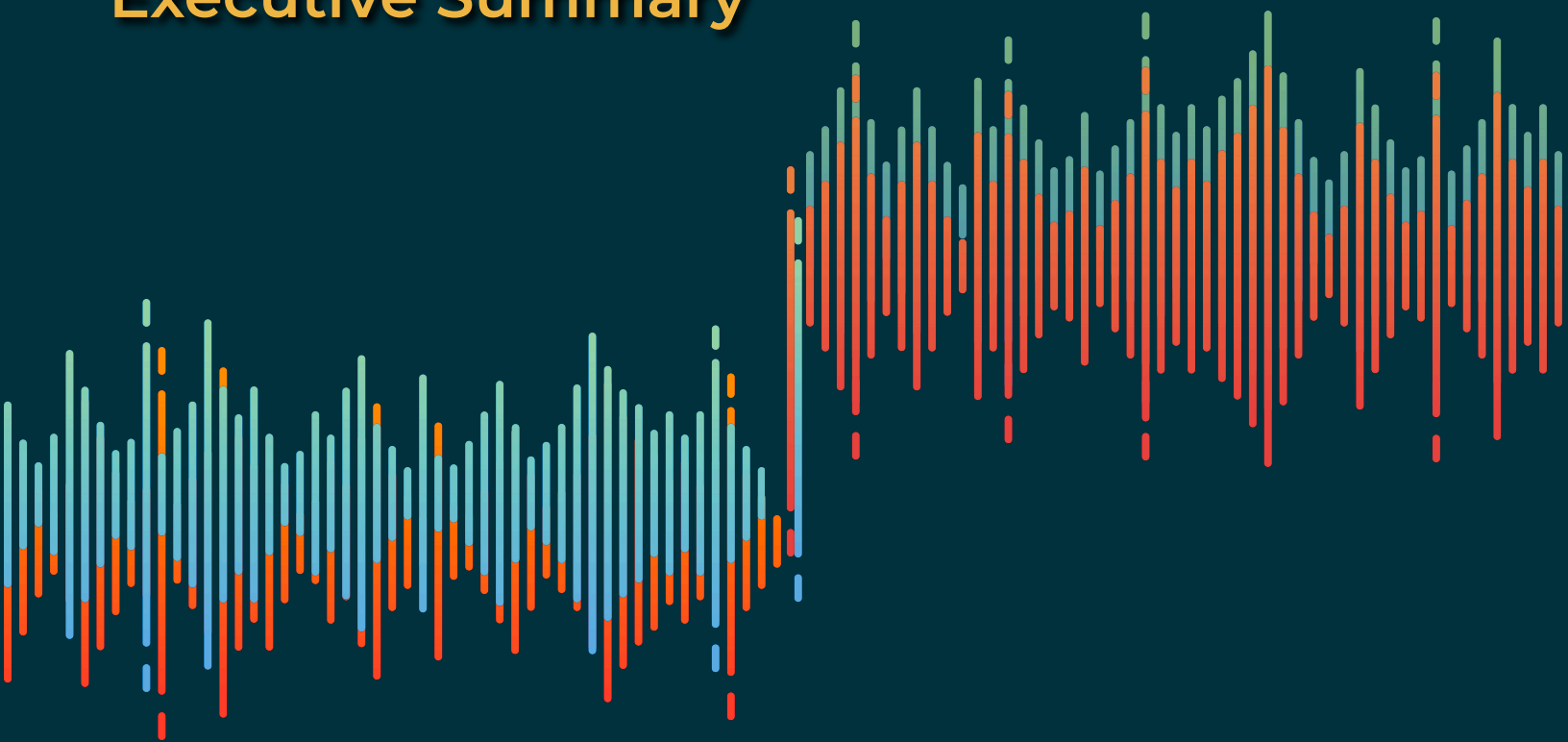


Listening to Leaders 2025

Development cooperation over a decade of disruption

Executive Summary



April 2025

Samantha Custer, Ana Horigoshi,
Bentje Boer, and Kelsey Marshall



AIDDATA

A Research Lab at William & Mary

Executive Summary

Disruption has defined the last decade of development cooperation—from climate change and global epidemics to persistent conflicts and geopolitical competition. To preserve past gains and advance progress, Global South countries mobilized domestic resources at home and cooperated with numerous bilateral agencies and multilateral organizations from abroad. Using four AidData surveys conducted between 2014 and 2024, we analyze how leaders representing 148 countries and territories rate the performance of their external development partners, how these attitudes evolved over the decade, and what factors might explain these perceptions.

We use the term leader broadly to include mid- to senior-level government officials, representatives from civil society and the private sector, and independent experts from universities, media, and think tanks who work closely with development partners in their countries. In this report, we examine the performance of individual development partners against the full field of players and compared to those in their closest cohort group: traditional OECD bilaterals, traditional multilaterals, non-traditional bilaterals, and non-traditional or Southern-led multilaterals. We collapse responses for all agencies flying the same flag into a unified score for each measure.

Footprint: With whom are Global South leaders working?

Global South leaders reported receiving advice or assistance from 71 bilateral and multilateral actors in the 2024 survey wave. We calculate the percentage of respondents who reported receiving advice or assistance from each development partner to measure that actor's footprint. This measure provides important context to understand the size and diversity of each development partner's constituency base. Typically, the largest partners worked with one-fifth or more of the leaders surveyed, while the smallest worked with 1 percent or fewer.

Footprint = % of leaders who reported receiving advice or assistance from a bilateral aid agency or multilateral organization during a five-year period

Three key takeaways about the footprint of development cooperation over the last decade:

- Traditional multilaterals and OECD bilaterals still worked with the most Global South leaders in 2024, proving durable in an age of expanded choice
- Despite waning multilateralism, traditional multilaterals held steady or expanded their footprints, while many OECD bilaterals have lost ground since 2017
- China remains the front-runner among non-traditional players, both bilateral or multilateral, and works with more leaders and countries, but this growth may be slowing

Performance: How do leaders rate development partners?

Global South leaders generally viewed their development partners favorably. In 2024, the average development partner was rated as influential by roughly three-quarters (72.4 percent) of the leaders they worked with and helpful by four-fifths (81.8 percent) of this group. However, averages can obscure attitudes towards specific partners. There was a 37 percentage point difference between the most and least influential development partners, the Global Fund (92.1 percent) and Brazil (55.1 percent), in 2024. That year, there was a gap of 29 percentage points between the most and least helpful partners, Portugal (96 percent) and Qatar (67 percent).

Influence = % of leaders who said a development partner was quite or very influential in shaping domestic policy priorities during a five-year period

Helpfulness = % of leaders who said a development partner was quite or very helpful in implementing policy changes during a five-year period

Two key takeaways about the performance of development cooperation over the last decade:

- Non-traditional players have not yet displaced traditional multilaterals and OECD bilaterals, who still dominated the leaderboard on influence and helpfulness in 2024

- BRICS and Middle Eastern development partners were among the most improved, charting big performance gains over the decade, but still lagging traditional players

Attraction: What do Global South leaders look for in their partners?

The decisions of bilateral aid agencies and multilateral organizations regarding how much they are willing to invest, where, and in what certainly affect the choices available. However, Global South leaders ultimately determine with whom they want to partner to catalyze socio-economic progress for their countries. In this report, we assessed the odds that leaders of different types rate development partners more or less favorably, examine the ingredients leaders consider important in explaining the performance of development partners, and assess the attributes leaders say they value most in a partner.

Why influential? = % of leaders who selected a reason to explain what made an organization influential in shaping domestic policy priorities in their country

Why helpful? = % of leaders who selected a reason to explain what made an organization helpful in supporting reform implementation in their country

Most valuable? = % of leaders who selected an attribute as the thing they value most in a partner

Three takeaways about what development partners look for in their partners:

- Money matters, but leaders in some country contexts—lower income, democratic, and moderately vulnerable countries—are more predisposed than others to view partners favorably
- Resources, respect, and relationships were top-of-mind for Global South leaders explaining what made development partners top performers
- Global South leaders place a premium on development partners willing to adapt their strategies to local needs and plan for long-term sustainability

Conclusion: Reimagining future development cooperation

If the past decade was one of disruption, the next decade does not promise fairer weather for development cooperation. Traditional bilaterals are retreating from earlier official development assistance commitments. Multilaterals must contend with rising skepticism and declining core contributions. Global South countries are questioning whether conventional aid has done more harm than good, while rising powers are challenging the traditional rules of the game and advocating for South-South Cooperation as a sustainable alternative.

In the next decade, development cooperation will likely be reimagined, as government and international organizations revisit how they create, finance, and deliver value in support of Global South countries. As we consider how development cooperation can and should evolve, the *Listening to Leaders* surveys highlight three opportunities for action:

- **Reorient future cooperation around shared prosperity and mutual benefit:** Bilateral cooperation could identify areas of shared interest that are responsive to what Global South counterparts want, while strategically aligned with a donor's national interests.
- **Safeguard multilateral venues with an expanded voice for middle powers:** Traditional multilaterals could position themselves as trustworthy venues to adjudicate between conflicting interests in ways that strengthen the negotiating power of non-traditional development partners and low- and middle-income countries. As traditional bilaterals cut back their aid and engagement, non-traditional development partners and Global South countries may increasingly represent the future of multilateral cooperation.
- **Get serious about policy coherence and a broader suite of economic tools:** As aid is likely to be in increasingly short supply in the coming decade, it will be even more important for development partners to focus on creating synergies between aid and other tools of economic statecraft, such as trade, foreign direct investment, and remittances. This implies that international organizations and government agencies need to walk the talk of "policy coherence," ensuring broader economic policies are helping, not hindering, this goal.