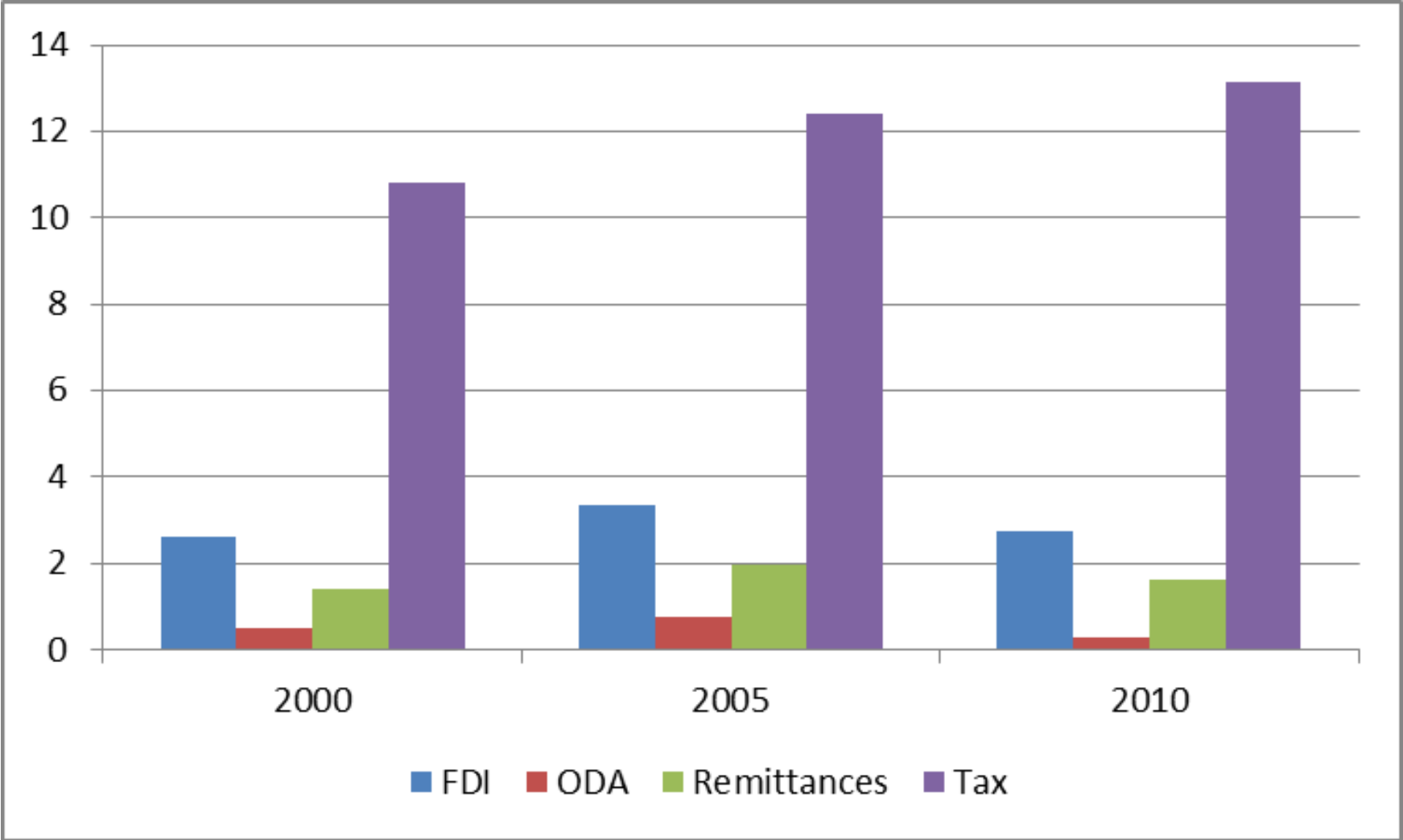


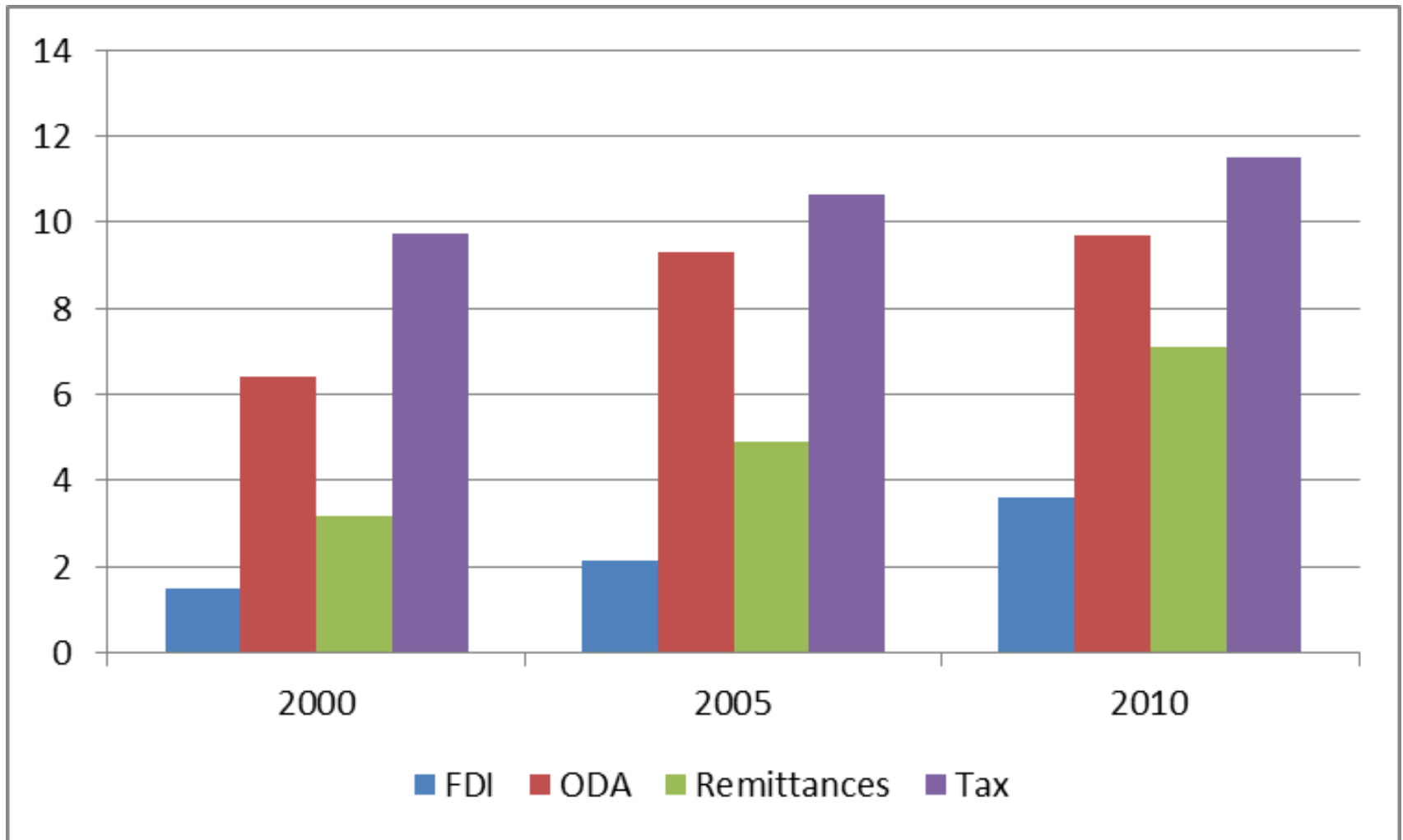
International Development
in hard times:
Reflecting on the major multilateral
replenishments of 2013

Richard Manning, former Chair,
OECD/DAC

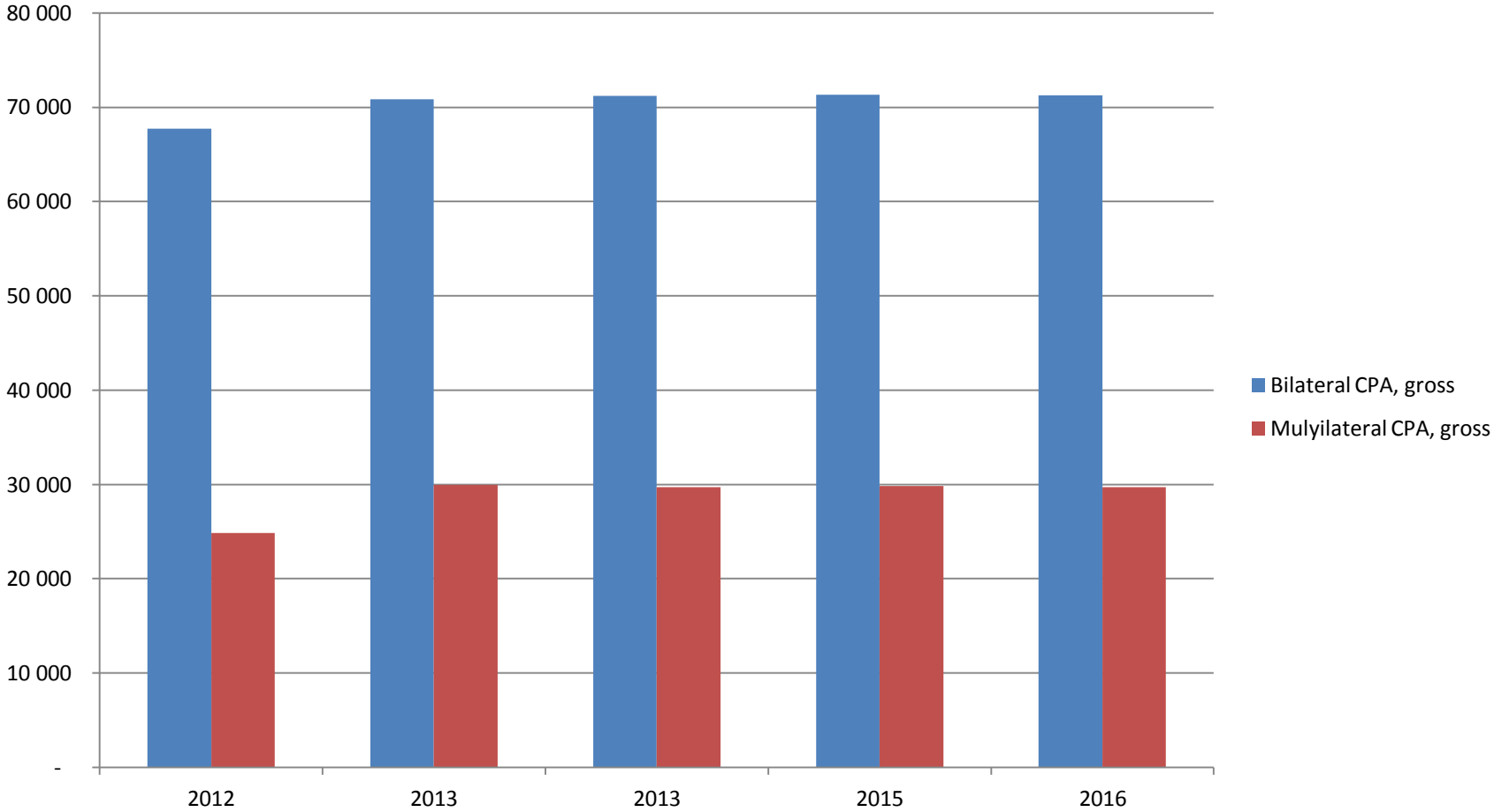
Does Aid Matter to Middle-Income Countries?



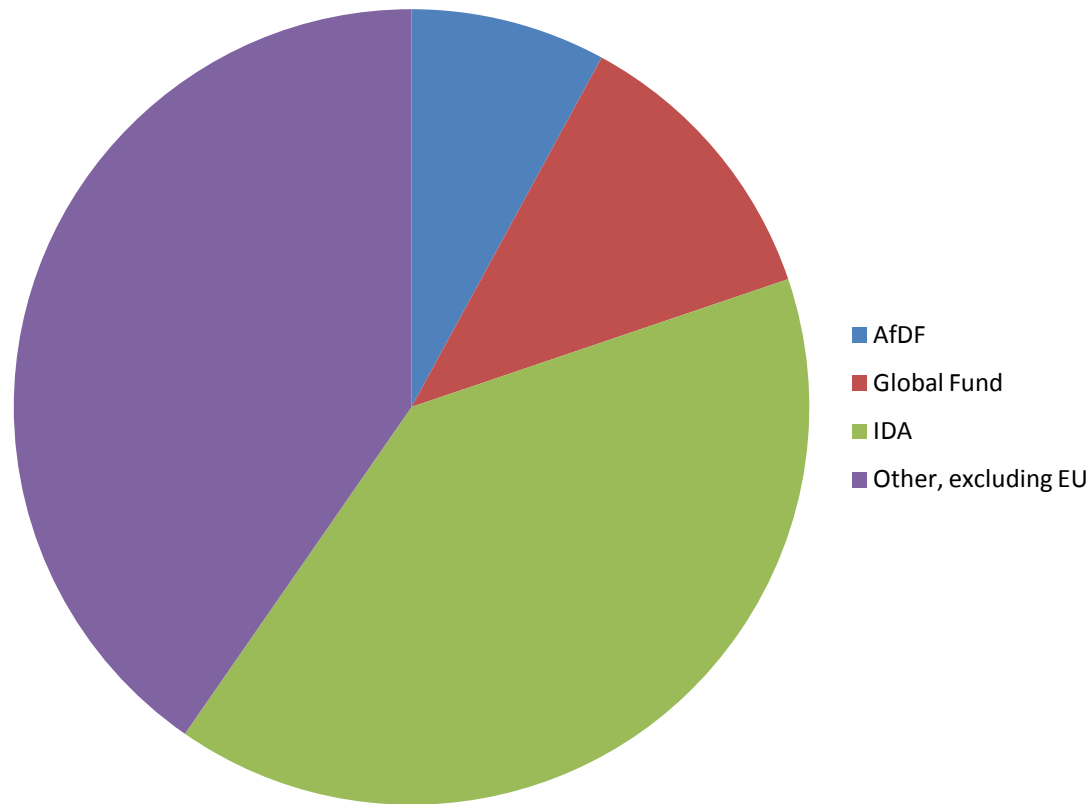
Does Aid Matter to Low-Income Countries?



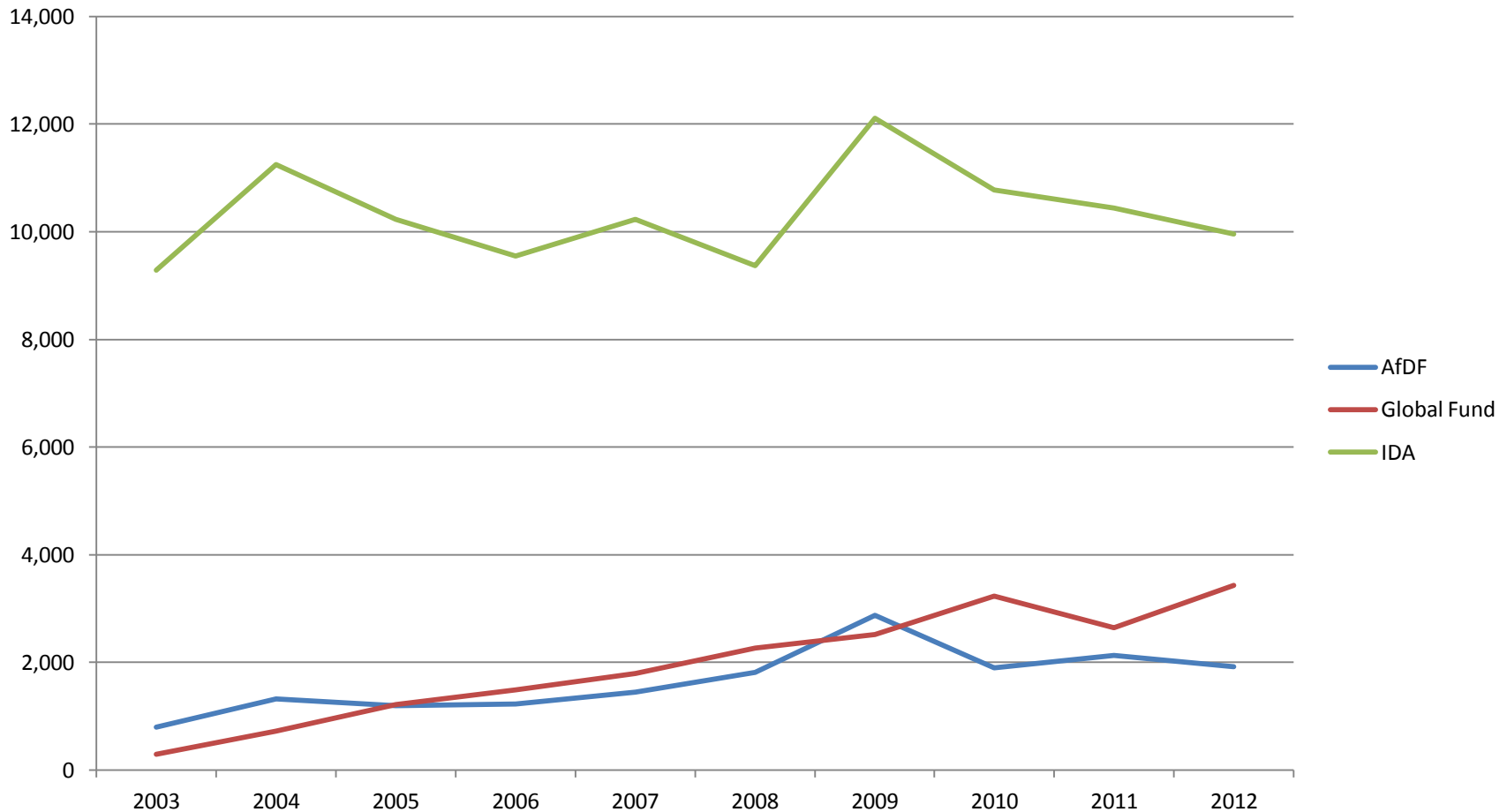
OECD Projections before the Replenishments (constant US\$ million 2012)



The significance of the three Replenishments: IDA, GF and AfDF account for 60% of all multilateral CPA, excluding EU Institutions



CPA from the three Institutions, 2003-2012 (constant US\$ million)





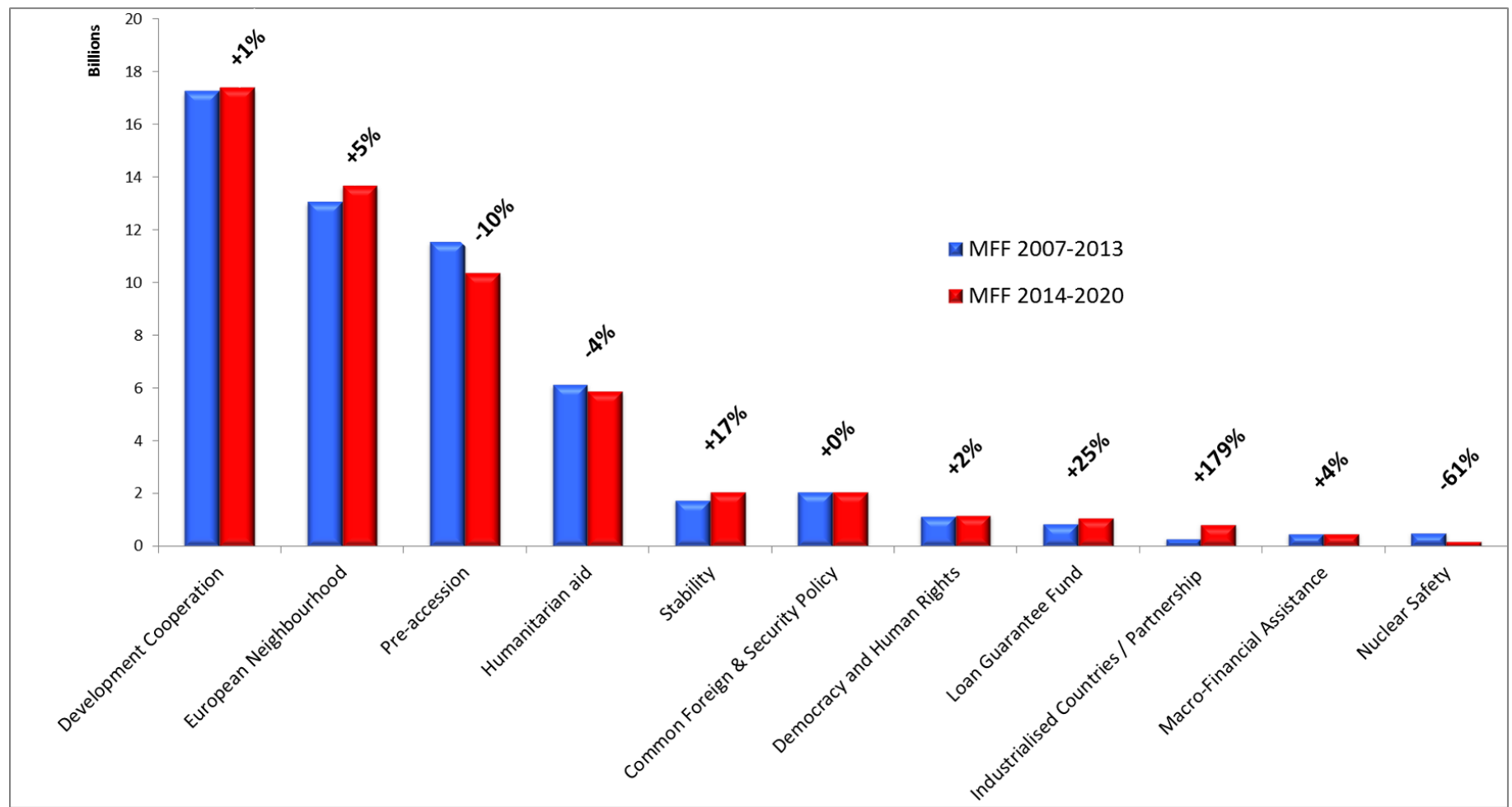
The development budget 2014-2020

Commitments €bn	MFF 2014-2020	MFF 2007-2013	Growth 2007-2013 v. 2014-2020		MFF 2007-2013 Share of the total budget	MFF 2014-2020 Share of the total budget
1. Smart & inclusive growth	450.76	446.31	4.45	1.0%	44.9%	47.0%
2. Natural resources	373.18	420.68	-47.50	-11.3%	42.4%	38.9%
3. Security and Citizenship	15.69	12.37	3.32	26.8%	1.2%	1.6%
4. Global Europe	58.70	56.82	1.89	3.3%	5.7%	6.1%
5. Administration	61.63	57.08	4.55	8.0%	5.7%	6.4%

Commitments €bn	EDF 11	EDF 10	Growth EDF 10 v. EDF 11	
European Development Fund	26.98	26.93	0.05	0.2%

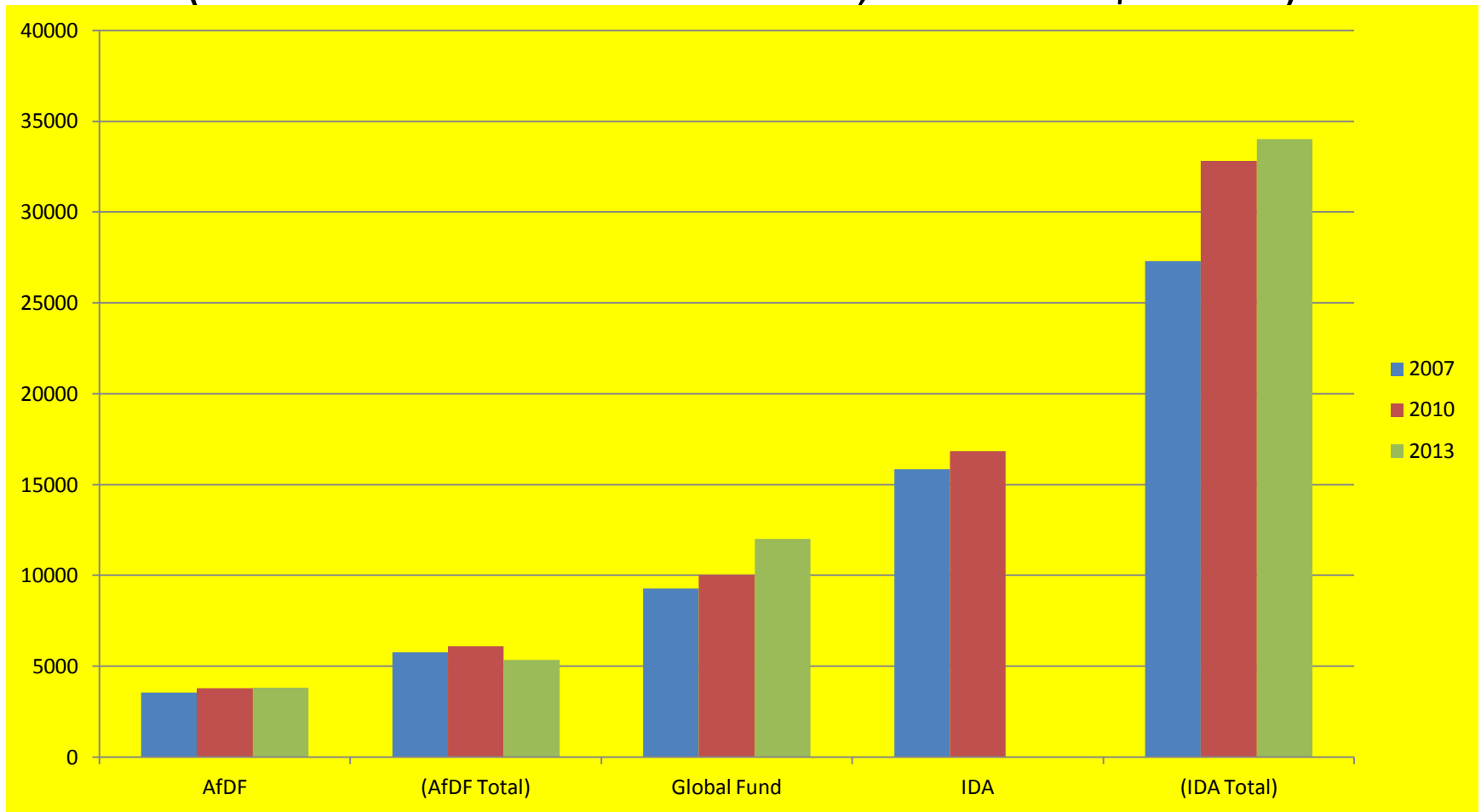
Comparison of present and proposed external actions instruments

€ billion in 2011 prices

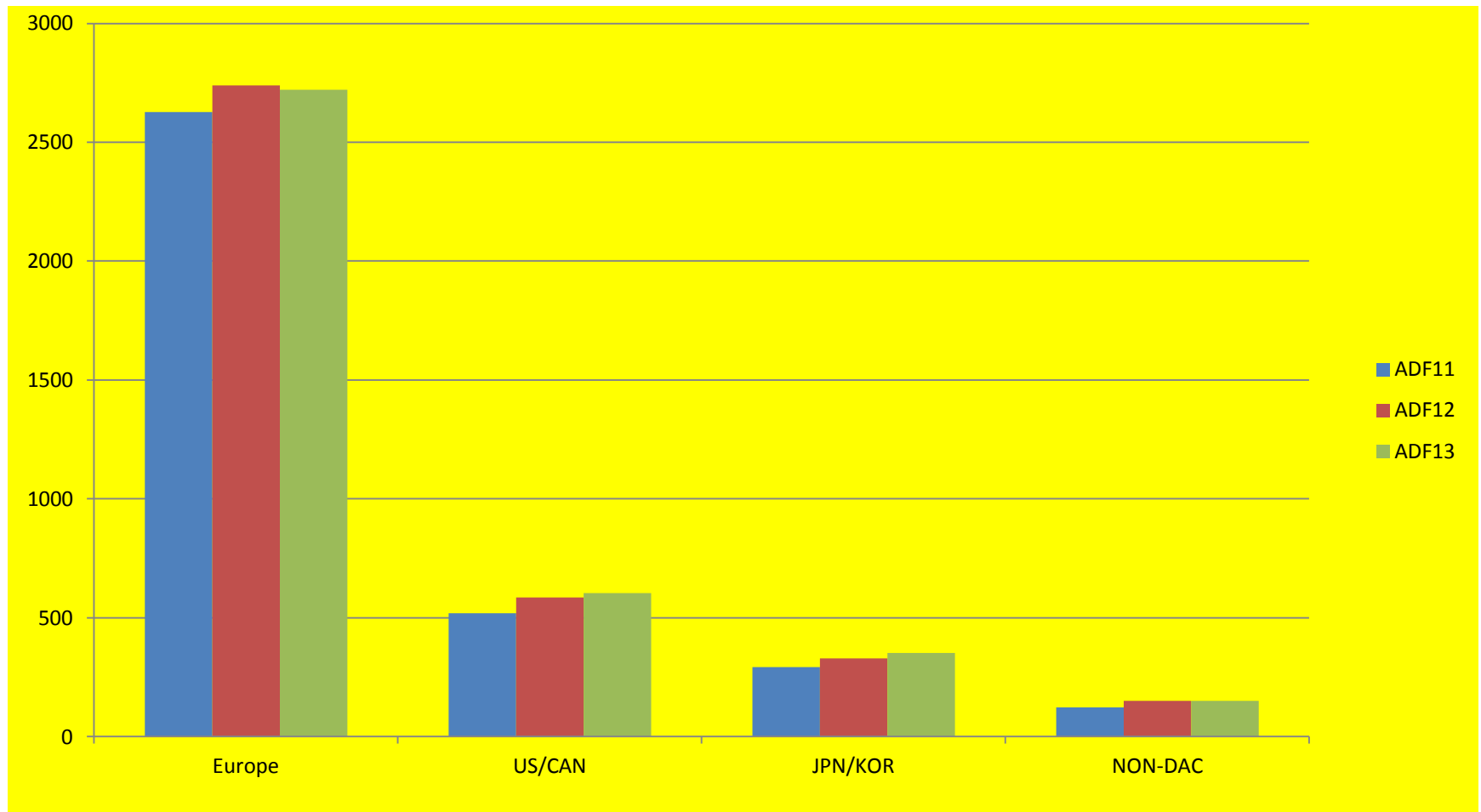


Donor Contributions to the Three Major Replenishments of 2013

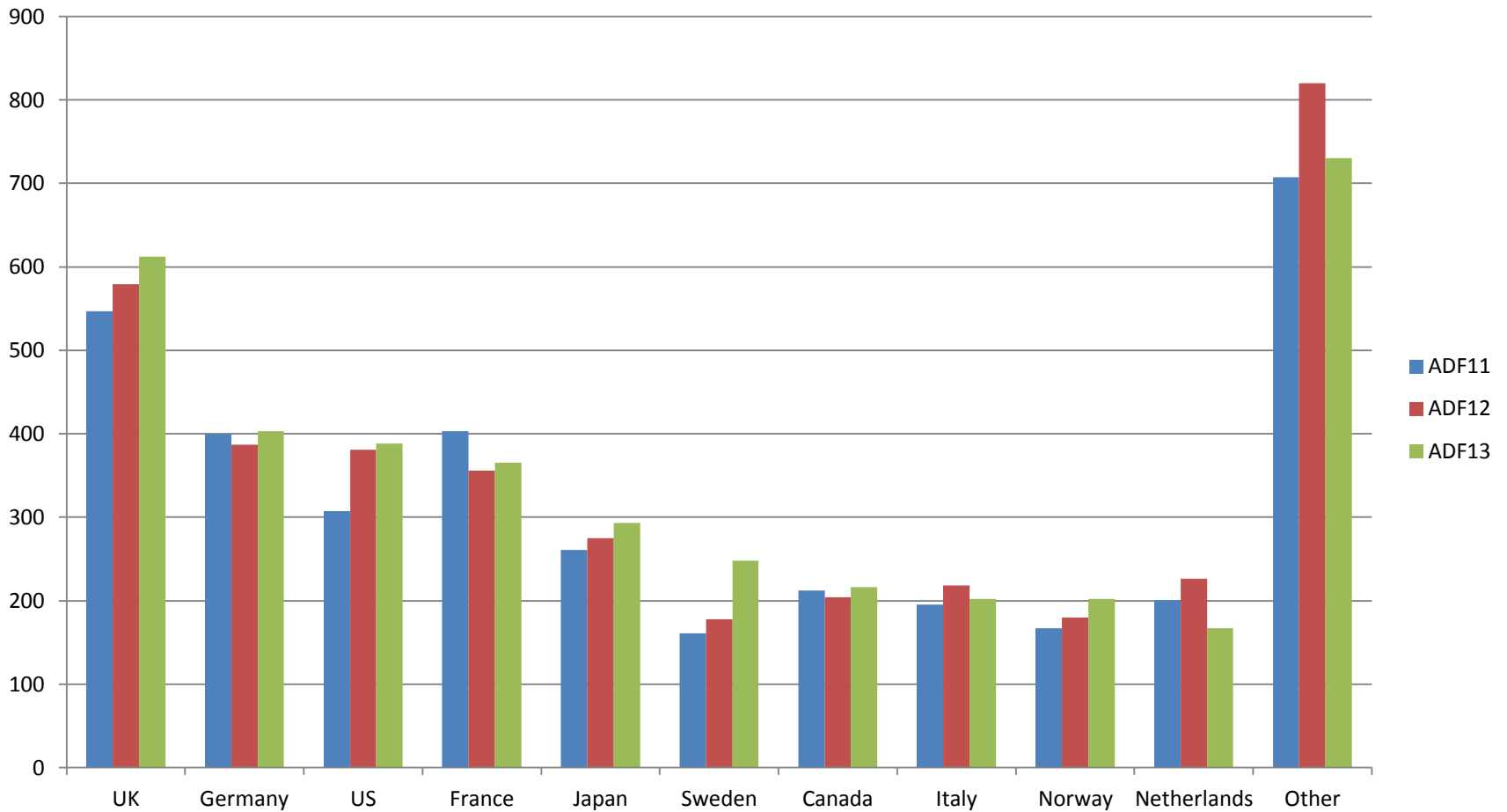
(Million SDRs for AfDF and IDA; Million US\$ for GF)



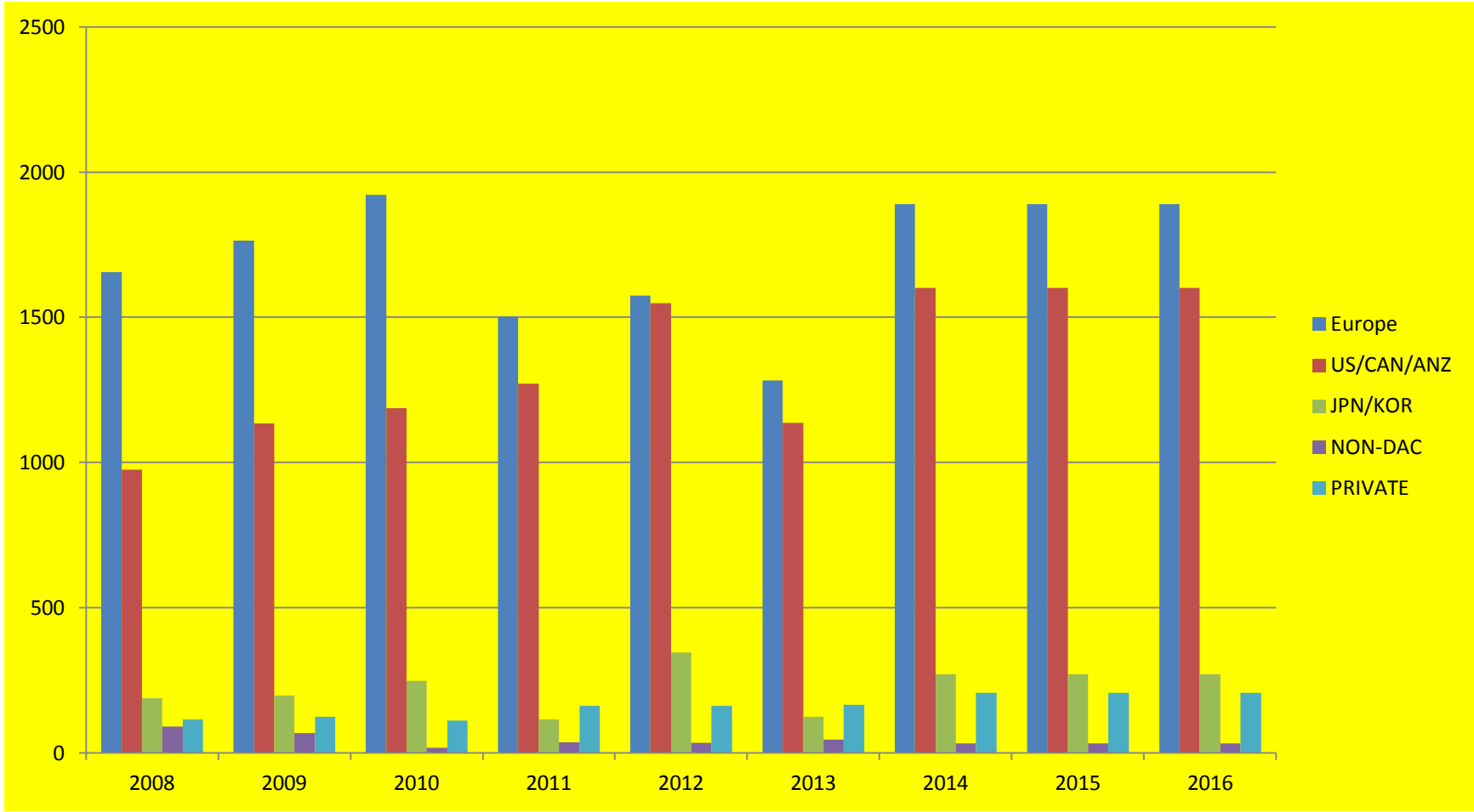
Donor Contributions to AfDF (Million SDRs)



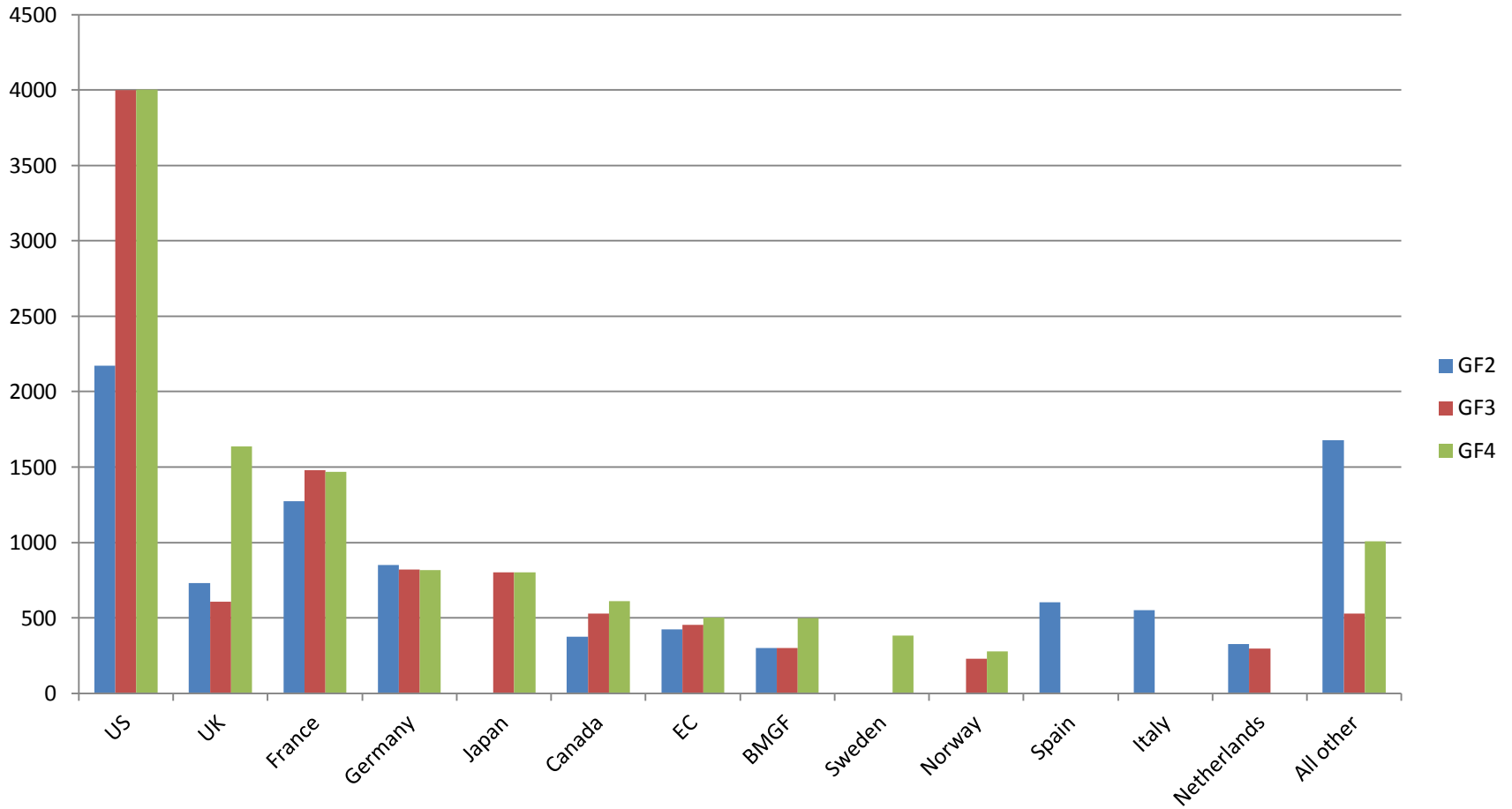
Top Ten Donors to AfDF



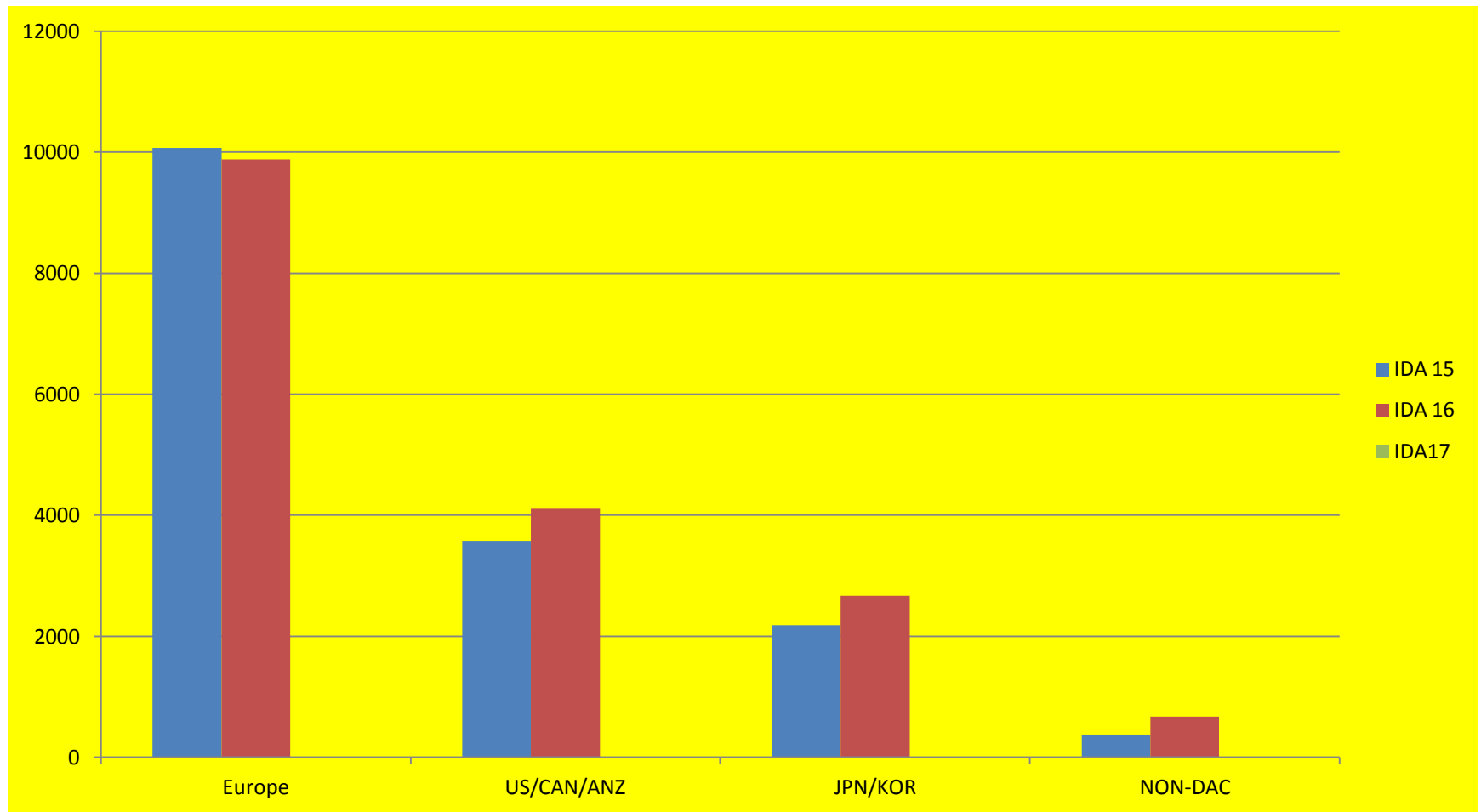
Donor Contributions to Global Fund (million US\$)



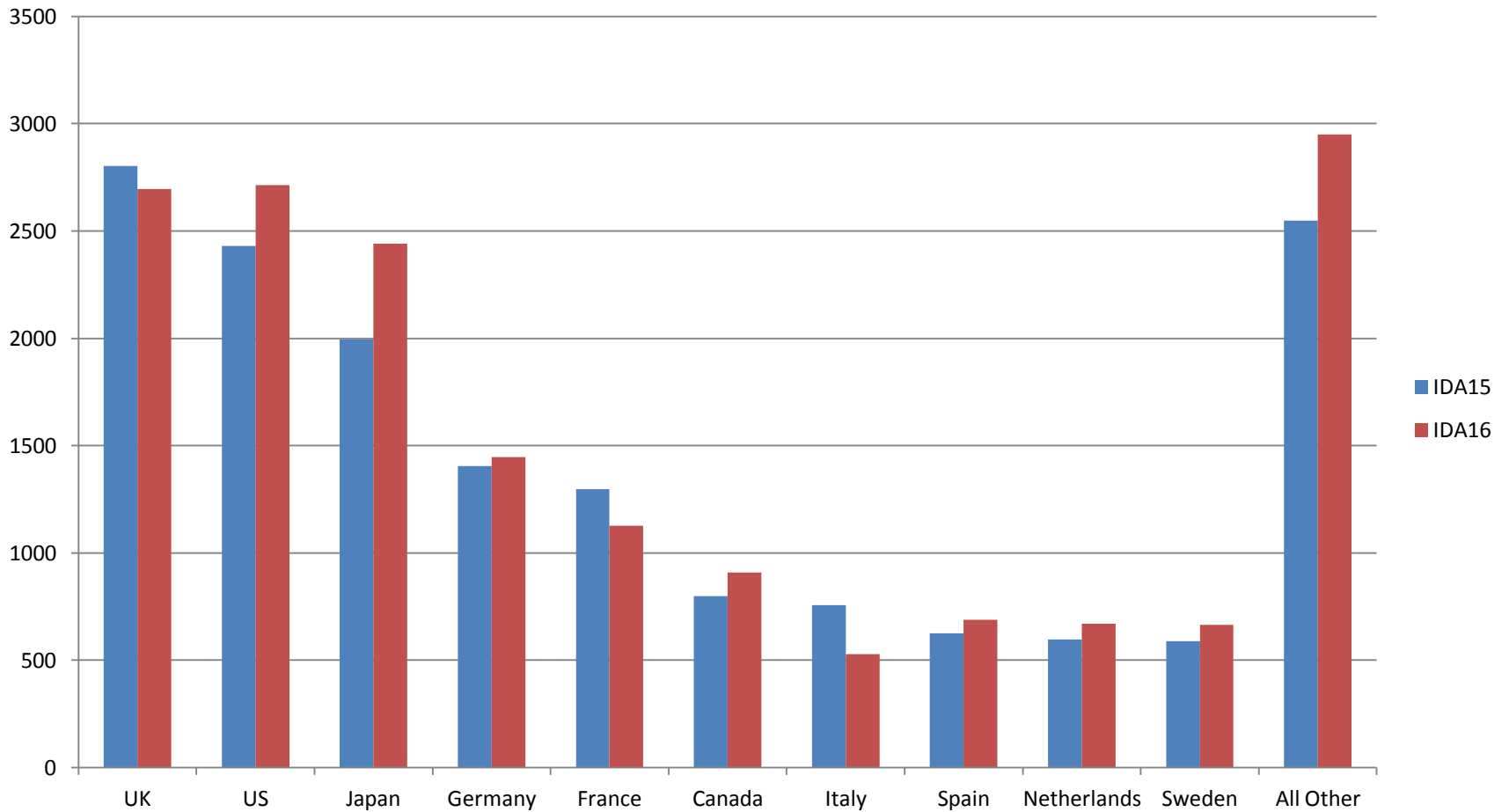
Top Ten Donors to the Global Fund



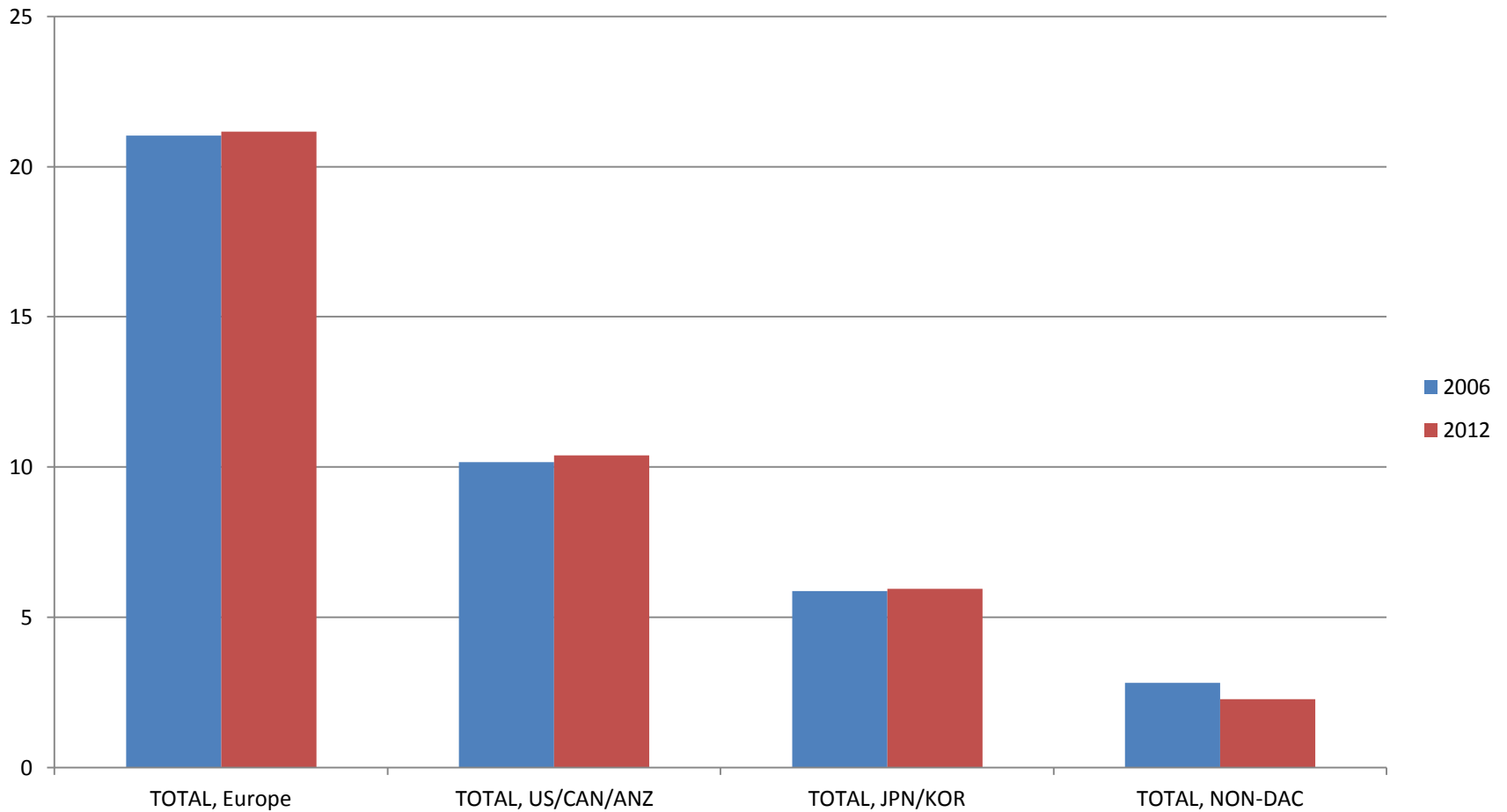
Donor Contributions to IDA (Million SDRs)



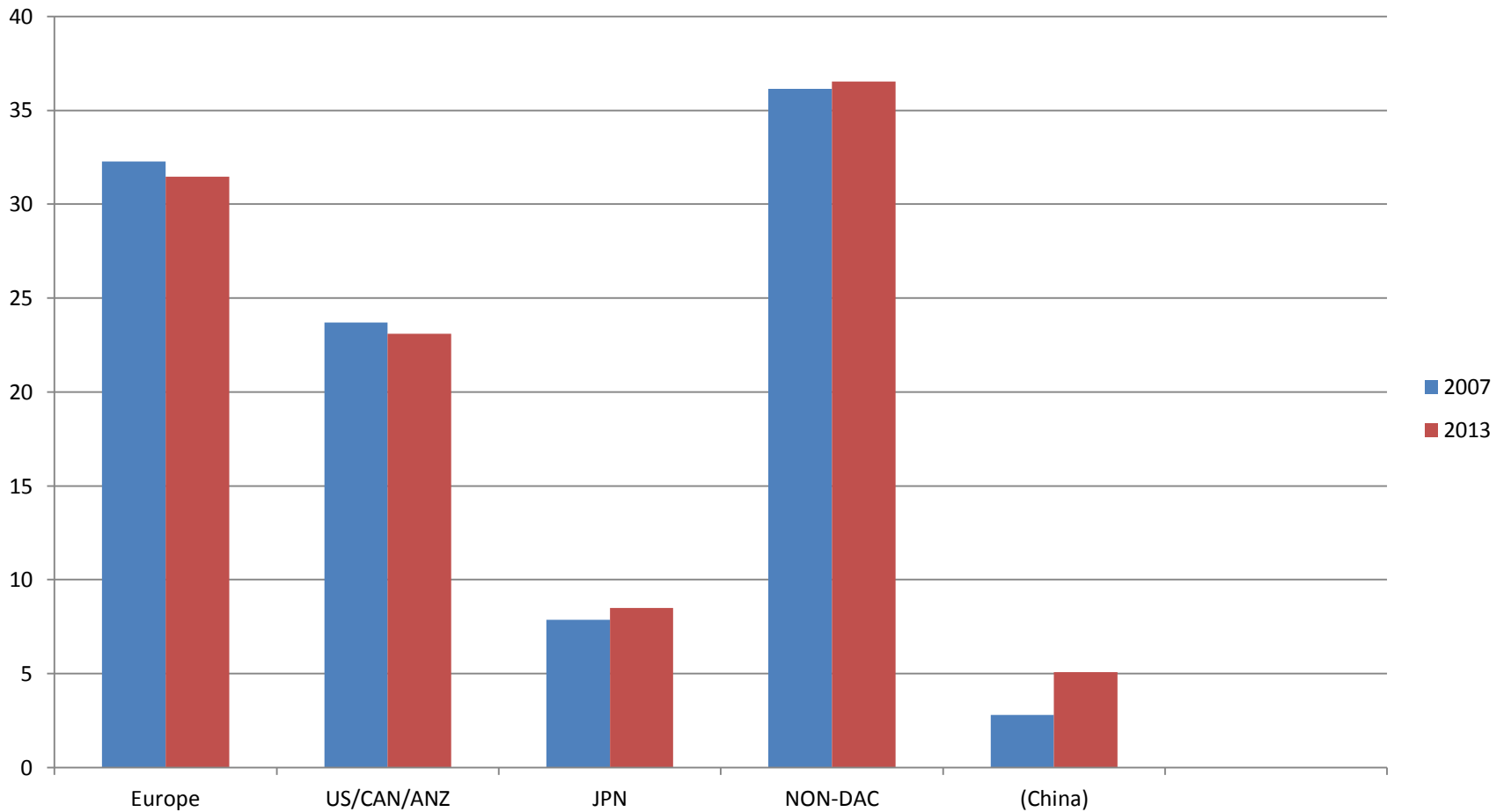
Top Ten Donors to IDA



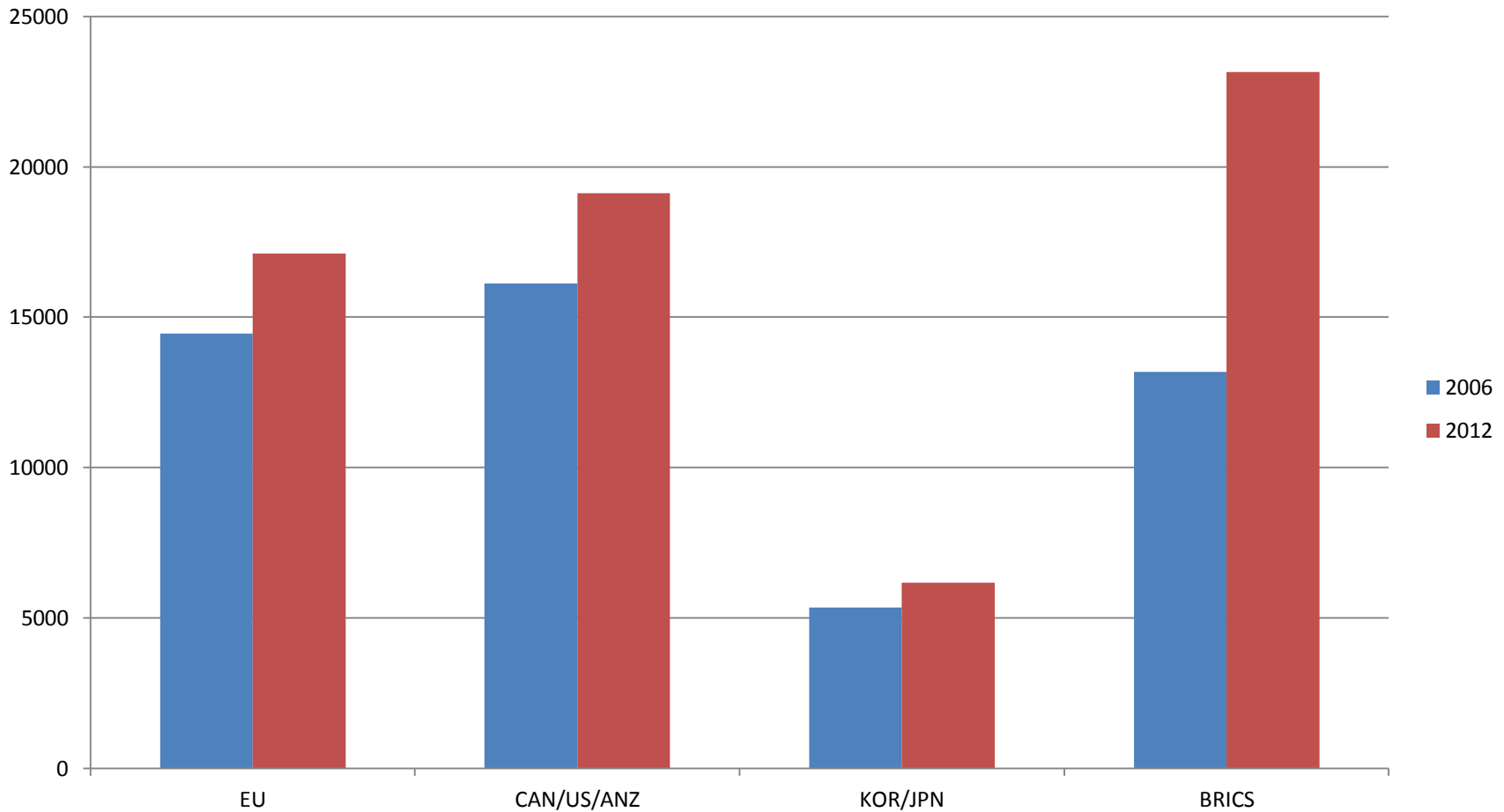
Voting Shares in AfDB, 31 December 2006 and 2012



Voting Shares in IBRD, 30 June 2007 and 2013

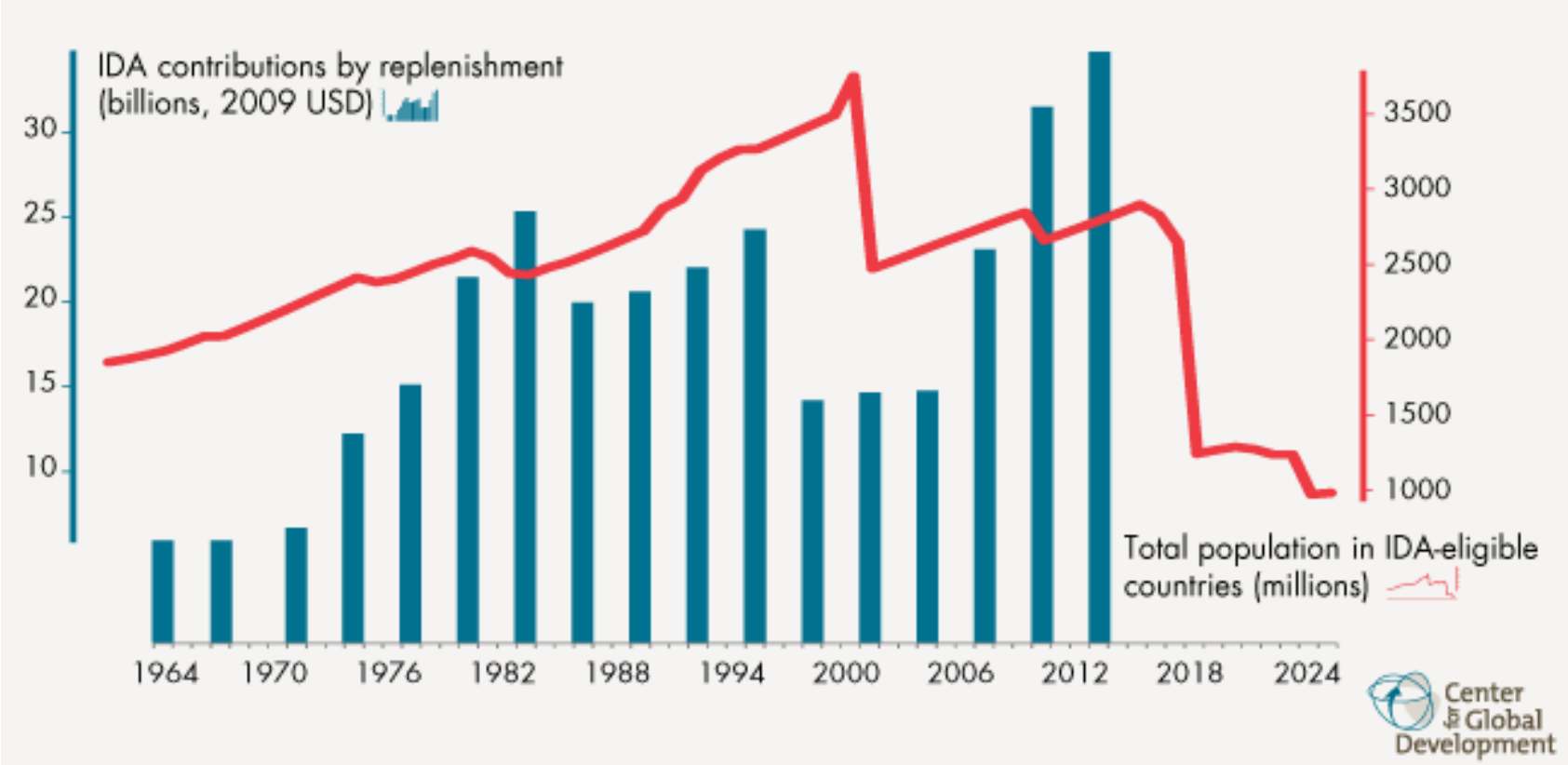


GNI, US\$ billion, PPP, current prices, 2006 and 2013

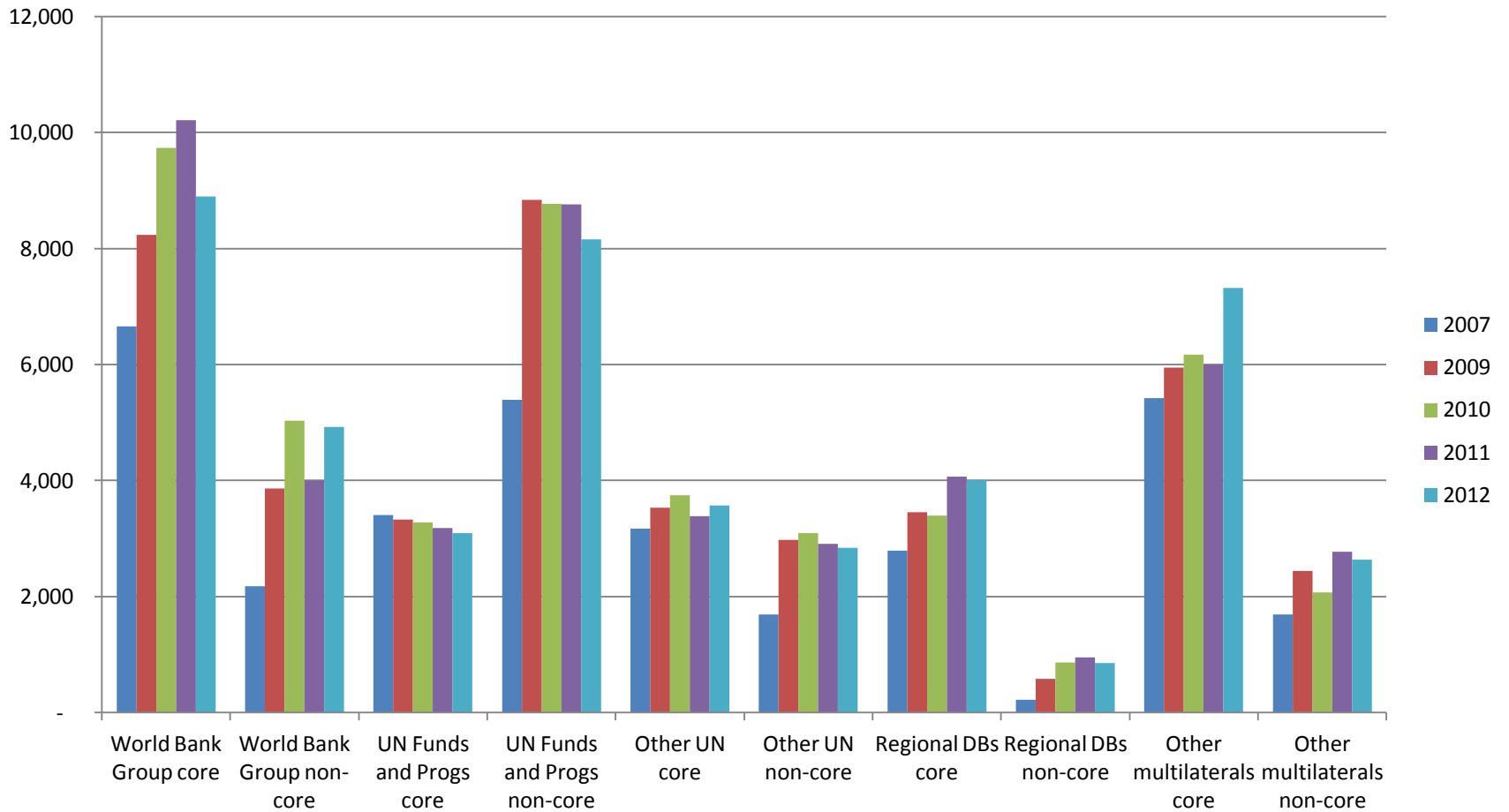


The Demand Side: a Shrinking Clientele for IDA

IDA Replenishments Are at All-Time High but Demand Is About to Drop



The Significance of non-Core Funding



Summary of Conclusions

- The multilateral 'system' is not about to collapse: indeed some parts are increasingly self-financing
- There are however signs of strain:
 - Little real growth
 - Continued dependence on traditional donors
 - Shrinking client base
- More work needed on adapting governance to changing realities
- Balance needed between
 - performance orientation and need/fragility
 - issue-based and country-based funds
 - core resources and trust funds

THANK YOU!