

Thematic Evaluation of the UK's Influence on Development Leaders, 2014-2024

Full Report

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Executive Summary

This thematic evaluation assesses how leaders in the Global South perceive the United Kingdom's performance as a development partner over the last decade (2014-2024). The UK Foreign, Commonwealth and Development Office (FCDO) commissioned AidData for an independent mixed methods evaluation with quantitative analysis drawing on four waves of AidData's *Listening to Leaders* survey and financial data, complemented by 109 qualitative interviews across six countries (Indonesia, Jamaica, Nigeria, Pakistan, Sierra Leone, and Yemen). This report investigates the UK's perceived influence and helpfulness vis-à-vis five evaluation criteria from the Organization for Economic Cooperation and Development (OECD) Development Assistance Committee (DAC): relevance, effectiveness, efficiency, coherence, and sustainability.

The UK's Performance

Despite political turnover, structural changes, and budgetary pressures, the UK has sustained strong marks on influence and helpfulness among leaders who worked with it. In 2024, nearly four-fifths (78 percent) of Global South leaders rated the UK as influential in shaping domestic policy priorities, and 84 percent rated the UK as helpful in implementing reforms—a rise of 20 and 11 percentage points, respectively, over the past decade. These gains underscore the UK's reputation as a trusted, technically-capable partner, and these sentiments were frequently repeated in key informant interviews. However, the UK's relative positioning has slipped. The UK ranked 6th in influence in 2014 and in 2017 among a set of 25 comparators, but fell to 11th in 2024. Helpfulness declined from 8th in 2017 to 10th in 2024. A more crowded and competitive marketplace for development assistance likely explains these relative ranking drops, rather than an absolute erosion in performance.

Drivers of Influence and Helpfulness

- The UK's influence and helpfulness are strongest where it is deeply engaged in social development and macroeconomic reforms, leveraging its convening power and technical expertise to drive impact.
- Alignment with national development priorities, especially in health, education, governance, and climate, reinforces perceived relevance.
- Short project and funding cycles undermine sustainability. To improve responsiveness, partners seek a stable and reliable relationship.
- Interviewees consistently reported that FCDO staff were both technically strong and respectful in working relationships.

Efficiency and Coherence

The UK is comparatively efficient in converting aid into influence and helpfulness. Statistical analyses show stronger marginal effects of UK financing on performance than for the average donor across a select group of comparators, likely strengthened by a grant-heavy portfolio and diverse offerings. The DAC defines coherence as the alignment between the UK's perceived performance and its stated policy priorities. Over the decade covered in this evaluation, the FCDO and its predecessor identified development cooperation as a core priority. Interviewees recognized consistency between what the UK identified as a priority and what it ultimately funded, and they valued the UK's assistance most when there was overlap between the UK's priorities and their own domestic development needs.

Regional and Sectoral Differences

Geographically, the UK performs best in Sub-Saharan Africa and Europe & Central Asia. In South Asia, the survey results for the UK's perceived influence and helpfulness rose in earlier survey waves and declined in 2024. Latin America & the Caribbean and small island developing states (SIDS) have seen improvement but remain lower on influence. Sectorally, social development is a key pillar of perceived performance, as leaders from this sector score the UK's influence and helpfulness very highly; environmental leaders report large gains in influence, signaling traction on climate agendas. Economic sector stakeholders consistently view the UK as more helpful than influential.

Looking Forward

The UK continues to be a valued development partner, seen as credible and technically strong, but risks diminishing influence if funding becomes volatile. To sustain the gains in influence and helpfulness, the UK should:

- Prioritize sectors where alignment with partner priorities and the UK's comparative advantage is strongest. Social development, governance, climate resilience, and economic recovery emerged as shared priorities for UK historical financing and Global South leaders.
- Reinforce respectful working relationships and maintain trusted partnerships. Some leaders expressed a desire for increased visibility of the UK's development assistance programming in their countries, noting that recipients often are not aware of aid provided by the UK. A few also acknowledged that colonial history may complicate the UK's ability to communicate extensively on the subject.
- Expand longer-term, predictable financing and reduce administrative burdens for implementing partners. This may improve opportunities for smaller, local organizations to participate in UK development programming, a desired outcome for many leaders.
- Bridge relief and reform: Combine humanitarian responsiveness with system-building in vulnerable or fragile contexts to ensure relevance translates into lasting outcomes.

Acronyms

ADB	Asian Development Bank	IMF	International Monetary Fund
AFDB	African Development Bank	IND	India
AUS	Australia	JPN	Japan
BRA	Brazil	KOR	South Korea
CAN	Canada	LAC	Latin America and the Caribbean
CHN	China	LtL	Listening to Leaders
CSO	Civil society organization	MENA	Middle East and North Africa
DAC	Development Assistance Committee	NGO	Non-governmental organization
DEU	Germany	NLD	Netherlands
DFC	Development Finance Corporation	ODA	Official development assistance
DFID	Department for International Development	OECD	Organization for Economic Co-operation and Development
DNK	Denmark	OOF	Other Official Flows
EAP	East Asia and Pacific	RUS	Russia
ECA	Europe and Central Asia	SA	South Asia
EU	European Union	SAU	Saudi Arabia
FCDO	Foreign, Commonwealth and Development Office	SDGs	Sustainable Development Goals
FCO	Foreign Commonwealth Office	SIDS	Small Island Developing States
FRA	France	SSA	Sub-Saharan Africa
GAVI	Global Alliance for Vaccines and Immunization	TUR	Turkey
GBR	Great Britain/United Kingdom	UK	United Kingdom
GCF	Green Climate Fund	UN	United Nations
GEF	Global Environment Facility	UNDP	United Nations Development Program
GF	Global Fund to Fight AIDS, Tuberculosis, and Malaria	US	United States of America
GNI	Gross National Income	USAID	US Agency for International Development
G7	Group of Seven	WB	World Bank
		WHO	World Health Organization

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1. Introduction

In an era of constrained aid budgets and intensified competition with alternative development cooperation providers, the United Kingdom seeks to sustain and optimize its influence to punch above its weight with counterparts in low- and middle-income countries for the greatest effect. Getting the most for each pound spent will require a deeper understanding of how the UK's influence in the Global South has evolved, surfacing strengths to build upon and weaknesses to overcome, while ensuring the FCDO's activities add up to more than the sum of their parts. To this end, the Foreign Commonwealth and Development Office (FCDO)¹ commissioned AidData, a research lab at William & Mary, to conduct a thematic evaluation to assess how public, private, and civil society leaders in the Global South perceived the UK's performance as a development assistance provider over the last decade.

The specific objective of this two-part mixed methods evaluation is to provide the FCDO with an independent and evidence-based analysis to optimize the UK's performance when implementing its International Development Strategy. The evaluation seeks to answer five questions about the UK's perceived performance, adapted from the Organization for Economic Cooperation and Development (OECD) Development Assistance Committee (DAC) evaluation criteria:

- (R1) Relevance: What factors explain the UK's influence on domestic policy priorities and helpfulness in implementing reforms, as perceived by leaders in the Global South?
- (R2) Effectiveness: To what extent has the UK achieved high levels of perceived presence, influence, and helpfulness in the eyes of the Global South leaders in absolute terms and relative to other development partners?
- (R3) Efficiency: With leaders from which sectors, geographies, and stakeholder groups does the UK get the best performance scores for its relative inputs of money and people?
- (R4) Coherence: To what extent does the UK's perceived performance (i.e., influence and helpfulness) align with its evolving stated priorities and objectives?
- (R5) Sustainability: How has the UK's perceived presence, influence, and helpfulness evolved over time and in light of changes in the architecture, aims, and resourcing of UK assistance over the last decade?

¹ Specifically, this work was commissioned by the FCDO's Multilateral Effectiveness Team (MET) within what is now the Development Policy and Partnerships Department (DPMED) in the Development and Open Societies Directorate (DOSD).

In phase 1 of the evaluation, AidData surfaced quantitative insights from financial data and perceptions surveys to explain variation in the UK's performance across different countries, sectors, and stakeholder groups over time. Background interviews were also conducted with 12 FCDO staff representing diverse portfolios (e.g., strategy, operations, regional, sectoral, field-based, HQ-based, development effectiveness, and foreign policy) to provide context for how these survey results may correspond with the UK's evolving aims, priorities, and practices of engaging with Global South counterparts.

In phase 2, the qualitative analysis focused on six countries—Indonesia, Jamaica, Nigeria, Pakistan, Sierra Leone, and Yemen—to ground-truth survey-based insights about the UK's performance, probe how changes to the UK's strategic priorities and the structure of its assistance affected partners, and understand what leaders want from their partnerships with the UK. This phase also incorporates forward-looking insights from the case studies to ensure the actionability of the evaluation for FCDO decision-making.

The remainder of Section 1 provides information on the strategic context for this evaluation (section 1.1), the data and methods for phase 1 (section 1.2) and phase 2 qualitative analyses (section 1.3), additional notes on evaluation design (section 1.4), and lastly the structure of the remainder of the report (section 1.5).

1.1 Strategic Context for This Evaluation

The last decade has been a consequential period for the UK's development cooperation efforts. Since 2015, the UK has embraced an explicit emphasis on ensuring that development cooperation efforts advance the nation's economic, security, and foreign policy goals. This culminated in the merger of the Department for International Development (DFID) and the Foreign Commonwealth Office (FCO) under the newly created Foreign, Commonwealth and Development Office (FCDO) in 2020. The last decade was a time of turbulence for UK politics that featured six different prime ministers, compared with three administrations in the decade prior.

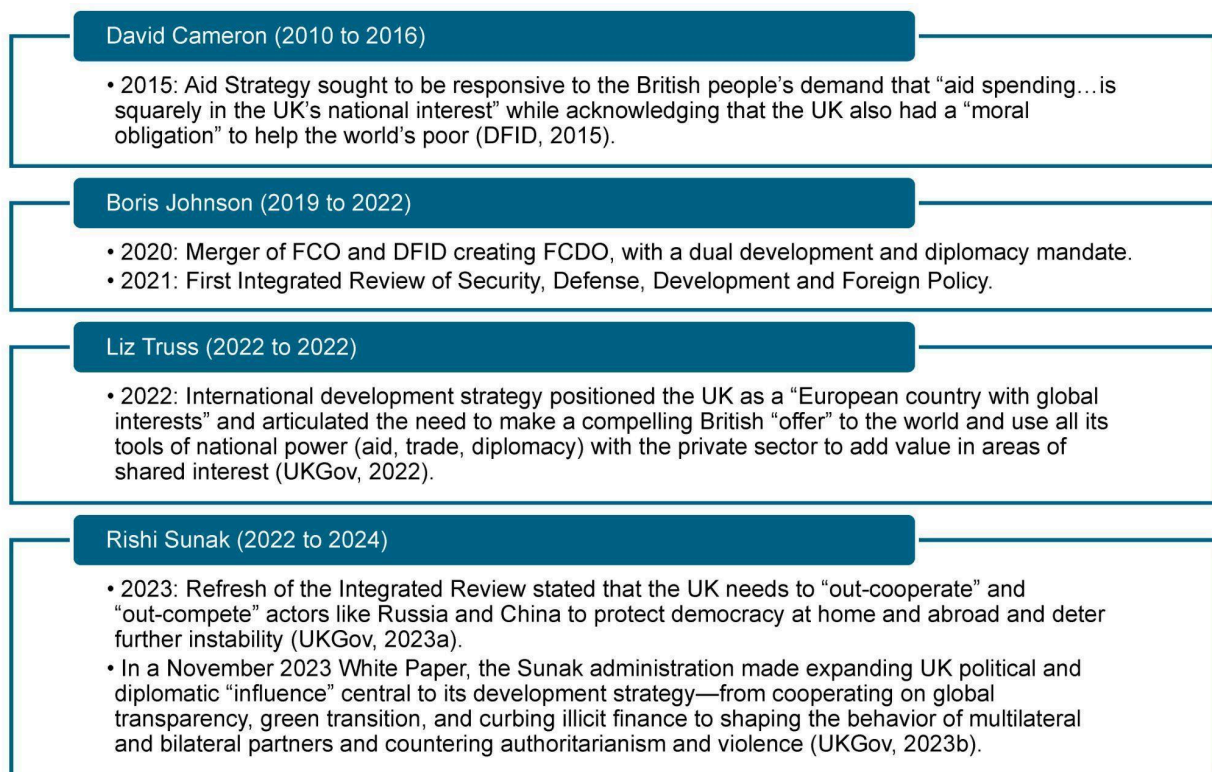
Economic shocks (e.g., COVID-19 and Brexit) and social pressures (e.g., refugee and asylum claims) have constrained resources and spilled over into how the UK finances and delivers its international aid. From 2013 to 2020, the UK consistently met its long-standing commitment to allocate 0.7 percent of Gross National Income (GNI) to Official Development Assistance (ODA), making it one of the few countries worldwide to achieve the United Nations (UN) target. This commitment was enshrined in law in 2015. However, in the aftermath of the COVID-19 pandemic, the UK announced a temporary reduction of that commitment from 0.7 percent to 0.5 percent of GNI. This reduced commitment level remained in place at the end of 2024. Additional budget cuts were announced in February 2025 that would reduce the UK's aid to 0.3

percent of gross national income from 2027; however, these fall outside the period covered in this analysis.

These shocks have not impacted the UK alone. While traditionally the domain of large bilateral donors, grouped together in the OECD's Development Assistance Committee (DAC), new drivers of international development have emerged. China is now the world's largest supplier of development finance, and private sector sources such as private philanthropies rival the scale of entire nations' development portfolios (Custer et al., 2025; Burgess & Custer, 2023). Other traditional aid donors have also dramatically cut their support to international development. In 2025, the United States issued a freeze on foreign assistance spending and dismantled its development arm, the US Agency for International Development (USAID). Other donors, including France, Australia, and Germany, have also made significant cuts to their portfolios, further straining a shrinking aid sector (Krugman, 2026).

Over the last decade, UK aid strategies increasingly positioned aid as instrumental in reducing security concerns (e.g., migration and refugee pressures, as well as terrorism) by addressing the root causes of instability (DFID, 2015; UKGov, 2021, 2022, 2023a and 2023d) and advancing economic interests by creating favorable conditions for new trade partnerships and investment (Figure 1). Although this rhetorical shift has provoked controversy, the UK has remained among the top-ranked countries on independent assessments of aid over the last decade, such as the Overseas Development Institute's Principled Aid Index that rates donors based upon how well they align their "interests in global stability, prosperity, and resilience with the success and well-being of other nations" (Krutikova & Warwick, 2017; Gulrajani & Silcock, 2023).

Figure 1. Key Events Integrating Development with Broader Foreign Policy in the UK



Prime Minister Keir Starmer's administration, which took office in 2024, has been vocal about its goal to reset the tone and modernize the UK's development offer for a world that looks very different from 1997, when the last Labour government came to power. At that time, the UK's relative global economic position was stronger, and democracy appeared to be ascendant globally (Lammy, 2024).² The mission statement of the Labour Party Manifesto in 2024 was "to create a world free from poverty on a liveable planet," signaling commitment to multilateral action and the intention to lead on this agenda. Development remains central in the manifesto (10 mentions), but traditional focus areas such as alleviating poverty (2 mentions) and advancing the Sustainable Development Goals (0 mentions) in poor countries (0 mentions) were muted. Instead, the vision was more heavily weighted toward global cooperation on climate (13 mentions) and economic (6 mentions) transformation,³ and partnerships for shared prosperity rather than aid (3 mentions).

² In an earlier piece in Foreign Policy in April 2024, Lammy (2024) noted that China's economy is now five times as large as the UK's and reinforced how the UK needs to think differently about influence and partnership in a new world order.

³ Other subtopics briefly highlighted as important priorities, though less prominently positioned than climate and economic transformation, included human rights (3 mentions), conflict (2 mentions), digital development (1 mention), and support for women and girls (2 mentions). Services were mentioned 3 times but in relation to exporting UK services, rather than supporting service delivery in poor countries.

1.2 Quantitative Evaluation Design: Data and Methods

The ability to effectively deploy aid in the UK's national interests is not solely about how it supplies development assistance dollars. Government officials, private sector leaders, and civil society representatives across the Global South influence innumerable decisions that affect their country's development trajectory and relations with external partners. This thematic evaluation examines the factors that best explain the UK's influence and performance as a development partner in the eyes of leaders in low- and middle-income countries between 2014 and 2024. It blends quantitative (phase 1) and qualitative (phase 2, see Section 1.3) methods to incorporate insights from financial data, perceptions surveys, and case studies to answer the five questions posed at the beginning of this chapter. With this information, the FCDO can assess how the UK has performed over time and in comparison to other donors.

To better understand the relationship between development assistance and perceived influence and helpfulness, we examine the level of UK advice or assistance provided and the partial correlation between development assistance provision and perceived performance, for both the UK and across a group of comparator donors.

One might assume that the more money and effort donors put into supporting development in other countries, the more likely they are to exert influence and advance their national interests. Although there is some evidence to support this assertion that a donor's inputs (e.g., money or advice) can buy access or favorability, it is evident from past studies and evaluations that the path to influencing developing country leaders is not straightforward. In reality, the specific and unique characteristics of donors and their partners may make it easier or more difficult for donors to break through in an increasingly crowded marketplace of development assistance suppliers. However, the methods used in this evaluation do not allow us to identify the direction of the effect. It is possible that greater development assistance leads to higher influence, but it is also possible that donors provide more development financing to contexts in which they have higher influence to begin with.

With this in mind, the evaluation will use the following theory of change:

If the UK is seen to provide technical and financial assistance to help countries achieve development outcomes (footprint)...

Then, the UK may be seen as influential in shaping the domestic policy priorities of counterpart elites (influence) and helpful in the delivery of policy reforms (helpfulness),

Conditional on the interplay of donor and partner characteristics that make leaders more or less open to influence by external actors,

Such that the UK can convince counterpart elites to make decisions in ways that advance its national interests

The purpose of this thematic evaluation is to provide the FCDO with data and evidence to understand the factors and characteristics that best explain the UK's evolving influence in the Global South over the past decade. The findings from this evaluation could inform how FCDO leaders craft future policies and programs to improve development partnerships with Global South leaders.

The following topics are excluded from this evaluation, as they are beyond the agreed scope of the Terms of Reference: (i) an assessment of citizen perceptions; (ii) the role of UK non-governmental or private sector actors in the Global South; (iii) pass-through influence benefits the UK might derive through its support to multilateral organizations; (iv) UK government activities outside of development; and (v) perceptions of the UK's role outside of the development assistance sphere (i.e., as a trading partner, security provider, or diplomatic counterpart). Moreover, the purpose of this evaluation is not to conduct evaluations of specific project-level interventions to achieve discrete development outcomes (e.g., economic, governance, social, and environmental improvements in the counterpart society).

A key assumption of this study is that favorable UK performance in the eyes of leaders in counterpart nations is not only an end in and of itself but also a means to advancing the UK's broader economic, security, and geostrategic interests. This evaluation considers how the UK translates its stated priorities (via strategies and plans) into revealed priorities (via its allocation of people and money) and converts these inputs into desired outcomes (counterpart perceptions of the UK's performance). To benchmark the UK's footprint and its performance (how helpful and influential leaders rate it) over the past decade, two lists of bilateral and multilateral donors as comparators will be considered: one limited and another more extensive (Table 1).

We first identified the top 10 development partners (as measured by the number of respondents who reported receiving advice or assistance from them) based on three waves of AidData's *Listening to Leaders* survey of leaders in low- and middle-income countries conducted in 2014, 2017, and 2020. We then retained only development partners that were in the top 10 in at least two countries and had at least 30 responses from leaders evaluating them; some final adjustments were made to ensure that all donor types of interest were represented. This led to an extended list of 25 development partners, including the UK, that is used for the descriptive analysis. We further reduced the list to a set of 15 comparators that are used for the cohort disaggregated analysis and the regression analysis, while still comprising examples of every primary "type" of donor, such as a large bilateral, global multilateral, regional multilateral, etc.

Table 1. List of Benchmarking Comparators

Comparators	Limited List (15)	Additional Donors in the Extended List (10)
Bilaterals	Australia, Canada, China, France, Germany, India, Japan, Russia, Saudi Arabia, South Korea, United Kingdom, United States	Brazil, Netherlands, Turkey
Multilaterals	African Development Bank, International Monetary Fund, World Bank	Asian Development Bank, European Union, Global Alliance for Vaccines and Immunization, Global Fund to Fight AIDS, Tuberculosis and Malaria, Green Climate Fund, United Nations Development Program, World Health Organization

The quantitative evaluation focuses on three primary sources of data: AidData’s *Listening to Leaders* surveys, the OECD’s Creditor Reporting System (CRS), and a limited number of background interviews conducted with FCDO staff in preparation for this report. Each of these data sources is briefly described below.

1.2.1 Listening to Leaders Surveys, 2014-2024

Since it is infeasible to speak with every leader who has ever worked with the UK throughout the entirety of this period, the evaluation leverages the responses to four waves of *Listening to Leaders*, an elite survey conducted by AidData in 2014, 2017, 2020, and 2024 in 147 low- and middle-income countries and autonomous territories. Unlike the convenience samples used by market research firms, for *Listening to Leaders*, AidData has systematically identified the positions and people within government agencies and organizations who make or shape decisions, using a sampling frame developed over ten years and updated annually. To mitigate potential bias, we apply a quota system based on specific positions.⁴ The four survey waves span 11 years and collected more than 20,000 responses assessing the performance of over 130 development partners, including the UK, over time.

The *Listening to Leaders* survey offers several advantages: (i) comparability of responses to a common set of questions across waves; (ii) comparability between multiple cohorts of interest (e.g., sector, geography, and gender); (iii) comparability of perceptions of various government agencies, data providers, and organizations using standardized scales; and (iv) breadth of data on diverse topics captured simultaneously. The methodology for the creation of the sampling frame, questionnaire design, survey implementation, and data aggregation is available in the

⁴ Additional details about the sampling frame are available in the Technical Appendix.

Technical Appendix.⁵ The *Listening to Leaders* survey is conducted online via the Qualtrics management platform over four to six weeks and is available in six languages: English, Spanish, French, Portuguese, Arabic, and Russian. A pre-notification, an invitation, and up to three reminders are emailed to prospective respondents as part of the recruitment process.

Across all four waves of the survey, AidData asked leaders to identify the development partners who had provided them with advice or assistance within the preceding five years out of a list of 100+ bilateral aid agencies and multilateral donors, including the UK. Respondents who report receiving advice or assistance from a given donor in the previous five years can then assess its performance in several areas, including influence on their country’s domestic policy priorities and helpfulness in reform implementation. Respondents also answer relevant questions about what makes a development partner influential or helpful.

The quantitative evaluation in this report analyzes the survey-based measures of footprint, influence, and helpfulness (see Figure 2) of the UK and a cohort of development partners between 2014 and 2024, as well as how these measures correlate with the UK’s government-directed financial, in-kind, and technical assistance between 2010 and 2022. A country’s overall footprint, influence, and helpfulness are calculated by combining results for the different organizations or agencies through which it channels ODA. For the UK, this included DFID, FCO, and FCDO, depending on the survey wave.

Figure 2. Key Performance Indicator Definitions

Footprint	Influence	Helpfulness
The percent of Global South leaders who reported receiving advice or assistance from a given development partner.	The percent of Global South leaders who viewed a given development partner they worked with as quite or very influential in shaping their domestic policy priorities.	The percent of Global South leaders who viewed a given development partner they worked with as quite or very helpful in the design and implementation of policy changes.

Notes: The full survey questionnaire, including the questions used to calculate these measures, is available in the Technical Appendix.

The sample size for the UK from each of the four *Listening to Leaders* survey waves is

⁵ A more extensive explanation of the methodology behind the *Listening to Leaders* survey can be found in the Technical Appendix of Custer et al. (2021).

sufficient to support a wide range of descriptive and determinants analyses to (i) assess variation in the UK's perceived influence and performance across regions, sectors, stakeholder groups, and other cohorts of interest and (ii) rigorously test which factors best explain variations in perceptions of the UK's influence and performance. AidData has also collected demographics of respondents across *Listening to Leaders* survey waves, including information on their stakeholder group, policy domain of expertise, sector, country, geographic region, education, and length of experience. It is important to note that the survey sample is not random probability-based, but instead is based on querying individuals from a sampling frame designed to capture the population of interest and letting them self-select into the sample. The non-response weights make adjustments in response to this self-selection. The descriptive results therefore do not imply statistically significant differences, unless explicitly stated.⁶

⁶ Consistent with common reporting practices in large-scale survey research, the body of this report focuses on descriptive statistics, rather than presenting significance tests for all subgroup comparisons. Comparing many subgroups increases the risk of presenting statistically significant results that arise purely by chance. The Technical Appendix provides statistical analysis of a limited set of comparisons of interest.

Table 2. *Listening to Leaders* Sampling Frame: Sample for Analysis of UK Performance

	LtL 2014 (Wave 1)	LtL 2017 (Wave 2)	LtL 2020 (Wave 3)	LtL 2024 (Wave 4)
Sampling frame size (approximately)	55,000	58,000	100,000	66,000
Successfully received the email (approximately)	43,000	47,000	84,000	49,000
Respondents who answered the influence/helpfulness questions for any development partner	4,474 (10.40%)	1,941 (4.13%)	4,046 (4.81%)	2,441 (4.98%)
Subset of respondents who reported working with FCDO	Not comparable	383 (19.7%)	817 (20.2%)	429 (17.5%)

Note: Percentages in parenthesis are unweighted

The *Listening to Leaders* survey covers six stakeholder groups: (i) government agencies and ministries, (ii) international development partners working in-country, (iii) civil society representatives at NGOs and CSOs, (iv) chambers of commerce and commercial associations, (v) independent experts at universities, media, and think tanks, and (vi) parliamentarians.⁷ The survey has expanded over time to cover more countries: it covered 126 countries in 2014 and 2017, 141 in 2020, and 148 most recently in 2024. Each iteration of the survey is pre-tested by AidData staff and experts prior to fielding, to ensure that the addition of new questions and modules does not unduly lengthen the survey or create burdens for survey respondents.

Beyond the descriptive analysis of leaders' perceptions of the UK and other donors, we use econometric models to establish statistical correlations between country- and individual-specific characteristics and how leaders assess influence and helpfulness. Desk research of the literature, discussions with the FCDO, and analysis of the descriptive statistics informed the choice of determinants of influence and helpfulness to be tested. We use the baseline probit and/or logit model proposed below to assess these correlations:

$$D_{i,d,c,t} = \alpha + \beta_1 * Aid_{d,c,t} + \beta_2 \cdot X_i + \beta_3 \cdot Y_c + \xi_t + \mu_i$$

where, $D = \{1 : \text{perceived as influential/helpful or } 0 : \text{not influential/helpful}\}$,

$Aid_{d,c,t}$ is a measure of development finance from donor d , to country c , in time t

X_i is a vector of individual characteristics,

⁷ Respondents are categorized on the basis of their answer to a question about the type of organization they worked for the longest during the past five years. Parliamentarians were included in 2020. For a more detailed explanation of AidData's *Listening to Leaders* methodology, see the Technical Appendix.

Y_c is a vector of country characteristics,

ξ_t are wave-fixed effects,

and μ_i is the error term

The variable for aid is calculated (for each donor-recipient pair) as the average yearly total development financing each donor sent to each recipient country in the three years preceding the survey wave. This includes both Official Development Assistance (ODA) grants and loans, as well as Other Official Flows (OOF) in the OECD-CRS classification.⁸

The individual characteristics tested were derived from the demographic questions in the *Listening to Leaders* survey questionnaire and included the following factors:

- Stakeholder group: government, in-country development partner, non-governmental organization/civil society organization, parliamentarians,⁹ private sector, and independent experts
- Policy areas:¹⁰ economic, environment,¹¹ governance, infrastructure, social, rural development, other

⁸ The UK models control for both UK development finance and “other” development finance simultaneously, while the “all donors” models only control for development finance provided by the specific donor being evaluated. See the Technical Appendix for more details.

⁹ Note that parliamentarians were only included in the 2020 wave of the *Listening to Leaders* survey.

¹⁰ These seven policy clusters are derived from 23 sectors listed as answer options in the recurring question, “Reflecting on your experience in [country], which area of policymaking are you most familiar with?” The 23 categories are: (1) agriculture, fishing, and forestry; (2) economic policy; (3) education; (4) energy and mining; (5) environment and natural resource management; (6) finance; (7) health; (8) human development and gender; (9) industry, trade and services; (10) information and communications; (11) labor market policy and programs; (12) nutrition and food security; (13) private sector development; (14) good governance and rule of law; (15) public sector management; (16) rural development; (17) social development and protection; (18) trade; (19) transportation; (20) urban development; (21) water, sewerage and waste management; (22) foreign policy; (23) other. These are crosswalked into 7 clustered policy areas as follows: (1) economic (economic policy; finance; industry, trade, and services; private sector development; trade); (2) environment (energy and mining; environment and natural resource management); (3) governance (good governance and rule of law; public sector management); (4) infrastructure (transportation; urban development; water, sewage, and wastewater; information communication technologies; general infrastructure); (5) social (education; health, human development and gender; nutrition and food security); (6) rural development (agriculture, fishing, and forestry; rural development); and (7) other (foreign policy; other write-in).

¹¹ We further disaggregated the environment policy area into *energy & mining* and *environment*.

The country-level characteristics tested were collected from secondary sources detailed in the following section:

- Regions: East Asia & the Pacific (EAP), Europe & Central Asia (ECA), Latin America & the Caribbean (LAC), Middle East & North Africa (MENA), Sub-Saharan Africa (SSA), South Asia (SA)
- Income group: low-income, lower-middle income, upper-middle income, high-income
- Fragility: extremely fragile state, other fragile state, not fragile state
- SIDS: small island developing state, other
- Regime type: democracy, autocracy
- Geostrategic and historic relevance: former colonial ties

1.2.2 OECD Creditor Reporting System (CRS), 2010-2022

To assess the UK's financial inputs, this evaluation uses the UK's official development finance between 2010 and 2022 as reported via the OECD's Creditor Reporting System (CRS). The OECD's CRS is a comprehensive database intended to provide reliable data on a comparable basis for all DAC members on where aid goes, what purpose it serves, and what policies it aims to implement. The CRS data is self-reported by donor countries and primarily includes ODA and other official financial flows (OOF) from donor countries to developing countries. The CRS details financial flows, recipient countries, sector and purpose codes, donor countries, disbursement information, project descriptions, and policy objectives.

In the scoping phase of this evaluation, the OECD-CRS data was determined to be of sufficient quality, granularity, and comprehensiveness to allow for in-depth analysis of the levels, terms, and types of UK official development financing provided to low- and middle-income countries, including but not limited to recipient characteristics (e.g., geographic region and income level) and project characteristics (e.g., type of project, concessionality, and sector).

AidData also collected relevant third-party data to analyze donor-specific attributes and country characteristics as possible determinants of UK performance. These additional indicators were sourced from reputable third-party sources. In selecting these indicators, AidData incorporated learning from previous donor-specific evaluations. Table 3 below includes a comprehensive list of these co-variate data sources.

Table 3. Co-variate Data Sources

Data	Source
Country groupings for global regions	The World Bank
Income level	The World Bank
GDP, population, etc.	The World Bank's World Development Indicators (WDI)
Fragility	The OECD's States of Fragility
Regime type	Varieties of Democracy (V-Dem)
Colonial history	The University of Zurich's colonial transformation dataset
Development financing	The OECD's Creditor Reporting System
Sustainable Development Goals financing	AidData's Financing the 2030 Agenda for Sustainable Development Dataset, Version 1.0

1.2.3 Interviews with FCDO Staff

The research team conducted semi-structured background interviews with 12 FCDO staff to deepen our understanding of the UK's strategy and priorities, beyond what was achieved with the desk research. The staff interviewed for this part of the evaluation encompass a diverse range of expertise and responsibilities within the FCDO. We spoke with (i) individuals working on developing global priorities and strategies for the FCDO; (ii) individuals overseeing policy and programming related to development effectiveness, great power competition, and economic statecraft; (iii) individuals who manage operations across various geographic regions and priority sectors; and (iv) individuals with a historical perspective of the UK's development strategy. FCDO staff provided valuable insights into the evolution of priorities, operations, and structures over the past decade.

1.3 Qualitative Evaluation Design: Data and Methods

To surface deeper insights about contextual factors that may be determinants of perceived UK performance, we followed the quantitative analysis with qualitative methods. Six countries—Indonesia, Jamaica, Nigeria, Pakistan, Sierra Leone, and Yemen—were selected using transparent criteria and with input from the FCDO as illustrative cases of broader cohorts of countries. Country income level, fragility level, and past patterns of UK influence (based on survey results) and UK financing (based on OECD-CRS data) were the primary selection criteria; secondary concerns included the feasibility of virtual interviews and the need for translation.

The research team conducted online, semi-structured key informant interviews with public, private, and civil society representatives who were familiar with the UK's development assistance and activities in each country. The script for these interviews was prepared by AidData in consultation with the FCDO and, once completed, was reviewed by William & Mary's Institutional Review Board. The findings from these interviews are integrated with the quantitative analysis, surfacing stakeholder-disaggregated results as relevant.

The selected countries varied geographically, by income and fragility level, and by the level of UK financing and influence, as measured from past waves of AidData's *Listening to Leaders* survey. In consultation with the FCDO, the research team produced a Sampling Quota Frame, comprising five stakeholder groups for each country (the target number of interviewees for each stakeholder group is presented in parentheses):

- Group A: UK Mission development Portfolio; FCDO project implementing partner (3)
- Group B: Host government partner from the Ministry of Finance or Planning or other line ministries (7)
- Group C: In-country private sector partner (5)
- Group D: In-country civil society partner (5)
- Group E: Other diplomatic community representatives (3)

Beginning with a target of 23 interviews per country, the research team conducted a total of 109 qualitative interviews across the six case study countries with representatives of the government, civil society, FCDO personnel and implementing partners, the private sector, and the diplomatic community in English (see Tables 4 and 5).¹² Interviewees were asked about their country's development challenges, the UK's past performance as a development partner, and areas for future cooperation between the UK and their countries.¹³

¹² Interviews were conducted only in English with no possibility for the use of translators, which may limit the perspectives represented.

¹³ See the Technical Appendix for further details on interviewee identification, recruitment strategy, and the questionnaire.

Table 4. Interviews Conducted by Country

Country	Number of Interviews	Average Respondent Familiarity with UK Assistance (Scale 1-5)
Indonesia	23	4
Jamaica	11*	3.5
Nigeria	20	4
Pakistan	20	4
Sierra Leone	19	4
Yemen	16*	4

Notes: At the time interviews were conducted, given the instability in Yemen, the FCDO did not work with civil society organizations in-country. The target number of interviews in Yemen was 18. Interviews in Jamaica were interrupted due to Hurricane Melissa's landfall. AidData, in consultation with the FCDO, decided to discontinue the remaining interviews due to the hurricane's significance and methodological concerns.

In Jamaica, the interviews followed general elections on September 3, 2025, to accommodate changes in government. During the interview period, Hurricane Melissa struck Jamaica's southwest coast as a Category 5 hurricane, the strongest ever to make landfall on the island. Due to the hurricane's significance and methodological concerns, the research team, in consultation with FCDO, decided to interrupt the interviews and proceed with the analysis based on the 11 interviews already completed.

Table 5. Number of Respondents by Stakeholder Group, Phase 2

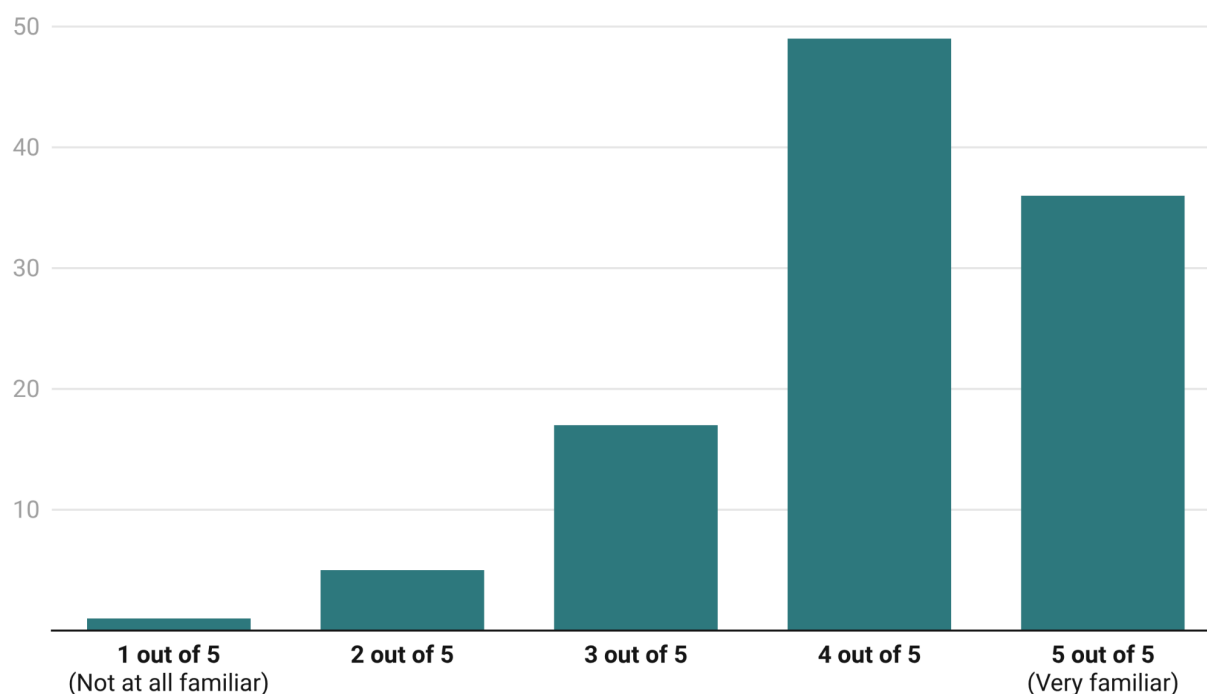
UK Mission + FCDO partners	Host Government	Private Sector	Civil Society	Diplomatic Community
20	24	24	23	18

Note: For further details on the interview recruitment strategy, refer to the Technical Appendix.

Most interviewees reported being somewhat or very familiar with the UK's development assistance in their country (Figure 3), offering informed views on past performance and future partnership. Many had engaged with the UK primarily through the FCDO, its predecessor DFID, and the British Embassy. Some had also interacted with FCDO-funded programs through the World Bank and UN agencies, including UNICEF. Interviewees represented diverse sectors, including governance (including combating corruption and economic reform), finance, climate, health, child protection, education, energy, security, and media.

Figure 3. Interviewees' Familiarity with UK Assistance

Number of interviewees who ranked themselves as:



Note: Interviewees were asked to rank themselves on a scale from 1 (not at all familiar) to 5 (very familiar) with the UK's development assistance. Source: AidData key informant interviews.

The remaining interview questions were mapped to the five OECD-DAC evaluation criteria: Relevance and Sustainability (Section 3.1 of this report), Effectiveness (Section 3.2), and Efficiency and Coherence (Section 3.3), as detailed in Table 6. The related findings, including stakeholder-disaggregated results, have been integrated into the quantitative analyses.

Table 6. Mapping Interview Questions to OECD-DAC Evaluation Criteria

Q #	Question Label	DAC Criteria	Criteria Title	Rationale
2	Mandate	R4	Coherence	Respondents' understanding of the UK's stated aims/goals, which is needed to judge whether perceived performance aligns with the mandate.
3	Priorities	R4	Coherence	Respondents describe UK priorities, providing the benchmark against which performance alignment (coherence) is assessed.
4	Development Challenges	R1	Relevance	Surfaces country needs and priorities, which are essential to evaluate how well UK assistance aligns with local challenges.
5	Relevance	R1	Relevance	Directly asks about the alignment of UK assistance to identified country needs/priorities.
6	Perception	R2	Effectiveness	Captures overall perceptions of UK assistance (presence, influence, helpfulness), which is central to effectiveness.
7	Advantages	R2	Effectiveness	Identifies areas where the UK outperforms other partners to understand comparative effectiveness.
8	Disadvantages	R2	Effectiveness	Identifies areas where the UK underperforms relative to others to understand comparative effectiveness.
9	Influence	R2	Effectiveness	Measures perceived influence on domestic policy priorities, and identifies relevant factors.
10	Helpfulness	R2	Effectiveness	Measures perceived helpfulness in implementation, and reasons behind perceived performance.
11	Trust	R2	Effectiveness	Affects partner effectiveness and is a dimension of perceived performance.
12	Lateral Learning	R2	Effectiveness	Compares UK approaches to others and identifies what the UK could improve to be more effective in engagement.
13	Alignment (Future Focus)	R1, R5	Relevance, Sustainability	Seeks recommendations on sectors/geographies to increase relevance for future alignment to local priorities.
14	Responsiveness	R1, R5	Relevance, Sustainability	Tests how well the UK responds to country priorities/concerns, for relevance in practice.
15	Access	R3	Efficiency	Probes ease of accessing UK financing/expertise, incl. transaction costs and responsiveness relate to efficiency of inputs and processes.

1.3.1 Qualitative Evaluation Ethics

AidData's qualitative evaluation aligns with academic and evaluation industry best practices. This research was conducted in adherence with William & Mary's Institutional Review Board procedures, which oversee research protocols and ensure that human participant research follows William & Mary and the US Department of Health and Human Services's Office for Human Research Protections guidelines. These include requirements for informed consent from participants and for all study personnel have completed required training in research ethics; processes for data collection, data handling, and data security; and guidelines for ensuring the cultural appropriateness of the work and minimizing risk for vulnerable populations and for women in contexts where their status differs from that in the United States/United Kingdom. This study did not target vulnerable populations. At no point was any participant's consent to be interviewed supplemented or supplanted by another person, nor was any participant interviewed solely based on the permission of another person. Data was stored in a restricted access directory available only to the research team, and interviews were anonymized so that no personally identifiable information was included in any public-facing analysis. Participants were informed of the confidentiality of their responses and of their ability to end the interview at any point.

1.4 Cross-cutting Evaluation Notes

1.4.1 Time Frame

This analysis primarily focuses on the period from 2014 through 2024, which has several benefits for learning and the policy process. First, the survey's temporal coverage is consequential in light of changes in the stated aims and architecture of the UK's development assistance over the past decade, including a more explicit emphasis on aid in the national interests (DFID, 2015; UKGov, 2021, 2022, and 2023a), as well as the 2020 merger of the Department for International Development (DFID) with the Foreign Commonwealth Office (FCO) under the umbrella of the FCDO. This allows for observation into whether and how these strategic and operational shifts may have informed Global South leaders' assessments of UK performance. Second, the timing of the evaluation took advantage of the newly-fielded fourth wave of the survey in late 2023, which provides up-to-date insights and facilitates comparative analysis of leader perceptions of the UK across the DFID and post-DFID period. Third, this evaluation complements the FCDO's own evaluation of UK influence with multilateral institutions, as the *Listening to Leaders* Survey also captures information on the relative influence and performance of a wide range of multilateral development banks, vertical funds, and other intergovernmental organizations.

1.4.2 Impartiality

This evaluation was designed with input and feedback from the FCDO, to ensure that the final report was relevant to and effective with the target audience. However, AidData has produced this report independently and retained editorial control of the final evaluation to mitigate the risk of any conflict of interest on the part of the FCDO affecting the underlying empirical results. In addition, AidData worked with the FCDO to ensure the analysis and final report is independently quality assured. These measures, as well as our research instruments, are designed to ensure that findings are presented impartially and with transparent methods.

1.4.3 Evaluation Limitations

The AidData team identified a series of potential limitations and risks to the evaluation. These included the risk of unavailable data or data of uneven quality or availability; the available level of detail on the FCDO's overseas posts; and limitations of the quantitative and qualitative data methods used.

AidData achieved quality data coverage through: (i) using previously-collected data from four past AidData *Listening to Leaders* survey waves that were already completed; (ii) using methods successfully employed in producing similar evaluations for other donors; and (iii) ensuring that there was minimum viable data coverage for the UK over time and across the core indicators, in order to support a range of possible descriptive and determinants analysis.

Survey instruments and key informant interviews were used to measure the participants' perceptions. Participants with stronger views of working with development partners, including the FCDO, may have been more inclined to respond to survey and interview requests. While this limitation is difficult to eliminate entirely, we accounted for it in our analysis by leveraging multiple instruments and identifying these factors where they had the potential to influence findings. Further, to mitigate potential bias, a quota system was used in interviewee identification. The research team also took steps to ensure that survey and interview respondents were aware that this evaluation was being conducted by an independent research team, that no identifying or disaggregated results would be shared with the FCDO, and that all responses would remain anonymous.

1.5 Report Structure

The remainder of this report is organized as follows. Section 2 describes the UK's engagement in the Global South as a function of its footprint—the percentage of leaders who reported receiving its advice or assistance—compared over time and relative to a select group of other donors as comparators. Section 3 systematically answers each of the five evaluation questions

identified in the introduction by analyzing the UK's influence and helpfulness scores across the past decade globally and by region, policy group, stakeholder group, and other constituencies of interest. This analysis considers the UK's performance in both absolute terms (2014 versus 2024) and relative to a set of 25 comparator countries, including the UK. Section 4 concludes with key lessons from this evaluation.

A separate Technical Appendix provides additional information on the statistical methods, the FCDO internal stakeholder interview guide (for phase 1 of the evaluation), the implementation and the questionnaire from AidData's 2024 *Listening to Leaders* survey, and the key informant interview recruitment strategy and interview script (for phase 2 of the evaluation).

2. The UK's Engagement in the Global South: Perceived Footprint Over Time

Development partners are not uniform in the size of their footprint—the percentage of leaders who reported receiving advice or assistance from a given bilateral or multilateral agency in a specific wave of AidData's *Listening to Leaders* survey. Of the twenty-five bilateral and multilateral actors included in this analysis, the smallest are South-South Cooperation providers (e.g., India, Brazil, and Turkey) and specialized vertical funds (e.g., the Global Fund and GAVI) that are driven by a geographic or sectoral focus and work with less than ten percent of leaders surveyed. The top four partners, by contrast, worked with between 40 and 50 percent of leaders surveyed (Figure 4). The UK was the ninth-largest partner by footprint in 2024, trailing the World Bank (WB), the United Nations Development Program (UNDP), and the United States (US), but placing ahead of regional banks such as the African Development Bank (AFDB) and the Asian Development Bank (ADB).

Several DAC peers had a similar footprint to the UK in 2024 (18 percent of leaders reported receiving advice and assistance from the UK), including Japan (25 percent), France (17 percent), and the Netherlands (17 percent). In addition to its bilateral assistance, FCDO staff interviewed for the quantitative analysis in phase 1 of the evaluation highlighted that the UK channels a sizable share of its development finance through multilateral vehicles, many of which are included in this study. This viewpoint is supported empirically by prior work by Mathew and Custer (2023), which found that the UK had the highest annual ratio of multilateral to bilateral giving (45:55) relative to ten bilateral peers between 2012 and 2021.¹⁴ In this respect, the UK may derive additional reach for its assistance program through its partnerships with the WB, UNDP, and the WHO, among others; however, a systematic assessment of this is beyond the scope of this study.

¹⁴ The ten bilateral peers considered in Mathew and Custer (2023) were Australia, China, France, Germany, Japan, India, New Zealand, Norway, Portugal, and the United States.

Figure 4. Footprint scores of 25 comparators in 2024

Rank	Development Partner	Respondents per Partner	Percentage of All Survey Respondents	Number of Countries with at least One Respondent
1	WB	1107	48.1	133
2	UNDP	1094	45.2	131
3	EU	970	40.9	131
4	USA	957	39.5	129
5	WHO	643	27.4	126
6	IMF	635	27.2	127
7	DEU	613	26.9	114
8	JPN	591	25.3	119
9	GBR	429	18.2	104
10	FRA	384	17.2	100
11	AFDB	385	17.0	62
12	NLD	391	16.6	87
13	ADB	345	14.8	60
14	CHN	338	14.4	97
15	CAN	316	13.1	93
16	AUS	293	12.0	60
17	GCF	286	11.7	102
18	KOR	242	10.5	88
19	GF	201	8.2	83
20	IND	150	6.2	61
21	GAVI	140	5.8	62
22	TUR	122	5.6	58
23	BRA	93	3.8	48
24	SAU	84	3.5	53
25	RUS	55	2.4	37

Notes: This figure shows the percentage of respondents who reported receiving advice or assistance from one of 25 donors (selected as comparators for the UK) between 2020 and 2024. These percentages take into account non-response weights. Source: AidData's 2024 Listening to Leaders Survey.

Roughly one-fifth of the leaders surveyed since 2017 reported receiving advice or assistance from the UK (Table 7).¹⁵ In 2024, respondents who had worked with the UK represented 104 countries.¹⁶ Although the size of the UK’s constituency base across partner countries declined by two percentage points, this is not the vast drop-off in absolute terms that may have been anticipated from merger disruptions and related budget cuts. The UK may have lost more ground in *relative* terms, however, as the size of its footprint in relation to its peers has declined with each survey wave: 7th in 2017, 8th in 2020, and 9th in 2024. The size of one’s footprint is not a measure of performance, per se, but it does present a picture consistent with the criticism that the UK’s global engagement has retreated (RUSI, 2022).

Table 7. Global View: Leader Perceptions of the UK’s Footprint

Indicator	2014 (%)	2017 (%)	2020 (%)	2024 (%)	Period Change (p.p.)
Footprint	NA	20.0	21.4	18.2	-1.8

Notes: “Footprint” captures the percentage of Global South leaders who reported receiving advice or assistance from a donor. The UK’s footprint is not reported for 2014 because of a change in methodology that makes the results of the first survey not comparable with following waves. Source: AidData’s 2024 Listening to Leaders Survey.

2.1 Country-level Attributes and the UK’s Perceived Footprint

The UK’s baseline presence, measured through its footprint, is not monolithic across geographic regions (see Table 8 below). For 2024, the shares range from a high of 23 percent in Sub-Saharan Africa and South Asia to a low of 12 percent in Latin America & the Caribbean. The geographic pattern of the UK’s footprint has been largely consistent since 2017, and these trends align with the distribution of the UK’s financial allocations (see Section 3.3). In 2024, the UK had a slightly larger footprint relative to its global average in South Asia, as well as Europe & Central Asia.

Beyond geography, there are some noticeable differences in the kinds of countries where leaders report engaging with the UK. Respondents from democratic countries were less likely in 2024 (16 percent) to say they received advice or assistance from the UK than in 2017 (21 percent), a drop of 5 percentage points. This dynamic may not be unique to the UK, given the increasing autocratization of the world (Alizada et al, 2021), and we observe a similar pattern

¹⁵ Across three survey waves (2017, 2020, 2024), leaders from about 100 or more countries surveyed had worked with the UK. The 2014 used a slightly different methodology for collecting information about footprint and thus is not included for comparison here for ease of comparison over time. Our estimates indicate that respondents from 118 countries reported receiving advice or assistance from the UK in 2014.

¹⁶ The *Listening to Leaders* survey expanded the number of countries it covered, from 126 countries in 2014 to 148 countries in 2024.

with other donors such as Germany and Japan.¹⁷ By contrast, the UK's perceived engagement with autocracies remained steady (at roughly 20 percent across the period).

The UK's footprint is consistently larger among respondents from countries with former colonial ties. There is one exception: small island developing states (SIDS). Only 11-12 percent of respondents from SIDS said they had worked with the UK since 2017 (-8 to 12 percentage points lower than the proportion of leaders from non-SIDS countries who reported working with the UK, across three survey waves). Since many SIDS are former British colonies, this is somewhat counter-intuitive. Australia and Japan are the few bilaterals with consistently higher footprints in SIDS countries than in non-SIDS countries, which may be expected given their geographic positions.¹⁸

The UK had a substantially larger footprint in 2024 in fragile states (23 percent) than in less fragile contexts (16 percent). The UK now has the largest footprint among the 25 comparators in this study in terms of the percentage of leaders engaged from extremely fragile countries. This apparent specialization has been durable since 2017 and likely corresponds with the growing focus in UK development strategies on addressing the root causes of instability that exacerbate conflict, crisis, and migration pressures in partner countries.

FCDO staff interviewed in Phase 1 of this evaluation also consistently pointed to the UK's commitment to supporting the poorest and least developed countries, with one staff member noting that "*we prioritize countries where ODA is most needed, where it is most effective, and where the people are very poor.*" Descriptive data from AidData's *Listening to Leaders* survey supports this view, as the UK has consistently had a higher footprint among leaders from low-income countries than among leaders from countries at all other income levels. Between 26 and 31 percent of leaders in low-income countries reported receiving UK advice or assistance, depending on the survey wave.¹⁹ The UK's relative footprint in both extremely fragile and low-income countries exceeded its global average, meaning leaders from these contexts reported receiving advice or assistance from the UK more often than their peers in other income or fragility groups.

¹⁷ Germany's footprint among leaders in Global South democracies declined by 6 percentage points between 2017 and 2024, while Japan had a decline of 2 percentage points.

¹⁸ Australia's footprint in SIDS remained above 30 percent across the 2017, 2020, and 2024 waves, while in non-SIDS countries it ranged from 8-10 percent. Japan's footprint in SIDS ranged between 24-34 percent and between 24-28 percent in non-SIDS.

¹⁹ It is notable that the UK experienced a reduction in footprint between 2017 and 2024 among leaders across all country income classifications, except those in high-income countries (e.g., former middle-income countries that have since graduated into a new income level). There were insufficient observations to assess high income countries in 2017 (as this is not the primary use of the *Listening to Leaders* survey) but the UK's footprint increased from 13 to 19 percent between 2020 and 2024.

Table 8. Deep Dive: Perceptions of the UK's Footprint by Select Geography

View	Cohort	2017 (%)	2020 (%)	2024 (%)	Period Change (p.p.)
Global	Global	20.0	21.4	18.2	-1.8
Geographic Region	East Asia & Pacific	17.8	17.8	16.5	-1.3
	Europe & Central Asia	15.6	18.6	15.5	-0.1
	Latin America & Caribbean	11.7	12.0	11.9	0.2
	Middle East & North Africa	14.0	15.1	16.9	2.9
	South Asia	26.6	24.5	23.4	-3.2
	Sub-Saharan Africa	25.8	28.5	22.8	-3.0
	Other	26.9	41.9	NA	15.0

Note: Our typical threshold for the number of observations required for analysis is 30 responses. If less than 30 responses were available for a given cohort, we list that result as NA (colored gray). To calculate the change in footprint over time (in terms of percentage points), we subtract the earliest year where data is available from the latest year that data is available. Where applied, each column uses conditional formatting to display values on a color scale ranging from the highest (green) to lowest (red) value. Colors are scaled within each column, not across the entire table, so comparisons should be made down each column and not across rows. Sources: AidData's Listening to Leaders Surveys in 2017, 2020, and 2024.

2.2 Individual-level Attributes and the UK's Perceived Footprint

With the UK's shift to projectized investments,²⁰ it could be assumed that the UK now engages more with leaders in sectors where it allocates a greater share of its assistance portfolio (see Table 9 below). For the sake of comparison, we use eight development policy domains, which each include multiple sectors: economic, energy and mining, environment, governance, infrastructure, rural development, social development, and other.

The sector where the second-largest percentage of leaders reported working with the UK is energy and mining—an area that attracted a growing share of aid from the UK over the period of study (see Section 3.3 below) but still trails social development and governance in spending. Twenty-three percent of leaders with expertise in energy and mining said they had received advice or assistance from the UK, and this has held roughly steady since 2017. The catchall category “other” also had a relatively high share of leaders who reported working with the UK (25 percent in 2024).

²⁰ Projectized investments refer to activities delivered as discrete, time-bound projects, rather than budget support.

By contrast, the UK has seen a sizable decline (-12 percentage points) in its footprint (from 30 percent in 2017 to 18 percent in 2024) among leaders with expertise in governance. This trend coincides with the downtick in governance financing as a share of UK aid spending (see Section 3.3). Across each of the three survey waves, the UK's smallest footprint was in infrastructure, with between 11 and 18 percent of leaders saying they had received assistance or advice from the UK during that time. It remains to be seen if this positioning changes in the future, as the UK has joined the G7's Partnership for Infrastructure and Investment, which may prompt an expansion of its activities and financing in this policy domain.

FCDO staff interviewed in Phase 1 did not note any intentional UK strategy to prioritize a particular subset of stakeholders depending upon their institution type (e.g., civil society, private sector, or government). Some interviewees observed that the UK tends to be "*highly engaged and front-footed*" in working with development partners—from joining donor coordination groups to channeling resources through multilaterals—which they felt gave it a strategic edge.

The survey results reinforce this point: the UK's largest footprint by stakeholder group in 2024 was with local representatives of development partners (23 percent). The UK also had a large footprint with government officials (20 percent in 2024) and parliamentarians (27 percent in 2020).²¹ This trend appears to align with FCDO staff impressions that a distinctive feature of the UK's approach was working through (rather than outside) governments. However, it is worth noting that the UK's closest comparators in terms of footprint, Japan and France, both rank higher among government officials (37 percent and 22 percent respectively in 2024).

Civil society leaders (14 percent) and independent experts from media, academia, and think tanks (13 percent) were the least likely of their peers to report working with the UK in 2024. The lower footprint among civil society leaders may be unexpected for the FCDO, as some staff viewed this constituency as one where it has long-standing relations at the country level. The largest percentage point decline over the period (-18 percentage points) was with independent experts. The UK's engagement with the private sector fell in the middle of the distribution relative to the other stakeholder groups.

²¹ Parliamentarians were only surveyed in 2020.

Table 9. Deep Dive: Perceptions of the UK's Footprint by Select Cohort Groups

View	Cohort	2017 (%)	2020 (%)	2024 (%)	Period Change (p.p.)
Global	Global	20.0	21.4	18.2	-1.8
Sector	Economic	19.8	19.0	17.2	-2.6
	Energy and Mining	24.1	20.8	23.2	-0.9
	Environment	13.8	21.8	16.4	2.6
	Governance	29.8	26.5	18.4	-11.4
	Infrastructure	12.1	17.8	11.2	-0.9
	Other	21.9	26.3	25.4	3.5
	Rural Development	16.5	19.1	16.0	-0.5
	Social	14.8	20.4	18.4	3.6
Stakeholder Group	Development Partner	25.4	23.8	23.1	-2.3
	Government	17.6	21.6	19.8	2.2
	Independent Expert	30.7	14.7	12.8	-17.9
	Civil Society	14.4	18.1	14.4	0
	Other	21.6	NA	NA	NA
	Private Sector	18.6	10.5	17.9	-0.7
	Parliament	NA	27.4	NA	NA

Notes: Our typical threshold for the number of observations required for analysis is 30 responses. If less than 30 responses were available for a given cohort, we list that result as NA (colored gray). To calculate the change in footprint over time (in terms of percentage points), we subtract the earliest year where data is available from the latest year that data is available. Where applied, each column uses conditional formatting to display values on a color scale ranging from the highest (green) to lowest (red) value. Colors are scaled within each column, not across the entire table, so comparisons should be made down each column and not across rows. Sources: AidData's Listening to Leaders Surveys in 2017, 2020, and 2024.

3. The UK's Performance in the Global South: Influence and Helpfulness Over Time and Versus Peers

As discussed in the previous section, the level of the UK's financing and the size of its footprint are useful measures to assess the breadth of the country's reach across the Global South and the depth of its engagement with counterparts in particular sectors and stakeholder groups and among different country cohorts. Nevertheless, financial flows and footprint are not *performance* measures, per se. Well-endowed development partners with large footprints have ample resources, networks, and visibility. However, they may be overstretched and less able to customize their offerings. Conversely, small development partners have limited resource envelopes and bounded networks, but with shrewd positioning, they can cultivate a customized offer appealing to a narrow but loyal constituency base.

In this section, we examine the UK's perceived performance using two perception-based measures derived from responses to four waves of AidData's *Listening to Leaders* survey conducted in 2014, 2017, 2020, and 2024. In addition, we include findings from key informant interviews conducted in six countries—Indonesia, Jamaica, Nigeria, Pakistan, Sierra Leone, and Yemen—between September and November 2025.

"Influence" refers to the percentage of leaders surveyed who said a development partner was "quite" or "very" influential in shaping domestic policy priorities. "Helpfulness" corresponds to the percentage of leaders surveyed who said a development partner was "quite" or "very" helpful in implementing policy changes. For both measures, we consider whether and how the UK's performance has changed in *absolute* terms: its positioning in the eyes of partner countries in 2024, compared to a decade earlier in 2014. Additionally, we consider whether and how the UK's performance has changed in *relative* terms: its positioning compared to other leading bilateral and multilateral development partners in 2024, as compared to 2014.²² Taken together, are views of the UK among leaders in Global South countries improving, holding steady, or worsening over time—and why might that be?

The survey results presented in this section are primarily descriptive and should not be interpreted as evidence of statistically significant differences across respondent groups or donors. They are intended as suggestive findings and should be read with caution. Only Sections 3.1.1.2 and 3.3.2 rely on regression models that permit interpretation of statistical

²² The method used to select the set of comparators is explained above in Section 1.2.

significance. These models identify partial correlations only and do not establish causal relationships or the direction of effects.

3.1 Relevance and Sustainability

The OECD's Development Assistance Committee (DAC) evaluation criteria on *relevance* seeks to understand whether a given intervention is doing the right thing. In the context of this thematic evaluation, we adapt and apply this criteria to consider whether and why public, private, and civil society leaders that received UK advice or assistance viewed these inputs as influential in shaping their domestic policy priorities and helpful when it came to the design and implementation of policy reforms in their countries. Of course, leaders are not identical, and some groups may view the UK as more influential or helpful than others.

In this section, we also consider the OECD-DAC evaluation criteria on *sustainability* (i.e., will the benefits last) by assessing the degree to which the UK has sustained or improved upon its performance at three-year intervals over the last decade. We further illuminate the time dimension of the survey results in particular by comparing the survey waves in 2020 and 2024, in order to assess whether and how the merger of FCO and DFID into the new FCDO in 2020 may have affected perceptions of the UK's performance. A detailed analysis of variations between stakeholder groups, policy sectors, and regions adds insight into how this structural change may have shaped perceptions of the UK's performance with stakeholders in the Global South.

In support of these two evaluation questions, we used the descriptive results from four waves of the *Listening to Leaders* survey (in 2014, 2017, 2020, and 2024) and a series of statistical models to consider whether and how perceptions of the UK's performance vary based upon the characteristics of the individual respondents (e.g., occupation and sectoral expertise) and the countries in which they live and work (e.g., geographic region, income level, regime type, level of fragility, status as a small-island state, a country with former colonial ties). For these questions, we examined perceptions of UK influence and helpfulness, our two survey-based performance metrics.

The descriptive results allow us to observe broad trends over time and space, while the statistical regressions²³ focus attention on what factors are significantly associated with performance while controlling for variations in aid flows and survey waves.²⁴ In phase 2 of this

²³ The regression results are isolated in two sections: Section 3.1.1.2 addresses the statistical significance of the relationship between country characteristics and perceived influence/helpfulness, and Section 3.3.2 addresses the association between aid and influence/helpfulness

²⁴ In other words, there may appear to be large amounts of movement in UK influence among a cohort—but if the regression coefficients are statistically insignificant, that is likely because those variations could be explained by other factors such as aid flows or the time/wave effect.

evaluation, we asked key informants about the most pressing development challenges in their country, the relevance of the UK's assistance, and two additional questions—on desired future alignment and improving responsiveness—related to both relevance and sustainability (see Table 6 above). This set of questions sought to contextualize how these specific performance metrics may impact leaders' perceptions of the UK.

Evaluation Questions:

- *Relevance: What factors explain the UK's influence on domestic policy priorities and its helpfulness in implementing reforms, as perceived by leaders in the Global South?*
- *Sustainability: How has the UK's perceived presence, influence, and helpfulness evolved over time and in light of changes in the architecture, aims, and resourcing of UK assistance over the last decade?*

In *absolute* terms, the UK's influence has been surprisingly durable through a disruptive period marked by political turnover, structural changes, budgetary pressures, and an explicit embrace of aid in the national interest (see Table 10 below). Of the Global South leaders who said they worked with the UK, approximately four-fifths (78.5 percent) rated it as quite or very influential in shaping their policy priorities in 2024. This is a marked improvement from 2014, when less than 60 percent of leaders said the same. A 20 percentage point increase in the UK's influence over the last decade is noteworthy, but not exceptional when compared with similar traditional donors. While the UK experienced a greater increase in influence than the EU (+15 percentage points) and the Netherlands (+8 percentage points), it fell well behind others such as Japan and France (+31 percentage points each). Nevertheless, the UK remains in the top half among the 25 donors considered as comparators for this evaluation, and its high absolute influence signals that the UK is a powerful voice in supporting Global South counterparts in identifying development policy priorities.

Almost all of this improvement came early in the period of study (between 2014 and 2017), as the UK grew its influence from 58.4 to 76.4 percent (+18 percentage points). This pattern is similar to that observed across the comparators selected for this analysis.²⁵ Subsequently, the UK's influence held steady with minor ups and downs in subsequent waves, all within three percentage points. Taken together, the opposing movements in footprint and influence between 2017 and 2024 (-1.8 p.p. and +2.1 p.p., respectively) support the assertion that footprint is not deterministic of performance, despite being small in magnitude.

²⁵ The average difference in influence between 2014 and 2024 across comparators is +19 percentage points, suggesting a strong wave effect, despite no substantial changes to the survey design between these years. However, there was also a substantial decline in the response rate between these two waves. To the extent that the composition of respondents differed across waves, this could account for part of the observed change in reported influence/helpfulness. Further research is needed to understand why there was a strong wave effect between 2014 and 2017.

The UK has also charted substantial improvement in how leaders across the Global South perceive its helpfulness in implementing policy changes. In 2024, 84.4 percent of those who reported receiving advice or assistance from the UK found it to be quite or very helpful. This was an 11 percentage point increase from the 73.5 percent of respondents who saw the UK as helpful in 2014. However, as with the UK's influence score, most of these gains in helpfulness were made earlier in the period, with perceptions holding relatively steady between 2017 and 2024 (no more than a two percentage point change between waves). Here too the modest gain between 2017 and 2024 went in the opposite direction of the small decrease in footprint over the same period.

Comparing changes in footprint, influence, and helpfulness between 2020 and 2024 shows how Global South leaders' perceptions of the UK shifted in the immediate aftermath of the FCO-DFID merger, (though it should be noted that these reported differences may not be statistically significant). The UK's gains in influence and helpfulness early in the decade had not worn off by 2023, when the fourth wave of the survey was fielded. However, perceptions reported in the Phase 2 key informant interviews, which were conducted roughly five years after the merger, were more mixed, as detailed below in Section 3.3.

Table 10. Global View: Perceptions of the FCDO's Footprint, Influence, and Helpfulness

Indicator	2014 (%)	2017 (%)	2020 (%)	2024 (%)	Period Change (p.p.)
Footprint	NA	20.0	21.4	18.2	-1.8
Influence	58.4	76.4	75.5	78.5	20.1
Helpfulness	73.5	82.5	82.9	84.4	10.9

Note: Footprint" captures the percentage of Global South leaders who reported receiving advice or assistance from a donor. The UK's footprint is not reported for 2014 because of a change in methodology that makes the results of the first survey not comparable with following waves. Source: AidData's Listening to Leaders Surveys in 2014, 2017, 2020 and 2024.

3.1.1 Country-level Attributes and Perceptions of UK Performance

The UK's influence increased in most geographic regions over the last decade (see Table 11 below). Leaders from two regions gave the UK its highest influence marks in 2024, relative to their peers from other regions: Sub-Saharan Africa (86 percent) and Europe & Central Asia (85 percent). According to FCDO staff interviewed in Phase 1 of this evaluation and historical aid allocations, Sub-Saharan Africa is among the UK's top traditional priority geographies, and it has consistently been among the top two regions for UK influence across four waves of the *Listening to Leaders* survey. Noticeably, however, Sub-Saharan Africa was the only region

where the UK saw a decline in influence (-5 percentage points) between 2017 and 2020, before rebounding to its highest level in 2024. Given Africa's importance to the UK as a priority for much of its ODA spending, this instability could signal uncertainties or fallout related to the merger and associated budget cuts around 2020. This also coincided with the UK Government announcing that, under pressure from the ongoing COVID-19 crisis, it would cut its aid portfolio from 0.7 to 0.5 percent of the nations' Gross National Income. This reduction in spending may have sent negative signals to African leaders, at a time when their domestic budgets were acutely strained by the ongoing pandemic.

Europe & Central Asia was among the regions where the UK charted the biggest gains in influence over the period (+24 percentage points), along with East Asia & the Pacific (+26 percentage points). However, the underlying stories are different across these two geographies. In Europe & Central Asia, most of the growth in influence was concentrated towards the end of the period, as the percentage of leaders there who saw the UK as influential grew from 74 percent in 2020 to 85 percent by 2024. This shift could reflect changes in the UK's ODA budget allocations, as there was an uptick in spending oriented to the region in recent years (see Section 3.3 below), possibly in recognition of its vulnerability to Russian influence and interference. In East Asia & the Pacific, however, the story is the opposite, with most of the UK's influence gains occurring earlier in the period. 2020 was the high point for UK influence in the EAP region with 81 percent of leaders viewing it as influential, compared to 72 percent in 2024.

Latin America & the Caribbean has traditionally been a lower priority region for the UK in its strategies and budget allocations (FCDO, 2024). In this respect, it is unsurprising that the UK tends to perform least well on perceived influence with leaders from this region, even as it has charted an improvement of 17 percentage points over time. In 2014, just over one-third of LAC leaders rated the UK as influential; by 2024, over half of LAC leaders surveyed said the same. In South Asia, traditionally a priority region for the UK in its strategies and ODA budget, the influence metric held steady. Seventy-two percent of South Asian leaders who worked with the UK in 2014 thought it was influential. The same percentage agreed in 2024.

The UK's perceived helpfulness also improved across all regions over the last decade (see Table 12 below). Once again, leaders from Sub-Saharan Africa (92 percent) and Europe & Central Asia (90 percent) were most likely to view the UK as helpful in 2024. There was a similar dynamic in perceptions of UK helpfulness in Sub-Saharan Africa as with influence: a noticeable decline in favorability from 2017 to 2020, before a rebound in 2024. The UK was consistently seen as less helpful in Latin America & the Caribbean, but scores have improved by 8 percentage points over the decade, reaching 71 percent in 2024.

The UK charted its largest increases in perceived helpfulness in Europe & Central Asia and East Asia & the Pacific (+18 percentage points each since 2014). These regions show very different

trajectories in their attitudes and engagement with the UK on helpfulness. As with influence, most of the growth in the UK's helpfulness in Europe & Central Asia may have coincided with an expansion in spending and programming to this region later in the period.

By contrast, the UK made large early gains with EAP leaders in perceived helpfulness from 2014 to 2020 (+30 percentage points), when 91 percent of leaders from that region rated it as helpful. Perceptions of the UK backtracked in 2024, as only 79 percent of EAP leaders reported the UK as helpful. This trend could align with FCDO staff observations that there was an intentional shift to emphasize the Indo-Pacific region for a period of time, but that focus has subsequently waned. The South Asia results were similarly volatile, as helpfulness initially increased by almost 20 percentage points to 91 percent in 2020, before sharply decreasing to 78 percent in 2024.

Table 11. Deep Dive: Perceptions of the UK's Influence by Geography

View	Cohort	2014 (%)	2017 (%)	2020 (%)	2024 (%)	Period Change (p.p)
Global	Global	58.4	76.4	75.5	78.5	20.1
Geographic Region	East Asia & Pacific	46.7	72.3	80.9	72.5	25.8
	Europe & Central Asia	60.7	62.3	74.0	84.7	24.0
	Latin America & Caribbean	36.4	NA	50.7	53.3	16.9
	Middle East & North Africa	45.2	NA	NA	NA	NA
	South Asia	71.7	79.7	77.3	71.6	-0.1
	Sub-Saharan Africa	63.6	83.7	78.8	85.8	22.2
	Other	NA	NA	91.1	NA	NA

Notes: Our typical threshold for the number of observations required for analysis is 30 responses. If less than 30 responses were available for a given cohort, we list that result as NA (colored gray). To calculate the change in footprint over time (in terms of percentage points), we subtract the earliest year where data is available from the latest year that data is available. Where applied, each column uses conditional formatting to display values on a color scale ranging from the highest (green) to lowest (red) value. Colors are scaled within each column, not across the entire table, so comparisons should be made down each column and not across rows. Sources: AidData's Listening to Leaders Surveys in 2014, 2017, 2020, and 2024.

Table 12. Deep Dive: Perceptions of the UK's Helpfulness by Geography

View	Cohort	2014 (%)	2017 (%)	2020 (%)	2024 (%)	Period Change (p.p)
Global	Global	73.5	82.5	82.9	84.4	10.9
Geographic Region	East Asia & Pacific	61.0	74.0	91.3	78.8	17.8
	Europe & Central Asia	71.3	67.7	78.6	89.5	18.2
	Latin America & Caribbean	62.6	NA	73.2	70.7	8.1
	Middle East & North Africa	68.6	NA	NA	NA	NA
	South Asia	72.0	83.3	90.6	77.7	5.7
	Sub-Saharan Africa	78.2	90.6	83.6	91.5	13.3
	Other	NA	NA	93.0	NA	NA

Notes: Our typical threshold for the number of observations required for analysis is 30 responses. If less than 30 responses were available for a given cohort, we list that result as NA (colored gray). To calculate the change in footprint over time (in terms of percentage points), we subtract the earliest year where data is available from the latest year that data is available. Where applied, each column uses conditional formatting to display values on a color scale ranging from the highest (green) to lowest (red) value. Colors are scaled within each column, not across the entire table, so comparisons should be made down each column and not across rows. Sources: AidData's Listening to Leaders Surveys in 2014, 2017, 2020, and 2024.

In Phase 2 interviews, to uncover the relevance of UK assistance as perceived in Indonesia, Jamaica, Nigeria, Pakistan, Sierra Leone, and Yemen, we asked interviewees in those countries to identify the most pressing development challenges facing their country and mapped those responses to the United Nation's Sustainable Development Goals (SDGs). Across all stakeholder groups, governance and institutional integrity dominate as the most pressing development challenge, with Peace, Justice & Strong Institutions (SDG 16) consistently ranking first (see Table 13 below). Among UK Mission staff and FCDO implementing partners, economic growth and job creation (SDG 8) and education (SDG 4) followed closely, while representatives of host governments emphasized economic growth and climate action (SDG 13). The private sector stood out for prioritizing energy access (SDG 7) alongside health (SDG 3). Civil society prioritized education and health, reflecting social sector concerns, while the diplomatic and multilateral community highlighted education and food security (SDG 2) as critical needs. Overall, the pattern across stakeholder groups underscores a strong demand for stability and institutional capacity, complemented by priorities for education, livelihoods, and sectoral resilience.

Table 13. Most Pressing Development Challenges Identified by Stakeholder Groups

SDG	UK Mission + FCDO partners	Host Government	Private Sector	Civil Society	Diplomatic Community
1 – No Poverty	5	9	7	7	2
2 – Zero Hunger	3	5	6	4	7
3 – Good Health & Well-being	4	7	7	6	5
4 – Quality Education	6	7	6	10	9
5 – Gender Equality	2	2	3	4	3
6 – Clean Water & Sanitation	1	4	1	1	0
7 – Affordable & Clean Energy	2	3	9	0	5
8 – Decent Work & Economic Growth	9	10	6	3	6
9 – Industry, Innovation & Infrastructure	2	4	4	0	3
10 – Reduced Inequalities	1	4	4	2	1
11 – Sustainable Cities & Communities	0	0	0	1	1
12 – Responsible Consumption & Production	0	0	0	0	0
13 – Climate Action	5	9	5	4	4
14 – Life Below Water	0	0	0	0	0
15 – Life on Land	0	1	0	0	0
16 – Peace, Justice & Strong Institutions	13	18	9	11	11

Note: The research team mapped responses from individual interviewees to the Sustainable Development Goals.

Source: AidData key informant interviews.

In the Phase 2 key informant interviews, respondents broadly judged UK assistance to be well aligned and relevant to development needs, tempered by concerns about scale, continuity, and the humanitarian-development balance. Host government respondents consistently

affirmed a tailored fit, noting that *"the UK's assistance is well aligned... supporting the government and working to find broader solutions,"* while those in a humanitarian aid context warned that coverage can be uneven and *"much more challenging."* Private sector respondents particularly praised a *"well-informed team... balanced, comprehensive, and responsive to contextual developments and risks,"* reflecting confidence in partnerships and context-aware program design. Civil society and diplomatic community representatives similarly saw alignment with domestic government priorities, but stressed that short-term approaches and bureaucracy reduced perceived relevance over time.

Interviewees emphasized institutional engagement, coordination, and a needs-based posture as key drivers of the UK's helpfulness. Several respondents linked UK influence to steady, genuine partnership: *"they build a team that's multifaceted, from the private sector and inclusive of stakeholders with local and international experience,"* and *"excellent... well-informed team that maintains strong relationships."* Where these conditions held, interviewees perceived a rise in the UK's relevance. However, where they weakened through funding cuts or risk aversion, leaders perceived reduced traction, saying *"budget has reduced... the last two years have been a very challenging environment,"* and *"bureaucracy has eroded nimbleness."*

A recurring theme in the key informant interviews was the need to bridge life-saving assistance with longer-term reforms and maintain countrywide coverage where political access is constrained. Civil society interviewees in particular critiqued short project cycles since *"short-term approaches don't produce results...then funding moves on,"* advocating for resilience through multi-year horizons while recognizing that other donors face similar challenges. Members of the multilateral and diplomatic community asked the UK to re-invest in community development, stating *"go back to community development...no one does it like the UK can"* to ensure relevance translates into tangible local improvements. Collectively, interviewees connected targeted programming to staying power, flexibility, and coverage, not just formal alignment.

Across the Phase 2 key informant interviews, respondents pointed to specific factors that explained the UK's influence on domestic policy priorities and its helpfulness in implementing reforms: (i) institutional embeddedness and policy dialogue, which shapes domestic priorities and builds implementation capacity; (ii) needs-based, context-aware design and coordination, which sustains program legitimacy and uptake; (iii) funding predictability and risk posture, which affects the UK's ability to stay engaged through reform cycles; and (iv) operational agility and presence, which translates relevance into visible, implementable change. Influence and

helpfulness hinge on trusted institutional partnerships, longer-term commitments, countrywide engagement, and flexible delivery—conditions that interviewees repeatedly tied to whether UK assistance is not only relevant on paper but also effective in practice.

3.1.1.1 Barometers of Need and Historical Relevance: Fragility, Poverty, Autocracy, SIDS, and Former Colonies

In small island developing states (SIDS), the UK's performance is more mixed. The UK grew its perceived influence (+26 percentage points) and helpfulness (+25 percentage points) among leaders from SIDS countries over the past decade. Across all survey waves, the UK is seen as more helpful than influential in SIDS. Eighty-six percent of leaders from SIDS countries rated the UK as helpful in implementing policy reforms in 2024, compared to only 61 percent in 2014. The UK was seen as relatively more helpful with leaders of SIDS than those from non-SIDS countries in 2024. Only 63 percent of SIDS leaders said the UK was influential in 2024. Although this is a dramatic improvement from 2014 (37 percent influential), 2024 was still a step backward from a high point in UK influence among SIDS leaders in 2020 (69 percent).²⁶ The UK was seen as more influential among leaders of non-SIDS countries.

The UK is regarded as highly influential in fragile state contexts. In 2024, 96 percent of leaders surveyed in extremely fragile states rated the UK as influential. This remarkable 43 percentage point increase in influence since 2014 is aligned with a priority made by DFID in 2015 to spend at least 50 percent of its budget in fragile states and regions (UKGov, 2015). The UK was seen as influential among 80 percent of leaders from fragile (though not extremely fragile) states in 2024, an increase of 14 percentage points since 2014. Historically, the UK has been viewed as most helpful among leaders from fragile contexts, with much of the improvement occurring between 2014 (77 percent) and 2017 (90 percent), with a slight decline afterward (87 percent). Helpfulness also increased consistently among leaders from non-fragile countries, from 72 percent in 2014 to 82 percent by 2024.

Low-income countries consistently rated the UK more influential and helpful than middle-income respondents. This trend appears to be aligned with the UK's historical priority of focusing its assistance on poorer countries. In 2024, 85 percent of leaders from low-income countries rated the UK as influential, and 92 percent saw it as helpful. This was an improvement from its performance on both measures in 2014 (+22 percentage points on influence, and +13 on helpfulness). Most of the UK's growth in influence occurred early between 2014 and 2017, but it has held relatively steady since then. However, the largest uptick in helpfulness occurred recently between the 2020 and 2024 waves (+8 percentage points).

²⁶ As discussed later in this report, the UK still has some of the lowest influence scores in SIDS, in contrast with other development partners in our comparison group.

Historically, the UK has been seen as less influential by leaders from upper-middle-income countries, with a 10 percentage point gap relative to leaders from low-income countries in 2024. The UK's influence in upper-middle-income countries rose by seven percentage points between 2014 and 2017 and increased by another four percentage points after 2020. Interestingly, the largest change in the UK's helpfulness score may be with middle-income countries. For the first three waves of the *Listening to Leaders* survey, the UK was seen as more helpful by leaders in lower-middle rather than upper-middle-income countries. This status quo shifted in the 2024 wave, when the UK was rated more highly on helpfulness by leaders from upper-middle (87 percent) than lower-middle (81 percent) countries for the first time.

The UK's influence was initially perceived quite similarly across respondents from autocracies and democracies. In 2014, 60 percent of leaders from both groups rated the UK as quite or very influential on average. These responses have diverged subsequently, as the UK's influence has grown more markedly among leaders from autocratic countries than among democratic peers (at 84 and 72 percent, respectively, in 2024). Historically, the UK was seen as more helpful by leaders in democracies than those in autocracies across the first three waves of the survey. Similar to the pattern in middle-income countries, there was a noticeable shift in 2024. Respondents from autocratic countries viewed the UK as more helpful (88 percent) than those in democracies (81 percent) that year. Moreover, there has been a 5 percentage point decline in how leaders from democratic countries rated the UK's performance on this measure of helpfulness since 2020.

Perceptions of UK influence have converged over the last decade between leaders from countries that are former British colonies and those that are not. Whereas leaders from Britain's former colonies were initially 11 percentage points more likely to view the UK as influential in 2014, that gap declined to 3 percentage points by 2020. By 2024, 78 percent of leaders from both groups saw the UK as influential. The UK's apparent comparative advantage with former colonies has been more visible and durable on the helpfulness measure over time. Leaders from Britain's former colonies (+5-14 percentage points) rated the UK as more helpful than those in other countries across all four survey waves. Nevertheless, these performance differences narrow over time. In 2024, only five percentage points separated the UK's helpfulness in the eyes of leaders in its former colonies (87 percent) from those in other countries (82 percent).

3.1.1.2 Statistical Results: Which Country Attributes Appear to Be Significant?

By controlling for differences in aid volumes and across survey waves, we can better explain which country attributes may drive leader perceptions of the UK's performance in absolute terms and identify relationships that appear statistically significant. Respondents from

Sub-Saharan Africa had a higher probability of viewing the UK as influential²⁷ and helpful²⁸ than their peers across other regions. By contrast, leaders in Latin America & the Caribbean²⁹ and from SIDS countries³⁰ had a lower probability of seeing the UK as influential.

Our statistical models indicate that the UK performs well with fragile—though not necessarily with *extremely* fragile—countries.³¹ Leaders from fragile countries viewed the UK as more influential and helpful, and being in an “other fragile” context has a significant effect on perceptions of the UK’s influence.³² However, the UK’s influence in extremely fragile states likely has more to do with the volume of aid flows to these countries than their fragility per se. No significant relationship was found between UK influence and extreme fragility, and leaders from these contexts had a lower probability of viewing the UK as helpful than their peers in non-fragile contexts.

Leaders from upper-middle-income countries are less likely to see the UK as influential or helpful than their low-income peers. That does not appear to be the case for lower-middle-income countries. Regime type was not a statistically significant factor in explaining UK influence or helpfulness in our models. Leaders from former colonies had a higher probability of viewing the UK as influential and helpful than other countries, to a statistically significant degree.³³

3.1.2 Individual-level Attributes and Perceptions of UK Performance

Leaders working in the social development sector gave the UK high marks on influence (82 percent) and helpfulness (89 percent) in 2024 (see Tables 14 and 15 below). The largest focus of the UK’s ODA spending overall (see Section 3.3 below) was social development, which was in the top two areas by share of leaders that viewed the UK as quite or very influential across three of four survey waves. The UK charted a healthy increase in its perceived influence and helpfulness with this group by +22 and +14 percentage points, respectively, since 2014. Much of the improvement in perceptions of the UK’s helpfulness among leaders in social development occurred relatively early between 2014 and 2017 (+6 percentage points), holding

²⁷ More precisely, respondents from LAC were nearly 15 percentage points less likely than the baseline group (EAP) to see the UK as influential, while respondents from SSA and ECA were more likely by +6 percentage points and +8 percentage points, respectively.

²⁸ Sub-Saharan Africa is the only region that has a statistically significant effect in our models, with an average marginal effect of +7 percentage points in the probability of the respondent perceiving the UK as helpful.

²⁹ The default category for the region is EAP; SSA had a larger positive and significant marginal effect than any other regions, while LAC had a more negative and significant marginal effect than any other region. Please refer to the Technical Appendix for further details.

³⁰ If we control for aid flows, the average marginal effect of being a SIDS country is negative by almost -12 percentage points. All else being equal, respondents from SIDS countries were less likely to see the UK as influential than other respondents. Please refer to the Technical Appendix for further details.

³¹ The fragility classification used has three categories: non-fragile, extremely fragile, and other fragile

³² The average marginal effect is 4 percentage points.

³³ The average marginal effect of being a former UK colony is approximately 5 percentage points and significant.

steady through 2020, and then experiencing renewed growth in 2024 (+6 percentage points). The UK's only higher-performing sector on both measures was the more varied "other" category.

Environment and climate is an area where the UK has dramatically increased its influence over time. In 2014, only 51 percent of leaders in the environment sector rated the UK as influential. This aligns with a general increase in the reported influence of other donors, such as Germany, France, the US, and the World Bank. By 2024, 78 percent of leaders from this group agreed (+27 percentage points) that the UK was an influential partner. The UK's perceived helpfulness in the eyes of leaders in the environment sector declined somewhat from 2020 to 2024, falling from 82 to 76 percent (-6 percentage points).

Despite attracting a growing volume of UK assistance over the period, perceptions of the UK's performance held by leaders in the economic sector are mixed, as the UK has consistently been seen as more helpful than influential. Eighty-three percent of leaders in this sector saw the UK as helpful in policy implementation as of 2024, compared to only 68 percent that rated the UK as influential in shaping domestic policy priorities. This dissonance was not unique to 2024: leaders in this sector routinely have indicated that they consider the UK more helpful than influential across all four survey waves and by a substantial margin of difference (+8-17 percentage points). There was an initial uptick in the UK's perceived influence among economic sector leaders between 2014 (53 percent) and 2017 (78 percent). However, the share of leaders viewing the UK as influential has declined subsequently with each survey wave since then: -8 and -3 percentage points in 2020 and 2024, respectively. The UK's perceived helpfulness has been less volatile but still experienced a decline since 2020.

Governance was a sector where leaders gave average marks for the UK on both measures of performance—neither the worst performing (economic) nor the best (social development). Governance was the second highest category for the UK's ODA over the last decade; 77 percent of leaders who worked with the UK in this sector said it was influential, while 79 percent rated it as helpful. The UK improved its scores on both influence and helpfulness in the governance sector from 2014 to 2024 by +9 and +3 percentage points, respectively. Its growth in influence has been relatively smoother and consistent across survey waves, while its perceived helpfulness has experienced more significant fluctuation, with gains in the middle of the period bookended by poorer performance in 2014 and 2024. The three remaining sectors of interest—rural development, energy, mining and infrastructure—account for a much smaller share of the UK's ODA, and few leaders surveyed in these areas reported on the UK's influence or helpfulness.

FCDO staff interviewed in Phase 1 tended to say that the agency did not have a particular stakeholder group it sought to support with development assistance, but rather was interested

in being inclusive in working with and through all groups. This big-tent approach may explain why there was relatively little divergence in the UK's perceived performance across leaders working within and outside of government by 2024. That year, civil society and independent experts were slightly more likely to view the UK as influential (82 percent for both) than their counterparts in government (78 percent) and the local representatives of development partners (75 percent). The UK has improved its perceived influence with government, civil society, and development partners by double digits (+19-21 percentage points) since 2014, while it has held steady with independent experts.

There was a similarly high degree of convergence in the perceived helpfulness of the UK. As of 2024, more than four-fifths of government officials, independent experts, civil society leaders, and local representatives of development partners who said they worked with the UK saw it as helpful in implementing policy reforms. The UK charted the largest gains with civil society leaders, increasing its perceived helpfulness among this group from 66 to 81 percent over the period (+15 percentage points). It also positioned itself as substantially more helpful to government officials. In 2014, roughly three-quarters of government officials saw the UK as helpful; by 2024, that number had increased to 87 percent (+12 percentage points). There is insufficient data to speak on the perceptions of the UK among private sector leaders and parliamentarians.

Table 14. Deep Dive: Perceptions of the UK's Influence by Select Cohort Groups

View	Cohort	2014 (%)	2017 (%)	2020 (%)	2024 (%)	Period Change (p.p.)
Global	Global	58.4	76.4	75.5	78.5	20.1
Sector	Economic	53.0	78.2	70.6	67.6	14.6
	Energy and Mining	NA	NA	NA	NA	NA
	Environment	51.4	NA	69.8	78.5	27.1
	Governance	68.3	75.5	76.0	77.1	8.8
	Infrastructure	NA	NA	70.8	NA	NA
	Other	58.2	75.8	76.1	87.8	29.6
	Rural Development	47.0	NA	83.3	NA	36.3
	Social	60.1	86.0	78.3	82.4	22.3
Stakeholder Group	Development Partner	56.5	69.8	72.2	75.0	18.5
	Government	59.2	77.5	76.5	77.9	18.7
	Independent Expert	NA	82.1	65.9	82.2	0.1
	Civil Society	61.0	72.5	71.4	82.2	21.2
	Other	NA	NA	NA	NA	NA
	Private Sector	54.8	NA	NA	NA	NA
	Parliament	NA	NA	88.4	NA	NA

Notes: Our typical threshold for the number of observations required for analysis is 30 responses. If less than 30 responses were available for a given cohort, we list that result as NA (colored gray). To calculate the change in footprint over time (in terms of percentage points), we subtract the earliest year where data is available from the latest year that data is available. Where applied, each column uses conditional formatting to display values on a color scale ranging from the highest (green) to lowest (red) value. Colors are scaled within each column, not across the entire table, so comparisons should be made down each column and not across rows. Sources: AidData's Listening to Leaders Surveys in 2014, 2017, 2020, and 2024.

Table 15. Deep Dive: Perceptions of the UK's Helpfulness by Select Cohort Groups

View	Cohort	2014 (%)	2017 (%)	2020 (%)	2024 (%)	Period Change (p.p.)
Global	Global	73.5	82.5	82.9	84.4	10.9
Sector	Economic	69.9	86.3	87.0	82.5	12.6
	Energy and Mining	NA	NA	NA	NA	NA
	Environment	NA	NA	81.9	76.4	-5.5
	Governance	76.5	83.1	82.6	79.4	2.9
	Infrastructure	NA	NA	77.7	NA	NA
	Other	73.7	87.4	74.1	91.2	17.5
	Rural Development	NA	NA	81.3	NA	NA
	Social	75.1	81.2	83.0	89.0	13.9
Stakeholder Group	Development Partner	73.4	79.2	83.7	81.7	8.3
	Government	74.6	82.3	84.5	86.7	12.1
	Independent Expert	NA	78.9	76.4	85.1	6.2
	Civil Society	66.0	87.3	83.3	80.8	14.8
	Other	NA	NA	NA	NA	NA
	Private Sector	NA	NA	NA	NA	NA
	Parliament	NA	NA	79.4	NA	NA

Notes: Our typical threshold for the number of observations required for analysis is 30 responses. If less than 30 responses were available for a given cohort, we list that result as NA (colored gray). To calculate the change in footprint over time (in terms of percentage points), we subtract the earliest year where data is available from the latest year that data is available. Where applied, each column uses conditional formatting to display values on a color scale ranging from the highest (green) to lowest (red) value. Colors are scaled within each column, not across the entire table, so comparisons should be made down each column and not across rows. Sources: AidData's Listening to Leaders Surveys in 2014, 2017, 2020, and 2024.

In Phase 2 of this evaluation, key informants were asked to reflect on how well UK assistance aligns with their country's priorities and how responsive it has been to emerging needs. They were also invited to share forward-looking recommendations on how the UK could improve both alignment and responsiveness in the future. These perspectives provided insight into perceived strengths, gaps, and practical steps to enhance the UK's influence and helpfulness in the future.

Interviewees perceived the UK's relevance as grounded in needs-based design and institutional partnerships but increasingly constrained by resourcing and delivery shifts over time. Civil society respondents in particular called for more on-the-ground presence, stating that *"meeting people face-to-face and seeing more of the work carried out in the field would always be beneficial."*

Interviewees also highlighted the cost of short cycles. The forward-looking prescription to maintain and improve the UK's perceived influence and helpfulness is clear: combine countrywide coverage with multi-year, integrated portfolios and revive community engagement. Respondents asked for durable commitments and program designs that bridge relief to policy reform, so that relevance translates into lasting development outcomes.

Sustained influence on domestic priorities appeared strongest where the UK is embedded in institutional reforms and policy dialogues and where it can remain present through political cycles, according to key informants. Private sector interviewees praised *"a great deal of alignment among UK actors and implementing partners"* and those from the host government highlighted tangible governance contributions, such as *"support for the Central Bank's payment system help[ing to] address liquidity."*

Finally, interviewees pointed to social sectors and economic recovery as well as climate action as enduring priorities that can anchor the UK's sustainable presence. They affirmed health, education, WASH, and social protection are aligned with local needs: *"the UK's current focus on health... and cash programming is well placed."* *"Put a lot of focus on social sectors... education, health, WASH... social protection in remote, inaccessible areas."* Interviewees also urged the UK to play catalytic roles in jobs, markets, and energy, as *"priority sectors include power generation and distribution"* and there was a need to *"focus on water resource management, livelihoods, and health."* To continue building relevance and sustainability, combining institutional partnerships with community-level delivery and market-oriented recovery offers a path to maintain helpfulness and influence, even as the UK's aid architecture and resourcing evolve.

3.2 Effectiveness

The OECD's Development Assistance Committee (DAC) evaluation criteria on *effectiveness* seeks to understand whether an intervention is achieving its objectives. In this thematic evaluation, we adapt and apply this criteria to assess how the UK's perceived performance (its influence in shaping domestic policy priorities and helpfulness in implementing policy reforms) compares with other donors in the geographies and sectors within which it works. To evaluate the effectiveness of the UK's engagement, we assess the UK's performance on our two survey measures both in isolation and against a set of comparators.

This analysis of the UK's performance over time reflects on how changing strategic priorities may have affected the UK's influence and helpfulness. Benchmarking its performance against other bilateral and multilateral development partners enables us to identify areas of comparative strength and weakness. We also analyze how the UK's performance scores vary across stakeholder groups, geographic regions, and policy sectors over time and compare them to those of its benchmark group. In Phase 2 of this evaluation, key informants responded to a set of questions designed to assess the UK's perceived effectiveness in each of six case study countries (Indonesia, Jamaica, Nigeria, Pakistan, Sierra Leone, and Yemen). These questions addressed perceptions of the UK, its advantages and disadvantages, its influence and helpfulness, the level of trust it commands, and recommendations for lateral learning. (For further details on the questionnaire, please see the Technical Appendix).

Evaluation Questions:

- *Effectiveness: To what extent has the UK achieved high levels of perceived presence, influence, and helpfulness in the eyes of the Global South leaders in absolute terms and relative to other developed partners?*

Globally, aggregate influence scores varied more than helpfulness scores across the 25 bilateral and multilateral comparators in this evaluation. In 2024, there was a 37 percentage point difference between the least influential (Brazil, 55 percent) and most influential (the Global Fund, 92 percent) (see Figure 5 below). The field was tighter on helpfulness, where the difference between the least and most helpful partners—Brazil (67 percent helpful) versus the Global Fund (94 percent helpful)—was only 27 percentage points that same year (see Figure 6 below). The UK was the 11th most influential and 13th most helpful partner in 2024, placing it roughly in the middle of the pack.

If we narrow this field to only bilateral players (of which there are 15 total), the UK performs better: it placed 2nd in influence and 4th in helpfulness in 2024. Although the US outperforms it in influence (+8 percentage points), the UK is on par with two of its Development Assistance Committee peers, Germany (-1) and Japan (-6), as well as China (-4). Notably, the US, Germany, Japan, and China all have substantially larger total development finance commitments and footprints than the UK.³⁴ As for helpfulness, the UK is behind the US (+5 percentage points), Germany (+3), and Saudi Arabia (+1). Germany is one of the largest bilateral donors, and its helpfulness score may reflect its focus on specific programs (e.g., polio vaccine rollout) as well as geographies, including Afghanistan, Africa, the Middle East, and Ukraine. Saudi Arabia has a smaller footprint (84 respondents across 53 countries in 2024), but

³⁴ The 2025 aid cuts in the United States and the shutdown of USAID are outside the period of evaluation covered in this report.

it is the largest provider of ODA to the Gulf region, according to the OECD (2024), and can highly tailor its offerings to the region.³⁵

The most influential and helpful development partners tended to share one or more of the following characteristics. First, they were often multilateral institutions. Nine of the top 10 most influential development partners in 2024 were multilateral organizations that included international finance institutions (the International Monetary Fund (IMF) and the World Bank (WB)), regional development banks (the African Development Bank (AFDB) and Asian Development Bank (ADB)), two vertical funds (the Global Fund and GAVI), two UN agencies (the United Nations Development Program (UNDP) and the World Health Organization (WHO)), and one regional bloc (the EU). The same multilateral organizations (except for the ADB) dominated the top 10 most helpful development partners. Second, roughly half of the top-performing institutions across both measures had a specific sector (e.g., the Global Fund, GAVI, and WHO) or regional focus (e.g., AFDB and ADB). Third, across both lists, many were big spenders in terms of the financial resources they deployed, including the US, the EU, the World Bank, and IMF.

However, none of these characteristics are necessarily deterministic of performance. Partners with sizable financial means can underperform relative to what might be expected if money was all that mattered for performance. Canada and the Netherlands were among the least influential and helpful partners in 2024, despite deploying considerable resources to support global development. The opposite is also true: some players can be more influential or helpful than expected based on money alone. This could reflect the needs of a particular moment, such as the WHO's strong performance in the 2020 and 2024 survey waves that overlapped with the COVID-19 pandemic. Other partners may be able to cultivate areas of unrivaled comparative advantage that buttress their global numbers, as in the case of the Global Fund, for example.

³⁵ The Saudi Fund for Development is particularly well known for its soft loans, which are not geographically restricted. They deal directly with the governments of developing countries to finance priority development projects in least developed and low-income countries. Leaders who worked with the UK typically came from a more diverse group of stakeholders, while Saudi Arabia typically interacted with government respondents.

Figure 5. Influence Scores of the UK and Comparators in 2024

Rank	Development Partner	Respondents per Partner	Percentage of Survey Respondents	Number of Countries with at least One Respondent
1	GF	201	92.1	83
2	IMF	635	89.4	127
3	WB	1107	88.4	133
4	USA	957	86.5	129
5	GAVI	140	86.1	62
6	EU	970	85.7	131
7	WHO	643	85.5	126
8	ADB	345	81.4	60
9	UNDP	1094	79.8	131
10	AFDB	385	79.4	62
11	GBR	429	78.5	104
12	DEU	613	77.7	114
13	CHN	338	74.6	97
14	FRA	384	74.3	100
15	AUS	293	74.1	60
16	IND	150	73.9	61
17	JPN	591	72.5	119
18	GCF	286	71.4	102
19	SAU	84	70.9	53
20	RUS	55	69.6	37
21	KOR	242	66.6	88
22	NLD	391	63.9	87
23	CAN	316	63.3	93
24	TUR	122	58.3	58
25	BRA	93	55.1	48

Notes: This figure shows the share of respondents who rated a development partner as quite or very influential in 2024, among those leaders who reported receiving advice or assistance from them. Percentages take into account non-response weights. Source: AidData's 2024 Listening to Leaders survey.

Figure 6. Helpfulness Scores of the UK and Comparators in 2024

Rank	Development Partner	Respondents per Partner	Percentage of Survey Respondents	Number of Countries with at least One Respondent
1	GF	201	94.0	83
2	GAVI	140	92.9	62
3	WHO	643	89.5	126
4	EU	970	89.3	131
5	USA	957	89.1	129
6	WB	1107	88.8	133
7	UNDP	1094	88.6	131
8	AFDB	385	88.4	62
9	DEU	613	87.8	114
9	IMF	635	87.8	127
11	ADB	345	86.8	60
12	SAU	84	85.5	53
13	GBR	429	84.4	104
14	KOR	242	83.9	88
15	AUS	293	83.7	60
16	JPN	591	83.3	119
17	CAN	316	81.9	93
18	FRA	384	81.8	100
19	CHN	338	80.8	97
20	NLD	391	77.9	87
21	GCF	286	76.7	102
22	IND	150	75.8	61
23	TUR	122	69.0	58
24	RUS	55	67.8	37
25	BRA	93	67.1	48

Notes: This figure shows the share of respondents who rated a development partner as quite or very helpful in 2024, among those leaders who reported receiving advice or assistance from them. Percentages take into account non-response weights. Source: AidData's 2024 Listening to Leaders survey.

While many top-performing partners have held their positions over multiple survey waves, leader perceptions are not static and can be responsive to market disruptions or changing strategies (see Figures 7 and 8 below). China is a useful illustration: in 2017 and 2020, it was among the top 10 most influential of the comparators, the first and only South-South Cooperation provider to achieve this feat. However, China has since receded, dropping from 6th most influential in 2020 to 13th in 2024. Traditional OECD-DAC donors are not immune to such disruptions. The Netherlands was once the 10th most influential partner in 2014 but has since declined in relative influence, even as its performance has increased in absolute terms over the decade. Large multilaterals such as the World Bank and the IMF held strongly to the top of the chart in influence despite some fluctuations, but the IMF performs notably worse in helpfulness than in influence.

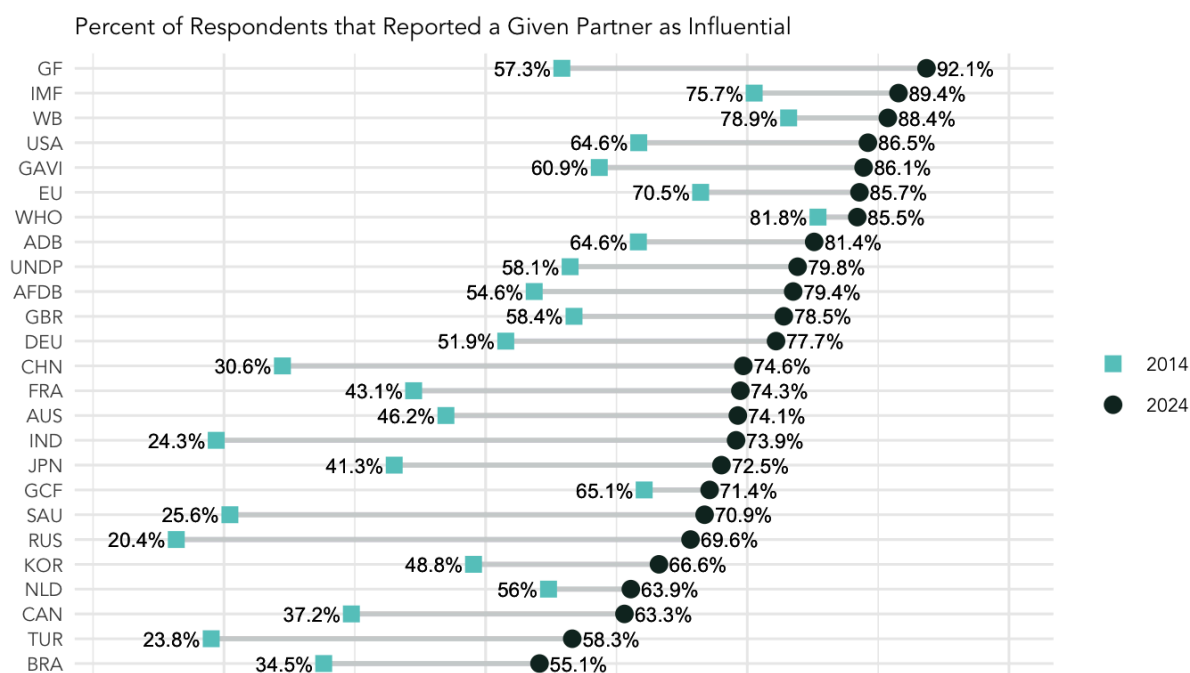
Comparing the UK to other development partners underscores the challenge of breaking through in a crowded assistance marketplace. The UK has charted considerable improvements in its influence and helpfulness scores in absolute terms (see Section 3.1 above). Nevertheless, if we consider perceptions of the UK's performance as compared to others, a slightly different picture emerges. Rather than a story of growth, we see one of relative decline. The UK's competitive positioning as a development partner was stronger earlier in the decade (6th in influence in 2014 and 2017) than later (8th in influence in 2020 and 11th in 2024). A similar trajectory is visible in the UK's relative helpfulness. Following an initial improvement between 2014 and 2017 (from 12th to 8th ranked), the UK's perceived helpfulness has declined in relative terms, falling to 10th by 2020 and 13th by 2024. One high-performing donor was added to the list of development partners included in the survey in 2020 (the WHO), but this alone is insufficient to explain the UK's incrementally decreasing rank on both measures.

During Phase 2 interviews, when asked what other development partners do well that the FCDO could emulate to improve effectiveness, several key informants pointed to greater flexibility in funding and implementation as an area where others outperform the UK. Interviewees noted that *"the EU provides a lot more flexibility in the implementation of programs"* and that *"some donors offer strategy-level funding... allowing partners to adapt without constant amendment requests."* This contrasts with the UK's firmer, proposal-driven model and short annual cycles, which informants say limit responsiveness and sustainability. Similarly, interviewees highlighted budget support and ownership models used by peers (for example, that *"the EU... gives the money directly to the government... promoting alignment and ownership"*), suggesting that the UK could explore approaches that strengthen country systems and reduce transaction costs. This notwithstanding, interviewees in certain contexts highlighted the advantages of a project-based approach, as it allows communities and recipients to have greater clarity on what is being funded.

Visibility and communication also emerged as lessons to adapt from other donors. Interviewees noted that *"the French have better press... they make their presence felt in communities"* and praised development partners who *"organize public events and continuous engagement,"* contrasting this with the UK's quieter posture. Respondents also urged the UK to emulate institutionalization and continuity practices seen in other donors, like the GIZ which *"...works very closely with locals... small projects, training engineers, going to villages and giving lamps."* Adopting flexible funding modalities, stronger visibility strategies, and institutional handover, as practiced by some peers, could help the UK reverse its relative decline in influence and helpfulness rankings and reinforce its effectiveness over time. However, at times respondents highlighted the challenge of publicizing activities in contexts with loaded colonial history and acknowledged that the UK may need to be more cautious than other donors on how it communicates its development activities.

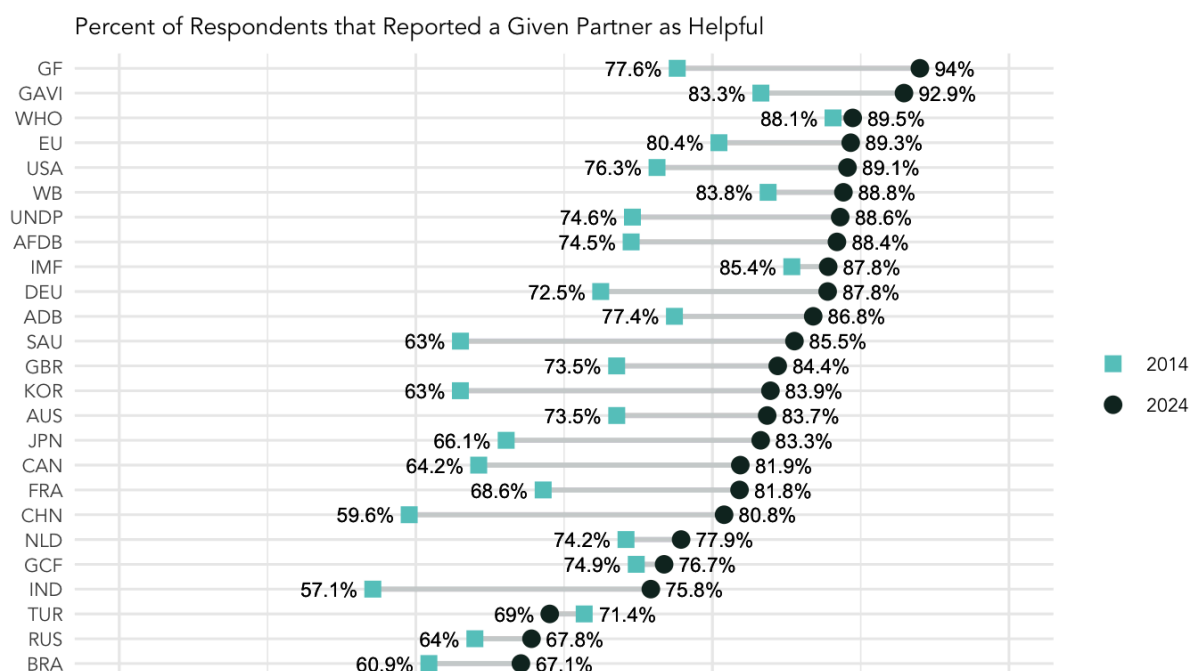
Across the four survey waves, 2017 was the year in which the UK performed the closest to the most influential and helpful development partners. In that year, the UK was only -10 and -5 percentage points away from the most influential and helpful donors, respectively. Since then, the distance between the UK and the top-performing donor on each measure has widened rather than narrowed. This downward pressure in the UK's relative perceived performance was visible as early as 2020 but became further entrenched in 2024. As of the most recent survey wave, the UK lags the most influential and helpful partners by -14 and -9 percentage points, respectively. Left unchecked, there is the potential for the UK's competitiveness as an influential and helpful development partner in the eyes of Global South leaders to further atrophy.

Figure 7. Comparison of the Perceived Influence of Development Partners, 2014 and 2024



Notes: This list of bilateral and multilateral donors selected as comparators, including the UK, is ordered from the highest to lowest overall influence scores, based on the percentage of respondents who considered the organization quite or very influential in AidData's Listening to Leaders surveys. (For the WHO, the earlier value reflects 2020, the earliest year available, rather than 2014). A version of this figure that displays results from all four survey waves is available in the Technical Appendix. Sources: AidData's 2014 and 2024 Listening to Leaders surveys.

Figure 8. Comparison of the Perceived Helpfulness of Development Partners, 2014 and 2024



Notes: This list of bilateral and multilateral donors selected as comparators, including the UK, is ordered from the highest to lowest overall helpfulness scores, based on the percentage of respondents who considered the organization quite or very helpful in AidData's Listening to Leaders surveys. (For the WHO, the earlier value reflects 2020, the earliest year available, rather than 2014). A version of this figure that displays results from all four survey waves is available in the Technical Appendix. Sources: AidData's 2014 and 2024 Listening to Leaders surveys.

3.2.1 UK Relative Performance by Country Type and Individual Characteristics

Compared to a subset of 15 comparators with sufficient sample sizes to support disaggregated analysis, the UK's strongest showing by geographic region (in 2024) included leaders in Sub-Saharan Africa (4th in influence, 3rd in helpfulness) as well as Europe & Central Asia (4th in influence, 3rd in helpfulness). The UK was viewed as highly influential in relative terms with leaders in extremely fragile states (1st in influence), though it performs less well on helpfulness with this group. It also performed well with low-income leaders (4th in influence, 3rd in helpfulness) compared to other donors.

Intriguingly, the results are mixed for the UK on the relative power of shared post-colonial ties. Leaders from its former colonies see the UK as relatively less influential than those countries that are not (9th versus 6th in influence). The opposite is true for helpfulness. The UK performed better in relative terms on this measure with leaders from its former colonies (5th in helpfulness) rather than those that were not (9th in helpfulness). This difference might signal the

importance of similar legal and social systems (with origins that may date back to the colonial period) in the design and execution of legal and executive branch policies.

Taking individual characteristics into account, civil society leaders viewed the UK as relatively more influential (3rd ranked) than helpful (6th ranked) versus its peers in 2024. With this group, the UK comes second in influence to only the US and the IMF, while in helpfulness, it falls behind these donors as well as Canada, Japan, and Germany. The UK's strongest sector performance in 2024 was among environmental leaders (4th in influence and helpfulness) and those in social development (5th in influence, 2nd in helpfulness). The World Bank, the IMF and the US were the top influencers across most sectors, while helpfulness rankings show more sectoral diversity: Germany leads in the environment, the World Bank in infrastructure, the US in social and rural development, and South Korea in governance.

In the Phase 2 key informant interviews, perceptions of the UK's development assistance converged with the finding that the UK is generally seen as a trusted and capable partner, but they also revealed nuances that may help explain why the UK's relative effectiveness has slipped over time. Across stakeholder groups, respondents emphasized the *"UK is widely trusted and viewed as a reputable and technically capable development partner"* and that *"the UK is perceived positively as a principled and professional donor."* This aligns with the survey findings that the UK retained credibility and influence relative to other bilateral donors. However, perceptions also underscore persistent challenges. Limited visibility, political optics, and funding uncertainty tempered effectiveness. One interviewee noted, *"I don't think the general population has a really great idea of all that they've done... they need more publicity."*

While the UK's principled approach and convening power remain valued in more vulnerable contexts, such as fragile countries or those experiencing instability, respondents pointed to factors that erode its competitive edge. *"Limited field presence... reliance on secondhand information," "policy somersaults," and "ministerial turnover and uncertainty around funding commitments... have made the UK a less reliable donor compared to its past reputation."*

Interviewees' responses to questions about their perceptions and the advantages of working with the UK affirmed that the UK's enduring strengths are trustworthiness, technical expertise, and a collaborative posture. However, interviewees also highlighted operational and strategic gaps that might account for the downward pressure on its rankings in influence and helpfulness.

FCDO implementing partners and host government representatives who were interviewed in Phase 2 highlighted the UK's ability to combine expertise with adaptability. *"Multi-year funding, greater flexibility in adapting projects, and openness to transparent dialogue"* and *"strong technical assistance, advocacy, and coordination capacities"* were qualities underpinning the UK's reputation for problem-solving and partnership. However, the interviews

also echoed the survey findings that these advantages are context-dependent and becoming increasingly constrained by resources.

Interviewees also surfaced perceived disadvantages of working with the UK that undermine its ability to translate reputation into sustained effectiveness. Across all six countries and stakeholders groups, the most frequently mentioned disadvantages were short funding cycles, limited in-country presence, and administrative burden. One respondent noted that *"one-year projects... [are] too short. A one-year project takes three months to set up, and time goes too quickly."* Implementing partners stood out in highlighting that administrative capacity did not weigh against them, and that the UK was generally supportive in getting a partner in position to fulfill their requirements for funding. In general, interviewees who had already been successful in securing funding or technical assistance from the UK found the administrative processes related to application and reporting less burdensome than those who had not.

Influencing domestic development policies emerged as one of the UK's most consistent strengths across interviews. Respondents repeatedly described the UK as a credible convener and policy interlocutor, leveraging diplomatic channels and technical expertise to shape domestic priorities, especially in development sectors that are seen as slow to change. Interviewees noted that *"the UK is highly influential...and is seen as part of the core group of Western partners... regularly consulted on policy and development matters"* and *"when the UK calls a meeting, it attracts key actors... and adds international weight to the discussion."* Yet, influence is often sector-specific and geographically uneven, with interviewees flagging that priorities can shift abruptly alongside political turnover in the UK.

In addition to influence and helpfulness, interviewees consistently praised the FCDO's trustworthiness, with one stating that *"the UK is considered a fully trustworthy development partner and often seen as the standard for transparency and accountability."* Historical ties with the UK were often viewed as reinforcing confidence. However, trust is not immune to the pressures of funding volatility and organizational flux.

3.3 Efficiency and Coherence

The OECD's Development Assistance Committee (DAC) evaluation criteria on *efficiency* asks how well resources are used in a given intervention. In this evaluation, we adapt and apply this criteria to assess the economic relationship between the inputs the UK controls (e.g., the volume of its assistance dollars) and the outcomes it achieves (e.g., its perceived influence and helpfulness). We assess the extent to which the UK's development financing translated into influence and helpfulness with leaders, both overall and across sub-groups of respondents. Additionally, in the Phase 2 key informant interviews, interviewees described the ease of accessing UK financing and technical expertise when needed. This allows us to evaluate

whether a more intense allocation of resources leads to higher perceived performance among leaders or not.

This section also considers the *coherence* DAC evaluation criteria, which assesses how well the design and execution of an intervention fits or aligns with what it says it wants to achieve. In this evaluation, we triangulate insights into areas of natural alignment between the problems that Global South leaders say they most want to solve and the revealed priorities visible across UK government strategies, interviews with FCDO staff in Phase 1, and ODA allocations cross-walked to the SDGs. We also surface insights from survey respondents' answers to questions about what makes a donor influential, helpful, and attractive as a preferred development partner, along with a discussion of the implications for how well the FCDO is or is not positioned to deliver a compelling development offer for Global South counterparts. Finally, we integrate views of key informants interviewed in Phase 2 on the UK's mandate and priorities, in order to assess the overall perception of coherence.

Evaluation Questions:

- *Efficiency: With leaders from which sectors, geographies, and stakeholder groups does the UK get the best performance scores for its relative inputs of money and people?*
- *Coherence: To what extent does the UK's perceived performance (i.e., its influence and helpfulness) align with its evolving stated priorities and objectives?*

3.3.1 Volume and Composition of UK Development Finance Over Time

The UK committed \$70.2 billion USD in official finance to support development in other countries between 2013 and 2022 (the last ten years of data available), roughly \$7.02 billion per year on average.³⁶ This total resource envelope of the UK's development finance includes grants, concessional (below market rate) and non-concessional (market rate) lending, and other forms of assistance, as reported to the OECD's Creditor Reporting System. The average obscures high volatility in the UK's development finance, which recorded peak outlays in the 2015 to 2019 period (\$7-11 billion per year) versus low points in 2013-14 and 2021 (\$3-6 billion per year).

Given intensified rhetoric around aid in the national interest (DFID, 2015; UKGov, 2021, 2022, and 2023a), one might expect to see the UK providing development finance on less generous terms to its partner countries over time. That is not necessarily the case. Nearly all of the UK's financing meets the OECD's standard of official development assistance (97-100 percent per

³⁶ In constant 2022 US dollars. The UK's development finance commitments and disbursements are recorded in US dollars in the OECD's Creditor Reporting System to facilitate comparison with other donors.

year), and the near entirety (99.9-100 percent per year) is issued in the form of grants that do not need to be repaid, rather than no- or low- interest loans. Although the volume of the UK's financing has been volatile, the generosity of its financial terms has not noticeably degraded over the period of study. The largest years for the UK's "other official flows" (loans approaching market rates) were early on in 2013 and 2014, with a minuscule amount recorded in 2022. The grant emphasis in the UK's ODA has been consistent across the decade.

The UK also stands out among development partners as a relatively generous donor in terms of its financial assistance. In a head-to-head comparison with ten bilateral actors,³⁷ Mathew and Custer (2023) find that while China (11-to-1), the United States (3-to-1), Germany (2-to-1), and Japan (2-to-1) outspent the UK in total development finance dollars from 2012 to 2021, the UK was more generous in providing over 90 percent of assistance as grants. Japan and China offered the smallest amount of their financing as grants, 23 and 30 percent, respectively. The US was closer to the UK and supplied 80 percent of its assistance as grants, though this ratio is expected to change, in light of Washington's ramp-up in innovative financing mechanisms through the US Development Finance Corporation. Germany was middle-of-the-road, offering just over half its assistance (54 percent) as grants.

Nevertheless, the underlying pressures and debates around development assistance in the UK are visible in another evolution over the last decade: rising in-donor costs as a share of financial flows. Recognizing the mounting costs associated with asylum and refugee claims, the OECD allowed DAC members to record these expenses in their borders as counting towards ODA commitments (OECD, n.d.). The share of UK development finance classified as in-donor costs rose to 24 percent by 2022, compared to roughly 8-9 percent for the several years prior.

Although this does not speak to its quality, analyzing the UK's technical assistance over time as a share of its overall offer does not necessarily support a story of a complete hollowing out of this tool. In both 2021 and 2022, the UK's technical assistance represented higher-than-average shares of its development portfolio (21 percent and 10 percent, respectively, of development finance flows). This should not be taken as an assessment of the efficacy of this tool but rather its share of the UK's development finance. Some FCDO staff interviewed spoke of a shift away from budget support to projectized assistance. The financial data reinforces this impression, as budget support fizzled out as a meaningful share of UK assistance after 2015.

One clear implication of the UK's desire to communicate closer linkages between aid and the national interest is a discernible pivot in the composition of its investments over the decade, away from the social sector and toward economic development. Social development received the largest amount of financing for most of the past decade (except 2020), but its share as a

³⁷ The group of 11 bilateral players evaluated included Australia, China, France, Germany, India, Japan, New Zealand, Norway, Portugal, the United Kingdom, and the United States.

percentage of the total declined in recent years, hovering around a quarter or less of UK aid. Economic development experienced the opposite trajectory: it attracted the third-highest volume of UK assistance over the period of study, but spending has been rising, particularly since 2020. Financing for the second highest category of UK assistance, governance, held relatively steady at 11-14 percent of spending in most years (except for 2021, when it reached 18 percent).

If budgets are indicative of relative priority, then the UK's aid spending over the last decade shows marked interest in Sub-Saharan Africa first and foremost (at 23 percent), followed to a lesser degree by South Asia and the Middle East & North Africa (each at 10 percent). The UK's geographic orientation of its aid portfolio to these three regions is highly consistent with the impressions of FCDO staff interviewed in Phase 1, as to where they see the agency orienting its efforts. These views are shaped largely by the UK's commitments to work with the poorest countries, but they also reflect post-colonial ties and concerns about conflict and migration pressures. The year-on-year trends signal a slight uptick in recent years in the share of financing directed to Latin America & the Caribbean and Europe & Central Asia; however, their share of allocations is still in the low single digits.

3.3.2 Patterns of UK Spending, Influence and Helpfulness

Our regression models³⁸ find that the volume of financing the UK provides to a recipient country is significantly associated with higher influence in setting development priorities, albeit with a very small effect.³⁹ Each additional \$1 million in the UK's annual outlays to a country is associated with a statistically significant increase of 0.07 to 0.11 percentage points in the likelihood that a leader rates the UK as influential.⁴⁰ The result is robust to controlling for the survey wave effects, the amount of financing provided by all other donors (excluding the UK), and a range of country characteristics (e.g., regime type, colonial ties, and fragility level). Note that the effect is only a fraction of that of immutable characteristics, such as colonial ties or being a small island developing state (SIDS).

What may seem like a small effect could depend on the size of the recipient country. To assess the role of country size in the relationship between the UK's ODA and its perceived influence, we tested similar models while controlling for development finance with commitments per capita instead of absolute values. The results are consistent and offer a clearer representation of how UK aid may impact influence. The average marginal effects of UK financing on its

³⁸ A more detailed explanation of the model specifications is presented in the Technical Appendix.

³⁹ This financing includes both Official Development Assistance (ODA) and Other Official Flows (OOF).

⁴⁰ The range of the 95 percent confidence interval across the seven models compared is between 0.04 percent and 0.15 percent. Across all models the effect is significantly higher than zero. See Figure A1 and Tables A1 and A2 in the technical appendix for the marginal effects and the full regression tables.

perceived influence range between 1.7 and 2.5 percentage points for an additional dollar per capita in aid from the UK, depending on the model specification.⁴¹

It is helpful to contrast two countries, Grenada and Yemen, to provide context. From 2020 to 2023, Grenada had yearly UK ODA commitments of \$85,000 on average. UK aid accounted for less than 1 percent of Grenada's \$70 million in ODA from all other donors combined. In Grenada, each additional \$1 million in UK ODA would represent an over 10-fold increase in assistance flows. By contrast, Yemen received UK aid worth nearly \$173 million per year on average during the same period. UK aid accounted for a more sizable 5 percent of Yemen's \$3.4 billion in ODA total from all donors. In a context like Yemen, each additional increase of \$1 million is only marginal. If we look at aid commitments per capita, in a context like Yemen, an additional dollar of per capita aid would represent an increase of 20 percent per capita. In Grenada, this would be an increase of 147 percent from the 2020-23 yearly average (USD 0.68 per capita).

Notably, the UK appears to be more efficient in translating money into influence than the average across a list of 15 comparators. Examining the influence determinants across the comparators, we find the average marginal effect of commitments in millions of USD of only approximately 0.01 percent across model specifications.⁴² This is ten times smaller than the average marginal effect of the UK's financing on its perceived influence.

We also find that higher aid volumes (both in overall commitments and commitments per capita) are positively associated with the likelihood a leader perceives a development partner as helpful, but the magnitude of this relationship is smaller than with influence. As with influence, the UK has a comparative advantage vis-à-vis its peers in terms of converting aid into helpfulness. UK aid has an average marginal effect on influence of 0.04-0.09 percentage points for overall commitments and 0.8-1.5 percentage points in commitments per capita.⁴³ Comparatively, the UK is more efficient at converting aid into helpfulness in the eyes of Global South leaders than the average of the selected 15 comparators, which had a near negligible average marginal effect of 0.001-0.003 percentage points.⁴⁴

Past studies have found that larger donors dispersing a higher volume of ODA dollars tend to be seen by in-country counterparts as more influential and helpful on average (Custer et al.,

⁴¹ The range of the 95 percent confidence interval across the seven models compared is between 0.1 percent and 3.3 percent. Across all models the effect is significantly higher than zero. See Tables A3 and A4 and Figure A2 in the Technical Appendix

⁴² See Tables A5 and A6 and Figure A3 in the Technical Appendix. Also note that the number of observations is much larger on the models that include the entire set of comparators. Given that very large sample size ($N \approx 30,000$), small and potentially spurious effects can achieve conventional significance levels.

⁴³ See Tables A7-A8 and Figure A4 for commitments and Tables A9-A10 and Figure A5 for commitments per capita in the Technical Appendix.

⁴⁴ See Tables A11 and A12 and Figure A6 in the Technical Appendix

2015, 2018, 2021; Faust et al., 2016). However, the size of a donor's purse is not deterministic, and there can be variations in the degree to which financial outlays are associated with perceived performance. In particular, the composition, terms, and focus of this financing may also play a role, beyond just the volume of assistance provided.

Custer et al. (2015 and 2018) used a series of regression models to pinpoint donor- and country-specific factors that were the best predictors of development partner performance. They found that donors whose aid allocations were more closely aligned with what leaders saw as the most important problems to solve were seen as more influential and helpful (ibid). Conversely, donors with larger shares of untied aid and technical assistance within their overall ODA portfolio were seen as less influential and helpful (ibid). Similarly, sectorally-specialized donors were less influential than their more generalized peers (ibid). Leader perceptions were more volatile concerning the effect of country programmable aid (CPA): at times, this was found as having no discernible effect (Custer et al., 2015), and in other cases, donors with higher shares of CPA as a percentage of their overall ODA were seen as more influential (Custer et al., 2018; Faust et al., 2016; Parks et al., 2016).

Leveraging AidData's *Listening to Leaders* survey, along with qualitative case studies in four countries, Kunert et al. (2021) found that adherence to many of the OECD's aid effectiveness principles is the smart approach for donors interested in maximizing their influence and helpfulness in the eyes of their partner countries. Influence and helpfulness were positively correlated with the degree to which donors channeled their aid on budget, had a higher degree of predictability, pooled funding with that of other donors, and were seen as being aligned with country priorities (ibid).

The UK's efficiency may be partly explained by how it spends money in recipient countries. One differentiating feature of the UK with respect to other donors is that the vast majority of its bilateral development finance is issued as ODA grants—a form of assistance that Global South leaders demonstrably preferred over concessional or less concessional lending (Custer et al., 2023). Moreover, the UK has a generally more diverse portfolio of cooperation modalities used, with a balanced combination of project-based interventions, technical assistance, and core contributions making up the majority of its aid.

FCDO staff interviewed saw the UK's ability to bring an integrated toolkit to the table as an asset in delivering well for partner countries. *"We bring [a variety of] different levers together in one package...grant ODA, technical expertise, and ability to operate in multilateral and international fora to shape outcomes."* At the same time, other interviewees expressed their concerns that one of the unintended consequences of the 2020 merger was the loss of the UK's deep reservoir of technical expertise in government. As one summarized, *"as a result [of the merger], we lost our [technical assistance] edge."* Others highlighted that the high degree of

political turnover at the top has made the UK's ability to present a consistent and coherent offering more difficult, saying that *"you always have to start [again] at the beginning"* with new leaders.

Comparatively, other donors tend to use a more diversified combination of ODA grants, ODA loans (i.e., no or low-interest loans), and OOF (i.e., loans approaching market rates). The international financial institutions included in this study as comparators consistently tend to rely more heavily on ODA loans and OOF flows than ODA grants over time. Bilaterals such as France, Germany, and Japan also have a substantial share of ODA loans as compared to the UK, which used ODA grants nearly exclusively in the 2013-2022 period for which data is available. These other bilateral donors also relied much more heavily on project-based interventions than the UK's more diversified portfolio. This dynamic is not necessarily unique to traditional donors. Differentiating the agency's development offer versus that of China, FCDO staff interviewed said that *"China brings a lot of money to the table, but doesn't complement it with additional [technical or in-kind] support."*

3.3.3 UK-Global South Partnership: Optimizing How Priorities and Resources Align

The degree to which a development partner is seen as aligned with a country's national development strategies and goals has historically been a strong and consistent predictor of its influence and helpfulness (Custer et al., 2018, 2021, 2023). This sentiment was shared by several FCDO staff interviewed, who argued that the way the UK can deliver on its partnership vision with the Global South would be to *"provide development assistance that is actually useful for other countries...that doesn't duplicate [what others] are already funding."*

AidData's *Listening to Leaders* survey provides insight into how to aggregate these priorities from the bottom up consistently and comparably. Leaders in the 2017, 2020, and 2024 waves were asked to identify up to six priority problems they wanted to solve from a fixed list of 16 of the Sustainable Development Goals (excluding SDG17, Partnerships for the Goals). Based on their responses, we analyzed the frequency with which leaders selected a goal as one of the six most important problems to solve and then ranked each goal based on the share of leaders who selected it as a priority.

In 2024, over half of leaders surveyed surfaced three overwhelming priorities that are top-of-mind across the globe—better schools (SDG4), more jobs (SDG8), and strong institutions (SDG16). Strikingly, these answers have proven to be durable before, during, and after a global pandemic, as these were the same top three priorities in two previous survey waves conducted in 2017 and 2020. One-third or more of leaders selected good health (SDG3), industry and innovation (SDG9), and climate action (SDG13) as priorities. Phase 2

interviews reaffirmed that strong institutions (SDG16), decent jobs (SDG8), and quality education (SDG4) remain the most pressing development challenges for leaders in Indonesia, Jamaica, Nigeria, Pakistan, Sierra Leone, and Yemen. (See Table 14 above for a breakdown by stakeholder group).

Other FCDO interviewees acknowledged that, while being responsive to a country's greatest needs is the goal, "*the reality [altruistically aligning resources to partner priorities] is more complicated.*" For some interviewees, a pragmatic view would have the UK optimize its assistance based upon "*alignment of mutual interest in areas where the UK is strong, where priorities align [with what Global South leaders want to achieve].*" This argument tracks with an emerging narrative in the current administration's emphasis on shifting the paradigm for the UK's engagement in the Global South from "assistance" to "partnership." While FCDO staff interviewed largely agreed with the "*change in tone*" from the perspective of leveling the playing field between the UK and its partners in the Global South, some expressed misgivings about whether this would dilute the original mission of UK aid to help the poorest.

In this respect, it is also useful to consider areas of natural alignment between the problems that Global South leaders say they most want to solve and the revealed priorities visible across UK government strategies, interviews with FCDO staff, and through ODA allocations cross-walked to the SDGs. For this analysis, we replicated AidData's *Financing for the SDGs* methodology, as described by Burgess et al. (2023).

Over a decade (2012-2021), the UK's top areas of SDG-focused financing were oriented in five areas (ranked in order of overall allocations): good health and wellbeing (SDG3), peace, justice, and strong institutions (SDG16), decent work and economic growth (SDG8), quality education (SDG4), and zero hunger (SDG2). These historical allocations are highly aligned with what Global South leaders, on average, have said are among their top priority problems to solve. Zero hunger is an outlier, but it is likely a higher priority in the subset of countries for which food insecurity is of greater urgency, and past research has identified SDG2 as an area of relatively high priority for citizens, as assessed using the My World Survey (Custer et al., 2021 and 2023).

In the most recent year analyzed (2021), UK ODA allocations placed greater emphasis on no poverty (SDG1), gender equality (SDG5), and reduced inequalities (SDG10). Caution should be used in interpreting this trajectory, however; as one interviewee astutely pointed out, there can be a substantial lag effect in seeing UK strategic priorities translate into sectoral budget allocations, because a typical UK-funded ODA project or program takes years to move from conception to completion. Even if the UK government says it wants to prioritize "X" today, it may be three or four years before these adjustments to sectoral budgets would be discernible in a meaningful way.

The UK's stated priorities for its ODA include long-standing commitments, which have held steady over decades, as well as more recently developed areas of focus. Poverty reduction has been at the core of the UK's development policy since the founding of the former DFID through the International Development Act (Legislation.gov.uk, 2002). This priority has anchored much of the UK's historical development efforts and was consistently mentioned as the most important aim among FCDO staff interviewed.

Relatedly, the UK's focus on fragile countries as another barometer of need has been a consistent priority since 2015 (UKGov, 2015) and was mentioned in interviews as a central point of collaboration opportunities within the new structure of the FCDO. In line with the goal of prioritizing fragile countries and regions, the UK's footprint has increased in fragile contexts over the last decade. Among fragility categories, the UK's footprint saw the largest increase among extremely fragile countries and regions (44 percentage points), which differentiates it from many other donors focusing on non-fragile or other fragile countries.

The geographic focus on Sub-Saharan Africa (SSA) is an example of a UK priority that has endured over time, but the underlying rationale for engagement may have changed in recent years. Before 2020, DFID focused on SSA as the likely center of poverty reduction work for decades to come (UK House of Commons, 2018). More recently, SSA remained a priority due to its role as a center of geopolitical competition and economic cooperation (UKGov, 2022).

The UK's focus on opportunities for domestic business and mutually beneficial economic growth for itself and partner countries has been reinforced with Brexit and is now a central FCDO priority (FCDO, 2025). Noticeably, the only reference to Africa in the Labour Party's 2024 manifesto was in the context of strengthening economic partnerships with the continent more broadly, as opposed to a focus on aid or development explicitly. As the UK builds these partnerships in the future, it could do well to focus them around poverty reduction and clean energy, two of the higher-priority goals articulated by SSA leaders that also lend themselves well to crowding in private sector involvement via an integrated aid-trade-investment offer.

Integrating aid more comprehensively within the UK's broader economic statecraft toolkit in countries of geopolitical interest was one of the main reasons for the merger of DFID and FCO. As one FCDO staff member interviewed summarized, *"trying to think beyond aid [alone] is the most positive thing about the merger, that may make us more effective."* Both UK strategic documents and interviews with FCDO staff indicate that strengthening integrated partnerships with key countries will continue to be a critical goal of the agency in the future. Nevertheless, most FCDO staff interviewed said that, while the aspiration is there to integrate the UK's economic levers into diplomatic, development and consular work, this has been more difficult in practice and the efforts are still nascent.

Climate change has become a higher priority for UK development assistance over the years. Older DFID priorities such as health and gender equality are still mentioned prominently in more recent policy documents (UKGov 2023b, 2023c). However, they are more often incorporated into newer areas of interest, rather than being stand-alone priorities. In the aftermath of the pandemic, health is now termed “global health” and is combined with climate change as a global challenge, for example. Gender equality is mostly integrated into economic development programs and education.

The UK’s reframing of health and education priorities may better meet leaders’ priorities from countries of geopolitical interest. The focus on climate change also suggests valuable points for development partnerships in strategically important regions. The region with the highest share of leaders prioritizing climate action (SDG13) is East Asia & the Pacific, which reported a larger increase in perceived UK influence over the last decade (though the UK’s influence has waned more recently). This aligns with the review of strategic documents conducted for this evaluation and FCDO staff interviews that speak to an initial “*push to the Indo-Pacific*” in the middle of the period that may have since lost steam in light of other priorities in recent years.

Climate action was increasingly recognized as a priority among all surveyed leaders. However, among leaders who had worked with the UK, a substantially higher percentage of respondents in 2024 prioritized climate action and clean energy, compared to leaders who did not work with the UK (8 percentage points and 6 percentage points, respectively). This suggests close alignment between key UK priorities and those who receive its advice and assistance. The UK improved its perceived performance in the eyes of leaders working on environmental issues (+30 percentage points in influence) over the last decade and with those from SIDS countries (+27 percentage points in influence, +15 in helpfulness) for whom climate vulnerability is likely a pressing issue.

Across all six countries where key informant interviews were held, respondents tended to describe the FCDO’s mandate based on the sectors where they had the most visibility and engagement. Overall, the UK’s mandate was seen as a hybrid of (i) humanitarian life-saving, (ii) governance and institution strengthening, and (iii) economic recovery and financial system-building, with (iv) climate and resilience emerging as cross-cutting threads. Humanitarian aims remain foundational: “*the UK’s primary aim is to save lives... the UK emphasizes value for money and efficiency.*” But several interviewees underscored an intentional pivot beyond emergency response: “*We now place greater emphasis on prevention... pivoted toward system-building rather than only addressing immediate needs.*” This is paired with the UK’s reputation for technical engagement in public sector reform and “*for its emphasis on policy-level interventions that address macroeconomic stability.*”

Interviewees also described tensions introduced by the DFID-FCO merger and operating realities. Even those who did not articulate the mandate of leading the UK's global engagement (while safeguarding national interests, as well as tackling poverty and other global challenges) expressed concern about development priorities giving way to political ones. In parallel, some respondents from the private sector and the diplomatic community framed the UK's mandate in market-enabling terms, particularly where recovery and jobs are salient, as *"building institutional and human capacity."*

In terms of coherence, the Phase 2 key informant interview responses signaled alignment with what Global South leaders say they value: credible resources, strong relationships, and respect. In practice, interviewees pointed to delivery frictions, such as funding volatility, annualized cycles, and political overlays that can dilute execution against stated aims.

Key informants were asked to identify the UK's top priorities in each of the six case study countries. They most frequently cited health and nutrition, education (especially opportunities targeting girls), governance and public finance management, and energy and climate resilience, but with great variability between countries. Private sector respondents were unique in emphasizing security among their top three identified priorities. Respondents also noted geographic and political shifts in the UK's priorities, including reduced engagement in some contested areas and perceiving domestic factors such as trade, migration and security driving the UK's priority choices: *"priorities change every five years or so... now human development is taking a backseat to trade and economy."*

Many of these priorities converged with leaders' durable demands for better schools, more jobs, strong institutions, health, and climate, and they align with the UK's stated ambitions to work across the nexus and build systems. Yet the interviews also surfaced divergences—particularly volatility around funding envelopes and annual project design cycles, the favoring of established partners, and process burdens related to due diligence and reporting requirements that impair fit-for-purpose delivery. To strengthen coherence, informants implicitly recommended clarifying priorities and right-sizing mechanisms by broadening opportunities to include domestic organizations, publicizing opportunities, sharing expert directories, and maintaining multi-year, predictable funding where development outcomes may require it.

3.3.4 Strengthening Delivery Processes: The UK's Development Offer

Finding natural areas of alignment is one aspect of partnership; another important facet is the process by which the UK delivers resources (both financial and technical) and catalyzes networks of relationships at home and abroad to help its partners advance shared development priorities. Leaders across multiple waves of AidData's *Listening to Leaders* survey had the

opportunity to reflect on what made development partners influential and helpful, as well as the attributes that they value most in a preferred partner. These insights can speak to the UK's efforts to modernize its development offer—not only what is on offer, but how it will be delivered—and ensure it is fit-for-purpose for Global South counterparts.

According to survey results, leaders prioritize three “Rs” associated with high-performing development partners: resources, relationships, and respect. “Resources” include finances, technical expertise, and other material support. Leaders selected this as a top reason why a given development partner was influential (41 percent) and helpful (39 percent) in 2024, and the prominence of this attribute is consistent with prior survey waves. Relatedly, leaders are interested in not only the volume of resources but also its quality, particularly when gaining access to international expertise as a driver of influence (22 percent) and helpfulness (17 percent). Notably, leaders who worked with the UK emphasized these qualities at an even higher level than those who did not.

“Relationships” refer partly to close working relationships with government counterparts, cited by leaders as a top reason for helpfulness (51 percent) and, to a lesser extent, influence (19 percent). However, increasingly, Global South leaders want to see development partners building support for programs and policies among a broader set of local stakeholders, including civil society and the private sector. Twenty-eight percent said this behavior made a partner more helpful. Finally, “respect” refers to an approach to partnership that recognizes the authority of the local government over final decisions and aligns with national development strategies, which leaders said made partners more influential (22 and 20 percent, respectively). Additionally, leaders found that donors who worked with them to develop implementation strategies tailored to their contexts and needs were more helpful.

When leaders reflected on what they valued most in a preferred development partner, they emphasized two attributes above all else: adaptability and long-term vision. In 2024, 40 percent of leaders surveyed put a premium on working with a development partner “willing to adapt its strategies to be responsive to the needs of my country.” The second most popular reason for wanting to work with a particular partner was that it “prioritizes long-term planning instead of adopting short-term approaches.” These reasons were surprisingly durable, as they were the top reasons given in the prior survey wave and across both leaders who did and did not work with the UK.

In some respects, the UK is well-positioned to articulate a development offer for the future that is responsive to what leaders from the Global South have said they want. In other areas, the FCDO will have to do some significant spadework to cultivate the political will, technical capacity, and organizational culture to work in new ways, build back better post-merger and budget cuts, and make important trade-offs.

The UK's interest in cultivating and sustaining a well-rounded toolkit of ODA financing along with high-quality technical assistance and other types of support could strengthen its position as an attractive partner. However, FCDO staff interviews underscore concerns that several factors (including economic pressures from COVID-19, rising costs of refugee programs, domestic animosity towards "aid" among the public and some politicians, and unintended consequences of the merger) have threatened the UK's ability to attract and deploy top technical talent and to mobilize ODA financing. Some FCDO staff viewed the combination of different departments and approaches in the agency as a signal of holistic government commitment to development, while others interpreted it as a downgrading of development.

Although the new government has made long-term economic partnerships in the Global South a strategic priority, perceived volatility in the UK's ODA financing in recent years and unrealized ambitions to integrate the aid-trade-investment tools are hurdles to overcome. As one interviewee described it, *"the UK is more rigid...other partners seem to be more flexible when it comes to issues and delivery mode[s]."* This instability is partly reflected in funding levels, as aid spending cuts disrupted existing partner relationships and meant a pullback on promises. Interviewees also cited the challenge of top political leadership and budget amounts that are constantly changing, creating confusion around what to prioritize and what to commit to, which hinders productive working relationships with counterparts in the Global South.

It is difficult to be coherent in presenting a clear development offer and delivering on these promises when UK aid has officially been disbursed via 23 departments, agencies, and offices over the last decade. The UK is not unique in this, as comparators such as France, the US, and Sweden relied on a similar number of agencies, while Germany's ODA was disbursed through 38 agencies in that same period. One of the hoped-for outcomes of the merger was that integrating development cooperation and foreign policy under the same roof would streamline coordination burdens internally and make it easier for Global South counterparts to engage with the UK government for better program delivery.

However, FCDO staff interviewed in Phase 1 of this evaluation and external observers indicate that this desired future has yet to be realized, and there is a high degree of frustration on all sides. Some interviewees expressed concerns that Global South counterparts had to navigate interactions with a multitude of UK government actors, all pursuing development goals with ODA in the same country without an overarching country strategy. Interviewees stressed that they saw significant potential to increase efficiency in achieving the UK's priorities with better insight into in-country ODA spending by different departments within and outside the FCDO. Data from the OECD's CRS confirms these impressions.

Access to UK financing and technical expertise presents a mixed picture across stakeholder groups in the Phase 2 interviews, revealing both alignment and gaps in terms of the attributes

Global South leaders say they value most. Established partners—particularly multilateral agencies—held the most positive views and consistently described access as predictable and efficient, citing formal frameworks and proactive technical support. One respondent noted, “*A formal framework agreement, regular coordination through the London office, and well-established procedures make the process predictable and relatively low in bureaucracy.*” These observations resonate strongly with survey findings that prioritize resources and relationships as core drivers of influence and helpfulness.

However, many interviewees representing civil society and the private sector underscored persistent barriers for smaller or local organizations, contrasting leaders’ call for adaptability. While the UK’s long-term partnerships provide stability, they also create exclusivity: new entrants face steep hurdles due to limited funding windows, complex due diligence, and lack of visibility into opportunities. As one respondent put it, “*If you are not a well-known INGO, it is impossible. You need to know the rules and be familiar.*” Another added, “*Application and due diligence checks are involved... a deterrent for smaller organizations.*” These process burdens and outreach gaps diverge from the survey’s emphasis on adaptability and inclusivity—attributes that leaders associate with preferred partners. Suggestions for improvement included “*creating a shared knowledge base or directory of experts*” and “*publicizing calls for proposals so smaller NGOs can apply.*”

Funding volatility and short-term cycles emerged as another friction point, converging with survey concerns about long-term vision. Respondents repeatedly flagged ODA cuts, annualized allocations, and shrinking budgets as obstacles to planning and delivery. One interviewee explained, “*Funding allocations are now made annually rather than over a three-year cycle, leaving little time for planning and coordination.*” These realities mirror leaders’ prioritization of partners that “*prioritize long-term planning instead of adopting short-term approaches.*” While some interviewees acknowledged the UK’s efforts to maintain multi-year strategies, implementation often fell short, reinforcing perceptions of unpredictability.

Finally, technical expertise remains a bright spot but is unevenly accessible. The interviews confirmed that UK advisors are highly regarded and often proactive; as one respondent praised, “*[t]hey have been very enthusiastic and proactive, always asking what we need and offering technical support.*” Yet access to specialized experts—especially for smaller actors—can be inconsistent. These insights point to opportunities for the UK to strengthen its development offer by operationalizing resources, relationships, and respect, while addressing the structural barriers that limit inclusivity and adaptability in practice.

4. Lessons and Conclusion

This concluding section distills cross-cutting lessons from the quantitative and qualitative evidence and outlines how the UK can sustain and sharpen its performance as an influential and helpful development partner to Global South counterparts. The section is organized around five themes that align with the OECD-DAC criteria adapted for this evaluation: relevance and sustainability, effectiveness, and efficiency and coherence, highlighting partnership to deliver development.

4.1 Relevance and Sustainability: Durable Strengths, Shifting Pressures

Finding 1: The UK's relevance remains robust and strengthening its longer-term commitments and institutional partnerships will likely support performance through political cycles and resourcing shocks.

Lesson 1: Relevance is anchored in social sector delivery and institutional partnerships.

Across four waves of AidData's *Listening to Leaders* survey (2014-2024), leaders who received advice or assistance from the UK consistently rated it as both influential in shaping domestic development priorities and helpful in implementing reforms. The UK registered sustained improvements in influence and helpfulness globally over the decade, even as its footprint fell modestly, suggesting that programming and partnerships underpin perceived performance, rather than just the volume of aid.

Leaders consistently highlighted respectful working relationships as a defining trait of working with the UK. Social development leaders rated the UK highly on both influence and helpfulness. Environmental leaders reported large gains in influence, while helpfulness dipped slightly recently, suggesting that climate-aligned programming is continuing to resonate but refinements may be needed to continue supporting implementation. Economic sector stakeholders consistently see the UK as more helpful than influential, indicating an opportunity for growth in policy influence for market- and jobs-related programming.

Lesson 2: Sustainability requires multi-year timelines and visibility.

Phase 2 interviews frequently connected relevance to staying power, coverage, and community engagement, especially in more vulnerable contexts. Short annual project cycles and limited visibility on the ground can erode perceived responsiveness, particularly where access to resources is limited and politics are volatile. In these scenarios, interviewees call for longer project cycles and portfolios that integrate humanitarian assistance with system-building so that

the UK's investments in development can translate into capacity building and longer-term positive outcomes.

4.2 Effectiveness: Absolute Gains, Relative Slippage

Finding 2: The UK should invest where it has momentum—Sub-Saharan Africa, Europe & Central Asia, fragile and low-income contexts—to reverse relative slippage. Further aligning with local priorities in Latin America & the Caribbean and SIDS could improve influence in these regions.

Lesson 3: The UK's absolute performance strengthened; relative rank slipped.

Benchmarked against a group of comparators, the UK's absolute influence and helpfulness improved or held steady across survey waves. However, its relative position slipped—from 6th in influence in 2014 and 2017, to 8th in 2020, and 11th in 2024. A more crowded marketplace for development assistance, coupled with the rise and repositioning of other partners, has heightened the competition, even as the UK has remained credible and effective in delivering development.

Lesson 4: Comparative advantage in specific geographic and stakeholder cohorts should inform the UK's strategy.

The UK performs especially well in terms of influence with leaders in Sub-Saharan Africa and Europe & Central Asia, as well as among low-income countries and in fragile contexts. The UK's performance in Latin America & the Caribbean and SIDS has improved, but it remains lower in influence, while helpfulness scores in South Asia have been volatile over the four waves of the survey. In 2024, more than four-fifths of Global South leaders who worked with the UK viewed it as helpful, and influence scores show a similar convergence. Effectiveness is context-specific, and the UK should adapt its strategy for different regions.

4.3 Efficiency and Coherence: Converting Resources to Results

Finding 3: The UK's historical financing profile and its perceived performance align well with leaders' top priorities—better schools (SDG4), decent jobs (SDG8), and strong institutions (SDG16). The most consistent request from interviewees is not “different” priorities but more continuity, coverage, and presence.

Lesson 5: The UK is comparatively efficient at translating aid into influence and helpfulness.

Statistical analysis shows that UK financing is more strongly associated with perceived influence and helpfulness than for the average across comparators. Phase 2 key informant interviews revealed that the UK's grant-heavy portfolio, technical assistance, and funding through multilaterals are valued by recipients and contribute to positive perceptions.

Lesson 6: The UK is well-positioned to remain coherent, if funding stays aligned.

Between 2012 and 2021, the UK's SDG-aligned financing concentrated on health (SDG 3), institutions (SDG 16), jobs (SDG 8) and education (SDG 4). This portfolio closely mirrors the top development challenges as identified by leaders in the survey and those in key informant interviews. This alignment between what the UK has historically funded and what leaders continue to prioritize signals coherence, provided that funding remains somewhat predictable.

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