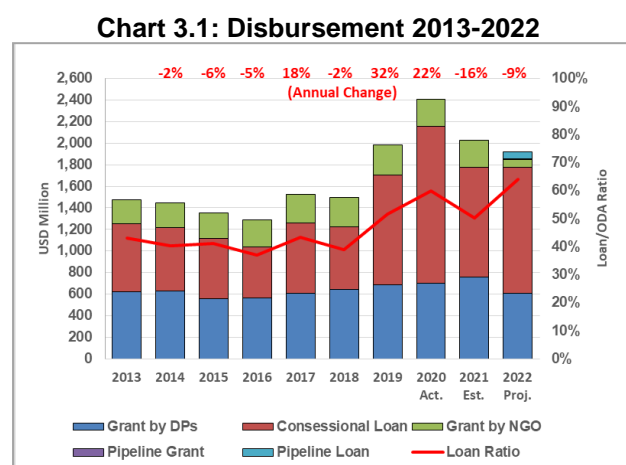
Development Partner	Use of Results Framework (%)		Use of PFM Systems (%)		Use of Procurement Systems (%)		Aid on Budget (%)		Annual Predictability (%)		Fully and Partially Untied Aid (%)		Medium-term Plan Share with RGC	
	2020 Act.	2021 Est.	2020 Act.	2021 Est.	2020 Act.	2021 Est.	2020	2021	2020	2021	2020	2021	2020 Act.	2021 Est.
UN Agencies														
FAO	100	100	0	0	0	0	0	0	40	0	100	100	Yes	Yes
IAEA	87	78	0	0	0	0	0	0	0	98	100	100	No	No
IFAD	100	100	100	100	100	100	91	95	74	63	100	100	Yes	Yes
ILO	100	100	0	0	0	0	0	0	102	103	100	100	Yes	Yes
UN Women	0	0	0	0	0	0	0	0	0	0	0	0	No	No
UNAIDS	100	100	0	0	0	0	0	0	0	91	100	100	Yes	Yes
UNCOCHR	0	0	0	0	0	0	0	0	0	0	0	0	No	No
UNDP	100	100	0	0	0	0	0	0	83	209	100	100	Yes	Yes
UNESCO	90	100	0	0	0	0	0	0	63	109	100	100	Yes	Yes
UNFPA	100	100	12	7	18	10	0	0	134	127	100	100	Yes	Yes
UNICEF	100	100	100	100	0	0	0	0	194	82	100	100	Yes	Yes
UNIDO	0	0	0	0	0	0	0	0	0	0	0	0	Yes	Yes
WFP	100	35	0	0	0	0	0	0	36	267	100	100	Yes	Yes
WHO	100	100	0	0	0	0	0	0	0	2415	100	100	Yes	Yes
Multilateral Partners														
ADB	100	100	67	67	0	0	100	100	160	79	100	100	Yes	Yes
GAVI	0	0	100	100	100	100	0	0	153	100	100	100	No	No
Global Fund	100	0	0	0	0	100	0	0	117	104	100	100	Yes	Yes
World Bank	100	100	66	67	100	100	99	94	64	55	100	100	Yes	Yes
European Partners														
EU/EC	35	57	79	60	79	60	90	97	103	47	100	100	Yes	Yes
Czech Republic	0	0	0	0	0	0	0	0	0	0	0	0	Yes	Yes
France	98	99	97	98	96	97	100	75	30	147	100	100	Yes	Yes
Germany	96	95	25	9	43	15	10	16	118	94	100	100	Yes	Yes
Ireland	0	0	0	0	0	0	0	0	0	0	0	0	No	No
Sweden	66	0	44	0	66	0	0	0	144	87	100	100	Yes	Yes
Switzerland	100	100	6	2	9	4	0	73	75	20	100	100	Yes	Yes
UK	0	0	0	0	0	0	0	0	0	4659	0	100	Yes	Yes
Bilateral Partners														
Australia	60	73	21	15	31	22	0	0	235	245	100	100	Yes	Yes
Canada	0	0	0	0	0	0	0	0	0	0	0	0	Yes	Yes
China	75	77	100	100	0	0	100	100	117	107	0	0	Yes	Yes
Japan	100	100	79	72	79	72	97	97	146	110	100	100	Yes	Yes
New Zealand	0	0	0	0	0	0	0	0	0	0	0	0	Yes	Yes
Republic of Korea	76	77	67	65	0	1	61	66	129	103	97	100	Yes	Yes
USA	90	40	0	0	0	0	0	0	111	250	100	100	Yes	Yes
Total	89	88	78	74	33	38	91	86	113	96	74	77	99	99

From the reviewing exercise of the performance assessment on partnership indicators in Cambodia both in 2020 and 2021, a brief evaluation of the DCPS's results framework can be made. Based upon the monitoring reviews, the overarching principles of the DCPS and its originally set targets are still relevant within this fast-evolving and unanticipated circumstance. The use of results framework and forward planning were ahead of the targets. Aid on budget and predictability were recorded on-track, and are expected to be achieved by 2023. However, more effort should be paid to the use of country system since both the national PFM and procurement system were not widely used by many development partners.

3. Trends in Development Cooperation

The Royal Government of Cambodia (RGC) has achieved sustainable and inclusive socio-economic development while acknowledging the effort and contribution of its development partners through effective cooperation and partnership. To visualize such progress, this chapter provides an analysis of Official Development Assistance (ODA) disbursements over a medium-term trend with specific emphasis on the actual disbursements for 2020, estimation for 2021 and projections for 2022, based on the data extracted in January 2022 from the Cambodia ODA Database managed by CRDB/CDC. The analysis will show composites of the disbursements, highlight major changes in donor and sector disbursements, and reflect the roles of ODA in supporting government’s development effort.

Trends of ODA Disbursement

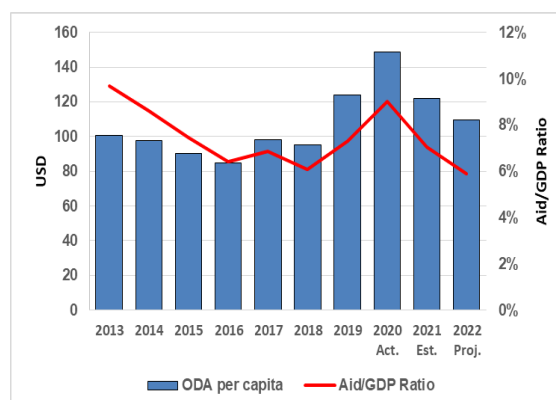


The ODA disbursement in 2020 was approximately USD 2.41 billion, a significant increase from USD 1.5 billion in 2018 and USD 2 billion in 2019 despite constraints on public resource availability in donor countries in the last few years. However, the disbursement for 2021 is expected to slightly decrease to USD 2.03 billion. The loan ratio continues to increase over the reporting years. The loan share remains relatively stable at 50% in 2019 and 2021; however, it went up to 60% in 2020 due to the “single disbursement” applied by some loan providers.

ODA per Capita and Aid/GDP Ratio

Chart 3.2 reveals the trends of development cooperation provision and its relative importance in contributing to national development, for instance, indicated in the share of GDP. Aid/GDP ratio has gradually declined between 2013 and 2018, which reflected high GDP growth. However, this ratio picked up to 9% in 2020 due to the increase in loan disbursements coupled with the negative GDP growth caused by the COVID-19 pandemic. For 2021 and 2022, the economy has begun to bounce back, and the total ODA disbursement was level off while aid/GDP ratio is expected to decrease significantly to around 6% in 2022. ODA per capita trend was generally increasing since 2016 and peaked in 2020. In short, the ODA’s relative share of financing in national development declines although actual aid volumes may remain stable or even increase, except in 2020 when both the actual volume and share reached the peak.

Chart 3.2: ODA Per Capita and Aid/GDP Ratio



Disbursement by Development Partner

Table 3.1 illustrates the total disbursement from all development partners between 2013 and 2022. The expansion of support is noteworthy among the international financial institutions. In 2020, the ADB almost doubled its disbursements from the previous year to USD 453 million with a single disbursement project (valued at USD 250 million) to support the COVID-19 recovery effort. The World Bank also increased its disbursements from USD 76.7 million in 2019 to USD 90.5 million in 2020. However, in 2021, the combined disbursements from

the ADB and World Bank were around USD 300 million. UN agencies gradually increased their support from USD 63.5 million in 2019 to more than USD 90 million in 2021.

Table 3.1: ODA Disbursement by Development Partner (USD Million)

Development Partner	2013	2014	2015	2016	2017	2018	2019	2020	2021 Est.	2022 Proj.
UN Agencies										
Total Program Funds	100.6	107.2	93.7	91.7	87.4	86.2	83.7	94.7	124.2	-
UN Own Funds	50.1	53.9	47.1	65.7	59.4	62.4	63.5	77.4	91.2	76.8
Multilateral Partners										
World Bank	35.5	50.6	17.6	17.6	21.1	30.5	76.7	90.5	87.4	137.4
ADB	171.4	129.8	137.2	118.2	125.7	122.8	243	452.6	204.8	160.9
GAVI Alliance	10.7	5.5	19.0	16.3	10.9	7.9	20.1	8.9	9.1	-
Global Fund	45.4	54.6	33.3	28.2	33.1	19.9	40.9	39.7	42.8	41.1
Sub-Total	313.0	294.4	254.3	246.0	250.1	243.6	444.2	669.8	436.2	416.5
European Partners										
EU/EC	36.6	70.3	55.8	55.7	50.8	88.4	65.5	89.4	76.9	108.7
Czech Republic	1.0	1.2	1.2	1.5	1.3	1.1	1.7	2.2	2.7	1.9
France	17.8	59.5	63.3	32.1	90.8	80.6	195.4	85.7	117.4	130.0
Germany	34.3	29.8	25.8	46.9	38.4	37.3	29.5	29.8	44.8	82.9
Ireland	1.2	0.7	0.6	0.6	0.7	0.7	0.8	1.2	1.6	-
Sweden	33.8	33.0	21.8	30.1	33.5	23.8	23.1	27.1	22.6	18.0
United Kingdom	13.7	0.07	0.2	1.6	2.3	1.2	1.1	0.9	3.4	1.6
Sub-Total	148.3	200.6	168.7	168.6	217.8	233.0	317.0	236.2	269.3	343.2
Bilateral Partners										
Australia	59.2	64.9	55.9	51.9	58.3	50.0	41.2	33.1	66.5	35.3
Canada	11.8	5.7	3.8	3.2	3.4	3.9	2.8	2.1	2.9	2.2
China	436.6	347.8	339.4	307.2	415.8	352.0	503.7	494.8	343.1	260.7
Japan	130.8	111.4	110.4	119.7	146.4	175.4	207.7	501.7	400.6	468.2
New Zealand	3.2	6.0	4.9	4.0	4.9	5.0	7.2	5.9	8.6	2.6
Republic of Korea	50.1	80.3	62.0	42.0	57.1	53.8	72.8	103.3	119.8	141.7
Switzerland	7.8	11.8	13.0	15.8	15.5	13.6	12.9	15.6	17.1	9.8
USA	93.5	91.6	101.0	77.9	93.2	91.7	95.3	93.0	112.1	97.1
Sub-Total	793.1	719.6	690.4	621.6	794.5	745.6	943.6	1,249.4	1,070.7	1,017.4
NGO Own Fund	220.8	228.9	237.0	251.0	259.8	274.9	276.4	255.4	250.3	83.2
Grand Total	1,475.1	1,443.4	1,350.1	1,287.1	1,522.2	1,497.1	1,981.2	2,410.8	2,026.6	1,860.03

Many bilateral partners also increased their support in 2019 and 2021. China, Japan, and Korea largely increased their disbursements from USD 784 million, approximately 40% of total ODA in 2019, to USD 1,100 million about 46% of the total ODA in 2020. Disbursements by European Union member states show an increasing trend from 2020 to 2021. Total assistance from European partners was 269 million in 2021 (13% of total ODA) which increased from USD 236 million in 2020 (10% of total ODA) although these amounts were less than the disbursement in 2019 (USD 317 million accounted for 16% of total ODA). Overall, from 2019 to 2021, the total disbursement was roughly USD 2 billion per annum. There was a significant increase in 2020 due to the provision of two projects with large single-disbursements to combat COVID-19 and support Government's recovery effort.

Table 3.2: ODA Disbursement by Term of Assistance (USD Million)

Development Partner	2013	2014	2015	2016	2017	2018	2019	2020	2021 Est.	2022 Proj.
China										
Grant	0.4		4.5	3.4	38.7	70.2	92.6	96.7	78	27.6
Loan	436.2	347.8	334.9	303.8	377.1	281.8	411	398	265.2	233.1
Total:	436.6	347.8	339.4	307.2	415.8	352	503.7	494.8	343.1	260.7
Japan										
Grant	107.6	90.9	85.2	88.2	97	102.4	114.3	116.7	118.2	77.9
Loan	23.2	20.5	25.2	31.5	49.4	73	93.4	385	282.4	390.3
Total:	130.8	111.4	110.4	119.7	146.4	175.4	207.7	501.7	400.6	468.2
EU/EC and EU Member States										
Grant	143.8	156.9	115.8	147.4	137.5	165.1	131.9	167.7	164.9	202.1
Loan	4.5	43.6	52.8	21.2	80.3	67.9	185.1	68.5	104.4	141.1
Total:	148.3	200.6	168.7	168.6	217.8	233.0	317.0	236.2	269.3	343.2
Asian Development Bank										
Grant	42.4	50.1	31.4	21.9	23	24.3	37.4	24	12.8	11.7
Loan	129	79.6	105.8	96.3	102.7	98.6	205.6	428.6	192.1	149.2
Total:	171.4	129.8	137.2	118.2	125.7	122.8	243	452.6	204.8	160.9
Republic of Korea										
Grant	21	29.1	33	33.7	27.7	29.9	30.8	35.7	46.4	35.2
Loan	29.1	51.2	28.7	8.3	29.4	23.9	42	67.6	73.4	106.5
Total:	50.1	80.3	61.7	42	57.1	53.8	72.8	103.3	119.8	141.7
World Bank										
Grant	23.3	16.1	15.7	11.8	7.3	3.3	1.4	0.8	1.3	1.9
Loan	12.2	34.5	1.9	5.8	13.8	27.2	75.3	89.8	86.1	135.5
Total:	35.5	50.6	17.6	17.6	21.1	30.5	76.7	90.6	87.4	137.4
Other Development Partners										
Grant	280.4	288.2	272.2	255.2	273.3	246.0	275.9	261.4	337.0	248.9
Loan	1.2	5.7	5.8	7.6	5.1	8.4	7.9	14.8	14.2	16.1
Total:	281.6	294.0	278.0	262.8	278.5	254.5	283.8	276.3	351.2	265.1
NGO Own Fund										
Grant	220.8	228.9	237.0	251.0	259.8	274.9	277.0	255.4	250.3	83.2
Total:	220.8	228.9	237.0	251.0	259.8	274.9	277.0	255.4	250.3	83.2
Grand Total										
Grant	839.7	860.3	794.9	812.6	864.4	916.2	961.3	958.5	1008.9	688.5
% Grant	57%	60%	59%	63%	57%	61%	49%	40%	50%	37%
Loan	635.4	583.1	555.1	474.5	657.8	580.9	1,020.5	1,452.3	1,017.8	1,171.8
% Loan	43%	40%	41%	37%	43%	39%	51%	60%	50%	63%
Grand Total	1,475.1	1,443.4	1,350.1	1,287.1	1,522.2	1,497.1	1,981.8	2,410.8	2,026.6	1,860.3

Table 3.2 displays ODA disbursement by term of assistance from 2013 to 2022. Despite public resource competition among recipient countries and constraints on financial availability among donor countries in the last few years, ODA disbursements in 2020 for Cambodia showed an increase of 22%; however, were estimated to decrease around 16% in 2021 compared to 2020. In proportionate to the total ODA in 2020, grant assistance went up to USD 959 million which shared 40% of the total ODA (9% decrease from 2019). Loan, which peaked at USD 1,452 million and shared 60% of the total ODA (9% increase from 2019), was immensely contributed by China, Japan, ADB, World Bank, Republic of Korea, and France. Grants and loans were estimated to share roughly an equal pie to the total ODA

in 2021. Projections beginning with 2022 show that loan share will continue to increase while grants will more likely decline. However, total aid disbursement remains relatively robust, even though many programmes and projects beyond 2022 are yet to be confirmed. The shifting to loan financing reflects an impressive track record of socio-economic progress, evident to Cambodia’s reclassification as the LMIC which for most of ODA providers decrease grant volumes and substitute for loan financing. This moves alongside the strengthening effort in domestic resource mobilization by the government.

Significant Changes in ODA Provision

Development partners including China, Japan, Korea, France, World Bank, and ADB were major ODA providers whose combined disbursements accounted for 80% of the total ODA in 2020 and were estimated to be around 70% in 2021 and 2022. As displayed in Chart 3.3, China is generally seen to be the largest provider, followed by Japan and ADB. Disbursements by China reached its peak at around USD 500 million in 2019 and 2020. A noticeable change in ODA provision from Japan and ADB is observed as they doubled their disbursements to USD 502 million and USD 453 million respectively in 2020. Chart 3.4 shows France and Korea increased their loans while keeping their grant assistance at a stable level.

Chart 3.3: Major ODA Providers

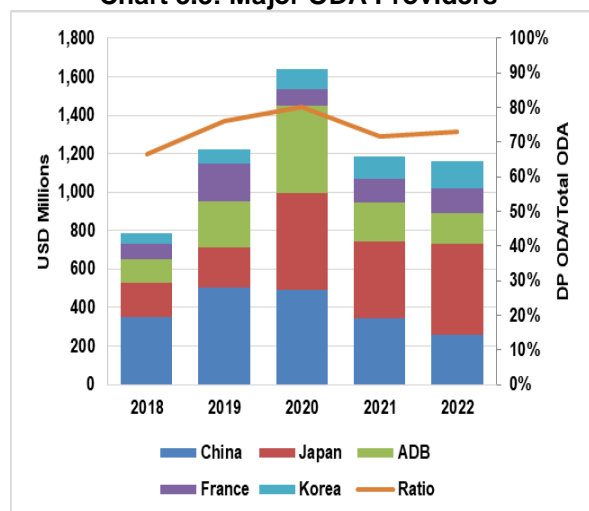
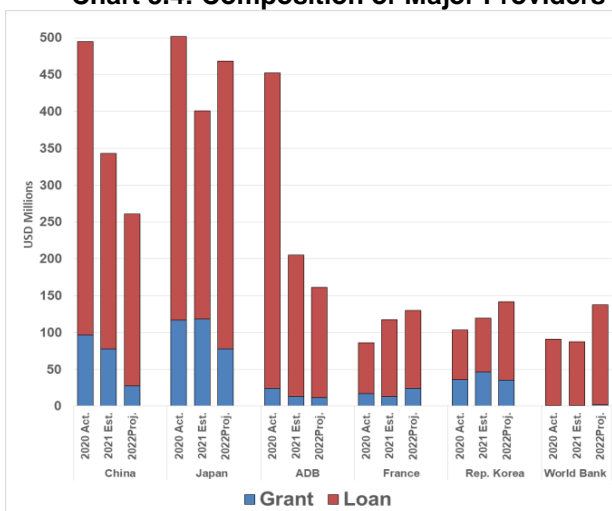


Chart 3.4: Composition of Major Providers



Trends in Sector Disbursement

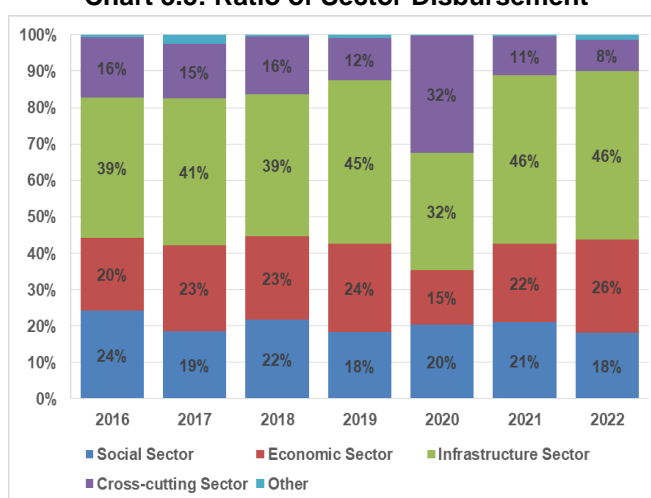
Table 3.3 details trends in sectoral allocations of development assistance over the period from 2013 to 2022 which are well-aligned with the RGC’s priorities as articulated in the RS-IV. Infrastructure sector received the largest share of ODA, around USD 760 million per annum, followed by economic and social sectors, which received supports around USD 375 million in average from 2019 to 2021. Significant funds were allocated to health, education, agriculture, transportation, and energy in which the combined share of support was 57% and 70% of all assistance in 2020 and 2021. These investments highlighted government’s priorities for infrastructure development and enabling growth in line with the RGC’s progress in implementing the Industrial Development Policy (IDP) 2015-2025 as well as the government’s effort to COVID-19 social and economic response and recovery. The cross-cutting sector was generally the least supported sector over the reporting period. However, in 2020 it received the largest support about one-third of all ODA in that year. This remarkable increase was driven by the single-disbursement budgetary support projects from ADB and Japan to facilitate the RGC’s effort toward COVID-19 response and recovery.

Table 3.3: ODA Disbursement by Sector (USD Million)

Sector	2013	2014	2015	2016	2017	2018	2019	2020	2021 Est.	2022 Proj.
Social Sector										
Health	133.2	128.5	126.0	141.4	107.0	127.7	168.3	216.4	226.6	163.0
Education	90.5	112.1	117.1	109.6	127.6	138.1	141.3	165.6	135.6	148.7
Social Protection	-	-	-	-	-	0.3	1.8	55.0	9.2	7.8
Sub-Total	223.7	240.5	243.2	251	234.7	266.2	311.4	437	371.4	319.6
Economic Sector										
Agriculture	177.8	211.8	165.8	135.9	173.1	184.4	289.8	221.0	249.5	286.7
Industrialization & Trade	11.1	3.8	4.5	5.9	22.9	7.2	10.6	5.4	11.0	7.3
Rural Development	56.4	65.1	71.5	45.6	84.4	67.0	53.3	48.2	72.0	112.3
Business & Financial Services	43.8	14.2	27.0	13.3	11.5	8.7	3.8	1.6	3.0	1.7
Urban Planning & Management	0.2	6.6	7.4	6.0	4.2	11.1	55.3	49.8	48.1	48.0
Sub-Total	289.3	300.8	276.2	206.6	296.1	278.3	412.9	326	383.6	456
Infrastructure Sector										
Technology & Communications	2.9	10.5	5.0	12.5	0.3	1.8	1.3	2.9	9.0	8.0
Energy, Power & Electricity	60.1	66.5	54.2	158.3	157.4	97.6	199.7	236.3	190.7	113.7
Transportation	378.6	309.1	286.5	190.7	267.9	301.0	419.0	393.4	444.4	623.5
Water and Sanitation	59.2	63.5	37.6	39.0	86.0	78.3	147.6	59.8	178.3	80.2
Sub-Total	500.8	449.7	383.4	400.5	511.7	478.6	767.7	692.4	822.5	825.5
Cross-cutting Sector										
Community Development	26.6	33.2	41.0	11.9	14.8	14.8	17.8	17.4	20.8	14.3
Culture & Arts	4.2	5.0	5.8	3.5	33.8	42.2	43.4	36.3	22.3	4.1
Environment and Sustainability	18.0	19.9	26.8	21.1	20.0	28.6	31.6	30.8	24.7	24.9
Climate Change	8.2	5.9	6.5	6.1	7.3	11.5	12.3	8.1	8.2	34.7
Gender	9.0	8.0	5.9	6.4	4.2	5.6	5.1	5.0	5.3	4.1
HIV/AIDS	28.5	38.8	24.9	18.8	19.5	6.6	5.0	3.7	0.2	0.6
Governance & Administration	114.8	81.8	75.9	100.2	72.6	81.4	72.5	92.0	84.5	53.0
Tourism	0.7	0.5	1.8	1.3	14.8	2.6	6.5	4.9	6.5	2.1
Budget & BoP Support	-	-	-	-	-	-	-	495.4	10.7	10.8
Emergency & Food Aid	19.1	24.9	14.6	1.0	0.1	0.1	3.5	1.0	9.2	1.8
Sub-Total	229.2	218.1	203.3	170.3	187.1	193.4	197.7	694.6	192.4	150.5
Others	11.3	5.3	7.0	7.7	32.8	5.6	15.0	5.4	6.4	25.5
Grand Total	1,254.3	1,214.5	1,113.0	1,036.1	1,262.5	1,222.2	1,704.8	2,155.4	1,776.3	1,777.1

Chart 3.5 reveals ratio of sector disbursement between 2016 and 2022. Social sector received a relatively stable amount of support about one-fifth of total ODA each year. Similarly, economic sector shared the similar trend, except in 2020 when countries around the world including Cambodia was hit by the COVID-19 pandemic, which in turn reduce the economic activities and support to this particular sector. Infrastructure sector received the largest disbursement around two-fifth annually. In 2020, development cooperation directed to infrastructure development slightly shrank, replaced by the increase in the cross-cutting sector.

Chart 3.5: Ratio of Sector Disbursement



Modalities of Support and Disaggregation of Loan Composition

Loan disbursements in support of infrastructure development and cross-cutting sector have driven an increase in overall ODA disbursement in recent years. This section presents disaggregated ODA data through modalities and priorities of loan programmes. Chart 3.6 indicates a long-term trend of rising and high share of investment projects while technical cooperation remains relatively stable yet low, averaging at USD 400 million. This reflects the current needs to support the government’s development effort, especially in the COVID-19 context, in which the RGC has placed priorities on social, economic and infrastructure investment. In the meantime, major development partners have provided loans in modality of investment projects to support the expansion of transportation networks, electricity and water supplies. The trend of such support modalities reflects the government priority direction and will determine the extent to which resources can be programmed for physical infrastructure investment and capacity development.

Chart 3.6: Modalities of ODA Support

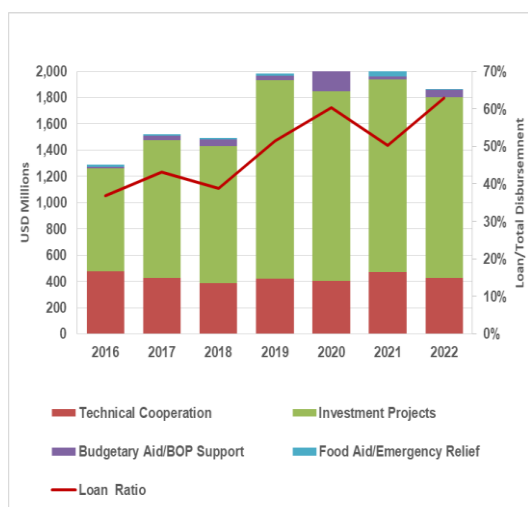
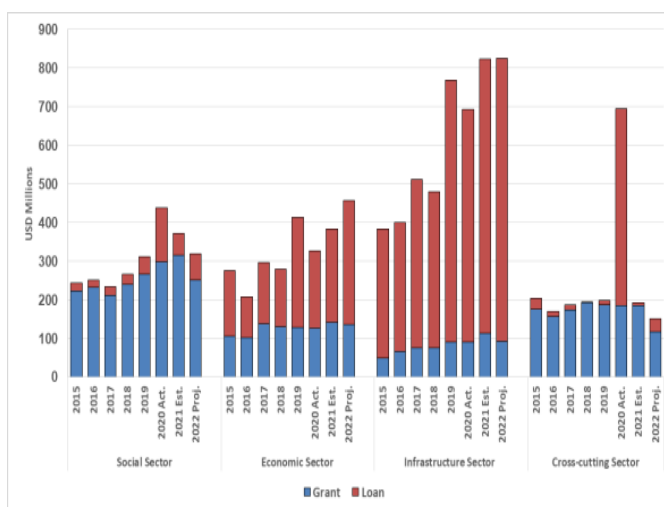


Chart 3.7: Sector Disbursement by Term of Assistance



As shown in Chart 3.7, changes in volume of disbursement and loan growth in infrastructure and economic sectors were significant since 2019 onward. In 2020, the infrastructure sector received approximately USD 710 million in loans, while the loans for the cross-cutting sector were USD 510 million. In both nominal and relative terms, the projections of loan disbursements show a gradually increasing trend at different levels among all sectors especially in economic and infrastructure sectors. The growth in loan financing is ensured to direct only to priority sectors/ projects and is mitigated by the RGC’s effort in domestic resource mobilization as well as the effective implementation of the Public Debt Management Strategy 2019-2023.

Development Partner Engagement in TWGs

Technical Working Groups (TWGs) are technical dialogue mechanism used to coordinate development cooperation and facilitate partnerships for inclusive and mutually accountable development results. Table 3.4 shows that between 2019 and 2023, there are 405 on-going projects under the TWGs with the average annual disbursement around USD 1 billion.

During the reporting years, Infrastructure and Regional Integration TWG managed the largest development assistance, with 70 on-going projects with an average disbursement of USD 563 million, accounted for 50% of the average total disbursement. In addition, Agriculture and Water, Education, and Health TWGs also coordinated a high number of projects (72, 46, and 45 respectively).

Table 3.4: Average Funding (USD Million) and DPs Activities in TWGs

Major TWG	2019	2020	2021 Est.	2022 Proj.	2023 Plan	# of DPs	# of Projects	Average Disbursement 2019-2023
Social Sector								
Health	63.3	80.7	119.0	74.8	56.0	16	45	7.9
HIV/AIDS	3.0	0.6	29.3	35.0	18.1	5	6	17.2
Education	72.8	75.3	66.9	82.0	47.6	16	46	68.9
Food Security and Nutrition	11.5	17.0	19.1	12.9	6.6	6	11	13.4
Rural Water & Sanitation	38.6	24.4	47.8	63.1	19.8	7	14	38.7
TVET	1.0	3.4	4.2	4.1	4.0	5	11	3.3
Sub-Total	190.0	201.3	286.4	272.0	152.1		133	220.4
Economic Sector								
Agriculture and Water	203.2	164.2	155.5	194.4	74.0	17	72	158.2
Fisheries	17.3	17.1	32.2	46.4	44.6	8	21	31.5
Forestry	16.7	11.4	11.0	14.6	13.7	8	19	13.6
Land	0.1	0.2	0.4	0.1		1	1	0.2
Mine Action	14.7	25.5	20.4	14.7	10.0	9	10	17.1
Private Sector Development	6.5	9.9	11.9	23.5	13.5	6	7	13.0
Sub-Total	258.5	228.3	231.4	293.7	155.8		130	233.6
Infrastructure Sector								
Infrastructure and Regional Integration	505.6	545.2	698.0	741.4	327.0	8	70	563.4
Sub-Total	505.6	545.2	698.0	741.4	327.0		70	563.4
Cross-cutting and Administrative Sector								
Public Administrative Reform	3.4	3.8	5.7	2.6	1.4	2	2	3.4
Public Financial Management	11.2	20.0	25.3	19.7	5.3	7	13	16.3
Decentralization and De-concentration	19.5	17.3	18.7	7.4	5.0	9	15	13.6
Gender	7.9	14.8	15.0	14.0	11.5	10	14	12.7
Legal and Judicial Reform	2.6	2.1	1.4	1.4		2	2	1.9
Partnerships and Harmonization	3.6	3.7	5.9	3.7	3.4	2	2	7.1
Planning and Poverty Reduction	5.4	7.0	15.6	4.5	3.2	6	6	7.1
Climate Change	2.8	9.0	8.2	9.3	11.5	8	18	8.2
Sub-Total	56.4	77.7	95.8	62.6	41.3		72	66.8
Outside TWGs	163.9	210.8	268.4	196.5	85.0	19	276	184.9
Grand Total	1,174.6	1,263.5	1,580.7	1,566.0	761.1	-	681	1,269.2

Table 3.5: Major Development Partners in TWGs (USD Million)

Major Development Partner in TWGs	# of Projects	Disbursement by Years			
		2019	2020	2021 Est.	2022 Proj.
China	11	239.4	361	261.4	250.8
Japan	31	99.8	181.2	257.9	413.5
ADB	62	233.4	164.5	174.4	160.9
World Bank	22	49.1	76	75	124.3
France	23	148.7	4.8	109.7	57.6
Republic of Korea	20	31.1	23.3	77	79.5
EU/EC	22	20	29.9	47.4	51.8
Australia	12	21.8	18.5	50	22
Global Fund	3	-	-	42.8	41
UNICEF	5	15.3	24.8	29.4	20
Others	137	350	105	108	81.6
Grand Total	348	969.2	989	1,233	1,303

Table 3.5 reveals that the ADB remains a leading development partner in engaging in TWGs project activities. Currently, it has 62 projects coordinated under the TWGs, followed by Japan (31 projects) and France (23 projects). In 2020, the ADB's support, disbursed to sectors managed by TWGs, was about USD 165 million, which decreased 29% from the

2018 figure. Japan disbursed around USD 181 million in 2020 to sectors under TWGs coordination, and the amount was estimated to increase to USD 258 million in 2021.

Provincial Distribution of ODA Disbursement

Table 3.6: Disbursement by Province (USD Million)

Province	2019	2020	2021 Est.	Average Share
Nation-Wide	434.4	997.1	455.3	29%
Phnom Penh	350.8	311.6	380.7	16%
Battambang	132.2	122.1	154.7	6%
Siem Reap	104.2	96.2	125.1	5%
Kampong Cham	78.6	59.8	81.2	3%
Banteay Meanchey	63.7	60.3	76.2	3%
Others	817.3	760.6	752.2	36%
Total	1,981	2,408	2,025	100%

Data disaggregation by province illustrates how the support from development partners has contributed to the development of the capital and provinces to enable inclusive benefits for all across Cambodia. This analysis provides evidence-based information for strengthening sub-national partnerships in line with the DCPS's Guideline on Sub-National Partnership Dialogue as well as encouraging development partners to advance their

collaboration in the least supported provinces. From 2019 to 2021, the average ODA amounted to two-third of the grand total was disbursed to nation-wide projects and to top 5 provinces combined. Another one-third covered the other 20 provinces. Phnom Penh received the largest share of support, followed by Battambang, Siem Reap, Kampong Cham and Banteay Meanchey.

Table 3.7: Provincial Support by Major Development Partner in 2020 (USD Million)

Development Partner	Banteay Meanchey	Battambang	Kampong Cham	Phnom Penh	Siem Reap	Nation-Wide	Other 20 Provinces	Total
Japan	29.20	56.9	0.7	57.5	15.7	278.1	63.5	501.7
ADB	9.9	18.3	7.6	5.3	15.3	301.4	94.6	452.6
China	-	-	32.9	149.8	1.6	-	310.4	494.8
EU/EC	0.1	0.6	0.3	16.2	0.4	69.3	2.4	89.4
France	-	1.3	7.0	2.1	1.9	56.7	16.6	85.7
USA	1.3	5.6	0.8	5.3	5.0	47.4	27.1	92.5
NGO	9.80	16.9	5.0	63.9	41.3	18.2	97.4	252.4
Others	10.1	22.6	5.4	11.4	15	225.8	148.1	438.3
Total	60.3	122.1	59.8	311.6	96.2	997	760.1	2,407.2

As illustrated in Table 3.7 above, Japan was the largest ODA provider among major providers in six major capital and provinces. Meanwhile, the ADB was the second largest, followed by China, EU/EC, France, and USA. NGOs also provided significant support to capital/province development. The next section will discuss development assistance provided by NGOs.

NGO Support to National Development

The RGC recognizes the importance of NGO contribution to Cambodia's development, and in the provision of social services and resources mobilization for implementing development projects within their priority sectors and targeted areas. With the data provided by NGOs, CRDB/CDC has recorded and analyzed the trends of NGO funding to reflect their commitments to ensure the alignment with RGC's priorities and development effectiveness agenda.

In 2020, CRDB/CDC received financial and activity reports from 418 NGOs, which consist of 646 projects. This section reviews the trends of NGOs supported to national development from 2019 to 2021 and emphasizes on the largest NGOs' contributions to Cambodia's development based on the data generated from Cambodia NGO database.

Table 3.8: NGO Funding by Sector (USD Million)

Sector	2019			2020			2021 Est.		
	NGO Fund	DP Fund	Total Fund	NGO Fund	DP Fund	Total Fund	NGO Fund	DP Fund	Total Fund
Health	86.2	27.7	113.9	80.1	30.9	111.0	87.4	30.9	118.3
Education	74.8	13.1	87.8	66.3	6.6	72.9	56.9	14.5	71.4
Community Development	56.4	5.3	61.7	53.6	5.2	58.8	53.9	6.0	59.9
Rural Development	22.9	19.7	42.6	23.9	17.8	41.7	23.4	17.2	40.6
Governance	4.7	12.8	17.5	4.1	15.3	19.4	4.3	16.7	21.1
HIV/AIDS	7.8	6.6	14.4	6.5	8.2	14.8	5.8	3.7	9.6
Agriculture	11.7	8.8	20.5	7.3	9.2	16.5	7.3	9.2	16.6
Environment	8.6	5.7	14.3	8.5	4.9	13.3	8.6	5.9	14.5
Others	3.3	5.8	9.1	2.0	4.3	6.4	1.6	4.5	6.1
Total	276.4	105.5	381.9	252.4	102.4	354.8	249.1	108.8	357.9

Table 3.8 shows NGO funding by sectors from 2019 to 2021. The total NGO fund is about USD 365 million in averages per year over the last three years, of which around USD 100 million per annum was mobilized by NGOs from development partners. In 2020, the health sector received major disbursements around USD 111 million, followed by the education sector (USD 72.9 million), community development (USD 58.8 million), and rural development (USD 41.7 million). The share of top four sectors accounted for approximately 80% of total NGO fund. Notably, the annual disbursement in 2020 and 2021 was slightly decreased as compared to 2019; however, NGO own fund is still disbursed at a stable level about USD 260 million annually.

Chart 3.8: NGO Sector Support (USD Million)

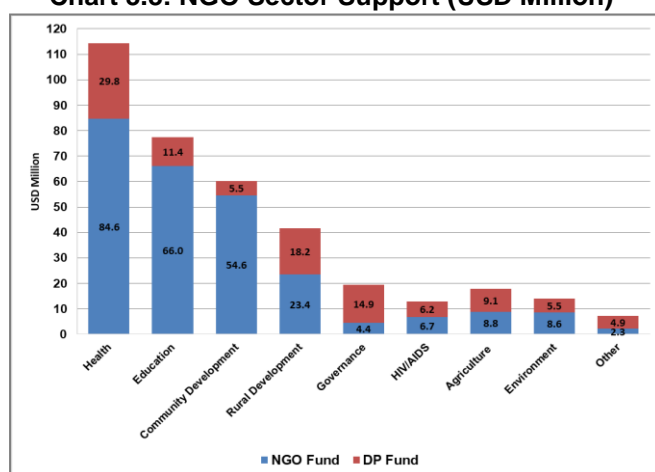


Chart 3.9: Average NGO Funding Shares

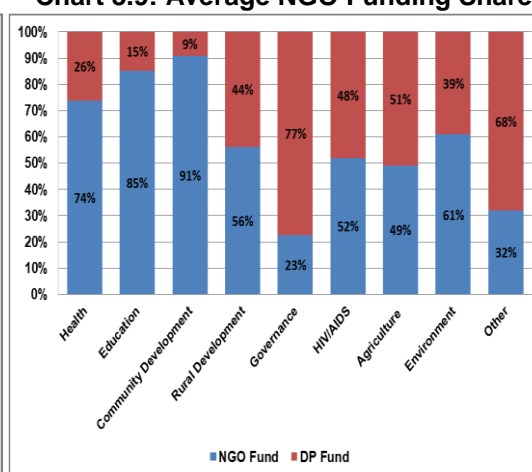


Chart 3.8 illustrates an average of comparative significance of sector disbursement between NGO own fund and DP fund between 2019 and 2021. Majority of NGO core financing has contributed to the health sector approximately USD 85 million, education sector USD 66 million, community development USD 55 million, rural development USD 23 million, and agriculture USD 9 million. The share of average relative NGO funding 2019-2021, as seen in Chart 3.9, indicates that the DP fund has contributed largely to the governance sector (77%), but very little to community development (only 9%) which is in contrary with the contribution from NGO own resources.

Table 3.9: Major NGOs by Funding (USD Million)

Major NGOs	2019			2020			2021 Est.		
	NGO Fund	DP Fund	Total Fund	NGO Fund	DP Fund	Total Fund	NGO Fund	DP Fund	Total Fund
Foundation Children's Hospital Kantha Bopha	27.7	4.3	32.0	26.5	4.5	31.0	30.4	4.6	35.0
World Vision Cambodia	22.9	3.0	25.8	21.5	3.3	24.8	18.8	1.0	19.7
Population Services International	8.1	3.1	11.2	7.2	3.5	10.7	7.0	2.4	9.5
Cambodian Children's Fund	7.9	0.0	7.9	6.7	0.0	10.6	1.0	0.0	1.0
Pour un Sourire d'Enfant	7.7	0.0	7.7	6.3	0.0	8.5	2.8	0.0	2.8
Nokor Tep Foundation	1.2	0.0	1.2	6.0	0.0	6.9	0.0	0.0	0.0
Hope Worldwide	11.6	0.0	11.6	5.9	0.0	6.7	7.1	0.0	7.1
Angkor Hospital for Children	5.8	0.0	5.8	5.3	0.0	6.3	5.4	0.0	5.4
Japan Relief for Cambodia and World Assistance for Cambodia	5.8	0.5	6.3	5.2	0.5	6.2	4.8	0.1	4.9
Plan International	4.2	7.7	11.9	5.0	3.5	6.0	7.4	7.6	15.0
Sos Children's Villages of Cambodia	4.1	0.0	4.1	4.1	0.0	5.9	2.6	0.0	2.6
Child Fund Cambodia	4.5	0.3	4.8	4.1	0.2	5.7	2.0	0.1	2.1
The Sonja Kill Foundation Cambodia	3.1	0.0	3.1	3.7	0.0	5.5	4.9	0.0	4.9
Don Bosco Foundation of Cambodia	4.2	0.0	4.2	3.6	0.0	5.3	2.5	0.0	2.5
Toutes A l'Ecole	3.0	0.0	3.0	3.5	0.0	5.2	3.4	0.0	3.4
Room to Read	3.5	0.0	3.5	3.3	0.0	5.2	3.2	0.0	3.2
Clear Cambodia	2.0	0.0	2.0	3.3	0.0	4.8	3.4	0.0	3.4
Wildlife Alliance	2.7	0.0	2.7	3.2	0.0	4.3	3.9	0.0	3.9
Samaritan's Purse International Relief	2.4	0.0	2.4	2.9	0.0	4.3	2.7	0.0	2.7
Jay Pritzker Academy	3.8	0.0	3.8	2.7	0.0	4.1	2.0	0.0	2.0
International Development Enterprises Cambodia	0.0	4.7	4.7	2.7	2.0	4.0	2.6	2.7	5.3
Enfant du Mekong	2.9	0.0	2.9	2.6	0.0	3.8	1.9	0.0	1.9
Norwegian People's Aid	2.2	3.2	5.4	2.5	2.8	3.7	2.7	2.6	5.3
World Wide Fund for Nature - Cambodia	2.3	3.8	6.1	2.4	3.8	3.7	1.5	3.6	5.1
Medecins Sans Frontieres - France	2.8	0.0	2.8	2.3	0.0	3.6	1.2	0.0	1.2
Caritas Cambodia	2.6	0.2	2.8	2.3	0.4	3.5	1.9	0.4	2.4
Soutien a l'Initiative Privee pour l'Aide la Reconstruction des pays du Sud-est Asiatique	1.1	0.2	1.3	2.2	0.5	3.3	1.2	0.4	1.6
Food for the Hungry Cambodia	2.0	0.0	2.0	2.2	0.0	3.3	2.2	0.0	2.2
Child's Dream Cambodia Organisation	1.2	0.0	1.2	2.0	0.0	3.2	1.6	0.0	1.6
Save the Children International	2.0	4.8	6.8	1.9	3.6	3.0	2.4	6.3	8.7
Total 30 Largest NGOs	155.4	35.7	191.0	153.2	28.7	203.4	134.5	32.0	166.5
Total 388 NGOs	121.1	69.8	190.8	99.2	73.7	151.4	114.7	76.7	191.4
Grand Total	276.4	105.5	381.9	252.4	102.4	354.8	249.1	108.7	357.9

Table 3.9 identifies that among 418 NGOs, the 30 largest NGOs contributed around USD 203 million, accounted for 57% of total support from NGO in 2020. Over the last three years, the Hospital Kantha Bopha and World Vision Cambodia remained the top contributors, which disbursed USD 31 million (9% of NGO fund) and USD 24 million (7% of NGO fund) respectively. In the same year, Population Services International, focusing on improving health outcomes for Cambodians and health quality assurance across the public and private sector, contributed USD 10.7 million, accounted for around 3% of NGO operational fund. All of the mentioned-above analysis reflects NGOs' ability to manage their own fund and development partner's fund as well as their operation at sub-national level, especially the provision of social services.

4. ODA Support to COVID-19 Response and National Social Protection Policy Framework

Covid-19 has become a global pandemic. After it circulated in late December 2019, the pandemic presents existential challenges to public health and global economy. Cambodia is no exception to the unprecedented impacts unleashed by COVID-19. The ramification of the pandemic has brought formidable challenges to both public health and the social protection system in Cambodia. Given the high possibility of being heavily affected by COVID-19 with limited resources as a developing country, Cambodia has surprised international community by effectively controlling the pandemic.

Support to COVID-19 Vaccination Campaign

In response to the rampant of COVID-19, the RGC has launched a series of emergency policy instruments to contain COVID-19 as well as to mitigate collateral damage in the most affected sectors. With the acknowledgement of vaccine as a prominent tool to invert the pandemic situation and circumvent the underlying social and economic stagnation, the RGC has officially deployed a nation-wide vaccination program, followed by a booster shot campaign to bolster the immunity of the people. The inoculation process began in early February 2021 and has been quickly accelerated. Moreover, the overwhelming support from international community as well as major development partners allows the RGC to further formulate and initiate long-term national policies to re-capture the development momentum once the pandemic is fully subdued as Cambodia strives to achieve a resilient recovery.

Table 4.1: COVID-19 Vaccine under Bilateral Cooperation and COVAX Facility

Development Partner	Type of Vaccines	Amount of Vaccine	Total Value (USD)
Bilateral Cooperation			
Australia	Pfizer-BioNTech	2.350.530	20.916.031
China	Sinovac & Sinopharm	8.300.000	58.100.000
Japan	AstraZeneca	1.000.000	4.490.000
Poland	AstraZeneca	300.000	1.347.000
UK	AstraZeneca	415.000	1.863.530
Total		12.365.530	86.716.561
COVAX Facility			
COVAX	AstraZeneca	324.000	1.454.760
	Sinovac	424.800	2.973.600
	Moderna	188.160	1.881.600
Japan	AstraZeneca	308.000	1.382.920
Netherland	AstraZeneca	290.400	1.303.896
Republic of Korea	AstraZeneca	324.000	1.454.760
USA	Johnson & Johnson	1.060.100	10.601.000
Total		2.919.460	21.052.536
Grand Total		15.284.990	107.769.097

The successful campaign of vaccination rollout is accredited to the massive support from major development partners in providing vaccines in the form of donation, which granted the RGC an early access to acquire a large portion of vaccines to fulfill its ambition. The distribution of vaccines was made through two main channels: bilateral cooperation and COVAX Facility.

Table 4.1 demonstrates that the RGC received approximately over 12 million doses with the value of more than USD 86 million from major bilateral partners. China, in particular, remains the largest vaccine donor to Cambodia with 8.3 million doses equivalent to USD 58 million. Australia provides 2.3 million doses, valued at USD 21 million. Moreover, the combination of 1.7 million doses of AstraZeneca (equivalents to USD 7.7 million) was contributed by Japan, the UK, and Poland.

In addition to vaccine provision through bilateral cooperation, the co-led Coalition known as COVAX facility has made a notable contribution to the Cambodia's vaccination campaign. The total of almost 3 million doses of vaccines (USD 21 million) that were obliged under COVAX facility allow the RGC to reinforce its capability to expand their campaign coverage across the country and bolster the RGC's approach to the booster shots operation. Under this mechanism, Cambodia can both purchase COVID-19 vaccines with an affordable price and receive vaccine donation from other partners. The US provided 1 million doses of Johnson & Johnson vaccine, accounted for around USD 10 million. Republic of Korea and Netherland contributed a combination of 614, 400 doses (USD 2.7 million). Japan, adding to its vaccine provision under bilateral cooperation, channeled 308,000 doses via COVAX facility. It is important to note that the vaccines provided through bilateral cooperation and COVAX facility represented one-third of the total whereas the other two-third were from the government budget.

ODA Support to Emergency Response

Alongside the donation of vaccines, development partners have reinforced their commitment in supporting the RGC during the pandemic. The inflow of ODA has been categorized into two major types of assistance namely the support to emergency response and socio-economic recovery. Under the pragmatic approach of the RGC, development partners have effectively allocated their financial assistance to COVID-19 affected sectors and yielded indispensable resources for Cambodia to revitalize and regain their momentum in advancing socio-economic development.

Table 4.2: Support to Emergency Response (USD Thousand)

Development Partner	2020 Act.	2021 Est.	2022 Proj.
Australia	2,693	28,705	4,994
China	28,100	30,000	
Czech Republic	107	-	-
GAVI	-	248	-
Germany	-	-	-
Ireland	397	535	-
Japan	18,721	1,902	-
Switzerland	272	926	-
UK	20	1,952	21
USA	7,990	16,602	11,891
UN Agencies	10,007	13,262	9,020
Total	68,307	94,132	25,926

Table 4.2 indicates that in 2020, the RGC received an emergency assistance with the total disbursement of USD 68 million. This assistance was either fully or partly contributed to the emergency response, but predominantly directed to support health sector such as (1) case detection and management, (2) medical supplies and equipment, and (3) preparedness, capacity building and training. It has also been designed for immediate and short-term support beyond the health sector but only for the specific purpose of an emergency relief. China was a leading partner providing USD 28.1 million, followed by Japan who granted USD 18.7 million in the same

reporting year. UN agencies disbursed a combination of around USD 10 million.

The fluctuation of ODA disbursement in 2021 factors the increase in support from the development partners in which the aggregate disbursement jumped to more than USD 94 million. China retained its position as a strategic partner granting USD 30 million to Cambodia. Australia increased its support from USD 2.6 million in 2020 to USD 28.7 million in 2021. Meanwhile, only four major development partners announced their planned disbursements to support emergency response for 2022, accounted for around USD 25.9 million. The US plans to provide around USD 11.8 million, followed by UN agencies (USD 9 million), and Australia (USD 4.9 million).

ODA Support to Socio-economic Recovery

In line with the RGC's effort for facilitating socio-economic recovery, development partners have allocated and/or redesigned their support specifically to align with the "Strategic Framework and Programmes for Economic Recovery in the Context of Living with COVID-19 in a New Normal 2021-2023". Some major development partners including ADB, Japan, and Republic of Korea designed newly-dedicated projects to support the RGC for socio-economic recovery. Some partners reallocated their assistance to COVID-19 related activities while others have mainstreamed necessary components for mitigating and adopting COVID-19 in their project. Although there is no clear-cut distinction of such

financing, this analysis will offer a profound insight into financial support from development partners that contributed both directly and indirectly to facilitate socio-economic recovery.

Table 4.3 Support to Socio-economic Recovery (USD Thousand)

Development Partner	2020 Act.	2021 Est.	2022 Proj.
ADB	263,517	15,178	1,800
Australia	18,998	25,289	21,785
EU/EC	4,326	10,880	8,827
GAVI	585	778	-
Germany	6,518	16,191	9,668
Ireland	-	10	-
Japan	234,017	-	-
New Zealand	-	3,194	-
Republic of Korea	52,849	2,731	1,630
Sweden	5,713	352	-
Switzerland	4,580	4,585	3,538
USA	18,521	20,970	17,945
UN Agencies	27,460	33,723	28,330
World Bank	28,336	13,450	10,998
Total	665,420	147,331	104,521

Table 4.3 illustrates that in 2020, development partners provided a total disbursement of USD 665 million to promote socio-economic recovery. ADB was the largest partner providing more than USD 263 million, followed by Japan (USD 234 million) and the Republic of Korea (USD 52.8 million). These three partners formulated dedicated projects to support the RGC of which a single-disbursement projects worth USD 250 million from ADB, USD 200 million from Japan, and USD 50 million from Korea. World Bank provided USD 28 million while all UN agencies contributed USD 27 million. In 2021, financial assistance for socio-economic recovery is expected to decline to only USD 147 million. The UN agencies extended their disbursement to USD 33 million while Australian support

rose to USD 25 million followed by the US with USD 20 million. EU/EC extended its support to USD 10 million. The projected disbursement for socio-economic recovery in 2022 will be around USD 104 million.

ODA Support to National Social Protection Policy Framework

COVID-19 manifests unprecedented challenges for Cambodia, yet from the optimistic viewpoint, there is an opportunity in crisis. Previous substantial investments in the health security system started paying off and gradually established a proactive health measure for Cambodia. COVID-19 provides impetus for triggering a long-term and rigorous reform in the health sector as well as advancing universal health coverage for its application. In the meantime, the pandemic opens a window of opportunity to accelerate the implementation of the National Social Protection Policy Framework (NSPPF) with due regard to the fast-evolving circumstance.

The RGC has executed nine phases of Cash Transfer for Poor and Vulnerable Households within a ten months period. By February 2022, approximately 2.7 million citizens from 687,354 households received cash relief benefits, accounted for USD 592.5 million. On top of that, 5,576 workers from 42 enterprises in the most affected sectors particularly garment and tourist sector received stimulus packages distributed from the RGC. The relief funds have been rolled out 78 times and ranked from USD 15 to USD 40 based on each individual working contract.

To support the RGC's effort in implementing the social protection programs and schemes, development partners play a pivotal role in leveraging income security and reducing economic and financial vulnerability of Cambodian people. Table 4.4 shows that, in 2020, Korea is the leading partner in providing extensive support to the social protection sector through health insurance scheme, accounted for USD 50 million. This support was employed as an emergency relief to assist the target poor and vulnerable group during the country lock-down. Sweden, second major donor with a project valued at USD 2 million, supported the program of social welfare of vulnerable people by addressing the limited social services delivery at sub-national level. UNICEF and EU are supporting and strengthening the social protection system through integrating COVID-19 response for urban poor setting, disadvantaged urban communities, vulnerable population, and workers who are not covered by the social security scheme.

**Table 4.4: Support to Social Protection Sector by Development Partner
(USD Thousand)**

Development Partner	2020 Act.	2021 Est.	2022 Proj.	2023 Plan	Total
EU	1,090.8	3,651.5	2,926.7	2,432.2	10,101.1
Germany	-	297.2	3,087.4	3,473.1	6,857.6
ILO	-	250.0	337.5	112.5	700.0
Japan	-	1,911.3	-	-	1,911.3
Republic of Korea	50,000.0	-	-	-	50,000.0
Sweden	2,048.1	-	-	-	2,048.1
Switzerland	169.4	43.9	-	-	213.3
UK	288.3	-	-	-	288.3
UNDP	450.3	643.4	749.3	37.4	1,880.3
UNICEF	1,150.0	2,368.3	690.6	704.8	4,913.6
Total	55,196.7	9,165.5	7,791.5	6,759.9	78,913.6

Contribution to National Social Protection Policy Framework

Besides the direct support to the social protection sector, many projects were implemented under other principal sectors (health, education, etc.), yet were associated and have indirect contribution to the National Social Protection Policy Framework. These projects were listed in the social protection marker for a better understanding of the social protection sector as a cross-sectoral. Table 4.5 indicates that four sub-sectors particularly under social assistance received additional support from development partners' projects, some of which contributed to more than one sub-sector of NSPPF.

In 2020, out of 11 projects, human capital development program received USD 9 million, which supported health and nutrition of pregnant women and children under 5 years old and improved food access through the provision of school meals for pre-primary and primary school children. Social welfare of vulnerable people was the second most funded area receiving around USD 1 million, followed by the emergency response program with the support to the strengthening of national and sub-national capacities to address shocks and disasters and to protect local food systems. The total contribution to social protection sectors increased from USD 10 million in 2020 to USD 18 million in 2021. Between 2020 and 2021, support to social welfare of vulnerable people remained stable while human capital development slightly increased by USD 1 million. The emergency response shared the second largest proportion in 2021 as it jumped from only USD 324, 800 in 2020 to more than USD 6 million in 2021.

Table 4.5: ODA Contribution to Social Protection Markers (USD Thousand)

Social Protection Markers	2020 Act.	2021 Est.	2022 Proj.	2023 Plan	# of Projects	Total
Social Assistance: Emergency Response	324.8	6,013.1	376.5	415.9	2	7,130.3
Social Assistance: Human Capital Development	9,012.0	10,243.2	6,956.8	6,751.1	3	32,963.2
Social Assistance: Social Welfare of Vulnerable People	1,072.9	1,067.3	1,208.7	-	5	3,348.9
Social Assistance: TVET	-	880.3	307.8	114.0	1	1,302.1
Total	10,409.8	18,203.9	8,849.9	7,281.0	11	44,744.6

5. Cross-cutting Thematic Profiles

The RGC has recognized the imperative roles of cross-cutting sectors in dedicating to inclusive and sustainable development. CRDB/CDC has continuously worked with relevant line ministries/agencies and development partners to formulate comprehensive guidelines and customize the Cambodia ODA database for tracking both financial and non-financial supports from development partners to major cross-cutting thematic profiles including gender, climate change, and private sector development. In addition to the sector and sub-sector classification, three thematic markers have been recorded in the Cambodia ODA database to measure indirect support beyond the principal sectors of the project activity by ranking the support in minor, moderate, and significant.

This chapter will provide an analysis of ODA contribution provided by development partners to principal sectors and three thematic markers. This analytical part will focus primarily on development cooperation to principal sectors and their sub-sectors as well as the indirect support mainstreaming in other sectors in which their activities were associated with the three cross-cutting areas. In the meantime, a piece of separate analysis of CSDG Goal 5 on Gender Equality and Goal 13 on Climate Action can be found in this Chapter 5.

ODA Support to Gender Equality and Women's Empowerment

To support gender financial tracking, CRDB/CDC and MoWA started working together to formulate a new Gender principal sector and sub-sectors in line with the Guideline on Gender Mainstreaming. As indicated in Table 5.1, total ODA disbursement to gender as a principal sector increased from USD 5.94 million in 2020 to USD 6.60 million in 2021, representing 0.32% of total ODA disbursement in 2021. This aggregate disbursement was coupled with the increase in NGOs core fund from less than USD 0.9 million in 2020 to more than USD 1.3 million in 2021. Between 2019 and 2021, gender mechanisms, networks and partnerships received the largest proportion of development cooperation although the same amount was classified as other outside the sector division established by MoWA. The second top receiving area was legal and policy framework. However, limited resource was mobilized to support gender research, statistics, and M&E. As this area is critically important, development partners are encouraged to engage in this priority.

Table 5.1: Disbursement to Gender as Principal Sector in 2019-2021 (USD Million)

Gender as Principal Sector and Sub Sector	2019 Act.	2020 Act.	2021 Est.	Total 2019-2021
Accountability and gender-responsive investments	0.02	0.04	0.08	0.15
Gender research, Statistics and M&E	0.05	0.00	-	0.05
Legal and policy framework	1.18	1.20	1.03	3.42
Mechanisms, Network, and Partnership	2.51	1.07	1.73	5.32
Positive public behavior	0.41	0.36	0.37	1.15
Others	0.92	2.35	2.03	5.30
Total	5.09	5.04	5.26	15.41
NGOs Own Fund	0.87	0.88	1.32	3.08
Grand Total	5.97	5.93	6.59	18.50

Currently, 13 major development partners are actively supporting and providing direct contribution to gender as a principal sector. From 2019 to 2021, the aggregate disbursement to gender sector was quite stable approximately USD 5 million per annum although some donors including Sweden and UNDP have phased out their support. Australia, Japan, UN Women, Germany, and EU/EC were major sources of development assistance, which disbursed over USD 11.77 million to gender project activities, accounted for more than 76% of total gender financing.

Table 5.2: Disbursement to Gender by Development Partner in 2019-2021 (USD Million)

Development Partner	2019 Act.	2020 Act.	2021 Est.	Total 2019-2021
Australia	0.52	2.30	2.03	4.86
Japan	1.78	0.45	0.68	2.92
UN Women	0.59	0.44	0.71	1.75
Germany	0.48	0.31	0.33	1.13
EU/EC	0.35	0.35	0.37	1.08
USA	0.13	0.29	0.65	1.07
ILO	0.30	0.33	0.19	0.83
Sweden	0.28	0.23	-	0.52
Canada	0.12	0.13	0.11	0.37
UNFPA	0.03	0.08	0.15	0.27
UNDP	0.16	0.04	-	0.21
Switzerland	0.20	0.00	-	0.20
UK	0.11	0.02	-	0.13
Total	5.09	5.04	5.26	15.41

Table 5.3 shows that the total estimated ODA disbursement amounted to USD 465.08 million has mainstreamed gender equality and women's empowerment in 2021, equivalent to one-fourth of total 2021 disbursement. Budget and balance of payment support is the key sector that mainstreamed 100% of gender equality and women's empowerment. Meanwhile, climate change and governance and administration are the second and third gender mainstreamed support sectors, with approximately 64% and 51% respectively. On the other hand, energy, power and electricity and culture and arts sector mainstreaming each accounted for less than 1% of total ODA disbursement in 2021.

Table 5.3: Sectors Mainstreaming of Gender Equality in 2019-2021 (USD Million)

Sector	2019	2020	2021 Est.				2021 ODA by Sector	Gender as %
			Minor	Moderate	Significant	Total		
Budget & BoP Support	-	261.33	-	10.697	-	10.69	10.69	100.00%
Climate Change	6.74	5.90	0.96	4.081	0.23	5.27	8.28	63.69%
Governance & Administration	36.00	42.87	5.72	33.266	5.98	44.96	88.70	50.69%
Tourism	2.79	2.37	0.18	3.018	-	3.20	6.48	49.33%
Banking & Business Services	1.85	0.78	0.14	1.033	0.17	1.35	2.97	45.38%
Health	64.97	74.91	68.34	65.759	2.08	136.18	315.11	43.22%
Social Protection	0.80	3.84	0.03	3.303	-	3.33	9.21	36.18%
Education	83.90	94.05	15.97	47.069	4.21	67.25	192.38	34.96%
Manufacturing, Mining & Trade	1.68	1.14	-	3.493	0.01	3.50	11.02	31.80%
Others	3.74	2.48	1.18	1.845	1.42	4.45	15.42	28.86%
Water and Sanitation	63.68	12.84	39.94	7.863	3.19	50.99	178.31	28.60%
Rural Development	15.47	16.14	3.41	18.26	3.38	25.05	95.46	26.25%
Emergency & Food Aid	0.11	0.54	1.59	0.25	0.48	2.33	9.16	25.43%
Agriculture	39.94	37.26	17.55	29.702	6.60	53.87	254.69	21.15%
Environment & Conservation	5.58	7.80	2.11	4.69	0.04	6.84	33.34	20.52%
Community & Social Welfare	12.58	10.08	0.01	14.062	-	14.07	74.67	18.85%
Urban Planning & Management	16.26	10.21	4.05	3.523	0.40	7.98	48.14	16.59%
Information and Communication	0.03	0.18	0.00	0.515	-	0.52	8.96	5.81%
Transportation	28.11	21.75	0.43	20.74	-	21.17	444.45	4.76%
HIV/AIDS	2.04	3.66	-	0.18	-	0.18	4.81	3.78%
Energy, Power & Electricity	1.84	12.73	1.26	0.42	-	1.69	190.77	0.89%
Culture & Arts	0.19	0.58	0.09	0.03	-	0.12	22.28	0.56%
Total	388.38	623.57	163.03	273.81	28.24	465.08	2,025.40	22.96%

Table 5.4 shows 32 development partners contributed their funding to gender mainstreaming in their respective portfolios, equal to 23% of total disbursement in 2021. Notably, GAVI and UNAIDS mainstreamed 100% of their funds into gender equality and women's

empowerment, while Canada and UNESCO mainstreamed more than 80% of their total 2021 disbursement. ADB is the largest development partner with its total fund of USD 84 million mainstreamed into gender equality and women's empowerment, followed by USA (USD 54 million) and World Bank (USD 52 million).

Table 5.4: DPs Mainstreaming of Gender Equality in 2019-2021 (USD Million)

Development Partner	2019	2020	2021 Est.				2021 ODA by DP	Gender as %
			Minor	Moderate	Significant	Total		
GAVI	20.08	8.86	8.32	0.77	-	9.10	9.10	100.00%
UNAIDS	0.21	0.07	-	0.18	-	0.18	0.18	100.00%
Canada	1.88	1.51	0.82	1.58	0.08	2.49	2.93	84.90%
UNESCO	4.07	3.78	2.72	0.36	-	3.08	3.69	83.64%
UNFPA	1.58	2.06	-	2.23	0.13	2.36	3.40	69.56%
Switzerland	7.46	10.90	7.69	3.58	0.54	11.83	17.11	69.13%
Australia	15.88	12.85	2.74	39.10	2.16	44.01	66.47	66.20%
Ireland	0.76	0.75	1.03	-	-	1.03	1.57	65.44%
FAO	1.75	1.02	0.24	0.56	0.43	1.24	1.98	62.99%
Global Fund	-	-	26.63	-	-	26.63	42.80	62.23%
Germany	18.60	17.18	10.81	15.68	1.36	27.86	44.83	62.14%
Sweden	16.08	20.82	7.09	2.93	3.47	13.50	22.46	60.10%
World Bank	41.22	51.04	17.36	32.41	1.88	51.66	87.39	59.12%
USA	47.70	48.03	13.91	34.64	5.61	54.16	112.11	48.31%
EU/EC	32.46	47.36	9.69	25.12	-	34.82	76.90	45.27%
ILO	1.71	1.47	0.38	1.68	-	2.07	4.89	42.32%
ADB	85.43	328.80	7.50	65.44	11.08	84.03	204.83	41.03%
UNICEF	6.28	10.75	-	11.98	-	11.98	29.42	40.73%
IAEA	-	0.30	0.31	0.03	-	0.35	0.86	40.57%
UNDP	5.13	4.48	0.68	3.01	0.05	3.75	9.51	39.46%
IFAD	4.68	6.62	2.44	3.16	0.11	5.72	14.73	38.86%
UK	0.61	0.65	0.75	0.44	-	1.19	3.41	35.02%
New Zealand	3.93	3.76	0.24	1.66	1.06	2.97	8.59	34.58%
WHO	0.54	3.19	4.026	-	-	4.02	12.07	33.34%
France	44.57	18.27	36.81	0.01	-	36.83	117.37	31.38%
UN Women	0.25	0.25	-	-	0.23	0.23	0.95	24.55%
Republic of Korea	18.02	14.10	0.10	24.27	-	24.38	119.77	20.36%
Czech Republic	0.95	0.75	0.29	-	-	0.29	2.73	10.62%
WFP	2.11	0.79	-	0.85	-	0.85	8.09	10.61%
UNIDO	0.16	0.08	-	0.19	-	0.19	2.29	8.37%
Japan	4.09	2.91	0.34	1.82	-	2.17	400.58	0.54%
UNOCHR	0.06	0.04	-	-	-	-	-	0%
Other	-	-	-	-	-	-	592.26	0%
Total	388.38	623.57	163.03	273.81	28.24	465.08	2,025.40	22.96%

ODA Support to Climate Change

CRDB/CDC and NCSD have been working closely in formulating and launching the guideline and criteria for tracking ODA supports in climate change mainstreaming. Total ODA disbursement to climate change, as the principal sector, was USD 9.01 million in 2020 and decreased to USD 8.28 million in 2021, equivalent to 0.40% of total ODA disbursement in 2021. The total reduction in climate change finance was due to the sharp decline in NGOs core fund disbursed to climate change sector from USD 0.89 Million in 2020 to only 0.06 million in 2021 although assistance from development partners remains relatively stable in the same period.

Table 5.5: Disbursement to Climate Change as Principal Sector in 2019-2021 (USD Million)

Climate Change as Principal Sector and Sub Sector	2019 Act.	2020 Act.	2021 Est.	Total 2019-2021
Climate change adaptation	11.67	7.64	3.82	23.14
Climate change mitigation	0.57	0.47	4.39	5.44
Others	0.01	0.01	-	0.02
Total	12.26	8.11	8.21	28.6
NGO Own Fund	1.03	0.89	0.06	1.99
Grand Total	13.30	9.01	8.28	30.6

Based on available data in the Cambodia ODA Database, 16 major development partners have currently financed climate change in the principal sector. From 2019 to 2021, the five largest partners for climate change include Sweden, UNDP, EU/EC, Japan, and the Republic of Korea, which accumulated more than USD 20 million, about 73% of total climate change sector finance. Although Sweden and UNDP were the biggest funding sources, their disbursements greatly declined from year to year. Sweden has reduced its support to only USD 0.46 million in 2021 while UNDP provided USD 0.03 million in the same year, becoming the second lowest funding partner, after UNICEF.

Table 5.6: Disbursement to Climate Change by DPs in 2019-2021 (USD Million)

Development Partner	2019 Act.	2020 Act.	2021 Est.	Total 2019-2021
Sweden	2.95	3.23	0.46	6.66
UNDP	3.43	1.46	0.03	4.93
EU/EC	0.49	1.80	1.58	3.88
Japan	2.74	-	-	2.74
Republic of Korea	-	-	2.60	2.60
UNIDO	0.57	0.36	1.43	2.37
IFAD	1.14	0.19	-	1.33
New Zealand	0.27	0.29	0.28	0.85
UN Women	0.25	0.25	0.23	0.73
FAO	0.05	0.20	0.40	0.66
Czech Republic	0.26	0.17	0.18	0.61
WFP	0.06	0.13	0.39	0.59
Germany	-	-	0.21	0.21
Ireland	-	-	0.20	0.20
UK	-	-	0.15	0.15
UNICEF	0.005	0.005	0.005	0.015
Total	12.26	8.11	8.21	28.60

Table 5.7 illustrates that in 2019-2021 agriculture sector mainstreamed climate change with its largest share of more than 50% of total disbursement to agriculture sector. In 2021, total agriculture mainstreaming of climate change was recorded USD 146.33 million, equivalent to 57% of total ODA disbursement for the agriculture sector. Urban planning and management together with energy, power and electricity were the second and third largest sectors with more than 30% of climate change mainstreaming finance. ODA disbursed to energy, power and electricity was USD 190 million, in which USD 60 million was reported as climate change mainstreaming support. Tourism and community and social welfare had their shares of less than 1% for climate change mainstreaming support in these three consecutive years.

Table 5.7: Sectors Mainstreaming of Climate Change in 2019-2021 (USD Million)

Sector	2019	2020	2021 Est.				2021 ODA by Sector	Climate Change as %
			Minor	Moderate	Significant	Total		
Agriculture	173.66	137.4	19.10	106.81	20.41	146.33	254.69	57.45%
Urban Planning & Management	20.94	29.60	7.17	7.58	0.40	15.16	48.14	31.48%
Energy, Power & Electricity	75.42	87.80	57.65	1.47	0.81	59.95	190.77	31.42%
Environ. & Conservation	18.25	14.53	0.79	2.70	5.99	9.49	33.34	28.46%
Water & Sanitation	59.67	7.74	1.06	40.31	4.22	45.6	178.31	25.57%
Social Protection	-	0.01	0.13	0.08	1.91	2.12	9.21	22.99%
Rural Development	7.02	7.77	0.29	8.13	7.62	16.06	95.46	16.82%
Manuf., Mining & Trade	0.06	0.02	-	1.15	-	1.16	11.02	10.52%
Banking & Business Services	0.17	0.16	0.12	0.15	-	0.27	2.97	9.07%
Culture & Arts	1.82	1.84	-	1.84	-	1.85	22.28	8.30%
Emergency & Food Aid	0.116	0.22	0.48	-	0.25	0.73	9.16	7.96%
Transportation	36.38	27.52	8.96	20.74	0.43	30.14	444.45	6.78%
Gender	0.50	0.25	0.43	-	-	0.44	6.59	6.67%
Education	15.04	21.50	9.59	1.79	1.05	12.44	192.38	6.46%
Governance & Admin	5.12	10.32	2.71	1.57	0.36	4.66	88.70	5.25%
Others	0.57	1.99	0.75	1.22	-	1.98	41.59	4.75%
Health	10.30	22.97	11.55	2.38	-	13.93	315.11	4.42%
Tourism	-	0.07	0.08	-	-	0.09	6.48	1.38%
Community & Social Welfare	0.81	0.19	0.01	0.01	-	0.03	74.67	0.04%
Total	425.94	371.67	120.93	198.01	43.48	362.432	2,025.40	17.89%

Table 5.8 demonstrates that 29 development partners have contributed their supports to Climate Change mainstreaming in 2019-2021. For 2021, only 18% of total disbursements were recorded to mainstream climate change. World Bank, France, Ireland, WHO, IAEA, ADB, Republic of Korea, UNICEF, UNDP, China, IFAD, and UN Women mainstreamed climate change with more than 20% of their total disbursement. China and ADB appeared to be the major partners which mainstreamed climate change with the largest amount (USD 80.83 million and USD 65.25 million, respectively) of their total disbursements in 2021.

Table 5.8: DPs Mainstreaming of Climate Change in 2019-2021 (USD Million)

Development Partner	2019	2020	2021 Est.				2021 ODA Disbursement	Climate Change as %
			Minor	Moderate	Significant	Total		
World Bank	34.35	37.61	4.27	20.27	7.03	31.58	87.39	36.13%
France	78.30	21.44	0.71	38.73	0.63	40.09	117.37	34.15%
Ireland	-	-	-	0.53	-	0.53	1.57	33.92%
WHO	0.54	3.19	4.02	-	-	4.02	12.07	33.33%
IAEA	-	0.2	0.13	0.15	-	0.28	0.86	33.03%
ADB	96.06	66.13	-	53.50	11.75	65.25	204.83	31.85%
Republic of Korea	11.83	13.74	8.86	28.06	0.45	37.38	119.77	31.21%
UNICEF	4.46	8.88	7.49	1.53	-	9.03	29.42	30.70%
UNDP	2.09	1.74	0.26	0.92	1.04	2.24	9.51	23.56%
China	120.45	125.22	56.83	24	-	80.83	343.14	23.55%
IFAD	3	4.53	-	-	3.28	3.28	14.73	22.27%
UN Women	-	-	0.19	-	-	0.19	0.95	20.25%
Germany	4.03	5.94	7.21	0.92	0.79	8.93	44.83	19.92%
FAO	1.35	0.37	0.04	0.11	0.18	0.34	1.98	17.59%
New Zealand	0.27	0.22	-	1.305	-	1.30	8.59	15.19%
USA	11.05	13.29	6.30	6.41	3.864	16.57	112.11	14.78%
EU/EC	10.28	2.51	2.95	4.94	2.67	10.57	76.90	13.75%
Japan	32.02	55.94	16.14	12.74	11.41	40.29	400.58	10.05%
ILO	0.11	0.01	0.47	-	-	0.47	4.89	9.62%
Australia	9.23	4.89	2.93	2.90	-	5.84	66.47	8.78%

Switzerland	1.14	1.79	0.96	0.47	-	1.43	17.11	8.37%
WFP	2.08	0.73	0.41	-	0.25	0.66	8.09	8.15%
UK	0.09	0.13	0.15	0.07	-	0.22	3.41	6.64%
Canada	0.28	0.12	0.17	0.01	-	0.18	2.93	6.40%
UNIDO	0.16	0.07	0.05	-	0.05	0.10	2.29	4.40%
UNFPA	0.07	0.18	0.13	-	-	0.13	3.4	3.82%
Czech Republic	0.22	0.07	-	0.08	-	0.08	2.73	3.22%
UNESCO	0.03	0.04	-	0.11	-	0.11	3.69	3.14%
Sweden	2.34	2.56	0.17	0.17	0.04	0.39	22.46	1.74%
Others	-	-	-	-	-	-	301.02	0%
Total	425.94	371.67	120.93	198.01	43.48	362.43	2,025.40	17.89%

ODA Support to Private Sector Development

Private sector development (PSD) remains a priority for the RGC to promote national growth as articulated in the RS-IV. Table 5.9 indicates that the amount of USD 693 million, accounting for 34.25% of total ODA disbursement is contributed to PSD mainstreaming in 2021, with a 13% average increase. With a combination of USD 483.42 million (69%) of the total mainstreamed funds in 2021, transportation and energy, power and electricity sectors are the two largest sectors for PSD mainstreaming. Meanwhile, China and Japan mainstreamed most of their funding to interconnecting transportation and energy infrastructures in 2021. Other three sectors, including Manufacturing, mining trade, tourism and banking and business services have also mainstreamed PSD to a great extent.

Table 5.9: Sectors Mainstreaming of PSD in 2019-2021 (USD Million)

Sector	2019	2020	2021 Est.				2021 ODA by Sector	PSD as %
			Minor	Moderate	Significant	Total		
Transportation	314.23	329.77	1.00	355.50	1.00	357.51	444.45	80.43%
Energy, Power & Electricity	115.01	130.93	0.87	124.03	1.00	125.91	190.77	66%
Manufacturing, Mining Trade	5.75	3.61	1.06	1.82	2.98	5.88	11.02	53.35%
Tourism	3.66	2.37	-	3.01	0.18	3.2	6.48	49.32%
Banking & Business Services	1.8	0.63	-	0.12	1.22	1.35	2.97	45.41%
Social Protection	0.98	1.16	3.55	0.08	0.12	3.75	9.21	40.77%
Gender	0.82	2.42	2.19	-	-	2.19	6.59	33.23%
Climate Change	2.5	2.03	1.15	1.48	0.1	2.74	8.28	33.07%
Rural Development	24.75	13.01	11.62	10.21	5.2	27.04	95.46	28.32%
Water & Sanitation	9.76	7.77	38.02	2.16	4.22	44.4	178.31	24.9%
Urban Planning & Management	15.97	9.58	6.12	1.45	0.4	7.98	48.14	16.58%
Governance & Admin	7.82	17.31	6.61	7.74	0.03	14.39	88.70	16.23%
Environment & Conservation	6.14	5.89	2.11	2.56	0.68	5.37	33.34	16.11%
Agriculture	69.45	38.73	12.52	14.93	12.85	40.32	254.69	15.83%
Education	17.63	24.38	2.62	20.19	3.91	26.73	192.38	13.89%
Comm & Social Welfare	4.04	7.08	2.03	2.96	1.56	6.56	74.67	8.78%
Others	6.34	2.06	1.39	0.13	0.42	1.95	24.33	8.01%
Emergency & Food Aid	0.11	0.23	0.73	-	-	0.73	9.16	7.99%
Culture & Arts	1.81	1.11	1.33	-	-	1.33	22.28	6%
Health	9.09	10.71	9.09	4.99	-	14.09	315.11	4.47%
Infor & Communication	0.04	0.03	0.01	0.21	-	0.22	8.96	2.5%
Total	617.79	610.90	104.11	553.64	35.95	693.71	2,025.40	34.25%

Table 5.10 shows that 27 development partners contributed to PSD mainstreaming. Japan, China, ILO and IFAD were amongst the principal development partners mainstreamed to PSD in their projects. Noticeably, China and Japan are the two main development partners who mainstreamed to PSD approximately 63% of their own fund in 2021.

Table 5.10: DPs Mainstreaming of PSD in 2019-2021 (USD Million)

Development Partner	2019	2020	2021 Est.				2021 ODA by DP	PSD as %
			Minor	Moderate	Significant	Total		
UNIDO	0.73	0.44	-	1.53	0.09	1.63	2.29	71.12%
Japan	84.25	120.89	-	265.93	0.34	266.28	400.58	66.47%
China	308.29	295.12	-	206.45		206.45	343.14	60.16%
ILO	1.72	1.49	0.38	0.08	1.68	2.15	4.89	44.07%
IFAD	4.68	6.62	-	3.28	2.44	5.72	14.73	38.85%
New Zealand	2.21	1.65	1.53	0.86	0.70	3.09	8.59	36.04%
WHO	0.54	3.19	4.02	-	-	4.02	12.07	33.33%
France	71.70	40.77	37.43	0.50	0.71	38.64	117.37	32.92%
USA	25.85	28.33	9.44	17.50	8.87	35.82	112.11	31.95%
UNICEF	4.55	5.15	3.92	4.48		8.40	29.42	28.56%
UNDP	3.11	2.32	0.41	1.51	0.65	2.58	9.51	27.13%
ADB	58.46	57.62	9.50	40.91	4.64	55.06	204.83	26.88%
IAEA	-	0.22	0.08	0.06	0.07	0.22	0.86	26.42%
EU/EC	9.50	13.68	14.12		6.03	20.16	76.90	26.21%
Australia	13.83	12.73	7.38	3.10	3.77	14.26	66.47	21.45%
Germany	5.63	6.53	3.06	2.60	2.27	7.95	44.83	17.73%
Switzerland	4.14	2.46	0.37	1.96	0.36	2.70	17.11	15.79%
UNESCO	0.52	0.27	0.48	-	-	0.48	3.69	13.21%
Czech Republic	0.25	0.62	0.26	0.08	-	0.35	2.73	13.11%
WFP	2.11	0.79	0.44	0.41	-	0.85	8.09	10.6%
Sweden	1.59	2.04	0.99	1.26	-	2.26	22.46	10.06%
Republic of Korea	13.18	5.42	9.99	-	-	9.99	119.77	8.34%
World Bank	0.16	1.93	-	1.00	3.15	4.15	87.39	4.74%
UNFPA	0.03	0.10	0.15			0.15	3.40	4.52%
Canada	0.42	0.31	-		0.13	0.13	2.93	4.5%
FAO	0.01	0.04	0.01	0.04	-	0.05	1.98	2.62%
UK	0.23	0.05	0.05	0.02	-	0.07	3.41	2.16%
Others	-		-	-	-	-	303.73	0.0%
Total	617.79	610.90	104.10	553.64	35.95	693.71	2,025.40	34.25%

6. ODA Support to Cambodia Industrial Development

Driven by its long-term vision toward 2030 and 2050, the RGC adopted and has been implementing the Cambodia Industrial Development Policy 2015-2025 (IDP), a new growth strategy to promote the country's industrial development and maintain sustainable and inclusive growth through improving economic diversification, strengthening competitiveness, and enhancing productivity towards achieving the aspired structural transformation of domestic economy and deeper integration into regional and global economic architectures.

Under the leadership of the RGC, relevant ministries and government agencies have been implementing policy measures and action plans set out by the IDP. In 2021, the IDP MTR was prepared to assess the progress and its impacts for the implementation period of 2015-2020 and provide key policy recommendations to improve and accelerate the next phase of its implementation. According to the MTR, progress has been made towards the IDP's targets, policy measures and action plans as well as the four key concrete measures. Cambodia's economy has experienced structural transformation as the industrial share in GDP increased from 27.7% in 2015 to 34.2% in 2019, surpassing the 2025 target of 30%. Nonetheless, although industrial share in GDP experienced positive progress and surpassed the set target, the performance of manufacturing sector is rather stagnant.

Role of ODA in Supporting Industrial Development in Cambodia

ODA still plays a catalytic role in leveraging other forms of development finance to support the IDP implementation and its priorities areas including infrastructure and logistic development, trade facilitation, economic competition, SMEs development, institutional capacity building as well as human resource and skill development. Hence, ODA helps create a favorable investment environment, thereby encouraging more investment and more industrial activities.

Recognizing the important role of ODA, CRDB/CDC, through data provided by development partners in the Cambodia ODA Database, has regularly monitored the volume of ODA and analyzed the trends of ODA support to IDP as a basis for policy making and a reference point of entry for partnership dialogues.

Analysis of ODA Provision to IDP

Using the mapping approach, table 6.1 shows that USD 300.3 million, which accounts for 17.6% of total ODA (excluding NGO funds), was disbursed in 2019 to support the implementation of IDP's four key concrete measures, policy measures and action plans. In 2020, the disbursement increased by 6% compared to that of 2019, reaching USD 318.3 million. The amount in 2021 was estimated around USD 306.1 million, and about 2/3 of the support was provided to the four key concrete measures, of which USD 190.7 million is directed to energy sector (mainly contributed by China and Japan).

Overall, the available data indicates that 21 development partners are active in supporting projects that contribute to the IDP implementation from 2019 to 2021, while China, Japan, ADB, France, and Australia were the largest sources of support. Most of the partners are active in contributing to IDP's supporting policies, including skill and human resource development, science, technology and innovation enhancement. In 2021, only four development partners – namely ADB, Japan, UNIDO and EU/EC – provided ODA to support investment promotion, amounting to USD 34.5 million.

Table 6.1: ODA Support to IDP in 2019-2021 (USD Million)

Development Partner	2019	2020	2021 Est.						2019-2021
			Investment Promotion	Expanding SMEs	Regulatory Environment	Supporting Policies	Four Key Concrete Measures	Total	
China	147.1	147.5	-	-	-	-	113.68	113.7	408.3
Japan	19.2	28.8	12.2	-	-	13.47	67.20	92.9	140.9
ADB	51.6	29.7	21.7	-	-	21.1	1.17	43.9	125.2
France	39.9	70.6	-	-	-	1.1	1.05	2.2	112.7
Australia	10.0	7.4	-	-	-	5.5	2.43	7.9	25.3
World Bank	6.7	7.6	-	-	-	8.09	-	8.1	22.4
Republic of Korea	5.9	7.3	-	0.3	0.1	2.18	5.67	8.3	21.5
EU/EC	5.2	3.9	0.2	-	3.65	-	1.73	5.6	14.7
Germany	3.8	3.1	-	1.3	4.2	-	0.59	6.0	12.9
IFAD	2.2	4.0	-	4.9	-	-	-	4.9	11.1
USA	0.8	1.5	-	1	0.45	3.5	0.02	5.0	7.3
Switzerland	2.3	1.8	-	-	0.01	2.52	-	2.5	6.6
New Zealand	2.1	1.5	-	-	-	-	-	-	3.6
Sweden	0.6	1.2	-	-	-	0.93	-	0.9	2.7
Canada	1.0	0.9	-	0.1	0.3	0.26	-	0.7	2.6
Czech Republic	0.3	0.5	-	0.1	-	1.05	0.07	1.2	2
UNIDO	0.5	0.5	0.4	0.1	-	0.18	-	0.7	1.7
UNDP	0.4	0.4	-	0.25	0.19	-	0.15	0.6	1.4
ILO	0.2	0.04	-	-	-	0.45	-	0.5	0.7
UK	0.2	0.02	-	-	-	0.4	-	0.4	0.6
IAEA	-	0.25	-	0.1	-	-	0.11	0.2	0.5
Grand Total	300.3	318.3	34.5	8.1	8.82	60.84	193.86	306.1	924.7

Table 6.2 indicates that USD 1,799.2 million of ODA was disbursed to support the IDP implementation in 2015-2022, averaging USD 225 million per annum. The four key concrete measures received the largest share of support, amounting to USD 1,220.5 million. Meanwhile, the IDP's effort concerning SMEs expansion received less support from development partners, which only accounted for around USD 48.8 million, approximately 3% of total support to IDP from 2015 to 2022.

Table 6.2: Medium Term Resourcing of IDP in 2015-2022 (USD Million)

IDP Policy Measures and Four Key Concrete Measures	2015	2016	2017	2018	2019	2020	2021 Est.	2022 Proj.	Total
Investment Promotion	0.2	3.3	1.8	2.3	47.6	15.3	34.5	40.7	145.7
Expanding SMEs	1.1	1.7	3.6	3.9	7.3	7.0	8.1	16.0	48.8
Regulatory Environment	4.3	9.0	25.9	9.2	8.3	5.0	8.8	8.0	78.5
Supporting Policies	27.4	22.2	28.2	29.3	35.3	52.8	60.8	49.7	305.7
Four Key Concrete Measures	55.9	148.0	162.0	104.8	201.9	238.2	193.8	115.9	1,220.5
Grand Total	88.9	184.2	221.4	149.5	300.3	318.3	306.1	230.4	1,799.2

Table 6.3 shows that China, Japan, ADB, France and Australia are the top five development partners that provided a large share of ODA support to the IDP implementation in 2015-2022. The support from these five development partners was amounted to USD 1,566.2 million, around 87% of the total support to IDP.

Table 6.3: Medium Term Resourcing of IDP in 2015-2022 by Development Partner (USD Million)

Development Partner	2015	2016	2017	2018	2019	2020	2021 Est.	2022 Proj.	Total
China	45.1	122.2	133.2	54.7	147.1	147.5	113.7	42.5	805.9
Japan	12.8	19.0	16.5	24.8	19.2	28.8	92.9	46.0	260.0
ADB	11.1	9.8	19.0	22.0	51.6	29.7	43.9	51.6	238.7
France	1.2	13.0	21.4	19.2	39.9	70.6	2.1	27.2	194.6
Australia	7.3	9.5	11.4	10.5	10.0	7.4	8.0	2.9	67.0
World Bank	1.8	-	-	0.1	6.7	7.6	8.1	16.5	40.8
Republic of Korea	-	1.1	6.3	4.9	5.9	7.3	8.3	5.2	39.1
EU/EC	2.8	1.7	1.3	2.5	5.2	3.9	5.6	4.6	27.6
IFAD	-	-	0.01	0.6	2.2	4.0	4.9	12.2	23.9
Germany	-	1.1	2.0	1.9	3.8	3.1	6.0	5.9	23.8
USA	1.2	0.8	1.0	0.3	0.8	1.5	5.0	5.5	16.0
Switzerland	0.5	0.8	2.0	2.5	2.3	1.8	2.5	2.3	14.8
New Zealand	2.6	1.9	3.1	2.2	2.1	1.5	-	0.4	13.7
Sweden	1.1	1.3	1.2	0.9	0.6	1.2	0.9	4.2	11.3
Canada	0.1	0.4	0.5	1.1	1.0	0.9	0.7	0.7	5.5
ILO	0.9	1.0	1.0	0.4	0.2	0.04	0.5	0.4	4.3
Czech Republic	0.3	0.4	0.3	0.01	0.3	0.5	1.2	0.3	3.4
UNDP	-	0.1	0.6	0.3	0.4	0.4	0.6	0.6	2.9
UNIDO	0.1	0.1	0.2	0.1	0.5	0.5	0.6	0.8	2.8
UK	-	-	0.05	0.4	0.2	0.02	0.4	0.7	1.8
IAEA	-	-	-	0.2	-	0.3	0.3	0.1	0.8
UNESCO	-	-	0.1	0.1	-	-	-	-	0.2
Grand Total	88.9	184.2	221.4	149.5	300.3	318.3	306.1	230.4	1,799.2

ODA Support to Technical and Vocational Education and Training (TVET) and Higher Education

Recognizing the importance of skills and human resource in supporting industrial development, the RGC through the IDP, set out a number of policy measures to promote skill and human resource development. Together with this, the national TVET Policy (2017-2025) was approved in June 2017 to improve the functioning of the national TVET system and establish a platform to engage key stakeholders as well as to mobilize resources.

Table 6.4 shows that in 2017-2022, 17 development partners were active in providing ODA support to promote TVET and higher education in the total amount of USD 255.1 million, averaging USD 42.5 million per annum. ADB, Japan, World Bank, Australia and France were main development partners, whose support accounted for approximately 77% of the total support to this sector.

Table 6.4: DPs Support to TVET and Higher Education in 2017-2022 (USD Million)

Development Partner	2017	2018	2019	2020	2021 Est.	2022 Proj.	Total
ADB	2.1	7.9	8.3	9.6	21.1	14.1	63.1
Japan	5.8	5.9	5.8	4	13.4	4.5	39.4
World Bank	-	0.1	6.7	7.5	8.1	16.5	38.9
Australia	7.2	6.9	5.9	4.5	5.5	-	30
France	0.9	1	0.9	20.1	1.1	0.03	24.03
Switzerland	2.1	2.5	2.3	1.8	2.5	2.3	13.5
Republic of Korea	4.2	0.4	1.1	0.9	2.2	2.7	11.5
New Zealand	3.1	2.2	2.1	1.5	-	-	8.9
Sweden	1.1	0.9	0.6	1.2	0.9	4.2	8.9
USA	0.2	0.2	0.3	1	3.5	3.5	8.7
Canada	0.2	0.4	0.4	0.3	0.3	0.3	1.9
Czech Republic	-	-	0.3	0.4	1	0.2	1.9
ILO	0.5	0.2	0.2	0.04	0.4	0.4	1.74
UK	0.1	0.4	0.1	0.01	0.4	0.7	1.71
UNIDO	-	-	-	0.01	0.2	0.3	0.51
EU/EC	0.2	0.07	-	-	-	-	0.27
UNESCO	0.1	0.12	-	-	-	-	0.22
Grand Total	27.8	29.1	35	52.8	60.6	49.7	255.1

7. ODA Support to Cambodian Sustainable Development Goals

Cambodian Sustainable Development Goals (CSDGs)

Cambodia Sustainable Development Goals (CSDGs) are Cambodian nationalized framework based on the universally-agreed SDGs crafted to bring about worldwide sustainability achieved by 2030, including economic, social, and the environmental dimensions. Whereas the SDGs comprised 17, the national framework included an additional goal 18 for mine action that fit with the national context, comprising 88 targets.

The national framework, integrated into the NSDP 2019-2023 and embedded in Budget Strategic Plan, has mapped out Cambodia's long-term policy agenda at both national and sub-national levels to eradicate poverty, and set an economic trajectory towards achieving Cambodia's Vision 2030 and 2050. It offers a policy guide that mainstreams policy-making and planning, budgeting, implementation, and monitoring at decision-making level.

Embracing the 2030 agenda, the RGC designated the Ministry of Planning as the focal point to lead this nationalization exercise by placing emphasis on "leaving no one behind" in close partnerships with stakeholders providing development financing. The assessment of progress is undertaken through Voluntary National Review (VNR) and annual reviews which adopt a whole of government approach drawing in ministries and local administrations.

The reviews indicate significant progress while challenges derive from resource constraint, stand in contrast with the level of CSDGs ambition. The implication is associated with the need for resource mobilization efforts to facilitate better CSDGs implementation. Therefore, considering CSDGs ambition and scale, the RGC reiterates the important role of all development actors, while striving to maintain ODA level and promote private sector investments, simultaneously.

The challenges are supplemented by COVID-19 outbreak that distorted implementation process since early 2020. Socio-economic development concerning poverty elimination, health, food security, gender and education all experienced setback that reportedly contributed to widening inequalities and gender alike. In this connection, the MOP took an initiative to review and approve the revised list of CSDGs targets and indicators echoing the RGC's strong need to recover from COVID-19 crisis and regain the track for attaining the CSDGs by 2030.

ODA Support to Implementation of CSDGs

Over the course of COVID-19, Cambodia's economic growth is affected and the government expenditure for the emergency response and socio-economic recovery has significantly increased, which led to challenges in resourcing for CSDGs implementation across goals. Although Cambodia's economy remains buoyant – growth, investment and public revenues are relatively strong, and provide a solid basis for CSDGs implementation, external supports by development partners to contribute to CSDGs implementation is increasingly significant.

In line with DP's significant role and the need to measure the CSDGs progress in the face of COVID-19 impact, the RGC has customized the ODA database maintained by CRDB/CDC to capture ODA support to CSDGs as part of monitoring progress in a new changing context.

Table 7.1 below summarizes development resources that support the 18 goals of CSDGs between 2019 and 2022. As illustrated, CSDG Goal 9 "Industry, Innovation, and Infrastructure" captures the largest share of total ODA, 35% of average annual ODA disbursement to CSDGs. CSDG Goal 3 "Good Health and Well-Being" gets the second highest ODA contribution accounting for 16%. This reflects the alignment of DPs' priorities with those of the RGC on human capital development as key growth drivers in response to COVID-19 pandemic. The other goals combined capture the least share under 10% of ODA disbursement to CSDGs, while CSDG Goal 12 "Responsible Consumption and Production" and CSDG Goal 15 "Life on Land" receive smallest contribution of ODA.

Table 7.1: ODA Disbursement by CSDGs Goals 2019-2022 (USD Million)

Goal	CSDGs	2019	2020 Act.	2021 Est.	2022 Proj.	Average Annual Share
1	No Poverty	55	46	64	78	4%
2	Zero Hunger	79	91	106	100	6%
3	Good Health and Well-Being	151	562	208	137	16%
4	Quality Education	113	120	91	127	7%
5	Gender Equality	33	114	33	35	3%
6	Clean Water and Sanitation	96	71	148	98	6%
7	Affordable and Clean Energy	105	128	129	78	7%
8	Decent Work and Economic Growth	52	40	66	88	4%
9	Industry, Innovation, and Infrastructure	557	540	538	678	35%
10	Reduced Inequalities	9	85	11	11	2%
11	Sustainable Cities and Communities	40	42	57	42	3%
12	Responsible Consumption and Production	6	6	8	7	0%
13	Climate Action	49	46	80	74	4%
14	Life Below Water	11	11	13	21	1%
15	Life on Land	7	4	3	3	0%
16	Peace, Justice, and Strong Institutions	15	31	19	18	1%
17	Partnerships for the Goals	10	8	12	12	1%
18	Cambodia Mine/ERW Free	16	17	16	11	1%
Total		1,403	1,960	1,603	1,617	100%

Table 7.2 below illustrates ODA disbursements to CSDGs implementation in 2021. Japan was the largest provider to CSDGs, contributing USD 396 million, equivalent to 25% of total ODA to CSDGs, followed by China (USD 342 million equals to 21%) and ADB (USD 125 million equals to 8%). Notably, Japan mostly supported on CSDG Goal 9 “Industry, Innovation, and Infrastructure” accounted for USD 190 million and CSDG Goal 7 “Affordable and Clean Energy” amounted to USD 67 million, indicating important contribution to Cambodia infrastructure development. China shares to CSDG Goal 9 and CSDGs Goal 7 were about USD 256 million and USD 57 million respectively, which also reflects strong persistent support on infrastructure development in Cambodia. The ADB significantly contributed USD 33 million each to CSDG Goal 6 “Clean Water and Sanitation” and Goal 9 “Industry, Innovation, and Infrastructure” purposely to support government effort in rural infrastructure development. Besides, other partners’ support to CSDGs combined to USD 123 million (8%), among which largely contributed to CSDG Goal 3, “Good Health and Well-Being” about USD 63 million, which clearly indicated the health response to COVID-19 pandemic.

Table 7.2: ODA Contribution to CSDGs by Development Partner in 2021 (USD Million)

CSDGs	Development Partner											Total
	Japan	China	ADB	France	USA	Korea	World Bank	UN Agency	Australia	EU/EC	Other	
G-1	1.40	-	2.62	1.53	8.04	13.59	3.51	8.99	0.23	12.21	11.61	63.73
G-2	22.05	10.07	13.16	0.34	4.64	13.10	15.86	12.79	4.04	2.29	7.65	106.00
G-3	8.55	11.07	-	27.42	30.85	8.65	15.24	14.31	29.11	-	62.99	208.18
G-4	16.64	4.14	11.25	1.55	8.43	8.84	8.28	12.78	6.26	7.30	5.52	91.01
G-5	0.69	-	0.01	0.78	11.59	-	-	4.46	5.71	1.67	8.49	33.41
G-6	36.97	3.85	33.46	52.74	5.69	0.18	1.76	6.50	2.43	4.19	0.57	148.35
G-7	67.20	56.84	1.05	0.66	0.01	-	-	0.38	2.43	0.27	0.42	129.27
G-8	7.80	-	7.01	1.10	11.80	10.91	2.64	5.83	4.26	5.65	9.47	66.47
G-9	189.61	256.56	33.42	-	0.92	18.48	36.93	0.72	-	0.22	0.96	537.80
G-10	0.24	-	0.01	0.07	1.35	-	-	3.93	2.17	2.38	0.48	10.63
G-11	38.01	-	6.72	2.81	1.44	5.90	-	1.65	0.07	-	0.16	56.76
G-12	0.59	-	-	0.24	1.87	0.04	-	1.41	3.03	-	0.69	7.87
G-13	2.23	-	16.45	26.56	4.38	15.49	1.77	6.22	-	4.56	2.34	80.00
G-14	0.21	-	-	0.27	0.42	-	1.41	0.01	-	10.46	-	12.77
G-15	0.03	-	-	0.33	0.64	-	-	0.94	-	-	0.83	2.77
G-16	0.69	-	0.12	0.57	8.82	0.25	-	3.03	3.52	0.52	1.86	19.37
G-17	-	-	-	0.28	1.72	0.33	-	2.76	0.08	0.83	6.17	12.18
G-18	3.01	-	-	-	7.00	1.66	-	0.03	1.58	-	2.66	15.94
Total	395.91	342.53	125.30	117.25	109.6	97.42	87.40	86.74	64.91	52.55	122.89	1,603
% of Total ODA to CSDGs	25%	21%	8%	7%	7%	6%	5%	5%	4%	3%	8%	100%

Progress on CSDG 17: Partnerships for the Goals

The RGC has demonstrated commitment and effort to deliver effective development results. The impressive successes include resource mobilization and its alignment with the national priorities, inclusive partnerships in the development process and improved coordination with development partners. In particular, the DCPS 2019-2023 continues to coordinate partnership arrangements and take opportunities to mobilize development cooperation and strengthen partnerships with stakeholders to support the implementation of the CSDGs. Progress has been made toward achieving Goal 17 “Strengthen the Means of Implementation and Revitalize the Global Partnership for Sustainable Development”, under CRDB/CDC monitoring mandate. Table 7.3 displays all localized indicators of Goal 17 are on-track or ahead of targets.

Table 7.3: CSDG 17 “Strengthen the Means of Implementation and Revitalize the Global Partnership for Sustainable Development”

Targets and Indicators	Unit	CSDGs targets							Actual							Progress
		2015	2016	2017	2018	2019	2020	2021	2016	2017	2018	2019	2020	2021		
17.3	Mobilize additional financial resources for developing countries from multiples sources															On track
17.3.1	Official Development Assistance as % of GDP	% of GDP	7.35	7.35	6.87	6.42	6.00	5.61	5.26	6.43	6.86	6.12	7.05	6.46	5.40	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	1.00	0.94	1.53	1.87	1.45	1.85	1.44	0.80	Ahead
17.9.2	Amount of ODA to Economic and Development Policy/Planning to Cambodia	% of GDP	0.03	0.03	0.02	0.02	0.02	0.02	0.02	0.04	0.05	0.04	0.04	0.03	0.02	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	Number	7	7	7	8	8	8	9	7	7	7	NA	NA	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	0.01	0.01	0.03	0.03	0.04	0.05	0.02	0.02	Ahead

8. Least Developed Country (LDC) Graduation- Cambodia

Cambodia has been one of the fastest-growing economies experiencing rapid growth. Prior to 2020, effective implementation of the CSDGs framework 2016-2030 guided by Rectangular Strategy-Phase 4 had gained significant momentum of Cambodia's sustainable development on a mapped-out economic trajectory towards LDC graduation.

In the event of COVID-19 pandemic, which directly hit all countries, Cambodia is not an exception with its economy contracted by 3.1% in 2020 and the poverty rate jumped to 17.8% due to the exposure of economic pain caused by the decline of the main engines of growth - manufacturing, agriculture, and tourism, combined with the introduction of new calculation method of poverty rate. In response to this challenge, the RGC has taken swift actions to combat the pandemic through responsive measures to maintain momentum for the smooth LDC graduation process.

The RGC brings forth a national socio-economic recovery plan, in accordance with a-whole-of-society approach to uplift the country's economy back on pace. Such RGC-led firm efforts triggered an economic rebound to 3% in 2021, while enabled Cambodia to achieve the LDC graduation thresholds with GNI per capita stands at \$1,377, Human Assets Index (HAI) at 74.3 and Economic and Environmental Vulnerability Index (EVI) at 30.6.

Table 8.1: Cambodia's LDC Graduation Criteria Data

LDC Criteria	2021 Thresholds	Cambodia
Gross National Income (GNI) per capita	\$1,222 or above	\$1,377
Human Assets Index (HAI)	66 or above	74.3
Economic Vulnerability Index (EVI)	32 or below	30.6

Against this LDC graduation criteria data, Cambodia was added into the graduation list at the last CDP review in 2021. This progress is expected for a forward move that is translated into Cambodia's prospect of fulfilling the criteria at the second triennial review in 2024. Following the second review in 2024 and then endorsed 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 2030.

Table 8.2: Summary Cambodia - LDC graduation process

Year 0 - 1st triennial review of CDP (2021)	CDP reviews progress and confirms Cambodia's eligibility in February 2021(1st finding)	<ul style="list-style-type: none"> Initiate preparations for graduation with support from UNRCO Build knowledge of graduation process, impact and monitor progress (considering COVID-19 and other shocks) Prepare Impact Assessment by UNDESA, Vulnerability Profile by UNCTAD
Year 0 - 3 (2021-2024)	Information gathering and early preparations (Cambodia Now)	
Year 3 - next CDP meeting (2024)	CDP re-confirms eligibility (2nd finding) and recommends graduation to ECOSOC (UN General Assembly endorsement)	
Years 3 - 6 (2024-2027)	Preparation period Transition strategy prepared	
Year 6 (2027)	Graduation is confirmed A transition period starts	
After Year 6 (2027 onward)	Smooth Transition strategy implemented (monitored by CDP), ensuring no abrupt reduction of support	

Years from now, Cambodia’s readiness to exit from LDC status entails a National Smooth Transition Strategy to facilitate Cambodia’s preparation process leading up to reevaluation in the upcoming years for the second finding and consequently lay a foundation for eligibility of eventual confirmed graduation from LDC category.

However, the prolonged impact of COVID-19, especially its new variants presents implications on the LDC graduation agenda. From the perspective of Cambodia’s LDC graduation, all 3 criteria are likely to be affected. In the case of a pandemic, human assets will be directly affected since COVID-19 has placed a strain on health systems at all levels. This will be followed by an impact on economic production, investment and trade that will have implication on the GNI. The challenges rest with the inequalities in the standard of living, income, education and access to opportunities that had yet to recover to pre-pandemic levels.

Implication of Cambodia’s LDC Graduation

Graduating from LDC grouping has impact on the International Support Measures (ISMs), in areas of development assistance and trade. The costs and benefits as the impact of graduating from LDCs are summarized as below.

Table 8.3: Cost and Benefits of Graduating from LDCs

LDCs Enjoy	LDC Graduation’s Benefits	LDC Graduation’s Trade-Offs
Access to ISMs, in particular areas of development assistance and trade	Good international image recognition of achievements	Loss of trade-related ISMs: market access preferences (DFQF, GSP, Rule of Origin flexibility)
Trade-related ISMs: preferential market access; special and differential treatment (SDT) provisions, trade-related technical assistance, accession to WTO	A strong signal of a more investor-friendly climate, good infrastructure	Loss of preferential treatment (WTO rules, TRIPS, TRIMS, export subsidies)
Technical assistance: Enhanced Integrated Framework; Aid for Trade	A strong signal of a stable political situation	Possible reduction in ODA from bilateral and multilateral donors
Technology-related ISM: Aid for science, technology and innovation; agreement on Trade-related aspects of TRIPs and TRIMs; climate change-related tech transfer	A strong signal of a predictable macroeconomic policy and country commitment to sustainable development	Loss of access to exclusive mechanisms (tech bank, EFI, Aid for Trade)
Other general ISM: contribution to international organizations; travel and research	Therefore, larger flows of the FDI (possibly)	Loss of access to other LDC-specific support (UN budget, travel benefit, etc.)

Cambodia has long enjoyed the benefits of LDC specific entitlements – ISMs, including ODA and trade and technical assistance, to mention a few. The change in status as a non-LDC country would suggest the ISMs will be phased out implying possible reduction in ODA and its concessional terms. The differential treatment exclusively granted to LDCs and arrangement support for international meeting participation will also have the same effect.

While Cambodia stands to benefit from a great deal of ISMs, the prospect graduation will inevitably result in trade-offs involving gains between receiving benefits from ISMs and the status of economic improvement that may attract further FDI. In this event, the RGC contemplates measures to mitigate the cost that is likely to incur in Cambodia’s post LDC graduation.

In this sense, the RGC has mounted efforts to negotiate with trading partners to expand free trade arrangements citing Cambodia’s favorable investment environment. The bilateral and regional FTAs such as CCFTA, CKFTA, and RCEP are expected to deliver huge benefit that can offset the expected fall in the degree of ODA concessionality. Thus, the RGC has

continued to ensure appropriate orientation and coordination of domestic policies and ISMs by focusing on coherence and synergy in trade, finance, technology and capacity building.

Cambodia's LDC Graduation Roadmap

In the context of LDCs, Istanbul Program of Action (IPoA 2011-2020) was laid out to set an ambitious goal of facilitating and enabling the LDCs to meet the graduation thresholds by 2020 and has been integrated into the NSDP to ensure coherent policy choices for sustainable development. Upon the assessment conducted for Cambodia over implementing the IPoA, the country has been widely recognized good economic performance prior to COVID-19 pandemic.

The Doha Program of Action (DPoA 2021-2030) as the new roadmap for supporting LDCs group is being prepared to inform the areas needed to be tackled. More specifically, the DPoA highlighted the LDCs vulnerability profile that has the potential to hurdle Cambodia's preparation for the upcoming review in 2024. Therefore, reducing vulnerability and building resilience will be the base for the implementation of the new program of action. In addition to the DPoA, mechanism is required at the national level through forming a national committee or task forces dealing with graduation to reflect on demand-driven aspects in the next course of action.

However, as the situation evolves, the COVID-19 is of major concern that highly impact Cambodia's progress heading toward implementing the new program of action. In this view, the path to graduation hinges on formulating a roadmap with due diligence to place Cambodia on the right track in preparing for the second review and future graduation.

Among other things, the RGC's efforts toward inclusive, resilient, and sustainable recovery, together with the support of international community, have become the core pillars of RGC's roadmap. This indicates that despite the changing aid modality from grant to more concessional loan, development cooperation remains highly relevant in supporting the RGC's push for LDC graduation and post COVID-19 economic recovery strategic framework and program of the government.

Key Policy Considerations

Although opting for the delay or staying as an LDC for other several years depends on political commitment, short and long-term economic outlook to sustain the economy and subsequently build future resilience is significant. While roadmap guides the important steps, a range of policy recommendations and priority areas are required to minimize economic risks and to help regain traction on a sustainable graduation pathway.

Human Capital Investment: Enhancing quality of human capital is of utmost importance, especially public health and education in COVID-19 context. Also, expanding social protection coverage is viable to reduce vulnerabilities that arise from shocks. On this basis, the RGC initiated a set of measures focusing on pro-poor growth under the NSPPF, supplemented by a national socio-economic recovery plan with the 3Rs pillars: Reform, Recovery, and Resilience, to invest in human development.

Industrial Policy: Cambodia can overcome impediments to structural transformation through establishing special economic zones embedded in the IDP 2015-2025. Industrial clusters, economic corridors, and growth poles will forge greater linkages of the domestic economy to further strengthen national competitiveness. MSMEs play the vital role in Cambodia's economy, therefore, empowering them will provide an economic stimulus to establish an enabling business environment, resulting in job creation and rising employment.

Infrastructure and Logistics: Adequate quality infrastructure and logistics is essential for sustainable and resilient growth. Therefore, developing bridges, roads, communication, and other facilities covering climate-resilient infrastructure will enhance Cambodia's economic competitiveness as part of building productive capacity.

Economic Diversification: Cambodia manufacturing activities are traditionally concentrated in labor-intensive products, with low-end garments/textiles which discourage modernization. The potential for economic diversification is constrained by rising wages, still-limited human capital, and relatively high cost of electricity and transportation. Given the fact that industrialization is a key to promote further diversification and competitiveness across sectors, prospects for industrial growth will depend upon greater investments in export upgrading and manufactured product diversification which is achievable through engaging in more of free trade agreements.

The RGC has proactively played its part in unwavering efforts to reach the completion of CCFTA, CKFTA, and RCEP and looked forward to negotiating a free trade agreement with the Eurasian Economic Union, all of which are conceivable to pin high hope on attracting more private investment, including FDI. The potential spill-over benefits related to the private investment, therefore, represent opportunities to escape from poverty as well as to transition from the vulnerable stratum into economic security in trade areas. Cambodia, through existing FTAs, is expected to enjoy broader market access besides European Union and the United States standing the largest export market. However, diversification is constrained by still-limited technological readiness and the development of new skills.

New Skills Development: The lack of a skilled labor force is seen as a major bottleneck for the country's development in human dimension. In this instance, nurturing new skills is important to accommodate the emerging digital economy that is more prone to job creation and generates high-value addition. The RGC has launched its Digital Economy and Society Policy Framework (2021-2035), providing a development model to leverage the power of technology and innovation for sustainable development to harness the digital economy for its competitiveness. Therefore, skills development is the most valuable asset for countering poverty and vulnerability in employment, and more specifically in the context of COVID-19. Digital skills and literacy will be of importance to build human assets and assist Cambodia's preparatory process for the upcoming graduation from LDC group.

Resource Mobilization – Both domestic and external development finance assumes a distinct yet supportive role in bridging LDC graduation. In this process, CSDG 17: Partnership for the Goals highlights its substantially meaningful role and can be undertaken through strengthening global partnerships to mobilize additional ISMs and actions in favor of LDCs. Besides, the fifth UN Conference on LDC (LDC5) scheduled to take place in Doha in 2022 will be an important avenue for garnering long-term investment and finance in the LDCs and additional international action to support their sustainable development.

All things considered, the pathway towards meeting the criteria at the second triennial review lies in the government's efforts to recover better from the pandemic and reduce vulnerability and inequality. Although the on-going COVID-19 impacts Cambodia's sustainable development, the crisis also presents opportunity for Cambodia to identify digital economy as a new socio-economic development model that could capture high value addition, lessen its vulnerable conditions, and strengthen its preparedness for the LDC graduation.

In this sense, the focus of ODA on ensuring quality growth both horizontally and vertically is absolutely imperative for Cambodia. Therefore, strong development cooperation and partnerships and international support are needed more than ever for recovery efforts, regain traction on achieving the CSDGs, and ensure a seamless post-LDC transition. Cambodia is looking forward to the eventual LDC graduation through collaborative effort and preparatory works from concerned ministries which play pivotal roles to ensure a smooth transition, in light of current economic uncertainties and profound impact.

9. Conclusion

In the face of evolving context and COVID-19 pandemic, development agenda has been disproportionately affected and posted implications on development cooperation and partnerships. However, the RGC's strong perseverance persistently allows Cambodia to captivate opportunity during this distressed circumstance. The RGC has strived against COVID-19-induced bottlenecks through swift, realistic and responsive approaches and measures. The precise formulation and effective measures and policy implementation underlines the RGC's vigorous ownership and leadership in responding to the immense pressure and moving gradually toward the socio-economic recovery. The joint response to the pandemic between the RGC and development partners is noteworthy. Achievement made by the RGC against the pandemic can be seen through the successful nation-wide vaccination campaign, COVID-19 related response and recovery efforts.

Such progress achieved by the RGC largely derived from the successful implementation of major national policies such as the RS-IV, NSDP, and DCPS. The RGC has mounted effort to restore the key sources of growth through focusing on the most productive sectors, fostering enabling environment for business, and investing in infrastructure that supports higher quality growth. All these are directed by policy adoption and reform agendas – the National Social Protection Policy Framework (2016-2025); the IDP 2015-2025; the new Law on Investment, the Strategic Framework and Programs for Economic Recovery in the context of living with COVID-19 in a new normal (2021-2023); the Digital Economy and Society Policy Framework (2021-2035). In the medium to long term, these aim at building resilience for the inclusive development towards structural transformation by taking advantages of digital development in the context of Industrial Revolution 4.0

Against this backdrop, the DCPR has offered a reflection of the overall trend of development cooperation in Cambodia and further provide concrete evidence of RGC's ability to effectively mobilize and manage ODA resources and overcoming hardship with impressive results. The report provides significant evidence-based progress and achievements of the development cooperation between 2020 and 2021.

Despite constraints on public resource availability in donor countries in the last few years, total aid disbursement remains relatively robust. The ODA in 2020 had a significant volume and experienced a noteworthy increase from the previous year. Regarding aid modality, the shifting to loan financing reflects impressive track record of socio-economic progress, evident to Cambodia's reclassification as the LMIC. This moves alongside the RGC's creditworthiness and its strengthening effort in domestic resource mobilization. The overall disbursement from development partners in the last three years (2019-2021) expanded exponentially. Sectoral allocations of development assistance in overall are well-aligned with the RGC priorities as articulated in RS-IV.

The RGC continues to deliver impressive progress on achieving CSDGs goals. Support has been mostly contributed to Goal 3 "Good health and well-being" and Goal 9 "Industry, Innovation, and infrastructure" in line with the RGC's effort to COVID-19 immediate health response and related recovery. The RGC's commitment to moving toward the LDC graduation remains commendable despite facing numerous challenges especially caused by the pandemic. Therefore, the RGC's effort toward inclusive, resilient, and sustainable recovery, together with support from development partners has become the core pillars of RGC's roadmap toward achieving the LDC graduation and beyond.

Based on the findings of this report, external resource continues to play an important role in Cambodia's socio-economic development, especially in the context of pandemic. Therefore, it become even more critical that these resources will be effectively managed so that they continue to complement domestic financing and other sources of development finance, including those from the public and private sector and south-south cooperation to achieve national development goals. In this spirit, the RGC is highly committed to continue strengthening the inclusive partnership with all development actors.

Annex 1

Disbursement by Development Partner and Sector 2019 (USD Thousand)

Major Donor	Term of Assist.	Health	Edu	Social Prot.	Agri	Man. Min. & Trade	Rural Dev.	Bank. & Biz	Urb. Plan & Mana	Inf. & Com	Ene. Pos. & Ele	Trans.	Water & Sani	Comm. & Social	Cult & Art	Envir. & Con.	Climate Change	Gender	HIV/AIDS	Gov. & Admin	Tour	Budget/BoP	Emer. & Food aid	Other	Total	
Own Funds Disbursed	Grant	6,824	15,044	997	7,306	673	1,752			246	21	217		6,466	532	3,663	5,533	1,100	214	4,089			348	509	55,534	
	Loan				7,967																					7,967
World Bank	Grant	400	636				16													328						1,379
	Loan	4,403	17,659		7,157		1,346					44,456	309													75,331
ADB	Grant		535		12,567		1,070	83	3,766			2,338	1,123			15,366				523						37,371
	Loan	4,410	19,830		64,689		12,081		44,508			15,010	33,863							5,890	5,361					205,642
GAVI Alliance	Grant	20,087																								20,087
Global Fund	Grant	40,854																								40,854
European Commission	Grant		27,094		17,476	1,613	671	472	403		2,862		369	490		420	497	354		12,673					113	65,506
Czech Republic	Grant	688	458		174	21							86				261									1,689
France	Grant	593	1,033		712		890				1,008		454	163	3,260	1,064				1,023	62					10,263
	Loan				61,504						38,021		85,563													185,088
Germany	Grant	6,359			3,563	3,414	5,196	403					84	168		149		486		9,148					508	29,477
Ireland	Grant	182	31				559																			772
Sweden	Grant	531	9,631	793												1,322	2,958	286		7,568						23,088
United Kingdom	Grant		285					76		136					50	94		115		349						1,104
Australia	Grant	9,703	6,949		9,622		695				4,102		4,102	732				523		3,060				1,737		41,226
Canada	Grant	992	392		1	178		471								57		120		597						2,809
China	Grant	31,814	3,880		1,415					287		17,708			37,546											92,649
	Loan				46,883						147,143	217,015														411,042
Japan	Grant	5,448	20,131		1,622	4,232	5,728		6,659		3,644	35,959	7,342	914		993	2,743	1,783		2,610				3,200	11,246	114,253
	Loan				17,767						1,963	66,760	6,911													93,401
New Zealand	Grant		3,429		3,467												276								60	7,231
Republic of Korea	Grant	6,418	3,677		2,693	495	891	1,810		596	900	346		7,062	2,014	696				3,200						30,797
	Loan				10,498		11,383					19,285	866													42,032
Switzerland	Grant	4,267	2,299		2,510		502	24			21			14				201		1,939	1,086					12,863
USA	Grant	24,377	8,273		10,248		10,525	500					6,573	1,839		7,762		130	4,805	19,456					841	95,329
SUB TOTAL: ALL DONORS:	Grant	159,535	103,779	1,790	73,373	10,627	28,494	3,838	10,828	1,264	12,558	56,568	20,134	17,847	43,403	31,586	12,268	5,098	5,019	66,562	1,148		3,548	15,014	684,281	
	Loan	8,813	37,490		216,465		24,810		44,508		187,127	362,525	127,513							5,890	5,361					1,020,503
	Total	168,348	141,268	1,790	289,838	10,627	53,304	3,838	55,336	1,264	199,685	419,093	147,647	17,847	43,403	31,586	12,268	5,098	5,019	72,452	6,509		3,548	15,014	1,704,784	
NGO Own Fund	Grand	87,553	74,803		11,708		22,798	5		51	160	313		56,200	253	8,623	1,039	875	6,447	4,701	445		29	405	276,407	
GRAND TOTAL	TOTAL	255,901	216,072	1,790	301,546	10,627	76,102	3,843	55,336	1,316	199,845	419,406	147,647	74,047	43,655	40,209	13,307	5,972	11,466	77,153	6,954		3,576	15,419	1,981,191	

Annex 2

Disbursement by Development Partner and Sector 2020 (USD Thousand)

Major Donor	Term of Assist.	Health	Edu	Social Prot.	Agri	Man., Min. & Trade	Rural Dev.	Bank. & Biz	Urb. Plan & Mana	Inf. & Com	Ene. Pos. & Ele	Trans.	Water & Sani	Comm. & Social	Cult & Art	Envir. & Con.	Climate Change	Gender	HIV/ AIDS	Gov. & Admin	Tour	Budget/ BoP	Emer. & Food aid	Other	Total	
Own Funds Disbursed	Grant	16,707	16,677	1,600	4,804	515	3,808	202		354	127	88	72	6,583	742	3,047	2,617	917	73	3,762			325	204	63,226	
	Loan				14,879																					14,879
World Bank	Grant	300	270				228																			798
	Loan	29,536	16,868		17,555		3,823					18,046	2,674				1,292									89,795
ADB	Grant		607		7,131		1,428	156	5,044		232	4,966	1,071								29					24,011
	Loan	5,863	18,337		39,937		10,289		24,965		5,376	32,645	16,456								21,221	3,473	250,000			428,561
GAVI Alliance	Grant	8,869																								8,869
Global Fund	Grant	39,698																								39,698
European Commission	Grant		25,928	1,091	11,400	1,736			266	178	1,889		12,955	1,311		2,019	1,804	359			17,006		11,339		80	89,360
Czech Republic	Grant	373	1,292			40					49		236				172									2,161
France	Grant	5,107	1,255		3,039		1,042				1,111		952	224	2,794	1,030					290	351				17,194
	Loan		19,054								49,418															68,472
Germany	Grant	11,185			4,265	2,671	5,180	408					57	85		343					4,703				603	29,819
Ireland	Grant	298	23		113		737																			1,171
Sweden	Grant	896	10,586	2,048									299			1,466	3,234	237			8,312					27,078
United Kingdom	Grant	41	204	288	37			10		45					3	243					13					905
Australia	Grant	4,991	4,801		5,688		686				2,949		2,949	2,361							3,601				2,757	33,091
Canada	Grant	529	343		168	176		255								8					488					2,101
China	Grant	35,696	7,711							570		22,135	193		30,434											96,739
	Loan				51,288						147,490	199,243														398,020
Japan	Grant	25,129	18,402		4,728	3	10,609		19,572	6	1,578	20,241	1,404	48		4,556					8,407	35			1,511	116,687
	Loan				22,726						22,670	90,098	15,454										234,017			384,964
New Zealand	Grant		1,962		2,187		1,296										293								195	5,934
Republic of Korea	Grant	7,974	7,604		4,570	209	424	48		1,710	3,425	2,693	100	2,787	2,320	1,655					180					35,698
	Loan			50,000	12,747		1,566					3,246														67,560
Switzerland	Grant	4,393	2,520		3,660		57							30		21					2,930	1,002		212	741	15,572
USA	Grant	18,800	11,171		8,328		7,000	500		28			4,879	4,018		11,824				291	3,593	21,061		464	1,033	92,991
SUB TOTAL: ALL DONORS:	Grant	180,983	111,355	5,027	61,889	5,350	32,494	1,579	24,882	2,891	11,360	50,142	25,167	17,447	36,293	29,539	8,120	5,049	3,666	70,783	1,388	11,339	1,001	7,126	703,102	
	Loan	35,399	54,259	50,000	159,131		15,678		24,965		224,953	343,279	34,584				1,292				21,221	3,473	484,017			1,452,252
	Total	216,382	165,615	55,027	221,020	5,350	48,172	1,579	49,847	2,891	236,313	393,421	59,751	17,447	36,293	30,831	8,120	5,049	3,666	92,004	4,861	495,356	1,001	7,126	2,155,353	
NGO Own Fund	Grand	81,352	65,112		7,300		23,893				0			53,638	80	8,459	893	890	5,298	4,078	58				1,359	255,411
GRAND TOTAL	TOTAL	297,734	230,727	55,027	226,549	5,350	72,065	1,579	49,847	2,891	236,314	393,421	59,751	71,085	36,373	39,290	9,012	5,938	8,964	96,082	4,920	495,356	1,001	8,485	2,410,764	

Annex 3

Disbursement by Development Partner and Sector 2021 (USD Thousand)

Major Donor	Term of Assist.	Health	Edu	Social Prot.	Agri	Man. Min. & Trade	Rural Dev.	Bank. & Biz	Urb. Plan & Mana	Inf. & Com	Ene. Pos. & Ele	Trans.	Water & Sani	Comm. & Social	Cult & Art	Envir. & Con.	Climate Change	Gender	HID/ AIDS	Gov. & Admin	Tour	Budget/ BoP	Emer. & Food aid	Other	Total	
UN Own Funds	Grant	20,345	15,706	3,262	2,723	618	4,631	256		462	233	28	521	9,023	655	3,679	2,507	1,067	182	5,029	74		6,013	880	77,895	
	Loan				14,209																					14,209
World Bank	Grant		52				388									813										1,253
	Loan	15,242	8,229		22,116		12,053					25,578	1,756			1,169										86,144
ADB	Grant				4,217				1,460		117	1,508	3,990			1,482										12,774
	Loan	4,341	29,131		58,836		24,123		22,495		1,052	25,134	19,724							1,746	5,329			148		192,058
GAVI Alliance	Grant	9,107																								9,107
Global Fund	Grant	42,802																								42,802
European Commission	Grant		7,166	3,651	23,283	1,883	3,442	1,762	213	175	1,728		2,715	1,063		2,177	1,587	376		14,790		10,697		199		76,908
Czech Republic	Grant	245	1,551		183	33					67		466				185									2,730
France	Grant	1,468	1,088		3,612						1,050		664		2,657	472				919	242				768	12,940
	Loan												104,439													104,439
Germany	Grant	9,118		297	8,400	5,186	3,816	244			594					2,377	219	333		12,898				1,352		44,835
Ireland	Grant	119	10				713						535				200									1,577
Sweden	Grant		7,233										211			87	469			14,466						22,466
United Kingdom	Grant	1,964	639		70					25						535	158			28						3,418
Australia	Grant	33,777	7,188		8,061		1,357				2,431		2,431	2,037				2,037		4,203				2,958		66,479
Canada	Grant	890	344		236			263								42		120		894				144		2,933
China	Grant	29,726	8,289							613		22,135			17,228											77,990
	Loan				24,000						113,679	127,478														265,157
Japan	Grant	8,884	21,365	1,911	3,002		4,159		23,976		686	32,483	18,545	141		778		686		1,599						118,215
	Loan				19,603						66,510	178,113	18,143													282,368
New Zealand	Grant		1,978		2,070	3,194	1,065										285									8,590
Republic of Korea	Grant	10,471	7,076		3,098	109				7,470	2,585	4,337		4,471	1,731	2,343	2,609			90						46,389
	Loan				35,827		9,301						27,650	603												73,381
Switzerland	Grant	4,497	3,236	96	3,322									65	16	6				3,924	845		1,102	7		17,115
USA	Grant	33,601	15,333		10,500		7,000	449		214	15		3,569	4,033		8,790		651		23,787			2,045	2,129		112,118
Sub-Total All Donors	Grant	207,013	98,254	9,218	74,804	11,023	26,570	2,975	25,649	8,960	9,506	60,492	33,646	20,832	22,286	23,579	8,219	5,269	182	82,627	1,160	10,697	9,161	8,437		758,534
	Loan	19,583	37,361		174,590		45,477		22,495		181,240	383,953	144,665			1,169				1,746	5,329			148		1,017,758
	Total	226,596	135,615	9,218	249,394	11,023	72,048	2,975	48,144	8,960	190,746	444,445	178,312	20,832	22,286	24,749	8,219	5,269	182	84,373	6,489	10,697	9,161	8,585		1,776,291
NGO Own Fund	Grant	88,517	56,766		7,326		23,417				30	11		53,847		8,596	67	1,324	4,632	4,333				251		250,329
Grant Total	TOTAL	315,113	192,381	9,218	254,692	11,023	95,464	2,975	48,144	8,960	190,776	444,455	178,312	74,679	22,286	33,345	8,286	6,593	4,814	88,707	6,489	10,697	9,161	8,836		2,026,620

Annex 4

Disbursement & Projection by Development Partner 2013-2023 (USD Thousand)

Major Donor	2013	2014	2015	2016	2017	2018	2019	2020	2021 Est.	2022 Proj.	2023 Plan
UN Own Fund	50,015	53,907	47,191	65,708	59,395	62,444	63,501	77,386	91,241	76,820	52,694
World Bank	35,473	50,615	17,623	17,572	21,102	30,535	76,710	90,593	87,397	137,430	160,136
ADB	171,405	129,782	137,234	118,212	125,713	122,821	243,014	452,572	204,832	160,895	2,034
GAVI Alliance	10,688	5,483	18,951	16,265	10,865	7,906	20,087	8,869	9,107		
Global Fund	45,431	54,593	33,347	28,194	33,066	19,863	40,854	39,698	42,802	41,099	28,629
IAEA								719	863	287	
European Commission	36,606	70,317	55,796	55,706	50,756	88,402	65,506	89,360	76,908	108,675	55,794
Belgium	415										
Czech Republic	992	1,167	1,232	1,510	1,293	1,077	1,689	2,161	2,730	1,911	1,538
Finland	5,376	4,400									
France	17,760	59,454	63,314	32,136	90,796	80,604	195,351	85,666	117,379	130,030	245,946
Germany	34,254	29,804	25,790	46,939	38,377	37,294	29,477	29,819	44,835	82,927	56,659
Ireland	1,247	733	556	631	744	723	772	1,171	1,577		
Spain	4,105	1,567									
Sweden	33,818	33,037	21,803	30,102	33,549	23,769	23,088	27,078	22,466	18,010	6,985
United Kingdom	13,678	72	169	1,596	2,286	1,155	1,104	905	3,418	1,616	354
Australia	59,265	64,945	55,942	51,850	58,257	50,047	41,226	33,091	66,479	35,278	29,130
Canada	11,839	5,694	3,754	3,166	3,434	3,916	2,809	2,101	2,933	2,186	1,648
China	436,616	347,790	339,385	307,198	415,777	352,007	503,692	494,759	343,148	260,664	123,657
Japan	130,759	111,420	110,363	119,678	146,394	175,415	207,654	501,651	400,583	468,161	90,857
New Zealand	3,230	5,974	4,897	4,015	4,861	5,016	7,231	5,934	8,590	2,590	2,986
Republic of Korea	50,129	80,326	61,714	41,989	57,142	53,825	72,829	103,258	119,771	141,694	182,478
Switzerland	7,772	11,810	13,021	15,802	15,466	13,630	12,863	15,572	17,115	9,782	5,976
USA	93,457	91,606	100,966	77,867	93,183	91,722	95,329	92,991	112,118	97,068	67,027
SUB TOTAL: ALL DONORS:	1,254,330	1,214,496	1,113,048	1,036,137	1,262,456	1,222,171	1,704,784	2,155,353	1,776,291	1,777,123	1,114,529
NGO Own Fund	220,764	228,865	237,007	250,955	259,792	274,920	276,407	255,411	250,329	83,176	23,903
TOTAL DISBURSEMENTS	1,475,094	1,443,361	1,350,055	1,287,092	1,522,248	1,497,091	1,981,191	2,410,764	2,026,620	1,860,299	1,138,431

Annex 5

Disbursement & Projection by Sector 2013-2023 (USD Thousand)

SECTOR	2013	2014	2015	2016	2017	2018	2019	2020	2021 Est.	2022 Proj.	2023 Plan
Health	133,224	128,463	126,046	141,399	107,042	127,691	168,348	216,382	226,596	163,065	100,410
Education	90,452	112,083	117,128	109,640	127,645	138,166	141,268	165,615	135,615	148,740	77,797
Social Protection						328	1,790	55,027	9,218	7,792	6,760
Agriculture	177,811	211,785	165,779	135,892	173,098	184,351	289,838	221,020	249,395	286,709	236,722
Industrialization & Trade	11,121	3,179	4,450	5,887	22,882	7,191	10,627	5,350	11,023	7,340	9,449
Rural Development	56,402	65,062	71,547	45,559	84,412	66,963	53,304	48,172	72,048	112,314	117,808
Business & Financial Services	43,761	14,242	26,971	13,332	11,501	8,738	3,838	1,579	2,975	1,665	1,213
Urban Planning & Management	252	6,560	7,448	5,970	4,230	11,102	55,336	49,847	48,144	47,967	1,244
Technology, Information and Communications	2,894	10,489	4,975	12,468	346	1,783	1,264	2,891	8,960	8,029	1,028
Energy, Power & Electricity	60,109	66,500	54,239	158,304	157,441	97,644	199,685	236,313	190,746	113,743	82,917
Transportation	378,615	309,146	286,546	190,687	267,865	300,940	419,093	393,421	444,445	623,547	250,633
Water and Sanitation	59,190	63,541	37,626	38,994	86,054	78,262	147,647	59,751	178,312	80,221	124,655
Community Development	26,592	33,233	41,073	11,856	14,758	14,827	17,847	17,447	20,832	14,344	5,375
Culture & Arts	4,180	4,985	5,831	3,456	33,756	42,236	43,403	36,293	22,286	4,093	1,799
Environment and Sustainability	18,006	19,944	26,820	21,114	20,017	28,576	31,586	30,831	24,749	24,926	20,795
Climate Change (adaptation & mitigation)	8,233	5,922	6,481	6,062	7,310	11,500	12,268	8,120	8,219	34,652	6,733
Gender	9,070	8,058	5,877	6,434	4,189	5,602	5,098	5,049	5,269	4,162	2,284
HIV/AIDS	28,514	38,794	24,923	18,765	19,547	6,584	5,019	3,666	182	596	577
Governance & Administration	114,806	81,774	75,916	100,241	72,588	81,373	72,452	92,004	84,521	53,015	32,966
Tourism	717	547	1,759	1,334	14,803	2,565	6,509	4,861	6,489	2,060	659
Budget & BoP Support								495,356	10,697	10,778	
Emergency & Food Aid	19,054	24,873	14,638	1,001	125	105	3,548	1,001	9,161	1,844	1,861
Other	11,330	5,315	6,973	7,740	32,849	5,643	15,014	5,355	6,409	25,522	30,843
TOTAL	1,254,330	1,214,496	1,113,048	1,036,137	1,262,456	1,222,171	1,704,784	2,155,353	1,776,291	1,777,123	1,114,529

Annex 6

Disbursement to Provinces 2019-2022 (USD Thousand)

No	Province	Donor	2019	2020	2021 Est.	2022 Proj.
1	Banteay Meanchey	UNs	1,040	2,093	3,389	1,605
		IFIs	66			
		European Union	4,516	4,092	3,537	13,656
		Bilateral	39,923	34,472	52,412	33,022
		NGO	9,693	9,759	9,216	3,143
		TOTAL	63,707	60,341	76,242	60,056
2	Battambang	UNs	2,223	3,302	5,347	3,680
		IFIs	785	2,316	2,816	5,540
		European Union	12,507	4,194	8,655	26,823
		Bilateral	73,983	77,101	102,580	55,792
		NGO	17,377	16,856	14,106	3,958
		TOTAL	132,161	122,115	154,692	108,752
3	Kampong Cham	UNs	1,298	2,371	2,214	1,942
		IFIs	314	1,106	3,747	8,474
		European Union	12,847	7,301	335	1,200
		Bilateral	51,070	36,317	54,439	51,104
		NGO	5,880	5,045	4,987	1,442
		TOTAL	78,607	59,788	81,196	84,009
4	Kampong Chhnang	UNs	2,124	2,208	1,878	1,477
		IFIs	1,111	1,819	2,146	4,425
		European Union	1,356	2,453	2,532	1,617
		Bilateral	19,309	30,930	60,530	64,424
		NGO	7,603	7,576	7,387	2,674
		TOTAL	43,419	50,814	79,146	78,170
5	Kampong Speu	UNs	1,905	2,809	2,601	1,533
		IFIs	708	1,917	2,119	4,252
		European Union	576	476	716	376
		Bilateral	21,187	13,044	7,425	27,362
		NGO	9,935	7,378	4,762	1,128
		TOTAL	37,579	29,040	19,547	36,754
6	Kampong Thom	UNs	3,935	3,005	3,782	3,710
		IFIs	809	1,855	2,041	3,722
		European Union	12,662	3,789	8,862	16,546
		Bilateral	14,690	14,493	16,197	5,541
		NGO	5,828	6,141	5,872	1,216
		TOTAL	58,480	43,917	55,746	40,776
7	Kampot	UNs	523	404	345	943
		IFIs	6,668	2,707	5,566	2,553
		European Union	2,359	2,380	4,750	5,672
		Bilateral	64,968	18,816	11,380	11,394
		NGO	7,245	6,981	7,899	1,120
		TOTAL	90,382	37,001	38,407	33,759
8	Kandal	UNs	1,366	1,235	1,495	1,401
		IFIs	246	945	1,944	5,158
		European Union	34,196	1,322	12,387	8,790
		Bilateral	21,357	21,725	41,534	84,961
		NGO	9,021	8,449	6,831	1,547
		TOTAL	66,186	34,537	64,191	101,857
9	Koh Kong	UNs	163	133	9	296
		IFIs	19	524	514	2,015
		European Union	13,299	8,162	1,130	2,258
		Bilateral	10,943	90,330	50,138	41,894
		NGO	2,523	3,106	3,599	2,867
		TOTAL	33,790	104,542	57,730	49,330
10	Kratie	UNs	1,260	1,761	1,759	1,630
		IFIs	5,837	4,714	9,361	11,854
		European Union	13,810	8,364	1,610	1,038
		Bilateral	23,262	21,317	28,016	5,160
		NGO	5,111	3,956	4,192	1,033
		TOTAL	49,913	41,617	48,686	28,469
11	Mondul Kiri	UNs	1,248	2,231	2,066	1,478
		IFIs	530	2,100	2,159	4,704
		European Union	1,253	1,530	1,126	1,134
		Bilateral	19,027	5,215	5,706	2,131
		NGO	4,982	4,549	4,721	970
		TOTAL	32,274	16,870	16,520	10,417
12	Phnom Penh	UNs	1,138	1,341	2,935	1,244
		IFIs	327	1,147	1,099	2,100
		European Union	80,729	19,218	102,023	5,843
		Bilateral	181,718	220,667	206,922	137,571
		NGO	71,496	63,870	63,181	9,905
		TOTAL	350,809	311,561	380,731	156,663
13	Preah Vihear	UNs	1,224	1,230	1,369	1,474
		IFIs	126	633	544	2,554
		European Union	11,640	2,825	3,021	9,269
		Bilateral	21,602	40,131	23,207	21,284
		NGO	6,467	4,957	4,747	470
		TOTAL	41,146	49,921	32,968	35,050
14	Prey Veng	UNs	523	387	272	661
		IFIs				
		European Union	1,139	1,322	2,060	1,063
		Bilateral	20,831	21,056	15,548	8,992

No	Province	Donor	2019	2020	2021 Est.	2022 Proj.
		NGO	5,879	4,064	4,641	1,911
		TOTAL	46,349	44,425	36,701	17,828
15	Pursat	UNs	1,150	602	815	1,198
		IFIs	318	353	436	1,127
		European Union	352	597	1,220	681
		Bilateral	52,633	21,560	32,512	44,464
		NGO	5,342	3,752	3,072	622
		TOTAL	85,312	36,419	47,298	51,644
16	Ratanak Kiri	UNs	1,658	1,930	2,042	1,657
		IFIs	453	1,431	1,720	2,854
		European Union	515	983	1,150	291
		Bilateral	24,787	2,221	4,000	1,731
		NGO	4,896	5,756	6,267	452
		TOTAL	32,309	12,321	15,178	6,985
17	Siem Reap	UNs	4,710	2,705	4,592	4,373
		IFIs	1,152	4,290	5,063	12,082
		European Union	11,179	2,439	4,275	21,488
		Bilateral	22,530	30,220	54,493	34,596
		NGO	46,640	41,257	41,355	11,357
		TOTAL	104,163	96,241	125,124	91,857
18	Preah Sihanouk	UNs	1,422	1,119	1,528	1,173
		IFIs	4,446	1,805	3,504	1,600
		European Union	271	389	1,346	3,342
		Bilateral	26,121	24,030	59,517	210,770
		NGO	5,566	4,263	3,155	1,755
		TOTAL	47,480	35,396	75,359	224,306
19	Stung Treng	UNs	741	983	878	1,227
		IFIs	657	1,915	3,508	6,498
		European Union	291	644	681	286
		Bilateral	28,932	49,486	26,765	11,555
		NGO	3,318	4,433	5,058	703
		TOTAL	44,060	60,722	42,141	25,776
20	Svay Rieng	UNs	793	894	1,030	414
		IFIs				
		European Union	30	18	22	
		Bilateral	3,040	8,295	3,623	1,075
		NGO	3,585	3,267	2,407	1,018
		TOTAL	14,278	30,212	18,408	6,434
21	Takeo	UNs	806	946	1,029	1,266
		IFIs				
		European Union	5	222	200	
		Bilateral	13,386	4,151	12,978	19,586
		NGO	9,101	7,857	7,768	1,549
		TOTAL	25,309	16,161	30,728	29,777
22	Otdar Meanchey	UNs	536	340	197	330
		IFIs				
		European Union	1,323	1,680	1,757	3,480
		Bilateral	13,019	4,187	3,461	3,349
		NGO	3,457	3,670	3,401	669
		TOTAL	18,423	10,022	8,897	7,828
23	Kep	UNs	354	336	265	907
		IFIs				
		European Union	53	121	185	2,113
		Bilateral	13,321	16,468	886	780
		NGO	572	464	349	126
		TOTAL	16,176	18,604	3,550	3,926
24	Pailin	UNs	279	429	282	663
		IFIs				
		European Union	109	144	107	5
		Bilateral	1,832	2,647	5,719	4,591
		NGO	2,238	956	802	156
		TOTAL	4,457	4,176	6,910	5,415
25	Tbong Khmum	UNs	391	524	441	801
		IFIs	7,581	4,485	9,366	10,302
		European Union	368	138	173	1,150
		Bilateral	14,384	16,839	28,591	22,098
		NGO	3,446	3,184	2,487	931
		TOTAL	27,467	27,812	46,307	46,167