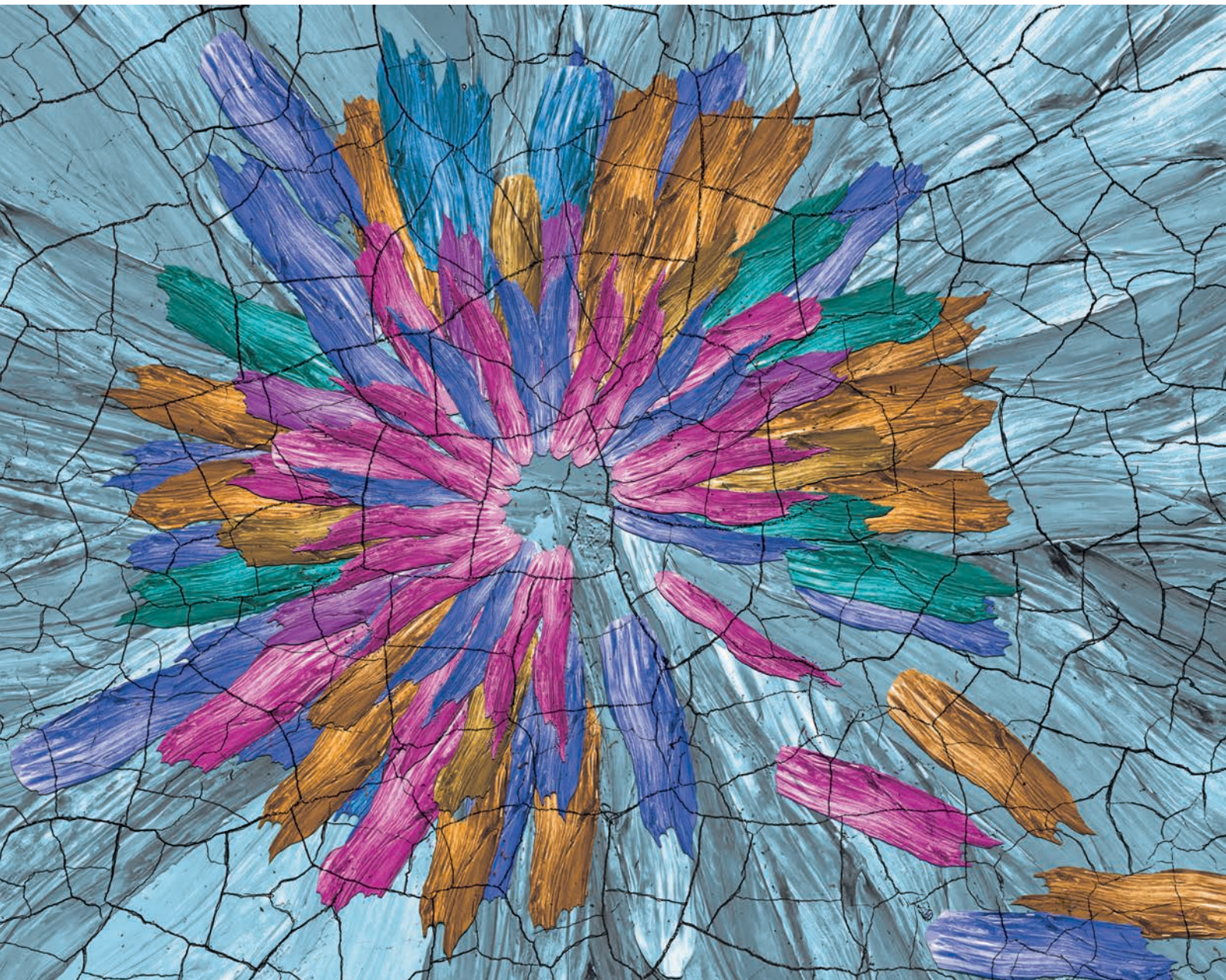


# States of Fragility 2025





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#### Please cite this publication as:

OECD (2025), *States of Fragility 2025*, OECD Publishing, Paris, <https://doi.org/10.1787/81982370-en>.

ISBN 978-92-64-97732-7 (print)  
ISBN 978-92-64-96657-4 (PDF)  
ISBN 978-92-64-52645-7 (HTML)

States of Fragility  
ISSN 2708-8596 (print)  
ISSN 2708-860X (online)

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# Foreword

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*States of Fragility 2025* marks 25 years of the OECD's work on fragility, a period during which it has constantly sought to challenge thinking and practice for effective humanitarian, development and peace, policy and implementation. This report continues in that vein. The evidence and analysis presented in this edition provide insights for donors and partner countries to tailor their approaches to addressing fragility in a changing world. Acknowledging the broad spectrum of issues, this report refines its focus on the development and peace pillars of the humanitarian-development-peace nexus, to focus on relationships and connections that have been frequently overlooked in recent discourse and analysis. Development co-operation, while not designed to necessarily deliver transformational change, can act as catalyst to drive development, prevent conflict and build better futures.

## From the *fragile* label to fragility analysis

The OECD first produced a *Fragile States* publication in 2005. Applying a state-centric approach, its concept of fragility focused on identifying fragile *states*. With the introduction of the multidimensional fragility framework in 2016, the focus of subsequent editions changed to consider fragile *contexts* – states, systems and communities – across five dimensions of fragility. In 2022, a sixth, human dimension was added to strengthen analysis on education, health and social protection. Now, *States of Fragility 2025* has taken this evolution further, moving away from what many consider a politically insensitive and binary label to acknowledge the universality of fragility which exists on a spectrum and can impact on the ability of all contexts to pursue their development goals.

Recognising that other organisations apply fragility frameworks to determine financing priorities and monitor policy implementation, the OECD's work on fragility is intended as a universal knowledge offer to build awareness and facilitate dialogue. Balancing a global perspective on fragility with a focus on the contexts most exposed to

fragility, the report responds to concerns about the implications of fragility for stability and development, especially in the context of the 2030 Agenda and the international promise to leave no one behind. The OECD is one of only a handful of sources of aggregate data and analysis for contexts exposed to high levels of fragility.

## A tool for decision makers

The purpose of the *States of Fragility* report series is to provide compelling evidence, analysis and perspectives that inform development partners' policies and underpin international debates. *States of Fragility 2025* is supported by an online platform and complementary publications produced by the Crises, Conflict and Fragility team of the OECD Development Co-operation Directorate (DCD) and supported by the International Network on Conflict and Fragility (INCAF). Together, they provide the substantive content underpinning the findings set forth in this report. This approach is tailored to meet the needs of political decision makers, policy makers and practitioners to 1) monitor levels and compositions of resource flows to contexts exposed to fragility, 2) understand qualitative trends related to these flows and 3) offer an outlook on the key issues and contexts to watch in the coming years.

This report is organised into four chapters. Chapter 1 analyses global trends through a multidimensional fragility lens. Chapter 2 identifies the contexts experiencing the highest fragility based on the most recently available data, considers their progress towards the Sustainable Development Goals and highlights the most prominent themes requiring attention. Chapter 3 provides a comprehensive overview of the responses to fragility, including trends in both official development assistance and other financial resources as well as in policies to address the drivers of multidimensional fragility. Chapter 4 presents an in-depth assessment of perspectives on fragility by people living in and from the most exposed contexts.

The most recent data captured by the OECD fragility framework predominantly date from 2023 and therefore the findings do not reflect the impact of recent events in the Middle East and elsewhere. However, more recent data are referenced when available to add detail and context to the analysis provided.

### **Listening to perspectives from contexts exposed to high and extreme fragility**

This latest edition of the report provides a platform for political and community leaders, experts, advocates and activists from a variety of contexts, including OECD member states, to share their experience on the realities of

living with and responding to fragility (Chapter 4). These contributions provide grounding and hope in equal measure, demonstrating that even where the challenges are greatest, people are working to find better solutions with and without the support of humanitarian, development and peace actors. Together, they highlight the need for new thinking on peace and development co-operation, where potential partners abound but where accommodating the motivations of donors and partners can yield drastically different outcomes for people, states and the planet. Chapter 4 should not be reported as representing the official views of the OECD or of its Member countries. The opinions expressed and arguments employed therein are those of the respective authors.

# Acknowledgements

This report was conceptualised by the Crisis, Conflict and Fragility team in the Policies and Networks Division of the OECD Development Co-operation Directorate (DCD) under the guidance of Cyprien Fabre and Eva Beuselinck. It was drafted by Emile Boral-Rolland, Maximilian Brien, Jens Hesemann, Jonathan Marley, Zoe Naranjo Leon, Leila Sahib, Sarah Spencer Bernard and Cushla Thompson. The team is particularly grateful for the support received across the DCD under the stewardship of María del Pilar Garrido Gonzalo.

The team was especially humbled and honoured by the reaction and support of the 16 leaders, experts, advocates and activists who agreed to submit their perspectives on fragility for Chapter 4 of the report: Neam Alqaseer (Ministry of Environment, Iraq), Amin Awad (President of the Foundation Council, DCAF - Geneva Centre for Security Sector Governance), Helder da Costa Secretary General (g7+), Ana María Diez (President, Coalicion por Venezuela), H.E. Mr. Bihi Iman Egeh (Minister of Finance for the Federal Republic of Somalia), Dr. Derek Futaiasi (Permanent Secretary, Ministry of Provincial Government and Institutional Strengthening in Solomon Islands), Wayne Ghemu (Minister responsible for the Ministry of Provincial Government and Institutional Strengthening in Solomon Islands), Naomi Hossain School of Oriental and African Studies), Carola Klöck (Science Po) H.E. Mrs. Francia Márquez (Vice President of Colombia), Ibrahim Mohamed (University of the Comoros), Habib Ur Rehman Mayar (Deputy Secretary General (g7+), Mariam Safi (DROPS), Joao M. Saldanha (Joao Saldanha University), Deqa Yasin (Human Rights Advocate & Social Justice Activist), Momodou Swawaneh (Ministry of Provincial Government and Institutional Strengthening in Solomon Islands), and Yasir Zaidan (University of Washington). In equal measure, gratitude is also due to Sandra Paesen (European External Action Service), Frederik Teufel (African Development Bank) and Kim Yukyum (Korea International Cooperation Agency) for the contributions from their respective institutions. The team was equally grateful for the engagement with Jules Ndambu and Paul Ouma (both from Crossboundary). For the content on subnational fragility, the team's appreciation goes to Michela Corvino (European Space Agency), Marko Davila (European Investment Bank); and Elizabeth De Benedetti.

Throughout the process, the team greatly benefited from the substantive advice and feedback received from members of the International Network on Conflict and Fragility (INCAF) of the OECD Development Assistance Committee (DAC). A special thank you goes to the Reference Group members who have selflessly given their time to support and guide the team through the concept and production process, including among others Colin Ashley-Bruce, Sara Batmanglich, Paul Bisca, Matthew Cogan, Rebecca Dale, Jonas Gewölb, Kimiko Hibri Ishida Pedersen, Marion Jelley, Kevin Melton, Diana Koester, Olivia Lazard, Sandra Paesen, Mateja Peter, Réachbha FitzGerald, Ryutaro Murotani, Estelle Saint-Cloud and Laura Schusser.

Thanks also go to the World Bank for providing data and advice on the use of poverty statistics, to Harsh Desai (DCD) for guidance on methodology and data, and to Clare Lockhart for valuable feedback at key junctures. The report benefited from peer reviews by Jonathan Papoulidis (Food for the Hungry) and the team led by Prof. Tim Allen at the Centre for Public Authority and International Development at the London School of Economics and Political Science. Guidance on the case studies and global partnerships was received from our colleagues at the Global Relations and Cooperation Directorate with thanks to Karim Dahou, Tamas Hajba, Celeste Laporte Talamon, Grégory Lecomte, Nejla Saula, William Thompson, Ferre Westermann. Harsh Desai, Cyprien Fabre, Frederik Matthys, Léopold Ghins, Ida McDonnell, Eloise Watson, Dan Schreiber and Gregory de Paepe provided valuable additional comments and feedback at key stages. This report was edited by Susan Sachs and proofread by Jill Gaston. Graphic design and data visualisation were provided by Lushomo Graphics. Joelle Bassoul, Stephanie Coic, Ola Kasneci, Henri-Bernard Solignac-Lecomte, Jessica Voorhees and Lucia Zarama supported the production and communications process at the OECD. The team would particularly like to acknowledge the invaluable support of Mireille Benicke.

This project was generously co-funded by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ).



# Editorial

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This is an era defined by multiple crises, shocks and uncertainty. Not a single context with high to extreme fragility is on track to achieve almost half of SDG goals. To face these challenges with confidence, members of the OECD Development Assistance Committee (DAC) and their partners need fresh ideas. The first step is to understand the resilience required to deal with the risks we all face, which is at the heart of the OECD's work on multidimensional fragility.

All of the 177 contexts analysed by the OECD multidimensional fragility framework are exposed to some level of fragility. In this 2025 edition of the States of Fragility report, 61 are identified as experiencing high or extreme levels of fragility. These contexts are home to 25% of the world's population – 2.1 billion people – but 72% of the world's extreme poor in 2024, a share which could surge to 92% by 2040. Their fragility profiles differ significantly. For some, extreme fragility is a chronic reality that leaves generations trapped in poverty. For others, it is compounded by the occurrence of conflict: death and destruction go hand in hand with acute food insecurity, the distorting effect of conflict economies and forced displacement; over 100 million refugees and internally displaced persons (IDPs), 80% of the global total, originate from contexts with high or extreme levels of fragility. Conflicts in the Middle East, the Horn of Africa (Ethiopia, Sudan) and Myanmar continue to have devastating effects, with violence exacerbating significant underlying fragilities such as water scarcity or economic exclusion. The human dimension of fragility, introduced into the framework in 2022, has also been negatively affected by conflicts – the absence of peace means health and education remain beyond the reach of effective policy responses for large populations.

For donors, understanding fragility is also essential for policy success in a competitive geopolitical landscape. So many issues that need to be addressed, from tax and trade to education and justice, are interconnected. Fragility

analysis identifies the points of risk and resilience and the connections between them that matter, which helps policy makers balance and prioritise the application of the diplomatic, development, humanitarian, peace and security instruments at their disposal to best effect.

Ignoring the drivers of fragility is to cede political and economic advantage to others in the longer term. Sustaining political commitment on development means being smarter on how, where and why development matters. This report also shows that, as the international order fragments, and the dynamics of donor-partner relations change, the agency of contexts with high and extreme fragility is evolving, with a growing willingness to pursue development goals through partnerships outside of familiar systems and frameworks. This evolution is symbolic of an era not just of contestation but also of competition, to which international development co-operation models must adapt to rapidly. DAC members need to redefine their bilateral and collective strategic offers and compete to establish their value for partners.

Finally, the report warns OECD members against focusing too narrowly on security at the expense of development as a strategy for supporting peace in partner countries. In contexts exposed to high and extreme fragility, the strategic value of steady, robust and adaptive development policies stands on its own merits, but it can also be essential for balanced and cost-effective foreign policy. Understanding fragility helps ensure that tight budgets are allocated to best effect to drive future resilience, domestically and internationally. As deaths from violence continue to rise, and with 27 of the contexts experiencing high and extreme fragility also exposed to organised violence, investing early to prevent conflict costs much less – financially and in terms of human suffering – than paying later to deal with its consequences.

This States of Fragility report marks a quarter of a century of OECD work on the topic. During this time, the Organisation has established itself as a thought leader and

a global knowledge source on fragility analysis. It has consistently challenged assumptions and responded to the feedback of partners, engaging directly with leaders, activists, academics and the community of analysts across multilateral institutions. In keeping with that tradition, this edition introduces a new classification framework that drops the label of “fragile context” as a generic term, to focus instead on the value of fragility analysis as a multidimensional concept that is more or less present across all countries, systems and communities.

Understanding global and local fragility – for instance, the linkages between economic security and resilience, the intensifying climate crisis, digital disruptions and challenging population dynamics – is the starting point for the strategic advancement of OECD standards and partnerships in support of sustainable development. The relationships the OECD is building with people and organisations in contexts with high levels of fragility are a vital contribution to global cohesion, one that is based on inclusive policy dialogue, mutual learning and standard

setting. The aim is to level the global playing field and avoid a fragmented global economy governed by competing standards. This work contributes to the OECD’s pursuit of its core objective of ensuring better policies for better lives. It is also an essential part of its offer to international fora such as the G20, G7 and APEC, and enhances its engagement with the United Nations system.



**María del Pilar Garrido Gonzalo**

Director,

Development Co-operation Directorate, OECD

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# Abbreviations and acronyms

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DAC	Development Assistance Committee (OECD)
DFI	Development Finance Institution
DRC	Democratic Republic of the Congo
EIB	European Investment Bank
EO	Earth Observation
ESA	European Space Agency
EU	European Union
FDI	Foreign direct investment
GDP	Gross domestic product
HDP	Humanitarian-development-peace
HIPC	Heavily indebted poor countries
IDP	Internally displaced person
IFI	International Financial Institution
IMF	International Monetary Fund
INCAF	International Network on Conflict and Fragility
MDB	Multilateral Development Bank
MENA	Middle East and North Africa
ODA	Official development assistance
OECD	Organisation for Economic Co-operation and Development
SDG	Sustainable Development Goal
SDR	Special drawing right
SGBV	Sexual and gender-based violence
UN	United Nations
USD	United States dollar





# Executive summary

Fragility is the combination of exposure to risk and the insufficient resilience of a state, system and/or community to manage, absorb or mitigate those risks. The OECD multidimensional fragility framework assesses fragility based on 56 indicators of risk and resilience across six dimensions: economic, environmental, political, security, societal and human. This provides the analytical foundation for the States of Fragility report series and online platform.

## The diversity of fragility profiles points to the need for more tailored and aligned approaches across development, peace and security

Following the shocks of the last five years, global fragility remains at a near-record high level. The diversity of fragility profiles across all contexts is striking: within the same classification of 'extreme fragility', Sudan, Yemen, Afghanistan and Somalia each present unique combinations of risk and resilience. This is also true within the medium to low fragility classification, where otherwise resilient contexts have concentrated subnational pockets of fragility, often characterised by acute poverty, environmental fragility and localised violence – Mindanao in the Philippines is a case in point. The concentration of fragility continues as a prominent trend. Though it increased the most in contexts with overall medium to low exposure, not eligible to official development assistance (ODA), its most severe impact is observed in the 61 contexts experiencing extreme or high fragility, home to 25% of the world's population in 2025 – 2.1 billion people – but 72% of the extreme poor (2024), which could surge to 92% by 2040.

## Violence of all types is rising as support for prevention diminishes

Fragility increased most in the political, security and economic dimensions, driven by geopolitical competition, the race for energy security, rising debt and an increased

willingness to use violence of all kinds. The number of armed conflicts is at its highest since the end of the Cold War. Armed conflict is concentrated in contexts with the highest exposure to fragility: Sudan, the Great lakes region, the Sahel and West Africa and Myanmar. Of the 61 contexts with high and extreme fragility, 24 are experiencing armed conflict and 8 are in a state of war. Beyond armed conflict, multi-layered trends on violence – increased non-state violence, violence against women, high homicide rates and the role of organised crime in and outside of conflict-affected areas – highlight the necessity of preventative action on violence. However, resources for peace and conflict prevention in contexts facing high and extreme fragility are at their second lowest level since 2004.

## Fragility is instrumentalised for geopolitical advantage and economic gains

Looking at a fragmented and disordered world through a fragility lens gives the impression of a state of geopolitical flux, with no truly dominant actors – autocracies are not as resilient as often assumed, and many democracies are investing less and less in their resilience capacity, particularly in state institutions, checks and balances. This state of flux also presents opportunities. The initiative is there to be seized by whoever can organise themselves most effectively. Across Africa and the Middle East, fragility is being instrumentalised for political, economic and security ends, often reversing development gains. State and non-state actors are analysing the sources of risk and resilience that shape fragility – not as challenges to address but as situations to leverage and exploit as part of local and global strategies. In contexts such as Mali and Niger, this compromises the quality and availability of partnerships as internal and external state and non-state elites focus on short term transactional gains that can feed cycles of conflict, poverty and inequality. Understanding fragility therefore offers an advantage in terms of how to apply and align instruments of international statecraft, including development assistance with domestic policy objectives.

## **Economic trends have proven to be important drivers and symptoms of fragility**

Global trade has repeatedly been disrupted in recent years, first by the COVID-19 pandemic, then by Russia's attack on Ukraine, a major grain exporter, and in 2024 by the Red Sea shipping crisis – a precipitous drop in the volume of traffic through the Suez Canal and Bab El-Mandeb Straight due to outright attacks on commercial vessels. Such incidents highlight the economic interdependencies on which global prosperity depends. Decades of relative prosperity have been an important source of resilience for much of the world, but the kind of growth that brings widespread poverty reduction has proven much harder to achieve in contexts exposed to high and extreme fragility. Incomes in these contexts stopped catching up with advanced economies around 2015, and post COVID have settled at negative growth (in contexts with extreme fragility) and around 2% (in contexts with high fragility). Debt sustainability and fiscal fragility have become even more challenging since 2022, constraining the ability to respond to shocks or invest in the future. Within these overall trends there is huge diversity, however, and this report identifies opportunities for economic partnerships that can be an important pillar of both development and peace strategies.

## **Youth have political agency, though their preferences cannot be presumed**

Global demographic growth is concentrated in contexts with high to extreme fragility, particularly in Africa. Youth in these contexts are increasingly digitally connected, politically active and open to engagement on their futures:

a political force to be harnessed by whoever provides the most convincing narrative; in most cases, their needs and expectations are being frustrated. They are also vulnerable to misinformation, disinformation and violence, and limited by poor health and education opportunities and gender divides. The ways and means of engaging with youth in contexts with high and extreme fragility needs to change. Short term engagements can be ineffective where other actors are offering hard incentives to migrate (illegally), join militias or organised criminal groups, or act as disruptive agents for one political entity or another. Failing to engage more substantively with youth populations in contexts with high and extreme fragility risks turning the potential for a demographic dividend into liability. Where risks of poverty, violence, disfranchisement and inequality, notably gender inequality, intersect, incentivising positive, attractive and competitive pathways for young populations is priority for effective development and conflict prevention.

## **Progress is possible even in contexts with extreme levels of fragility, but staying engaged is essential**

Even in contexts with extreme fragility progress is possible and development assistance can be effective. Positive signs in Iraq and Somalia demonstrate that sustained engagement across humanitarian, development and peace pillars can foster progressive change. However, in many other contexts with extreme fragility, longstanding development gaps, high levels of poverty, and political vacuums persist. This has geopolitical consequences: competing national and international actors are often quick to establish their influence and models for short-term, transactional, extractive and elite-centric gains.







# Policy recommendations

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## **Development co-operation must reassert its value as an instrument of international statecraft**

The share of Development Assistance Committee (DAC) members' country-allocable official development assistance (ODA) provided to contexts with high and extreme fragility was the lowest in two decades in 2022 and 2023. The risk-adverse approach of many members of the DAC in these contexts comes at a strategic cost. ODA delivered independently or as a component of foreign policy, is essential for international statecraft in a geopolitical environment where power is shifting, and even contexts with the highest levels of fragility have more agency and choice. Being more competitive means being smarter about building development co-operation and responding not just to the risks associated with fragility but to the specific means of building resilience for the long term.

## **Conflict prevention is a geopolitical and human security necessity**

Striking global trends on conflict and violence point to prevention as a core component of geopolitical strategy, development and peace. Yet direct conflict prevention measures, especially through multilateral institutions, are increasingly starved of resources and upstream structural and systemic conflict prevention measures are rarely applied. This is placing undue burden on defence and security instruments while incentivising the recourse to violence for political and economic objectives, notably in contexts with low institutional resilience. Ignoring conflict prevention is wasting the potential of co-operation and compromising the delivery of development assistance. Reimagining prevention requires adapting analytical frameworks and indicators; making that analysis easier for development actors to access and apply; and sustaining engagement to ensure that drivers of fragility do not become drivers of conflict and violence.

## **Inclusivity is not enough, so thinking on partnerships must evolve again**

Contexts with high to extreme fragility have more partnership options than they did 20 years ago and are exercising their choice, with positive and negative outcomes, increasingly outside the established multilateral system. While this does not herald the end of multilateralism, the substance, design and purpose of future partnerships in those contexts needs to adapt. Being inclusive is not enough when populations in donor countries are sceptical about the value of co-operation, and states with extreme and high fragility expect more from their partnerships on issues of trade, investment, security, energy or migration. Economic partnerships should be considered as strategically important for addressing fragility, and they may provide new entry points for policy dialogue. Mutually accountable partnerships are key for adapting to the increasingly competitive nature of development co-operation in those contexts.

## **Understanding fragility is at the core of effective strategy for a changing world**

Fragility strategies are beginning to prove their worth, most notably across international financial institutions (IFIs), where the broader analytical base – picking up on disruptors from different dimensions, not just the political and economic – drives more tailored responses. As humanitarian, development and peace actors compete to have their agendas respected and implemented, fragility analysis has untapped potential to inform the strategic alignment of development, foreign and security policies by analysing the interplay of risk and resilience across intersecting dimensions. Investing in fragility analysis at subnational levels will help to better understand local and national aspirations in contexts most exposed to fragility.

## Infographic 1. Key features of contexts with high and extreme fragility

### Rapid demographic growth

2.1 billion people, or 25% of the world's population, are living in contexts with high and extreme fragility in 2025. This figure is projected to grow to 2.3 billion by 2030 and 3.2 billion people by 2050. In contexts with high and extreme fragility in Africa, growth is projected to go from 1.2 billion in 2025 to 2 billion in 2050.

25% of the world's population live in contexts facing high and extreme fragility



Source: World Population Prospects

### Poverty concentration

500 million people were living in extreme poverty in contexts with high and extreme fragility in 2024, accounting for 72% of the world's extreme poor. By 2040, this share is expected to increase to 92%.

72% of the world's extreme poor live in contexts facing high and extreme fragility

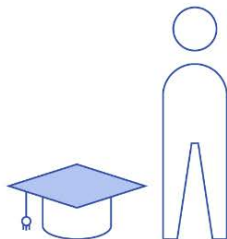


This is expected to increase to 92% by 2040

Source: World Bank

### Youth

Youth (ages 15-24) account for one out of every five people in contexts experiencing high and extreme fragility. On average, 27% of the youth population in these contexts are not in employment, education or training.



Source: World Bank

### Economic growth

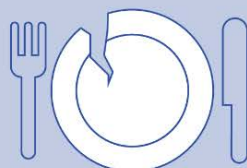
In 2023, median per capita GDP growth was negative for contexts in extreme fragility and about 2% in contexts facing high fragility. 25 contexts facing high and extreme fragility are either in debt distress, or at high risk.



Source: World Bank

### Food insecurity

Of the 59 contexts worldwide with acutely food insecure people in 2024, 43 were experiencing high and extreme fragility, including the top 10 contexts with the largest number of people in conditions of food crisis or worse.



Source: Food Security Information Network

### Climate and environment

From 2010 to 2023, contexts facing high and extreme fragility accounted for less than 4% of cumulative CO<sub>2</sub> emissions, but suffered 29% of disaster events and 50% of deaths from natural disasters.



Source: Our World in Data and EM-DAT

### Organised violence

Contexts exposed to high and extreme fragility are not necessarily violence-affected: 27 out of 61 contexts facing high and extreme fragility were affected by organised violence with 8 in a state of war.



44% of contexts facing high and extreme fragility were affected by organised violence

Source: UCDP

### Governance

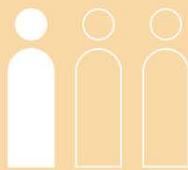
Fifty-three contexts experiencing high and extreme fragility are autocracies, with a doubling in the number of closed autocracies, from 10 in 2018 to 20 in 2023. Ten coups occurred in contexts facing high and extreme fragility between 2021 and 2023.



Source: V-DEM

### Gender

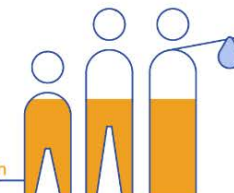
Women in contexts facing high and extreme fragility have 67% of the legal rights of men. However, gender inequalities vary significantly according to the context. One of the largest challenges for development practitioners concerns data availability, quality and timeliness.



Source: World Bank (Women, Business and the Law)

### Forced displacement

Contexts experiencing high and extreme fragility host 64% of the world's forcibly displaced population, including 80% of all internally displaced persons. 80% of all forcibly displaced persons have fled from contexts experiencing high and extreme fragility.



80% of forcibly displaced persons originate in contexts facing high and extreme fragility

Source: IDMC and UNHCR

Note: Women, Business and the Law measures legal frameworks in eight areas.







# 1 UNDERSTANDING AND NAVIGATING GLOBAL TRENDS THROUGH A FRAGILITY LENS

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*This chapter demonstrates how the analysis of unfolding global trends through a fragility lens can drive better strategy and policy responses to peace and development challenges. The OECD multidimensional fragility framework presents analysis on how global risks are connected and how the interplay of risks and resilience are driving positive and negative outcomes at state and subnational levels. These trends are challenging established thinking on development co-operation and the role of international institutions, and place a premium on building new geostrategic approaches that balance instruments of statecraft, especially for development and peace.*



# In Brief

## Understanding and navigating global trends: The relevance of fragility analysis

- **Fragility is being instrumentalised to suppress and reverse development gains.** State and non-state actors are analysing sources of risk and resilience that shape fragility – not as challenges to be addressed but as situations to be leveraged and exploited as part of local and global strategies. The nature of geopolitics means that ignoring fragility trends is to cede political and economic advantage to others.
- **While many actors identify violence as a last resort, for others it is a preference** – accessible, effective and efficient when compared with alternative options to achieve political, economic or other objectives. In 2023, 27 contexts exposed to high and extreme fragility experienced organised violence (state-based, non-state and one-sided violence).
- **The benefits of growth have proven harder to achieve where contexts experience higher levels of fragility.** Incomes in contexts exposed to high and extreme fragility stopped catching up with the incomes of contexts facing medium to low fragility around 2015, undermining the expectation that incomes and living standards would eventually converge. This has been felt even more acutely in the presence of other fragilities; and the post-COVID recovery has been significantly more sluggish in high and extreme fragility contexts than in other contexts.
- **Global fragmentation and disorder bring opportunities for increased agency and ambition; they also carry significant risk.** Across contexts exposed to high and extreme fragility, partnerships to secure flows of capital and goods appear to be realigning, taking into account not just geographical distance but increasingly, geopolitical alignment.

Redefining the strategic offer for contexts with high and extreme fragility:

- **Analysing fragility is essential for designing strategy to address risks, increase resilience and balance processes towards peace and development goals.** It is the starting point to inform, organise and prioritise the application of diplomatic, development, humanitarian, peace and security approaches.
- **There is an urgent need to prioritise conflict prevention and to address building resilience as development and foreign policy objectives.** With global violence reaching ever higher levels, support for delivering and protecting peace is declining.
- **Effective international statecraft will require smarter alignment of foreign, development and peace policies.** Development co-operation is inherently political; and while countries hold the primary responsibility for their own development outcomes, creating clear incentives for development partnerships that prioritise political will and leadership is a point of strategic advantage for donors and partners.
- **In a disordered global system being inclusive will not be sufficient.** The capacity to compete amid fluctuating power dynamics will determine the success or failure of multilateral initiatives as will the perceived and actual quality of partnerships with OECD members.

There is broad consensus that current economic, environmental, technological and political trends are driving a return to a fragmented, multipolar world (Cilliers, 2024<sup>[1]</sup>; US National Intelligence Council, 2021<sup>[2]</sup>). The disruption of global supply chains, geopolitical tensions and increase in financial and economic restrictions are both reactions to fragility and themselves increase fragility by compromising the interconnectedness of the global economy, the rules-based trading system, and access to global markets (Gaál et al., 2023<sup>[3]</sup>). This increased fragmentation also heightens the risk of proxy conflicts (Hossain and Islam, 2024<sup>[4]</sup>) and military confrontations, and erodes the global institutions needed for peace and development (Rodgers, 2020<sup>[5]</sup>). While technological advances foster new sources of coping capacity and opportunities to address fragility, the technological arms race in artificial intelligence (AI) and cybersecurity is rapidly adding layers of risk by creating asymmetrical threats and new arenas of contestation and mistrust between nations.

Human-induced environmental changes are accelerating rapidly. Ever more frequent and intense extreme weather events, rising sea levels and droughts (Seneviratne et al., 2021<sup>[6]</sup>), loss of biodiversity and the collapse of ecosystem, to name a few such changes are intensifying and creating new sources of fragility. The transitions required to navigate this space are inherently disruptive. The global transition to renewable energy is reshaping traditional energy geopolitics, disrupting established power dynamics and opening new areas of competition that are likely to create a new set of winners and losers, leading to a greater risk of conflict and humanitarian crises and requiring a fresh approach to local and international justice frameworks (OECD, 2024, p. 25<sup>[7]</sup>; UNDP, 2023<sup>[8]</sup>). Communities and states are grappling with resource scarcity and the political and human transaction costs of energy transition. The 2024 United Nations (UN) Biodiversity Conference of the Parties (COP16) and the 2024 UN Climate Change Conference (COP29) showed how difficult it can be to achieve collective solutions while countries are pursuing individual agendas that exacerbate the fragility of global systems.

Major crises and protracted conflict create fertile ground for terrorism and arms proliferation and make it difficult to achieve peace and recovery. Intended and unintended spillovers from conflict further exacerbate global fragility through migration and forced displacement, with neighbouring communities bearing the greatest responsibility for the forcibly displaced. Even though conflicts across the Middle East and Russia's armed

aggression against Ukraine, for instance, have produced two of the biggest refugee crises in modern history, leaving millions displaced across Europe and the Middle East, most of the countries receiving forcibly displaced populations are themselves exposed to high and extreme levels of fragility. While the evidence suggests that stopping displacement and migration is almost impossible, it will nonetheless be essential, both for adaptation and prosperity, to manage migration and forced displacement (De Gruyter, 2016<sup>[9]</sup>; Wolf, 2024<sup>[10]</sup>; US National Intelligence Council, 2021<sup>[2]</sup>).

Longer-term demographic changes are altering the parameters for peace and development. Africa's population is projected to grow from 1.3 billion in 2019 to 2.2 billion by 2050 (Cilliers, 2024<sup>[11]</sup>). The potential demographic dividend offers opportunities for Africa but also risks for the continent over the coming decades (Weny, Snow and Zhang, 2017<sup>[12]</sup>; Cilliers, 2020<sup>[13]</sup>). For example, the large-scale and rapid urbanisation that accompanies population growth will add 2 billion people to cities worldwide by 2050 (Our World in Data, 2023<sup>[14]</sup>), requiring urgent attention to basic service delivery, infrastructure building and security provision in urban centres.

All of these trends and more are connected. Analysing fragility is a means to understand how those connections matter for effective policy responses.

## **UNDERSTANDING FRAGILITY IS THE FIRST STEP FOR BUILDING BETTER POLICIES IN ALL CONTEXTS**

Societies must continuously adapt to stressors: power shifts, old and new sources of grievance, the latest technologies, environmental changes, economic disruptions, and institutional change at multiple levels. Long-term development success is in large part determined by navigating those hurdles without suffering a major rupture or becoming stuck in a protracted crisis and by ensuring sufficient resilience to counter and minimise multiple risks. Fragility analysis provides valuable insights on how to address risks, increase resilience and balance processes towards peace and development goals. The OECD fragility framework shows that all contexts experience fragility in varying ways and to varying degrees (Chapter 2). But it also demonstrates that fragility poses significantly greater challenges for contexts with a bigger mismatch between risks and coping capacities – that is, those contexts experiencing high and extreme fragility (Box 1.1).

## Box 1.1. Explaining the sixth edition of the OECD's multidimensional fragility framework

### An overview of fragility

Fragility is analysed by the OECD as the combination of exposure to risk and insufficient resilience of a state, system and/or community to manage, absorb and mitigate those risks (OECD, 2016<sub>[15]</sub>). As fragility is understood as a universal phenomenon, the OECD assesses fragility worldwide through its multidimensional fragility framework, first introduced in *States of Fragility 2016* and now in its sixth edition. The framework is an independent, data-driven resource that assesses fragility on a spectrum of intensity across six dimensions: economic, environmental, human, political, security and societal. Using 8 to 10 quantitative indicators in each dimension and 56 indicators in total for all 6 dimensions, the framework analyses sources of risk and resilience across the 177 contexts for which sufficient data are available.

### Introducing a new classification of fragility and dropping the label of “fragile context”

*States of Fragility 2025* introduces a new system of classifying fragility that addresses the political sensitivity around labelling, while also seeking to strengthen analysis for the states of fragility in today's world. The analysis remains centred on sources of risk and resilience. However, the label “fragile contexts” is no longer applied. Instead, all contexts are considered as experiencing fragility on a spectrum of extreme, high and medium to low fragility. This change acknowledges the universality of fragility, while retaining the intention that States of Fragility reports and therefore development partners should focus on the contexts that are experiencing high and extreme levels of fragility.

Further information on the methodology of the multidimensional fragility framework, including the indicators and measures, is available in the methodological notes in Annex A and on the OECD States of Fragility data platform. The platform is a one-stop shop for evidence and analysis on multidimensional fragility and resource flows to contexts exposed to high and extreme fragility, available at <https://www3.compareyourcountry.org/states-of-fragility/overview/0/>.

Note: The OECD applies the term “context” to allow for analysis of territories not officially recognised as states as well as for more adaptable analysis of fragility in all its presentations from subnational to global levels.

Source: OECD (2016<sub>[15]</sub>), *States of Fragility Report 2016: Understanding Violence*, <https://doi.org/10.1787/9789264267213-en>.

Acknowledging the general consensus on global trends, this section applies fragility analysis to complement and challenge conventional thinking within and beyond OECD member countries, building the case for why development policies and an understanding of fragility are vital for those countries wishing to successfully navigate the geopolitical environment.

Underneath all of this tension and upheaval is agency (Nyabola, 2018, p. 215<sub>[16]</sub>).

## GLOBAL DISORDER IS INCREASING BUT SO ARE OPPORTUNITIES FOR AGENCY AND AMBITION IN CONTEXTS WITH HIGH AND EXTREME FRAGILITY

Many contexts with high and extreme fragility are attempting to capitalise on global disorder to strengthen

their political and economic agency through traditional and emerging frameworks. Three features of this dynamic stand apart: 1) Established and rising powers are offering more and different options for development co-operation; 2) Many contexts with high and extreme fragility are actively looking for support within the established multilateral system; 3) Patience with the established multilateral system is wearing thin and contexts are increasingly developing alternative sources of resilience with varying economic and political outcomes.

First, rising medium and large powers are seizing the opportunity of a more fragmented international order to compete with established development partners as part of their foreign and development policy engagement (Pomeroy and Akram, 2024<sub>[17]</sub>). China's Belt and Road Initiative and African strategy are the most obvious and long-standing examples. Chinese development finance to contexts with high and extreme fragility has declined since 2012 (The Economist, 2024<sub>[18]</sub>). This is the result of tighter prioritising and a scaling back of investment in areas such

as infrastructure as well as a sign of China's transitioning to a new era of engagement. In 2024, more African heads of state attended the Forum on China-Africa Cooperation (FOCAC) than the UN General Assembly (Amare and Vines, 2024<sub>[19]</sub>). China has established a considerable presence across Africa from which to diversify its future activities, with more than 10 000 active Chinese firms (Jayaram, Kassiri and Sun, 2017<sub>[20]</sub>). A recent assessment of 3 000 Chinese enterprises invested across the continent found that more than 70% are private sector businesses (Munyati, 2024<sub>[21]</sub>). Beyond Africa, China has also expanded its commitments across Asia, Central and Latin America (AidData, 2022<sub>[22]</sub>). The development returns to Chinese partners in the contexts with the highest fragility are mixed. But there are success stories. Objective observation of Chinese outreach also offers valuable lessons in modern partnership building (Chapter 4). From the Chinese perspective, however, this outreach is part of a global strategy that balances an assessment of fragility, including an assessment of China's own environmental fragility (Igini, 2024<sub>[23]</sub>), with the application of economic (development), diplomatic and soft military power.

International powers such as India (Gopaldas, 2024<sub>[24]</sub>) and Türkiye, to name just two, are separately bringing forth initiatives that are changing the landscape for international development, especially in contexts most exposed to fragility. Türkiye, for instance, has taken a distinct security-economic partnership approach: the value of its trade with African countries exceeded USD 40 billion in 2022, and since 2012, it has entered into more than 50 separate security-related agreements of varying scales with contexts such as Ethiopia, Ghana, Kenya, Nigeria and Rwanda (Pinto, 2024<sub>[25]</sub>). These include defence industry co-operation agreements; in parallel, Türkiye has more than tripled the number of its embassies since 2008 (Yaşar, 2022<sub>[26]</sub>).

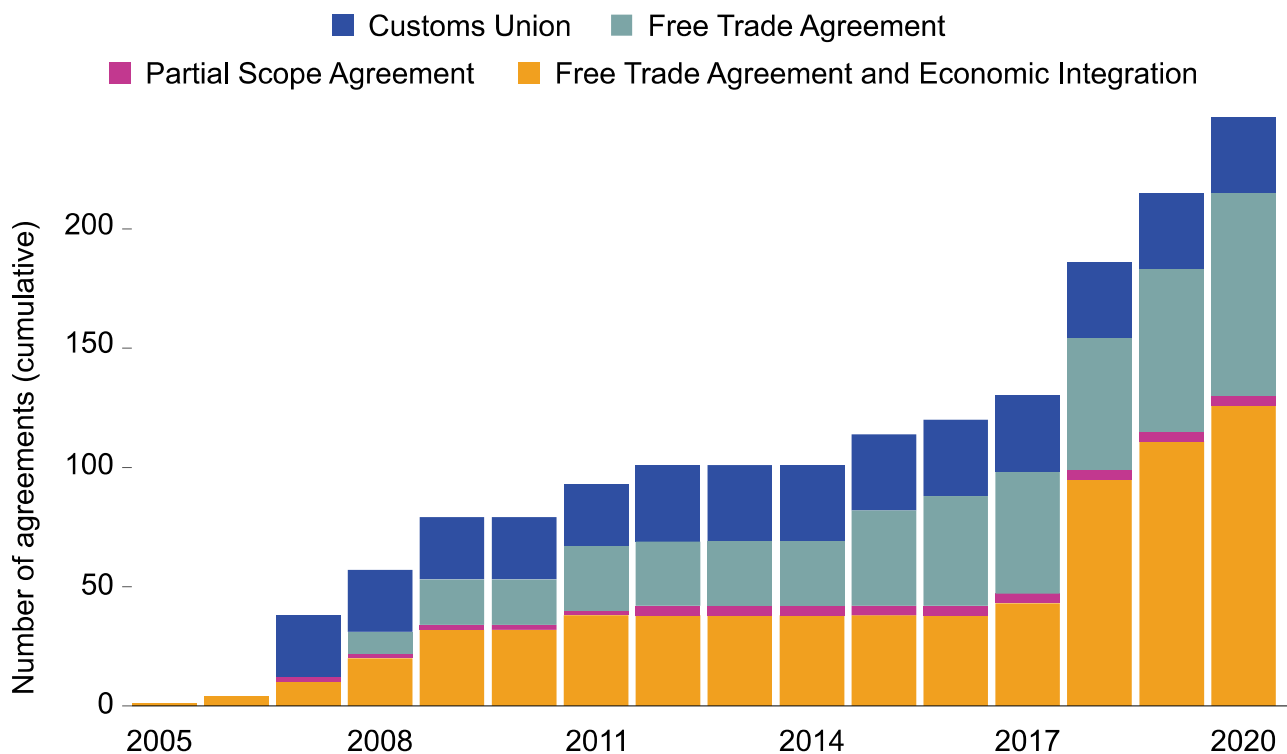
Second, despite the attractiveness of new partnerships, contexts with high and extreme fragility have not substantially disengaged from multilateral systems, economic integration, or the development investments of the past. In 2024, Iraq successfully joined the European Bank for Reconstruction and Development (EBRD, 2024<sub>[27]</sub>), Somalia joined 35 other African countries in the OECD's *Global Revenue Statistics* (OECD, 2024<sub>[28]</sub>), Comoros and Timor-Leste acceded to the World Trade Organisation, while several other countries are going through the

intensive multilateral and bilateral negotiations required (WTO, 2024<sub>[29]</sub>). International Development Association's IDA21 replenishment saw new donors contribute<sup>1</sup>, and 17 existing donors increase their national contribution by 25% or more (World Bank Group, 2024<sub>[30]</sub>). Contexts exposed to high and extreme fragility have on average smaller economies than those exposed to medium to low fragility, and small economies have historically been active advocates for rules-based systems, economic integration, and multilateralism as they rely heavily on them to ensure their interests are protected, and to access the markets they rely on for trade and investment (Lupel, Pitakdumrongkit and Ng, 2024<sub>[31]</sub>; Georgieva, 2023<sub>[32]</sub>). Multilateralism is also critical for dealing with debt sustainability issues, with Chad, Ethiopia, Ghana and Zambia having applied for debt relief under the Common Framework for Debt Treatments (Pazarbasioglu, 2024<sub>[33]</sub>).

Third, though engagement with multilateral institutions remains, many contexts are actively seeking alternatives to an international order viewed as "unfair, anachronistic or simply not effective enough" (Smith, 2024<sub>[34]</sub>; Global Policy Watch, 2024<sub>[35]</sub>). To a certain degree, the apparent loss of faith in the international system can be understood as a byproduct of the loss of momentum for the 2030 Agenda, which is struggling for attention as geopolitical competition diverts political capital and has simply undershot its objectives because of 'rich countries' failure to invest in fulfilling the Sustainable Development Goals (Gowan, 2023<sub>[36]</sub>). However, through new partnerships, alliances and deals, contexts with high and extreme fragility are finding and developing alternative sources of resilience with varying outcomes depending on their economic and political profiles.


Regional and bilateral economic alliances, coalitions and agreements have proliferated in the last 20 years, including those signed by contexts with high and extreme fragility (Figure 1.1). Over the period of 2008-15, these contexts entered into more comprehensive economic integration agreements with the aim of moving towards more structured economic co-operation. This led to a notable increase over 2016-20 and the emergence of a distinctly regional dimension, for instance with the adoption of large regional agreements such as the African Continental Free Trade Area and the rise of other regional trade blocs.

**Figure 1.1. Evolution of economic agreements in force in contexts exposed to high and extreme fragility, 2005-20**



Note: No agreements were signed after 2020 in contexts exposed to high and extreme fragility despite data availability extending until 2022.

Source: World Bank (2024<sup>[37]</sup>), *Deep Trade Agreements: Data, Analysis and Toolkits* (webpage), <https://datatopics.worldbank.org/dta/table.html>.

StatLink  <https://stat.link/4wos8c>

Overall, the partnerships needed to secure flows of capital and goods appear to be realigning, taking into account not just geographical distance but increasingly, geopolitical distance. Even though there are costs with some of these arrangements, some governments may prioritise security of access in uncertain times (Gaál et al., 2023<sup>[31]</sup>). The elite (government) decision making driving these trends varies considerably across contexts exposed to high and extreme fragility. For some, interacting with partners beyond the OECD DAC is the result of careful planning to open new markets or to avoid perceived long-standing structural inequalities in the international financial architecture (Patrick, Sidiropoulos and Hogan, 2024<sup>[37]</sup>; Global Policy Watch, 2024<sup>[35]</sup>); for others, decisions were as much opportunistic as strategic, especially where conveniently narrowly defined alliances with external partners can maintain local balances of power (Rampini, 2024<sup>[38]</sup>). The extent to which the world economy will fragment is impossible to predict, but there are pronounced risks. Small, low-income and open-market economies affected by high and extreme fragility stand to lose the most in a more fractured world economy (Georgieva, 2023<sup>[32]</sup>).

## THE TWO-TRACK NATURE OF ECONOMIC GAINS IS ALREADY ENTRENCHED

At the time of the last States of Fragility report, as the world began to exit the COVID-19 crisis, many commentators warned of the risk of a two-track economic recovery (Georgieva, 2021<sup>[39]</sup>), a risk that has since materialised. In reality, trends of two-track economic gains between and within countries pre-date the COVID shock.

At their best, economic ambitions are key components of development strategies and achieving those ambitions can increase living standards and human dignity, support power-sharing agreements and provide the resources for governance systems to respond effectively to shocks. Globally, economic growth has been the single biggest driver of poverty alleviation over the last 30 years (Patel, Sandefur and Subramanian, 2021<sup>[40]</sup>). From a peace perspective, inclusive economic opportunities disincentivise conflict by increasing the costs of conflict and it can be easier to share the pie when there is a larger pie to share (Dube and Vargas, 2013<sup>[41]</sup>).



But these economic growth and poverty reduction gains have bifurcated. First, while there is significant diversity, the benefits of growth have proven harder to achieve in contexts facing higher levels of fragility. On average, incomes in contexts exposed to high and extreme fragility stopped catching up with incomes in contexts exposed to medium to low fragility around 2015, undermining the expectation that incomes and living standards would eventually converge (Chapter 2). In addition, the post-COVID recovery in contexts facing high and extreme fragility has been significantly more sluggish than in contexts with medium to low fragility. Median per capita gross domestic product (GDP) growth has stabilised at about 2% for contexts facing high fragility and is negative for contexts facing extreme fragility. Economic and fiscal challenges are compounded with environmental, political, societal, human and security fragilities in idiosyncratic ways; and the impacts of stagnating or reduced incomes are felt more acutely when fragilities in dimensions other than economic are also present.

To meet the aspirations of growing populations of young people and make the most of the global population dividend that they could provide, sustained and sustainable growth is needed in contexts with high and extreme fragility. And this growth must avoid exacerbating – and ideally help address – other types of fragilities.

Within contexts experiencing high or extreme fragility, different populations have access to very different economic opportunities, as shown in Chapter 2. This is particularly prevalent for women and girls who must contend with unique combinations of fragility. More so than in other developing countries or advanced economies, there is a mismatch between the sectors that are the sources of GDP growth and the sectors in which most people work. A relatively small proportion of the population is employed in the highest export-earning sectors, which provide the highest-paying jobs. This means that in many contexts, people stay stuck in underemployment in sectors with limited opportunity, especially low-productivity or subsistence agriculture. Informal employment is pervasive, and while the rate of entrepreneurship is high, many micro-businesses run out of necessity rather than opportunity and have little to no prospects for growth. The persistence of these structural features has complex causes including elite control, a limited business environment, entrenched inequalities in education and access to opportunity, and a high concentration of investment in natural resource and extractive sectors.

At a systems level, the best-understood and most-studied economies – those with the largest safety nets, highest levels of investment and greatest depth of global expertise in successfully implementing reform programmes – tend to be those without high or extreme fragilities.

All economies experience fragilities and imbalances, and taking a big picture view, economies around the world have benefited to varying degrees from advances in economic stewardship at the macro levels – central bank independence, fiscal anchors, debt sustainability disciplines, a rules-based trading system, or global and regional safety nets – or in development programming such as livelihoods, health and education programming, or social safety nets. Many of these advances have come in response to crises and shocks, and some have explicitly or implicitly provided greater support to larger and less fragile economies<sup>2</sup>. Looking ahead though, fragility is poised to be the next thorny global problem for practitioners and researchers to grapple with.

The structural transformation of the economy that has fuelled long-term opportunity in much of the developing world, often as part of a broader social transformation, has either not yet been realised in many contexts facing high and extreme fragility or has involved measures that weakened or ruptured their social fabric. Factors synonymous with fragility – weaknesses in local economic conditions, poor governance and investment, inadequate infrastructure and regulatory frameworks, and sometimes conflict – have limited the structural transformation process, even when there have been more specific or short-term growth opportunities in certain sectors such as extractives. Control over economic assets and resources are often fault lines of conflict and instrumentalised through conflict. Addressing these challenges will become ever more important to meet the ambitions of youth, to achieve the climate transition; and to sustain growth globally.

### *THERE IS ENLIGHTENED SELF-INTEREST TO KEEPING THE FOCUS ON FRAGILITY*

History has shown that economic development is not a zero-sum game – we rise or fall together. Fragility disrupts global trade, increases the risk of market fragmentation, and puts food and energy security at risk. Fragmentation deepens cleavages between economic blocs, hinders growth, access to resources and co-operation on global challenges like pandemics and climate change.

While fragmentation is apparent now, longer-term interdependencies are likely to grow between larger and

wealthier economies and contexts facing high and extreme fragility. Many OECD members face the challenges of rising protectionism, responding to population aging, and securing the resources and ecosystem services to support the green transition and digital transformation. By contrast, many of these needed resources and potential economic partnerships – and certainly an increasing proportion of the workers, voters and consumers of tomorrow – are located in contexts facing high or extreme fragility. At a global level, the future population dividend will be in contexts facing high and extreme fragility. Achieving the green transition will depend on the ecosystems and natural resources of contexts exposed to high and extreme fragility.

Many development partners are looking to shift their approach to one based more on economic partnerships (Chapter 3), often with some kind of short-to medium term benefit to the companies or country concerned. To be successful, such approaches will need to address fragility, and the development needs of the partner country – it has to be win-win (Fabre and Spencer-Bernard, 2024<sup>[42]</sup>). While development remains the end goal in and of itself, there is also an enlightened self-interest to staying engaged. Not developing sustainable economic opportunities and pathways risks creating negative spillover impacts on other dimensions of fragility, including security and conflict. Strong, flexible and inclusive economies are good for peace, and peace is good for business.

### *THE SUCCESS OF THE GREEN TRANSITION DEPENDS ON HOW ITS ASSOCIATED FRAGILITY IS MANAGED*

Achieving the green transition – comprehensive and systemic shifts towards environmentally sustainable and climate-safe practices (United Nations, 2022<sup>[43]</sup>) – will depend on the ecosystems and natural resources of contexts exposed to high and extreme fragility. This will in turn depend on addressing the fragilities caused or exacerbated by their extraction. Extractive activity is already exacting a significant and visible environmental toll and affecting trends in poverty and inequality (OECD, 2024<sup>[7]</sup>), with the effects concentrated in contexts experiencing high and extreme fragility (Global Witness, 2022<sup>[44]</sup>). Extractive activity is expected to increase rapidly over the next 15 years and with it, the potential for more severe ecological impacts. According to a study for the Extractive Industries Transparency Initiative, by 2040, demand for lithium will have grown by over 904%, for graphite by 385% and for cobalt by 268% (Sturman et al., 2022<sup>[45]</sup>). Many contexts facing high or extreme fragility provide valuable ecosystem services, but the pollution and biodiversity loss that

frequently go hand in hand with the race for renewables and rare earths also compound the negative impacts of climate change and drive fragility across all dimensions (Smith, 2024<sup>[34]</sup>). Analysis of climate and environmental tipping points for contexts exposed to already high and extreme fragility shows the potential for a series of shocks that will test resilience and preparedness across all dimensions of fragility (Chapter 2).

The green transition is likely to accentuate risks of fragility for contexts with high levels of dependence on fossil fuels. Of the 28 contexts that derive over 20% of government revenues from oil and gas rents, 15 are also exposed to high and extreme levels of fragility (Prince et al., 2023<sup>[46]</sup>). Peaks in demand for fossil fuels are predicted to occur before 2030 and oil prices are likely to stay at roughly 2023 levels or decrease depending on the specific emissions scenario (International Energy Agency, 2024<sup>[47]</sup>). These factors could increase risks by causing substantial fiscal shortfalls that would impact the nature of political settlements in these contexts, especially those dependent on fossil fuel revenues and exposed to high and extreme levels of fragility (Sarkar et al., 2024<sup>[48]</sup>). In many of these contexts, oil revenues are used as a means of political control, as they provide the discretionary funds that feed into patronage-based politics (Sarkar et al., 2024<sup>[48]</sup>). These contexts also have unique economic risks, as profits from oil and gas can inflate exchange rates and “crowd out non-fuel related economic activities”, making their economies less diversified overall (Peszko et al., 2020<sup>[49]</sup>). Past examples of decarbonisation, especially among oil producers, show that shocks tend to lead to greater immiseration of populations, as elites search for alternative sources of rents, including through violent means (Sarkar et al., 2024<sup>[48]</sup>).

To date, the geopolitics of the green transition show how swiftly and effectively China has consolidated its position in the global energy market. The available data on Chinese extraction and processing (i.e. rare earth supply chains) also provide a perspective on the development landscape. China’s pursuit of rare earths and accumulation of a significant geostrategic energy advantage have existed in combination with a development strategy that has been highly effective by its own benchmarks (Zbytniewska, 2022<sup>[50]</sup>). With climate change impacts (Forster et al., 2024<sup>[51]</sup>) intensifying alongside geopolitical competition, development and security offer different (and potentially complementary) pathways to achieve more durable and cost-effective energy transitions.

However, it is difficult to see how planetary security can be prioritised sufficiently where geopolitical goals take

precedence. Climatic, ecological and geopolitical fragility are increasing. If ideas of science, global public goods and new economic models are to prevail, then development strategies must adapt to compete within the current geopolitical reality. What Lazard (2021<sup>[52]</sup>) calls “ecological diplomacy” can only work if it is empowered to resonate across geopolitical debates.

### ***YOUTH ARE ON THE FRONT LINE OF THE POLITICS OF CYBERSPACE, DIGITALISATION AND DEVELOPMENT IN HIGH FRAGILITY CONTEXTS***

Cyberspace and digital technologies are providing new arenas of competition, with networked communications becoming the new front line in soft power geopolitics (Douzet et al., 2021<sup>[53]</sup>; Voelsen, Ruhlig and Seaman, 2019<sup>[54]</sup>). Youth populations in all contexts are the key target audience for much of this content, as both local and international actors project political information, misinformation and disinformation to secure the support and attention of young people.

This is not just about youth and the digital economy but also about how digitalisation changes the terms on which young populations engage with the environment around them. In keeping with the geopolitical environment (and in some cases because of it), cyberspace and digital frameworks are fragmented and vary across contexts exposed to high and extreme levels of fragility. Such contexts are home to the most unconnected populations: in contexts exposed to high and extreme fragility in sub-Saharan Africa and South Asia, for example, less than 43% of the population uses the Internet (World Bank Group, 2023<sup>[55]</sup>). These contexts also reflect a cross section of digital divides, which have positive and negative outcomes especially for governance, women and youth inequality (discussed in more detail in Chapters 2 and 4). For every example of positive change and innovation – mobile payments such as M-Pesa and the National Payment System in Somalia (Bareisaite, Goyal and Karpinski, 2022<sup>[56]</sup>), for instance, or the growth of low-cost Internet services, digital entrepreneurship, digital education and public services digitalisation – there are unfortunately negative examples such as cybersecurity threats (including data breaches and fraud), job displacement and cost barriers that compound existing drivers of fragility.

Harnessing digitalisation, digital skills and inclusive and sustainable economic growth, as a force for young populations in high and extreme fragility contexts will require its own approach. If the real potential for large-scale job creation in Africa lies in the diffusion of digital

innovations from the lead firms to the rest of the economy, then it will depend on how that diffusion responds to the broader networks of risks and resilience that shape fragility. Moreover, the monopolisation of advanced technologies by a few countries further entrenches power imbalances and exacerbates global inequalities. The lack of international frameworks governing cyberspace makes accountability difficult, fostering suspicion among users and unbalancing global relations as the power of cyber technology and digital platforms grows (Pawlak and Géry, 2024<sup>[57]</sup>). Consequently, technology is becoming a cause and a consequence of fragility. Less technologically advanced contexts are at a significant disadvantage. Their reliance on outdated technology can expose them to cyber threats and digital espionage and limit their participation in global digital economies, including digital banking, e-commerce and other digital services.

## **FRAGILITY IS BEING INSTRUMENTALISED FOR GEOPOLITICAL ADVANTAGE**

Fragility is being instrumentalised to suppress and reverse development gains. State and non-state actors are analysing sources of risk and resilience that shape fragility not into challenges to be addressed but into situations to be leveraged and exploited as part of local and global strategies (The Economist, 2024<sup>[58]</sup>). This is within a broader dynamic whereby competition and fragility intersect and drive a sustained and escalating cycle across state, community and economic systems (Murphy, Rice and Zapf, 2024, p. 2<sup>[59]</sup>). This section highlights two such examples: the actions of Russia and of the Houthi regime in Yemen.

### ***THE EXPLOITATION OF FRAGILITY AS PART OF RUSSIAN STRATEGY***

Russia’s armed aggression in Ukraine and interventions in Africa,<sup>3</sup> the Middle East and the Western Balkans are – while occasionally opportunistic and transactional in execution – emblematic of a deliberate approach to geostrategic competition with the West. These activities go beyond what Bilal (2024<sup>[60]</sup>) terms hybrid warfare to include elite-driven commercial and economic interests and calculated interventions in the development space focused on risks and factors of resilience. A template of engagement is emerging that involves linking specific Russian interests with key drivers of risk and resilience in contexts with high fragility. Over the past decade in particular, Russian state and non-state agents have sought to capitalise on

opportunities for “quick, transitory gains” (Galeotti, 2021<sub>[61]</sub>) in contexts that are experiencing high political and security fragility and especially in contexts with significant natural resource wealth and where there is dissatisfaction with Western support (Adibe, 2019<sub>[62]</sub>). The means of Russian aid range from security sector assistance and sector-specific finance to digital disinformation and geostrategic disruption often aimed at undermining Western or other competitors’ influence.

The fragility profiles of Russian partner contexts exhibit a number of shared features:

- high or extreme security fragility usually involving an ongoing security crisis<sup>4</sup> during which beleaguered leaders seek external sponsorship or paramilitary support to exert control over the country;
- an abundance of mineral resources or hydrocarbon assets coupled with permeable patronage-based political systems, usually with an authoritarian strongman leader<sup>5</sup>;
- a geographically strategic area (most notably in terms of supply chains or the opportunity to cause and manipulate forced displacement) and a history of military or diplomatic ties with Russia (often with an emphasis on a Soviet-era development legacy);
- deteriorating relations between the government and its international partners and/or associated perceived power vacuums.

For example, Russia’s significant involvement in the Central African Republic capitalised on the vacuum left by the withdrawal of Western partners. This allowed Russia, as a rival security provider, to step into a sympathetic political settlement through sustained disinformation and select military support (Dukhan, 2020, p. 2<sub>[63]</sub>; Mazet, 2024<sub>[64]</sub>). Russia’s partnerships in certain contexts with high and extreme fragility are limited (Droin and Dolbaia, 2023<sub>[65]</sub>), as was the case in Nigeria, or they are peripheral if Russia perceives the country as still susceptible to Western pressure (Brennan, 2019<sub>[66]</sub>) or finds that potential partners are reluctant to engage based on their previous experience (Githua, 2024<sub>[67]</sub>).

Featuring anti-colonial rhetoric and reviving Cold War Soviet networks, Russia’s current strategy instrumentalises fragility for elite-focused gains at the expense of broad-based socio-economic gains, which complicates efforts to advance health, well-being, sustainable development and economic performance in many countries. Developing sources of resilience is key to preventing the negative impact of Russian interventions. Russia’s engagement in

Africa, for example, is mostly focused on high and extreme fragility contexts, where its intervention often compromises the space for development and aggravates drivers of fragility, including by undermining social and political cohesion and exacerbating environmental degradation (Siegle, 2021<sub>[68]</sub>). Russia targets and exploits fragilities, in large part by using a network of (semi)-deniable actors that are not legally recognised as part of the Russian state but are nevertheless closely connected to the Kremlin (Marten, 2019, p. 412<sub>[69]</sub>; Lanfranchi and de Bruijne, 2022<sub>[70]</sub>). Of the 16 African contexts identified by the Africa Center for Strategic Studies as subject to Russian disinformation, 14 experience high and extreme fragility (Ferragamo, 2023<sub>[71]</sub>). In the medium to long term, the economic concessions demanded by Russia risk creating a highly “unequal relationship, in which Moscow extracts much more than it offers” (Watling, Danylyuk and Reynold, 2024<sub>[72]</sub>). In some areas, such as the Central African Republic, the environmental impact will leave generational fragility, as land degradation, deforestation and water pollution combine to undermine resilience across societal and human dimensions (Morin et al., 2021<sub>[73]</sub>).

With few exceptions, Moscow has not meaningfully engaged in development co-operation in contexts that are exposed to high and extreme fragility, and it remains an insignificant trade partner to sub-Saharan African states in particular.<sup>6</sup> However, Russia’s trade with Africa, estimated at USD 17.1 billion in 2021 and focused on food and energy (Droin and Dolbaia, 2023<sub>[65]</sub>), is growing. Announcements made at the November 2024 Russia-Africa summit in Sochi concerning apparent initiatives on debt relief, development projects and refinancing (TASS, 2024<sub>[74]</sub>) may be indicative of an evolution in Russia’s strategy and a sign of its willingness to compete with existing development models as part of a more comprehensive approach, particularly in Africa.

### ***THE MANIPULATION OF FRAGILITY AT THE CENTRE OF CONFLICT STRATEGY IN YEMEN***

The strategic logic of instrumentalising drivers of fragility is similarly evident in the choices of the Ansar Allah Houthi regime in Yemen. Acknowledging the regime’s recent attacks on Israel and Red Sea shipping, this subsection highlights two examples of such instrumentalisation at different levels: first, the leveraging of a potential environmental disaster associated with the tanker FSO Safer and, second, the calculated degradation of the governance and economic resilience of the internationally recognised government of Yemen (IRGY) in Aden. Both actions can be understood in the context of the Houthi’s war objectives. Like the Russian activities discussed in the



previous subsection, they are also examples of direct targeting of sources of fragility, notably in the environmental and economic dimensions.

Given the challenges associated with the conflict prevention agenda, as discussed in Chapter 3, the UN-led response in 2023 to the environmental risks associated with FSO Safer is noteworthy as an intervention where the value of prevention can be clearly measured. Moored off Yemen's Red Sea coast, the decaying tanker held 1 million barrels of oil – so much that an oil spill from FSO Safer would have been the fifth-largest ever from a tanker, with catastrophic environmental, humanitarian and economic impacts on a context already exposed to extreme fragility and war (UN, 2023<sup>[75]</sup>). The Houthi regime, intent on extracting concessions, leveraged this multidimensional risk for years. However, the process was impressively monitored from multiple sources and effectively managed by a UN-led effort that successfully mediated an agreement and ultimately oversaw the transfer of oil to a secure tanker in August 2023 (Ralby, Ralby and Soud, 2023<sup>[76]</sup>; UN, 2023<sup>[77]</sup>). Aspects of the agreement remain to be completed, but the immediate outcome of the effort was to avoid the compounding of multidimensional drivers of fragility. The marine ecosystem was protected and the already struggling local human environment – including the fisheries sector and critical humanitarian supply chains – was spared the impact of what would have unquestionably been a devastating shock.

The economy is a critical focal point of the conflict in Yemen, intersecting in significant ways with political, human and security fragility (Wennmann and Davies, 2020, pp. 5-7<sup>[78]</sup>). Actions carried out by the Houthi regime have focused on revenue-generating assets (notably oil) and critical infrastructure (ports and roads) as well as on economic institutions (private banks and state institutions such as the Central Bank of Yemen and government ministries), as exemplified by the de facto existence of two currencies and banking systems (International Crisis Group, 2024<sup>[79]</sup>). A complex political economy has developed that puts stress on a private sector trying to balance competing elite interests with evolving dictates on tax, customs, currency and real day-to-day security concerns. The Houthi regime has demonstrated its capacity to evolve and innovate despite its relative international isolation, successfully building alliances – most notably with Iran (itself intent on manipulating regional fragilities through Hamas and Hezbollah) and with Russia – and addressing weaknesses in its own systems by improving tax systems, controlling trade and manipulating currency to prevent inflation (Davies and Wennmann, 2022, p. 13<sup>[80]</sup>). The

Houthi regime's actions also have severely disrupted the IRGY's infrastructure, including through port attacks and coercive restrictions that further impact the IRGY's revenue capacity by requiring importers to redirect energy shipments from Aden to Hodeida, the main Red Sea port under Houthi control (Ardemagni, 2023<sup>[81]</sup>). These activities are clearly aimed at undermining the resilience of the IRGY and increasing the human and economic fragility in IRGY territories, but they also impact the humanitarian response to alleviate the human suffering from the conflict. Disruptions to the response include the targeting of aid workers (International Crisis Watch, 2024<sup>[82]</sup>).

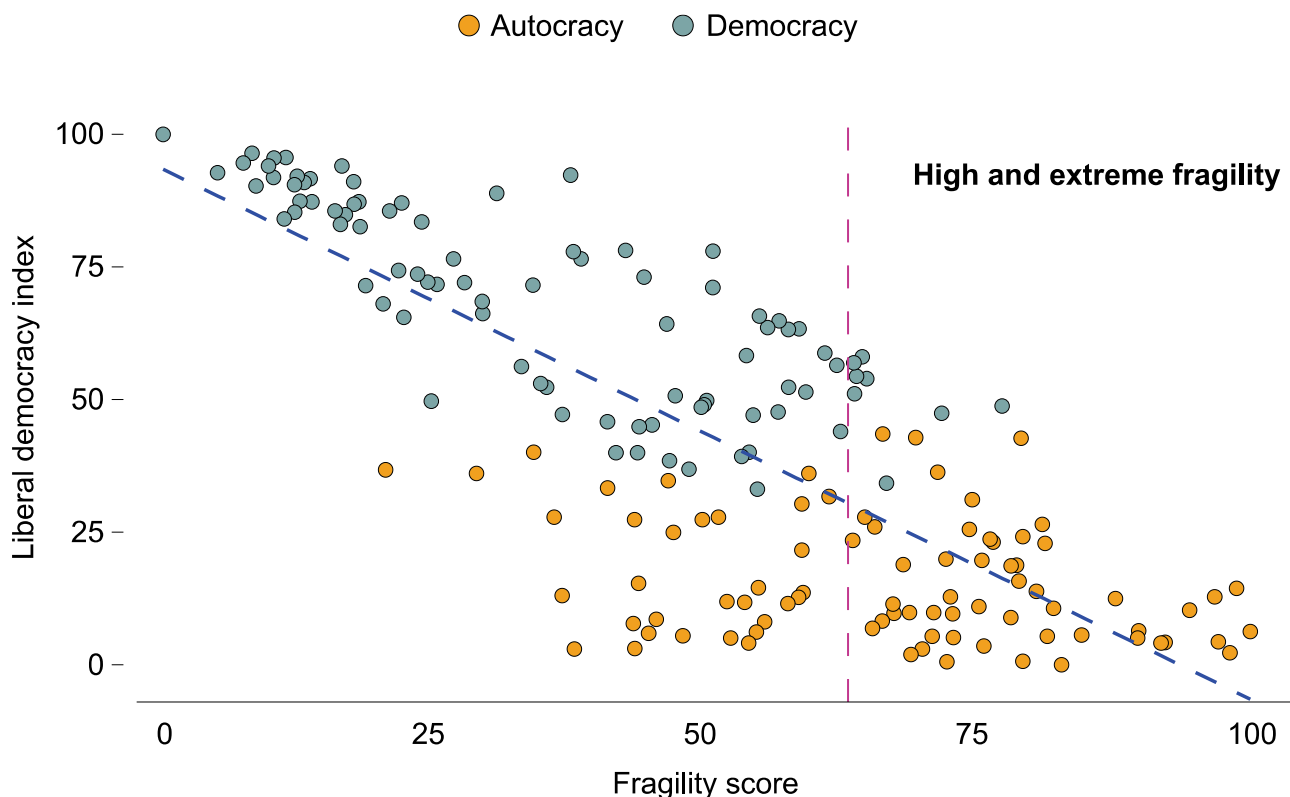
## CHALLENGING THE MYTH OF RESILIENT AND EFFECTIVE AUTOCRACIES

The narrative of effective autocracies has become more widespread since 2012, infused with ideas of what Repucci and Slipowitz (2022<sup>[83]</sup>) call an emerging autocratic "order" driven by state and non-state grievances (ideological, resource-based and ethnic) and economic inequality that are enabled and dispersed across increasingly influential digital platforms. Fragility analysis places these popular narratives in context. Autocracies come with significant and often more diverse presentations of fragility than do democratic contexts (Chapter 2). Though some contexts have adapted forms of "authoritarian capitalism" (Gat, 2007<sup>[84]</sup>) with some success, these often stand as outliers due to significant sources of resilience, mostly based on economic strength and security. Most autocracies, particularly in contexts exposed to high and extreme fragility, have not brought about development. (Figure 1.2).

In contexts exposed to high and extreme fragility, autocratic power is often more transient, as reflected in the frequent occurrence of attempted and realised coups d'état (Chapter 2) and tendency to drift towards high levels of corruption and inequality, low levels of economic growth, unaccountable hierarchies, and higher risks of conflict (Cheeseman, 2024<sup>[85]</sup>; Deudney and Ikenberry, 2009<sup>[86]</sup>). One notable departure from this trend is the degree to which autocracies have adapted cyber and digital technologies to build surveillance and information systems that allow them to better monitor and control threats to their power, including by enabling them to influence popular narratives in Western democratic discourse as an extension of autocratic soft power. Autocracies such as Myanmar, for example, have been innovative in the use of force and digital surveillance.



**Figure 1.2. Most contexts facing high and extreme fragility are autocracies with low scores on the Liberal Democracy Index**



Note: The liberal democracy index contains information on voting rights, the freedom and fairness of elections, freedoms of association and expression, civil liberties and executive constraints. The liberal democracy index and fragility score were rescaled from 0 to 100. A higher fragility score is associated with more fragility while a higher level on the liberal democracy index is associated with a higher level of democracy.

Source: Coppedge et al. (2024<sub>[87]</sub>), *V-Dem [Country-Year/Country-Date] Dataset v14*, <https://doi.org/10.23696/mcwt-fr58>.

StatLink  <https://stat.link/sitacm>

## THE ATTRACTIVENESS OF VIOLENCE AS AN INSTRUMENT OF POLITICS

Violence of any type is a cause and a symptom of fragility. Violence is an intrinsic part of human nature and experience, as reflected in the drive for status, for the resources associated with status, for belonging and for the means to protect the gains achieved (Martin, 2018<sub>[88]</sub>). Consideration of risks and coping capacities across all dimensions of fragility influences the decision, whether by the leader of a drug cartel or by a state, to use violent force. While many actors identify violence as a last resort, for others it is a preference – effective and efficient when compared with other options to achieve political, religious, economic or other objectives.

Global trends associated with violence, whether to project power or in self-defence, are leading drivers of political narratives at multiple levels. There were more recorded state-based armed conflicts in 2023 than at any time since

1946 (Rustad, 2024<sub>[89]</sub>) and their return to prominence is one of the primary reference points in geopolitical debates. Organised violence (state-based, non-state and one-sided violence) was recorded in 43 contexts in 2023, including 27 that were exposed to high and extreme fragility. Between 2021 and 2023, the conflicts between Ethiopia and the Tigray People’s Liberation Front; between Russia and Ukraine; across the Middle East; and between rival factions in Sudan accounted for the majority of the 600 000 people killed in conflict around the world (Rustad, 2024, pp. 9-10<sub>[89]</sub>). Though the number of non-state violent conflicts has declined since the last States of Fragility report, from 84 in 2022 to 75 in 2023, the number of fatalities was higher. Globally, fatalities from one-sided violence dropped from 11 900 in 2022 to 10 200 in 2023 across 35 countries (Rustad, 2024, pp. 7-8<sub>[89]</sub>).

Across these trends, two in particular stand out. First, there has been a notable increase in non-state violence in some contexts experiencing medium to low fragility (Chapter 2),

driven by greater violence associated with organised crime. Fatalities resulting from conflicts between organised crime groups in contexts with medium to low fragility exceeded fatalities from conflicts involving rebel groups in contexts with high and extreme fragility (Davies et al., 2024<sup>[90]</sup>). The second and not unrelated trend of note is the persistently high level of gender-based violence in the world. Globally, approximately 51 100 women and girls were killed by intimate partners or family members in 2023 and an estimated 736 million women, or nearly one in three, have been subjected to physical and/or sexual intimate partner violence, non-partner sexual violence, or both at least once in their life, according to UN Women (2024<sup>[91]</sup>). No country is on track to achieve gender equality by 2030, and nearly 40% of countries stagnated or declined across indicators of the Gender Index between 2019 and 2022 (Equal Measures, 2024, p. 3<sup>[92]</sup>); almost all of these countries are contexts exposed to high and extreme levels of fragility.

### **SUPPORT FOR BUILDING AND PREVENTING PEACE IS DECLINING WHEN IT IS NEEDED MOST**

Support for critical coping capacities for mitigating, disincentivising and preventing violence is not adapting to growing challenges or is simply being deprioritised. This trend affects not only peacebuilding, where there are striking shortfalls in ODA to support the areas of conflict prevention and justice, among others (Chapter 3). It is also indicative of the drift of multilateral and regional peace institutions and mechanisms away from the arenas where decisions regarding peace and violence are considered. We are seeing fracturing of peace processes, with parallel processes running “in tandem, in competition, or in complete ignorance of each other” (Peter and Rice, 2022<sup>[93]</sup>). Building resilience in a fragmented and competitive world will depend on building capacity to achieve and sustain peace. Capacity for this type of resilience is often the missing component in contexts where political and economic elites are focused on short-term gains.

At the same time, regional and international institutions with traditional peace and security roles are facing a crisis of confidence. The criticisms of the UN, an organisation designed to reflect 20th-century power relations and struggling for political traction and finance, are also being levelled at other, similar institutions such as the African Union and the Economic Community of West African States. Should the loss of faith in the UN force it to scale back its role in crisis management (Gowan, 2023<sup>[94]</sup>), the peace burden would fall mostly on individual states that are

increasingly focused on competition over collaboration and often reluctant to accept the risks that accompany effective peacekeeping and peacebuilding. A likely outcome would be shortfalls in peace capacity (e.g. for operations, mediation, resolution and peacebuilding), meaning that conflicts will be left to run their course at ever higher costs to lives and livelihoods, as observed in the Middle East.

The global cost of violence has failed to drive renewed investment in peace. In 2023, the global economic impact of violence reached USD 19.1 trillion, equivalent to 13.5% of global GDP (Vision of Humanity, 2024<sup>[95]</sup>), suggesting that new and stronger arguments for peace are needed. It is far from certain that arguments based on the human and geostrategic advantages of peace would be more convincing than financial arguments. But how communities, states and organisations think about peace is fundamental to what happens next. The recent trend away from top-down and towards bottom-up approaches ignores the nested reality and complex political economy of violence and peace. Developing a framework or frameworks to understand and reimagine the connections between “local agreement-making” and national peace processes and also acknowledging the different processes at play would be steps in the right direction (Bell and Wise, 2022<sup>[96]</sup>).

## **INVESTMENT IN SECURITY IS NECESSARY, BUT EFFECTIVE INTERNATIONAL STATECRAFT WILL REQUIRE SMARTER ALIGNMENT OF FOREIGN, DEVELOPMENT AND PEACE POLICIES**

The relationship between defence and development is not an “either or”: it is a “both and”. **Carsten Staur**,  
*Chair of the OECD Development Assistance Committee*

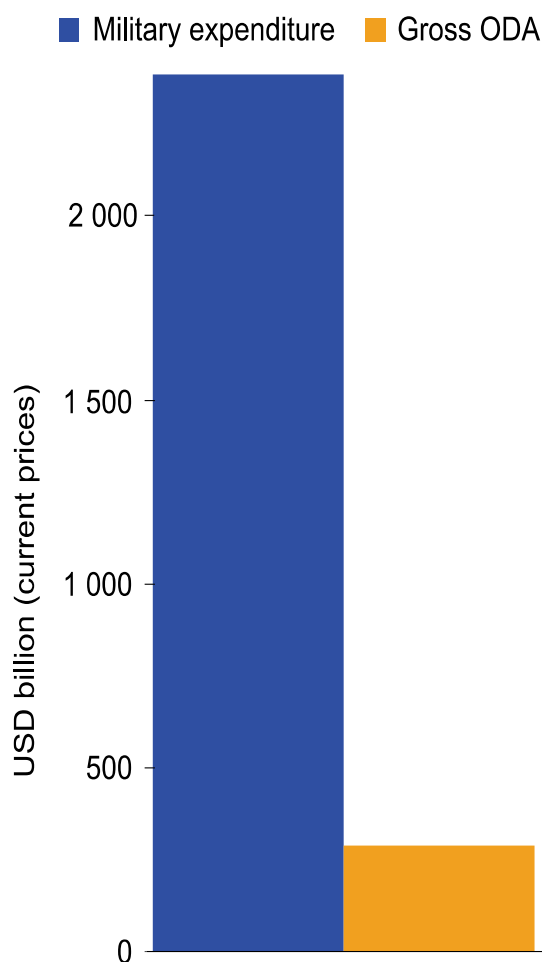
Tailoring the application of peace, security and development policies is a central element of statecraft. In many states, including OECD member countries and contexts exposed to high and extreme fragility, foreign policies that were initially securitised in response to terrorist attacks in the early 2000s are now evolving to confront challenges associated with geopolitical rivalries. Greater priority is being given to military capabilities and to security-focused missions and partnerships that are often centred on varying types of security sector assistance (but not on UN peacekeeping, which has itself become more

securitised through the application of stabilisation doctrine) as well as to border security and economic security, in particular energy and technology security (Farinha and Youngs, 2024<sup>[97]</sup>). In many cases, the trend towards increased investment in defence and security corrects the security deficits that developed following the end of the Cold War (Posaner and Kayali, 2024<sup>[98]</sup>). The evolution in foreign policies is also driven by state-centric motivations that in some cases go hand in hand with moves to adopt more nationalistic policy frameworks, which in turn trigger international competition on a host of issues (Wilson, 2019<sup>[99]</sup>).


Within this overall securitising trend, there are reasons for optimism as well as concern. The moves by the United Kingdom to revisit the strengths of stabilisation policies based on lessons identified from experiences of the last 20 years and the evolution of Germany's stabilisation policy and moves towards greater emphasis on prevention and peace are two examples that reflect an interest in developing instruments that acknowledge the complementarity of foreign, security and development approaches in addressing interdependent challenges in high and extreme fragility contexts (Rynn, 2022<sup>[100]</sup>; Germany Federal Foreign Office, 2022<sup>[101]</sup>). Similarly, the

United States Global Fragility Act is an innovative response to previous security-led approaches that in many cases delivered sub-optimal outcomes (Special Inspector General for Afghanistan Reconstruction, 2021, pp. 14-18<sup>[102]</sup>). It remains to be seen if these initiatives will be outliers or the vanguard of a new era of development and peace cohesiveness but early evidence on implementation in contexts such as Mozambique and Papua New Guinea, points towards the potential of better alignment of development, peace and security approaches (U. S. Government, 2025<sup>[103]</sup>).

The comparative scale of global investment in defence and development underlines the difficulty of finding balanced strategic approaches across development, foreign and security policies. According to calculations by the Stockholm International Peace Research Institute, world military expenditure reached a record total of USD 2 388 billion in 2023, the ninth year of consecutive increases (Tian et al., 2024<sup>[104]</sup>). As Figure 1.3 shows, the contrast with development assistance is stark: Total combined ODA in 2023 (gross disbursements) amounted to USD 288.5 billion in 2023, which was more than 10% of military expenditure that year (Stockholm International Peace Research Institute, 2024<sup>[105]</sup>; OECD, 2024<sup>[106]</sup>).

**Figure 1.3. Global military expenditure and total official development assistance in 2023**

Source: OECD (2024<sub>[106]</sub>), *CRS: Creditor Reporting System (flows) database*, <http://data-explorer.oecd.org/s/z1>; SIPRI (2024<sub>[107]</sub>), *Military Expenditure Database*, <https://doi.org/10.55163/COGC9685>.

StatLink  <https://stat.link/tmdqz>

The disproportionality between security and development is not in itself problematic, however there is a tendency in some countries to draw a false equivalence between security and development spending that overlooks their complementarity. Public attitudes on development assistance can vary significantly (Yanguas, 2018<sub>[108]</sub>) for example, in a recent survey by Focus 2030 (2024<sub>[109]</sub>), 58% of French respondents favoured increasing or maintaining the amount of French ODA. Older surveys conducted in the United States have found that respondents overestimated government spending on foreign aid by a factor of about 30:1 (DiJulio, Norton and Brodie, 2016<sub>[110]</sub>; Wu, 2022<sub>[111]</sub>). Other research suggests that perceptions of ODA are closely aligned with respondents' economic preferences for domestic policy and level of interest in foreign affairs (Prather, 2024<sub>[112]</sub>).

These perceptions carry political weight and therefore influence how foreign, defence and development policies are balanced, constructed and directed. The current correlations between rising defence expenditure and fewer resources for development and humanitarian support (Andrés, 2024<sub>[113]</sub>) in contexts exposed to high and extreme fragility need to be carefully tracked, especially where projected cuts in ODA in 2025 could drive an even larger gap that would further undermine their complementarity. For example, embedded within the military expenditures presented in Figure 1.3 are substantial (though mostly unverifiable) expenditures on security sector assistance, sometimes called 'train and equip' support; such spending comes at a time when record low amounts are going to security sector governance, according to the latest ODA data (Chapter 3). This in part indicates a failure to protect the substantial investments in security made over the years with complementary support for governance, especially in

contexts with high and extreme fragility. This risks repeating the mistakes of the recent past where the subordination and in some cases appropriation of international development (including security sector reform and governance) to defence priorities (Adams, 2012<sub>[114]</sub>) led to reduced effectiveness of security and development approaches and to unsustainable peace (Special Inspector General for Afghanistan Reconstruction, 2021, p. 66<sub>[102]</sub>).

## THE INTERNATIONAL HUMANITARIAN, DEVELOPMENT AND PEACE ARCHITECTURE IS NOT FACILITATING POLITICAL LEADERSHIP

In 2024, the UN Security Council, Group of Seven (G7) and Group of Twenty (G20) alone organised 148 separate events at ministerial level or higher that focused on international development and related issues such as climate, finance, gender and health (Focus 2030, 2024<sub>[115]</sub>). These were just a fraction of the events for high-level political attendees that are scheduled in any calendar year, a surfeit that leaves most countries having to select which events to prioritise with political representation and which to have administrative staff attend. Assessing the quality of outcomes emerging from these international development events is difficult. Many political figures and analysts suggest that mistrust, especially between the Global North and contexts in the Global South, is undermining the effectiveness of such events, which frequently deliver abstract conclusions and where increasing participation is not always matched by improved performance across a host of peace and development issues (Gowan, 2024<sub>[116]</sub>; International Peace Institute and Institute for Economics and Peace, 2024<sub>[117]</sub>).

In other cases, many fora where political leadership was considered essential for implementing outcomes, development and peace policy are being left to technocratic or apolitical expertise “with no skin in the game” (Opalo, 2023<sub>[118]</sub>), thereby denying it legitimacy and credibility among politicians and in the eyes of sceptical publics, regardless of their exposure to fragility. As seen with initiatives such as FOCAC, business is increasingly being conducted beyond established multilateral frameworks, with political energy and momentum emerging from other points in the global order where alliances and agreements are more easily forged. Arguably this is leading to a drift towards a preference for transactional development over the transformational

potential inherent in sustainable development. The lack of high-level political support for the potential of country platforms and the disparity between support for security sector assistance and security sector governance are cases in point (Chapter 3). Development co-operation is inherently political; and while countries hold the primary responsibility for their own development outcomes, creating clear incentives for development partnerships that prioritise political will and leadership is a point of strategic advantage for donors and partners alike (Matthys, 2024<sub>[119]</sub>).

## THE GEOSTRATEGIC CHALLENGE FACING DEVELOPMENT AND PEACE ACTORS

The global trends highlighted in this chapter show the scale of the development challenge to address entrenched fragility in an environment where there is less international co-ordination, greater competition among development models and diminishing confidence in the ability of the multilateral system to effect positive change. The trends do not necessarily suggest that the post-Second World War order is being rejected wholesale. Nor do they foretell its demise. But they signal to those invested in development and sustaining peace that traditional formulas and approaches need to be reassessed.

### *REALISING THE POTENTIAL OF DEVELOPMENT AS AN INSTRUMENT OF INTERNATIONAL STATECRAFT*

The trends highlighted in subsequent chapters of this report show that ODA and development co-operation are most effective when they are consistent, sustained and tailored to the specific needs and priorities of a context. They also show that where donors are increasingly risk-averse in their engagement, especially in contexts with extreme fragility, development assistance can be reactive and short term (Murphy, Rice and Zapf, 2024, p. 3<sub>[59]</sub>) and in some cases superficial, leading to a low-risk, low-return dynamic. In a geostrategic environment with multiple development assistance offers, being more competitive means being smarter about building development co-operation and responding not just to the risks associated with fragility but to the specific means of building resilience for the long term. Taking the lead on strengthening resilience could be seen as a fundamental element in a renewed approach to conflict prevention and also as a complement to foreign and national security policy (Murphy, Rice and Zapf, 2024, pp. 14-15<sub>[59]</sub>).



On the financing side, some multilateral institutions are already responding to this message. Informed by their respective fragility strategies, the International Monetary Fund and the World Bank have both moved to adapt their practices over the past five years. Arguably, some regional development banks have moved even faster, with both the Asian Development Bank and African Development Bank showing a willingness to innovate and share risk with partners in contexts exposed to high and extreme levels of fragility (African Development Bank Group, 2024<sub>[120]</sub>).

The picture is different on the political side. The UN and the African Union, for instance, are struggling for traction in an environment of multipolar side deals (Gowan and Forti, 2023<sub>[121]</sub>). This has a global as well as localised impact as it risks diminishing the potential for UN and collective responses to global aspects of complex issues such as climate, cyber security and trade (Smith, 2024<sub>[34]</sub>). Contexts experiencing high and extreme fragility have more options for partnerships today. The capacity of multilateral institutions to compete amid the emerging power dynamics of a multipolar world will determine the success or failure of multilateral initiatives as will the perceived and actual quality of the partnerships (reflected in repeated calls from all sides for more inclusive partnerships). Failing to compete risks losing hard-won gains, principles and values to geopolitically driven expediency.

### ***STRATEGIC ENGAGEMENT: STAYING ENGAGED AND MORE EQUAL ACCOUNTABLE PARTNERSHIPS***

The severity of fragility vary across contexts from year to year but for many people in the world, high and extreme fragility is and has been the norm. In 2023, Gambia and Timor-Leste, though still exposed to high fragility, showed notable improvements, and Moldova stood out for its progress in the medium to low fragility category. The indicators that capture human fragility have been showing improvement, a valuable sign of development effectiveness in the most challenging of circumstances. But for 29 contexts, exposure to high and extreme fragility is chronic. In 25 years of OECD analysis and 10 years of applying the OECD fragility framework, there are not many examples of contexts that have navigated a path to greater resilience. This sobering reality raises fundamental questions for those who promote peace and development about the soundness and flexibility of their strategy, policy, financing and approaches. But it does not necessarily reflect the failure of their efforts.

Every context is responsible for its own development trajectories and, as Chapter 2 highlights, the nature of some

political settlements leaves insufficient political will to address drivers of fragility. It is important in these situations to stay engaged with these contexts so that, when an opportunity arises, it can be seized and supported. For contexts where engagement is easier, recognising their agency and options will require reimagining partnerships. Being inclusive will not be sufficient. Responding to the accountability of local partners through more equal partnerships looks set to be a significant indicator of whether peace and development actors can rise to the challenge (Campbell, 2018<sub>[122]</sub>). Finally, development co-operation is a small component of international activity and a relatively small feature of the economic landscape in most contexts experiencing high fragility. While managing expectations is always important, protecting and developing the catalytic value of humanitarian, development and peace assistance is essential for contexts with high and extreme fragility.

### ***ANALYSING FRAGILITY HIGHLIGHTS THE URGENT NEED TO PRIORITISE CONFLICT PREVENTION AND TO ADDRESS BUILDING RESILIENCE AS DEVELOPMENT AND FOREIGN POLICY OBJECTIVES***

The trends identified in this chapter and developed in the rest of the report show that increases in violence and the willingness to use violence need to be countered but that international, state and community capacity to respond is in most cases diminishing. Nowhere is this more apparent than on questions around conflict prevention. Each of the perspectives identified above demonstrate in different ways how security and development questions are deeply entwined in contexts with high or extreme fragility – across climate, cyber, politico-economic and youth issues. Security-led responses alone will not address all these challenges, therefore making development work for conflict prevention is essential for balanced responses that respect the resources and interests of donors and partners. Finding a mechanism for packaging prevention analysis that works for development has been a key challenge for donors and partners and this will be considered in Chapter 3.

Finally, the trends in political fragmentation and instrumentalisation outlined in this chapter are part of a wider conversation around resilience that threads through the following chapters. The discussion in Chapter 2 recognises that declining or diminishing resilience equally drives fragility and increases risks. Chapter 3 shows how the World Bank, the UN, the United States and others are adapting resilience frameworks even as ODA to support

resilient capacities, especially those within the peace pillar, is in decline. Finally, Chapter 4 shares perspectives on the pursuit of resilience by contributors from Comoros, Iraq, the Solomon Islands, Somalia, and Timor-Leste. For these and other contexts, developing more effective approaches to resilience includes linking state and institutional capacity to drivers of fragility across all dimensions. As autocracies and democracies present different strengths and

weaknesses, considering political settlements and capacities for reform is just as important as considering what will enable long-term growth and poverty alleviation (Papoulidis, 2023<sup>[123]</sup>): an effort in one area, such as poverty, is unlikely to succeed unless it is balanced with an approach that recognises the interplay of risk and resilience capacities. Without fragility analysis, policy responses may be too narrowly defined and strategically flawed.

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## NOTES

<sup>1</sup> The final number of new donors is unclear. One report suggests 16 new donors had made commitments as of December 2024. See Aloo (2024), “World Bank nears \$100bn target as 16 new donors join IDA replenishment drive”, <https://www.theafricareport.com/370447/world-bank-nears-100bn-target-as-16-new-donors-join-ida-replenishment-drive/>.

<sup>2</sup> For example, while both the World Bank and the International Monetary Fund are embracing a larger role in contexts facing medium to low fragility, and have pursued Voice and Reform initiatives since the 2000s, the USD 650 billion issuance of special drawing rights (SDR) in 2021 inevitably favoured larger members, as the issuance was based on shareholding. Several members have since reallocated a portion of their SDR allocation to provide concessional support through the Poverty Reduction and Growth Trust. For more information, see <https://www.imf.org/en/About/Factsheets/Sheets/2023/special-drawing-rights-sdr> and <https://www.imf.org/en/News/Articles/2021/08/23/pr21248-imf-managing-director-announces-the-us-650-billion-sdr-allocation-comes-into-effect>.

<sup>3</sup> At a July 2022 press conference, Russian Foreign Minister Sergei Lavrov said he expected Africa would play a growing role in Russia’s Foreign Policy Concept because of both long-term and short-term interests and as “a result of what the West is doing in respect of Russia”. For more details, see [https://mid.ru/en/foreign\\_policy/news/1824012/](https://mid.ru/en/foreign_policy/news/1824012/).

<sup>4</sup> The Normandy Index (NI) measures the level of threat to peace, security and democracy across the world and gives an indication of a country’s level of resilience to the global threats set out in the European Union Global Strategy such as terrorism, energy insecurity, disinformation and crime. Countries most at risk in terms of peace and security are those with lower NI scores. Russia’s presence and influence are most evident in countries with NI scores of five or lower out of ten. See [https://www.europarl.europa.eu/thinktank/en/document/EPRS\\_STU\(2024\)762368](https://www.europarl.europa.eu/thinktank/en/document/EPRS_STU(2024)762368).

<sup>5</sup> Freedom House’s average freedom index for the African countries where Russia is active is almost half that of the other African countries. See <https://africacenter.org/spotlight/mapping-a-surge-of-disinformation-in-africa/>.

<sup>6</sup> The value of Russia’s trade with Africa, for example, is just one-tenth that of China’s, according to International Monetary Fund data (<https://data.imf.org/?sk=9d6028d4-f14a-464c-a2f2-59b2cd424b85&sid=1514498277103>). For more information, see also <https://www.csis.org/analysis/great-power-competition-implications-africa-russian-federation-and-its-proxies>.







# 2 THE STATE OF FRAGILITY IN 2025

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*This chapter presents the main findings from the 2025 edition of the OECD multidimensional fragility framework, including the state of global fragility and the key characteristics of the 61 contexts experiencing high or extreme fragility. The analysis identifies the most pertinent trends to consider for humanitarian, development and peace actions, highlighting fragility trends related to politics, violence, economics and how they impact on issues such as inequality, food insecurity and forced displacement.*

# In Brief

## The state of fragility in 2025

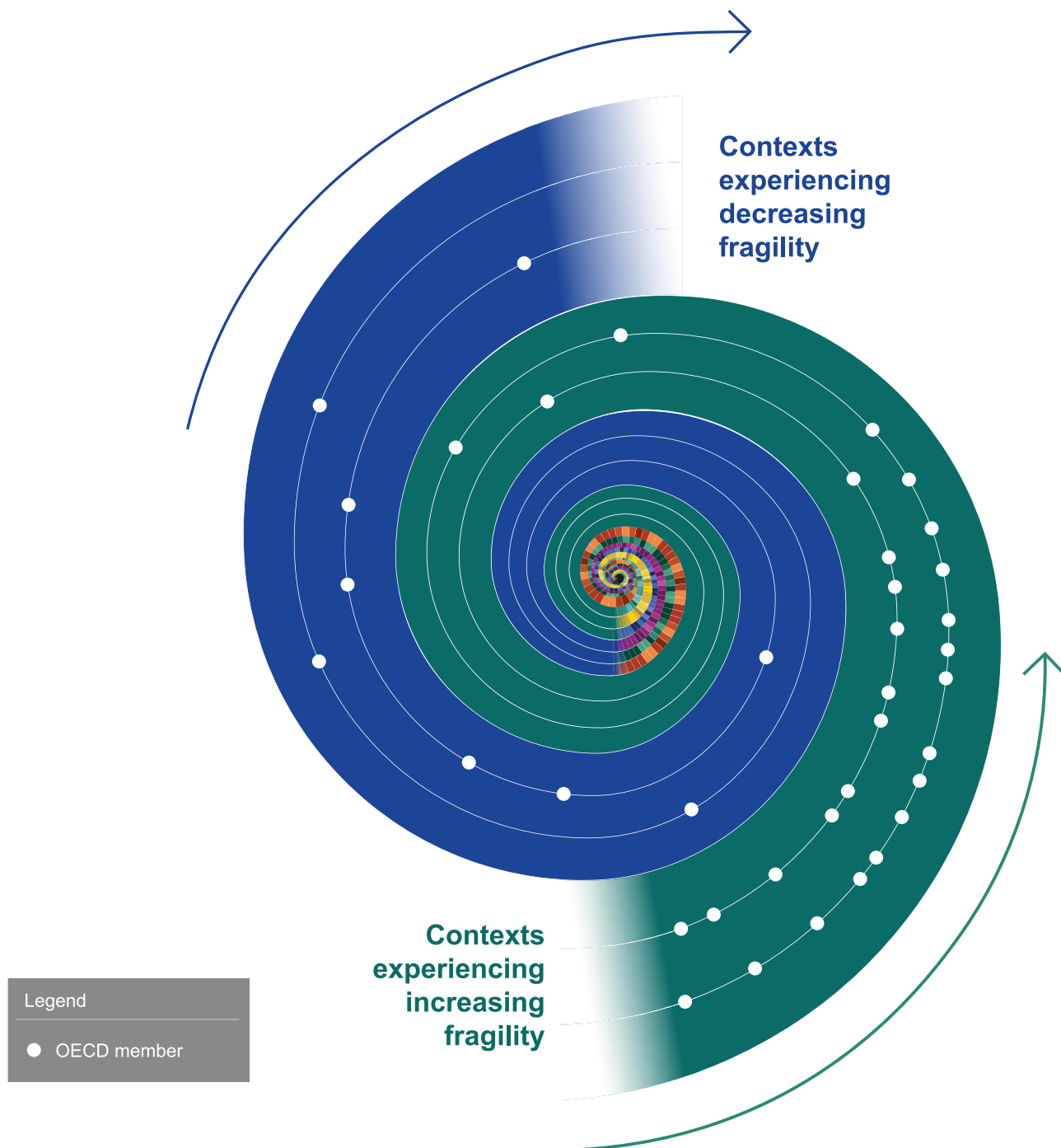
- **All 177 contexts analysed by the OECD multidimensional fragility framework are exposed to some level of fragility, but 43 are identified as experiencing high fragility and 18 as experiencing extreme fragility. These 61 contexts are the main focus of this report.**
- **Political polarisation, increasing financing needs and data gaps are severely undermining the achievement of the 2030 Agenda for Sustainable Development.** No context with high or extreme fragility is on track to achieve critical Sustainable Development Goals (SDGs) related to peace, hunger, health and gender equality.
- **Negative trends related to security, political and economic dimensions are most prominent.** These trends are closely connected to rising inequality, poverty, food insecurity and forced displacement. Contexts experiencing high and extreme fragility are home to 25% of the world's population but 72% of the world's extreme poor. By 2040, 92% of the world's extreme poor could be living in contexts with high or extreme fragility, according to calculations for this report.
- **Many types of economies experience high and extreme fragility, including more middle-income contexts (34) than low-income contexts (26).** The higher the level of fragility, the harder the recovery has been from the pandemic, with median per capita growth stabilising around 2% for contexts facing high fragility, and negative median growth for contexts facing extreme fragility. In 2023, such contexts received less than 5% of global net foreign direct investment (FDI) inflows, though they are home to one-quarter of the world's population.
- **Violent conflict is highly concentrated in contexts with high and extreme fragility.** In 2023, 27 of the 61 contexts with high and extreme fragility were affected by organised violence. At least 1 of the participants in 47 of the 59 state-based armed conflicts was a context with high or extreme fragility.
- **Recent gains on gender equality are exposed to multiple threats.** Eight of the ten contexts with the widest gender gaps are exposed to high and extreme fragility. Negative trends on gender equality and violence against women and girls are associated with democratic backsliding, as many leaders of autocratic and autocratising contexts instrumentalise gender issues for political objectives, curtailing women's rights.
- **Contexts with high and extreme fragility generate and host the majority of the world's forcibly displaced.** Over 100 million refugees and internally displaced persons originate in contexts exposed to high and extreme fragility, representing almost four fifths of all forcibly displaced persons worldwide.

## GLOBAL FRAGILITY TRENDS IN 2025

Previous States of Fragility reports have pointed to a now missed critical juncture in delivering on the 2030 Agenda for Sustainable Development (2020) giving way to an age of crises (2022) propelled by the global systemic shocks of COVID-19, climate change and Russia's war of aggression against Ukraine. In 2025, the findings from the OECD multidimensional fragility framework substantiate the assessment of Chapter 1 of a world in flux, where all contexts experience some level of fragility (Infographic 2.1).

However, the concentration of fragility among contexts with the least capacity to cope is an established trend; 43 of the 177 contexts analysed are identified as exposed to high fragility and 18 to extreme fragility.<sup>1</sup> In 2025, 2.1 billion people were living in these 61 contexts, representing 25% of the world's population. Yet they accounted for 72% of the world's extreme poor in 2024. By 2040, 92% of the world's extreme poor could live in contexts with high or extreme fragility, according to projections prepared for this report.



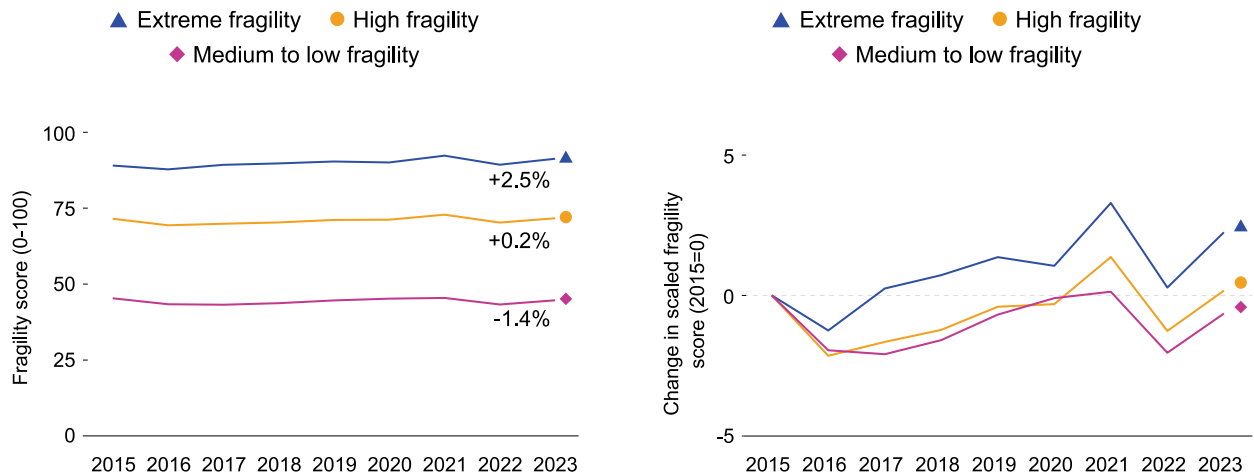
**Infographic 2.1. Fragility is universal, as all contexts exist along a spectrum of risks and resilience**

As shown in Figure 2.1, global fragility has increased moderately overall. Fragility in contexts with extreme exposure has increased the most, though a notable increase is also observed among those contexts not eligible for official development assistance (ODA) with medium to low fragility. While the non-ODA-eligible contexts have greater resilience than contexts in the high and extreme categories, the trend of increasing fragility is a reflection of

political tensions and rising discontent around economic pressures like inflation.


The gaps between those with the most and least exposure continue to grow (Figure 2.1), reflecting trends associated with poverty and inequality that are analysed in more detail elsewhere in the chapter. The widening gaps also show that the global recovery since COVID-19 has not extended equally to all contexts.

**Figure 2.1. Fragility increased the most in contexts exposed to extreme fragility**



Note: Each coloured line represents a population-weighted mean of the fragility score of the contexts within each category. In 2023, 18 were exposed to extreme fragility, 43 to high fragility, and 116 to medium to low fragility (ODA and non-ODA eligible). The graph in the left panel shows fragility scores rescaled from 0 to 100 (least to most); the graph in the right panel shows the relative evolution of fragility for each category starting from 0 in 2015.

Source: UN DESA (2024<sup>[11]</sup>), *2024 Revision of World Population Prospects* (database), <https://population.un.org/wpp/>.

StatLink  <https://stat.link/fji7n9>

The ability to track exposure to sources of risk and resilience over longer periods of time has substantially enhanced the understanding of both the drivers of fragility and its implications. The OECD fragility framework was created in 2015, the same year that the SDGs were launched. Since then, fragility has been persistently high

among a specific set of contexts (Figure 2.1). Of the 56 contexts identified with the first application of the fragility framework in 2016, 50 continue to be exposed to high and extreme fragility. Yet, this apparent stasis masks significant dynamism. Box 2.1 reviews some of the nuances behind the trends.

## Box 2.1. Main trends in fragility since 2015

Exposure to fragility has decreased the most since 2015 (noting that all contexts started from a different baseline) in Timor-Leste, Maldives, The Gambia, Armenia, Qatar and the Republic of Moldova; many of the contexts with decreased fragility have recently democratised. Conversely, exposure to fragility increased the most in the Bolivarian Republic of Venezuela, Syria, Myanmar and Nicaragua.

### Increasing fragility is a global phenomenon

Fragility has increased since the introduction of the fragility framework particularly in the security, political and economic dimensions. Reflecting the increasing incidence of multiple forms of violence, fragility in the security dimension has increased in 93 out of 177 contexts. Political and societal fragility have increased in 107 of the contexts, driven by the third wave of autocratisation. Fragility in the economic dimension also has increased in more than half, or 94, of the contexts. Though the overall trends associated with environmental fragility have remained relatively static, there are several examples of increasing environmental fragility concentrated at a regional level, such as in the Middle East and the Sahel.

### Decreases in human fragility suggest there is potential for positive returns from development co-operation

Fragility in the human dimension has decreased across 135 out of 177 contexts since 2015. The contexts with the greatest improvement are Sierra Leone, Iraq (though it is still exposed to extreme fragility), Nigeria and Bangladesh. In contrast, human fragility has increased the most in the Democratic People's Republic of Korea, Venezuela and Libya. Interestingly, Venezuela has also experienced protracted humanitarian needs while Libya has been enmeshed in a civil war; both are highly dependent on natural resource revenues (oil), and both face political pressures (civil war for Libya and a macroeconomic crisis for Venezuela).

### Every fragility profile continues to feature a unique presentation of risk and resilience

Though security fragility has decreased in Libya and Syria (in each case departing from a high baseline), it intersects with other dimensions of fragility, especially political and societal, pointing to a situation of negative peace in both contexts that could easily fall apart. The overthrow of the Baathist regime in Syria at the end of 2024 is a recent illustration. In Afghanistan, the transition from armed conflict to peace led to lower security fragility but greater societal fragility particularly due to increased fragility for women and girls.

Conflicts in Ethiopia, Sudan and Ukraine explain their increased security fragility since 2015. But Ukraine stands apart due to its significant resilience across multiple dimensions, and its overall exposure to fragility, despite three years of conventional warfare on its territory, is still classified as medium to low. This assessment also reflects the sustained commitment of OECD Development Assistance Committee (DAC) members to ensure Ukraine's resilience since the escalation of Russia's armed aggression in 2022. By contrast, regional conflict and the impact of a sustained economic crisis have increased Lebanon's fragility despite its significant resilience for much of the period since 2015. Another example of a context-specific fragility profile is Haiti, where organised criminal violence and lack of resilient capacities at the state level, reflected in its severe exposure to societal and human fragility, have increased security fragility since 2015.

Note: The human dimension of fragility was added in States of Fragility 2022, but historical data is available.

The global shocks identified in the 2022 States of Fragility report – the systemic impact of COVID-19, the political and economic effects of Russia's invasion of Ukraine, and the ongoing effects of accelerating climate change – continue to leave their mark. But their impacts have since been compounded by a series of diverse regional shocks such as conflict across the Middle East, Myanmar, Sudan and the

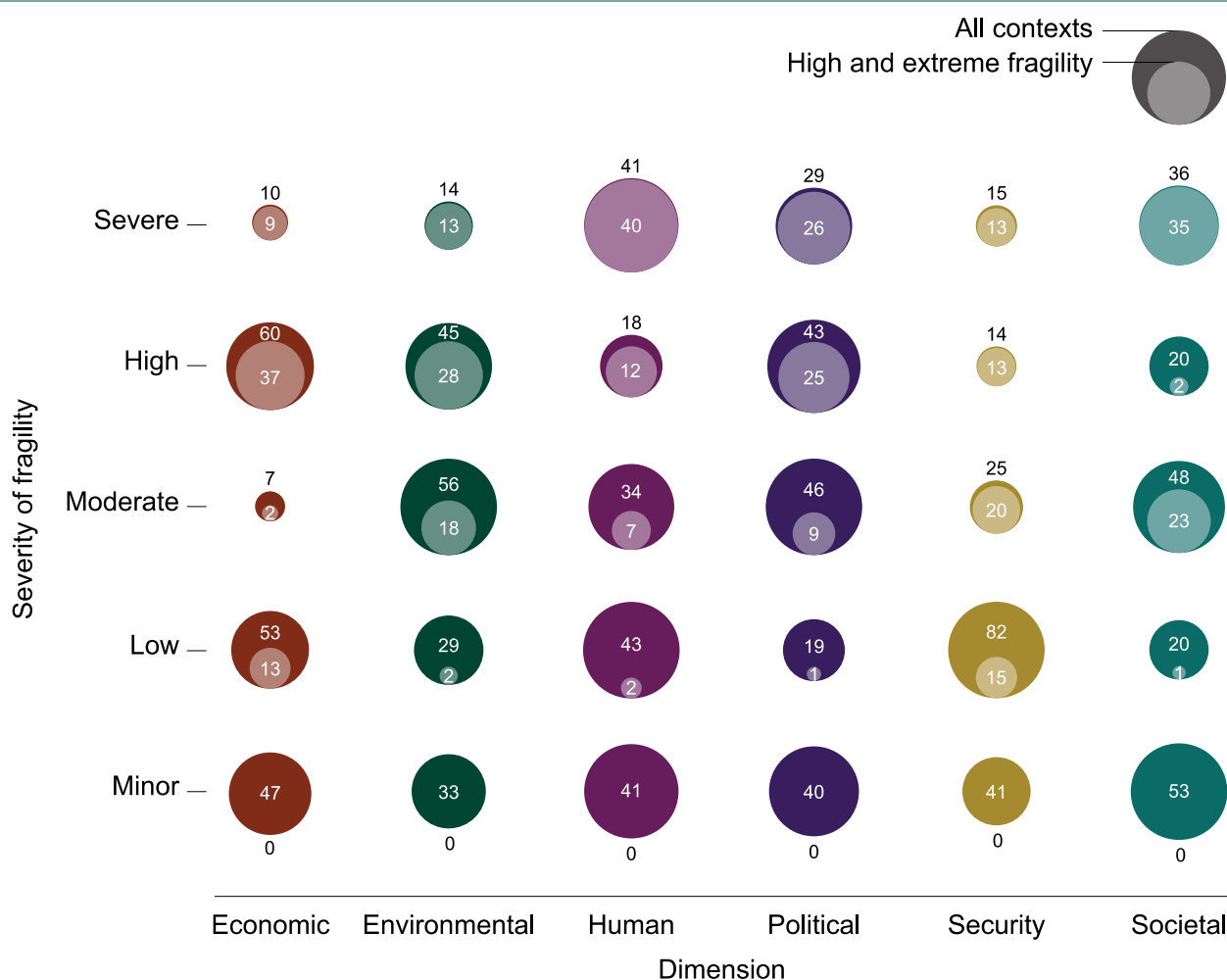
Sahel. The shocks from these events will continue to be felt most acutely in contexts with high and extreme fragility, exacerbating existing risks and further undermining already weak sources of resilience (Figure 2.2).

Climate change offers a particularly stark illustration. While its impacts are unevenly distributed, it is clearly compounding regional drivers of fragility in the Sahel and

Middle East as politics, economies and societies struggle to adapt to the pressing realities of desertification, water scarcity, flooding, droughts and heat waves. The most visible impact of these combinations of fragility can be seen in the skyrocketing number of displaced persons, mostly driven by conflict, and the record demand for humanitarian assistance. As 2025 began, the United Nations (UN) anticipated that 305.1 million people would need humanitarian assistance and protection due to climate emergencies, conflicts and other crises (UN OCHA, 2024<sup>[2]</sup>).

Moreover, approximately 91% of people in need of assistance or protection were living in contexts experiencing high and extreme fragility; most of the remaining live in Ukraine (exposed to severe security fragility) and contexts in Latin America including in Central America (mainly El Salvador and Honduras). Reflecting the scale of the challenge, the UN and partner organisations appealed for USD 47.4 billion to assist 189.5 million people across 72 countries in 2025 (UN OCHA, 2024, pp. 7-8<sup>[2]</sup>).

**Figure 2.2. While fragility is universal, exposure is concentrated in the 61 contexts with high and extreme fragility**



Note: For further information on the methodology for clustering contexts according to their degree of fragility, see <https://www3.compareyourcountry.org/states-of-fragility>. The colours of the clustering are made according to the severity of fragility for the 61 contexts exposed to high and extreme fragility. They correspond to the shades of the snail from darker shades (more fragile) to lighter shades (less fragile).

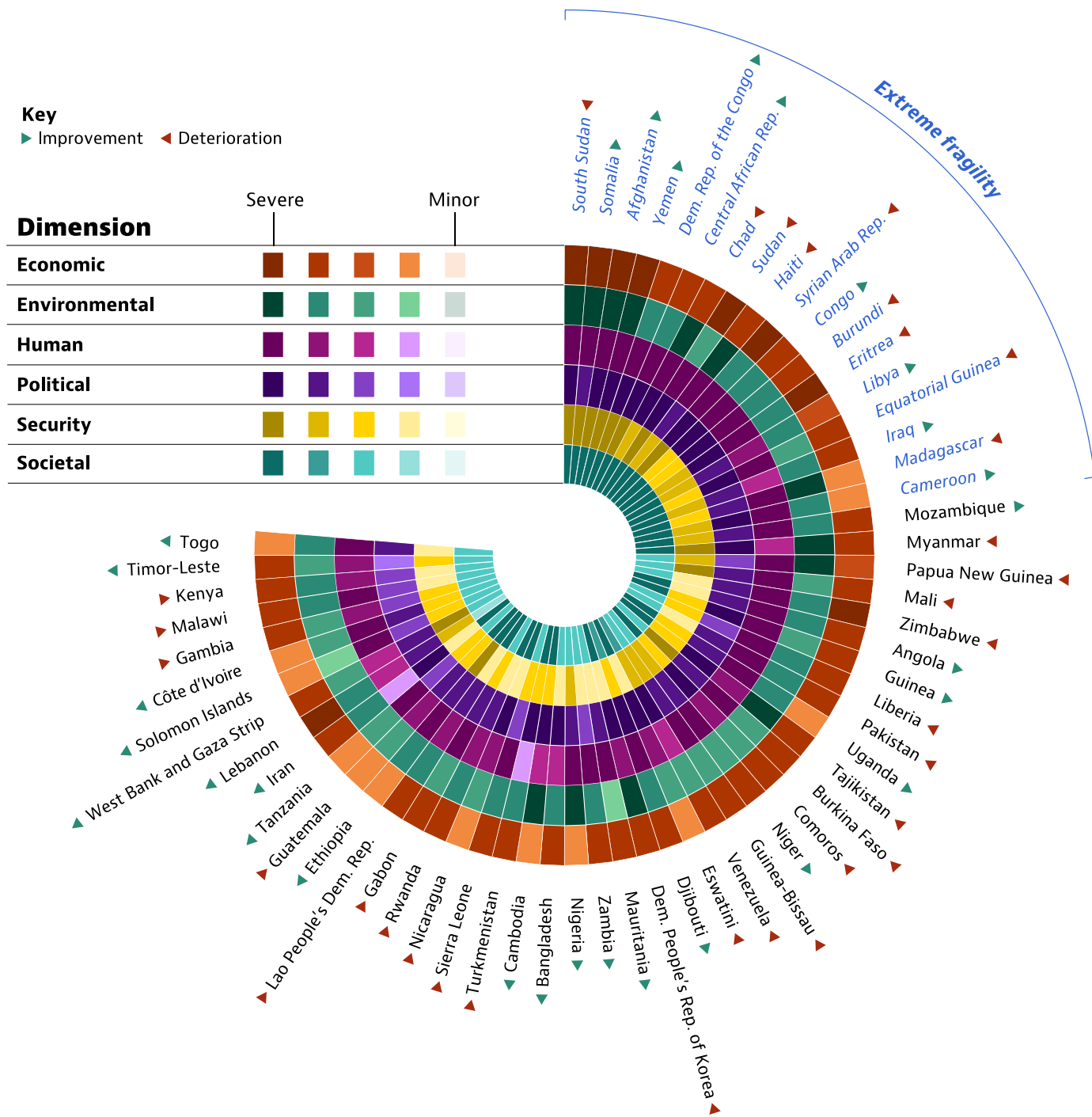
StatLink  <https://stat.link/k8lwxi>

The OECD multidimensional fragility framework, depicted in Infographic 2.2, offers unique insight into the diversity of characteristics across all dimensions of fragility among the 61 contexts experiencing high and extreme fragility. The different shadings of the colours used for dimensions

represent various degrees of severity of fragility experienced in each context in a particular dimension. By showcasing this diversity, the framework helps reconcile the complexity of fragility with the simplicity needed to guide effective and differentiated action in every context.



Infographic 2.2. The OECD multidimensional fragility framework



**Context moving** from medium to low → high fragility

Gabon	Malawi
Lebanon	Rwanda

**Context moving** from high → medium to low fragility

Benin	Honduras
Lesotho	

Note: For more information on the methodology for the OECD's multidimensional fragility framework, please see the methodological notes found in Annex A.

## Box 2.2. Movements between levels of fragility

Among the 61 contexts with high and extreme fragility, 29 contexts were assessed as experiencing decreasing fragility with 32 contexts experiencing increasing fragility. In contrast to previous editions of this report, no context has moved away from the extreme fragility category.

### Three contexts moved from high fragility to extreme exposure to fragility

Cameroon, Libya and Madagascar moved to extreme exposure to fragility:

- **Cameroon** has extreme exposure to fragility, reflecting severe societal, political and human fragility. Most notably, this reflects the deterioration of its education sector alongside high environmental fragility (dwindling food and water resources) and security fragility (driven by the ongoing crisis in the Lake Chad Basin).
- **Libya** was on the cusp of being classified as exposed to extreme fragility in 2022. It has now entered this category due to deterioration across multiple dimensions of fragility, including exposure to severe societal fragility and to high security, political, human and environmental fragility. Its points of economic resilience were insufficient to counterbalance the overall increase in fragility.
- **Madagascar** shifted to extreme exposure to fragility based on its exposure to severe human, environmental and societal fragility and to high political fragility. Environmental fragility has especially increased significantly since the 2022 fragility framework assessment. Madagascar is the fourth most climate change-affected country in the world (UN, 2024<sup>[3]</sup>) and one of the few megadiverse countries that is home to a high percentage of the world's biodiversity.

### Three contexts moved from high fragility to medium to low exposure to fragility

Benin, Honduras and Lesotho, three contexts that have sustained high fragility since 2015, moved towards medium to low exposure to fragility in this edition of States of Fragility.

- **Benin** experiences moderate levels of societal, political and environmental fragility, low economic fragility, but severe human fragility. Since the last States of Fragility report, fragility has slightly diminished in the environmental, political and societal dimensions. Benin has tended to be classified as between high exposure to fragility and medium to low exposure to fragility (as is also the case for Malawi and Timor-Leste).
- **Honduras** moved towards medium to low fragility thanks first and foremost to improvements in the political dimension (i.e. change of government in 2022) and also to changes in the societal dimension. However, fragility in the security dimension increased, as Honduras was under a state of emergency for much of 2023 in an attempt to emulate security gains achieved by El Salvador (InSight Crime, 2024<sup>[4]</sup>).
- **Lesotho** moved towards medium to low fragility exposure through improvements in the political, environmental and economic dimensions. However, a recent increase in food insecurity and the El Niño-induced drought suggest these gains could be short-lived (World Vision, 2024<sup>[5]</sup>). Lesotho also remains exposed to high economic, environmental and human fragility.

## Four contexts moved from medium to low fragility towards high exposure to fragility

Gabon, Lebanon, Malawi and Rwanda became exposed to high fragility in 2025:

- **Gabon** showed deteriorations in the security and human dimensions and is characterised by severe human fragility as well as high political and economic fragility.
- **Lebanon** is experiencing severe economic fragility as well as high security, political and environmental fragility. There was a noticeable increase in economic and security fragility, likely the result of myriad interconnected crises including the country's public debt default, its rising poverty rate and the Beirut port explosion. The most recent data do not capture developments that took place in 2024.
- **Malawi** shifted to high fragility exposure, with deteriorations across the environmental, political, economic and societal dimensions. It is exposed to severe human fragility as well as high economic and environmental fragility. Malawi has tended to be classified between high exposure and medium to low exposure to fragility.
- **Rwanda** is exposed to high fragility, mainly due to deteriorations in societal and political fragility. In particular, Rwanda is exposed to severe societal as well as high environmental, political, human and economic fragility. Nevertheless, there have been improvements in the economic and human dimensions that reflect a longer-term development trajectory.

## Main trends in contexts with medium to low fragility

While this report focuses mainly on contexts exposed to high and extreme fragility, trends across contexts exposed to medium to low fragility show a similar range and diversity of fragility. While OECD members are among the most resilient contexts, it is nevertheless noteworthy that fragility increased in 29 of the 38 members, reflecting the impact of the COVID-19 pandemic response and the need to stay focused on the fundamentals of resilience during a period of high volatility (Infographic 2.1 above). Beyond the OECD, fragility profiles are particularly diverse, as illustrated by the examples of Ukraine, Russia and Fiji:

- **Ukraine** retains many points of resilience despite the severe impact and deterioration of its security fragility which is now severe due to the Russian war of aggression, that began in February 2022. Resilience is particularly notable in the political, societal and human dimensions with a slight decrease in political fragility in the past two years. Ukraine's resilience was also strengthened in other areas such as government cybersecurity capacity.
- **Russia** has increased the repression of political dissent and domestic civil society following the decision to launch a war of aggression against Ukraine, increasing fragility in the political and societal dimensions. While economic fragility has also increased due in part to sanctions, Russia remains quite resilient: Gross domestic product (GDP) per capita has grown since 2021 due to high energy revenues and war-related fiscal stimuli, though there are signs that the economy is slowing (Stognei and Seddon, 2024<sup>[6]</sup>).
- **Fiji** has experienced improvements in every dimension, with declines especially in societal, political and economic fragility. These gains partly reflect the first peaceful transfer of power to a coalition government at the end of 2022 (Runey, 2023<sup>[7]</sup>) and the repeal of a restrictive media law, opening more space for civil society (CIVICUS, 2023<sup>[8]</sup>).

Sources: UN (2024<sup>[3]</sup>), "Climate-affected Madagascar adapts to new reality", <https://news.un.org/en/story/2024/02/1146737>; InSight Crime (2024<sup>[4]</sup>), InSight Crime's 2023 Homicide Round-Up, <https://insightcrime.org/wp-content/uploads/2023/08/InSight-Crimes-2023-Homicide-Round-Up-Feb-2024-2.pdf>; World Vision (2024<sup>[5]</sup>), "Lesotho Declares National Disaster: Food Insecurity Due to El Niño-Induced Drought", <https://www.wvi.org/stories/global-hunger-crisis/lesotho-declares-national-disaster-food-insecurity-due-el-nino-induced>; Stognei and Seddon (2024<sup>[6]</sup>), "The surprising resilience of the Russian economy", *Financial Times*, <https://www.ft.com/content/d304a182-997d-4dae-98a1-aa7c691526db>; Runey (2023<sup>[7]</sup>), "Case study: Fiji", in *The New Checks and Balances: The Global State of Democracy 2023*, <https://www.idea.int/gsod/2023/chapters/asia-pacific/case/fiji/>; CIVICUS (2023<sup>[8]</sup>), *Fiji: Repeal of restrictive media law, reverse of travel bans and other reform commitments a positive signal for civic freedoms*, <https://monitor.civicus.org/explore/fiji-repeal-of-restrictive-media-law-reverse-of-travel-bans-and-other-reform-commitments-a-positive-signal-for-civic-freedoms/>.

## PROGRESS ON THE 2030 AGENDA HAS FALTERED IN MOST HIGH AND EXTREME FRAGILITY CONTEXTS

The SDGs remain the unifying framework for sustainable development, and their substance will inform the potential of the Pact for the Future, the Global Digital Compact, the Declaration on Future Generations, the Fourth International Conference on Financing for Development, and other emergent frameworks that may shape a post-2030 conversation where geopolitical necessity meets the reality of global fragility. Achieving the SDGs is a stated priority of DAC members and almost all partners experiencing high or extreme fragility. As of July 2024, 58 of the 61 contexts with high or extreme fragility had presented voluntary national reviews at the UN High-level Political Forum, demonstrating a steady increase in engagement over the last ten years.

However, global progress on achieving the SDGs is decisively off track, highlighting concerns around the suitability and relevance of the international architecture noted in Chapter 1 (Sachs, Lafortune and Fuller, 2024<sup>[9]</sup>). The loss of momentum is compounded by growing financing gaps, estimated at USD 4 trillion yearly in 2023 compared to USD 2.5 trillion in 2015 (UNODC/OECD/World Bank, 2024<sup>[10]</sup>). Increased political polarisation, within-country income inequality and human security concerns have made it more difficult to address increasingly interconnected challenges (UNDP, 2024<sup>[11]</sup>). Gaps in terms of data quality and availability to track the SDGs (Box 2.3) raise questions about the extent to which it is possible to

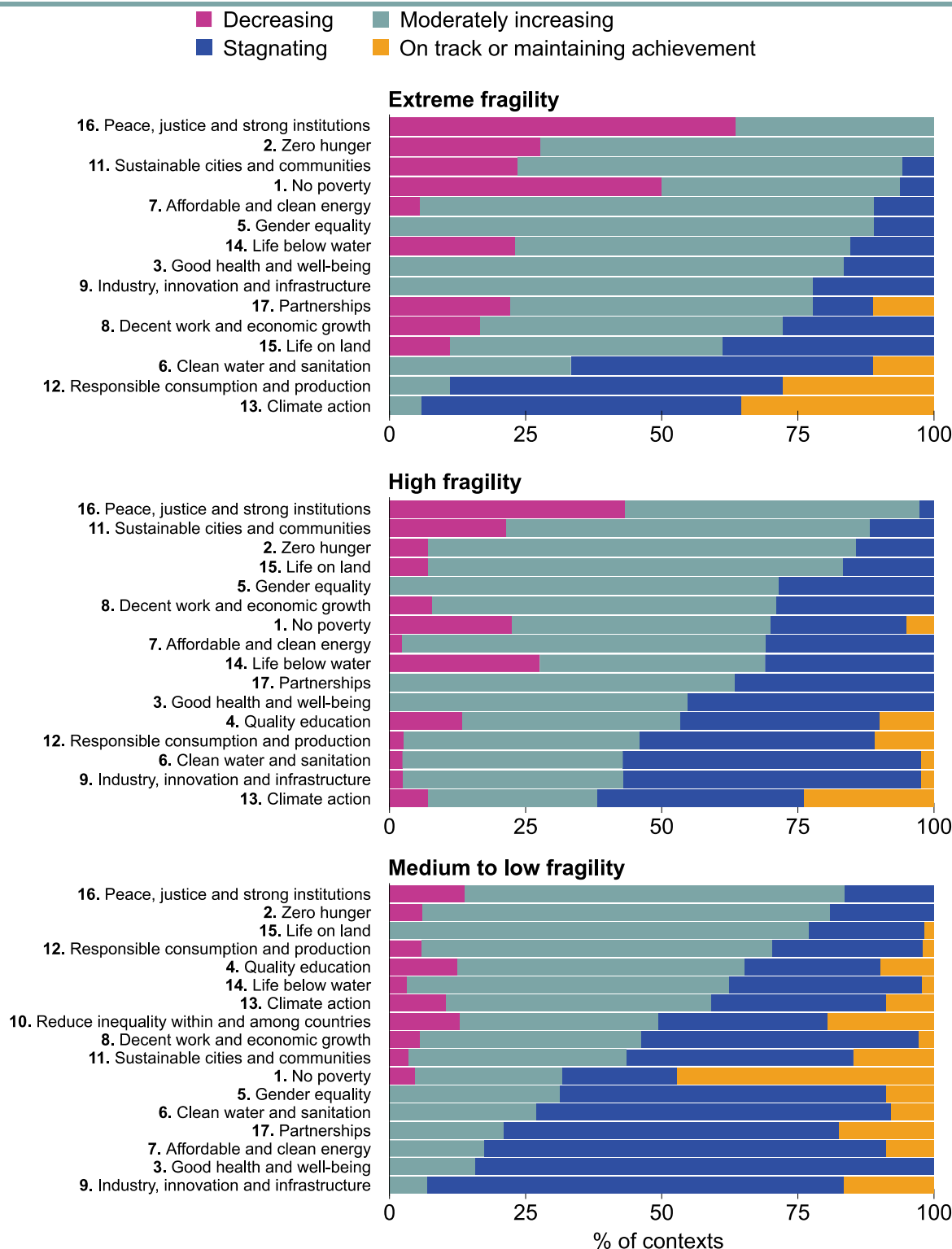
track SDG progress accurately and comprehensively. With this caveat in mind, this section provides preliminary reflections using existing sources.

### *CONTEXTS WITH HIGH AND EXTREME FRAGILITY ARE LOSING GROUND ON POVERTY REDUCTION AND ON PEACE, JUSTICE AND STRONG INSTITUTIONS*

Not a single context with high or extreme fragility is on track to achieve even 8 of the 17 SDGs (Figure 2.3). Progress has reversed or is stagnating for over 75% of these contexts, according to available data, towards achieving SDGs 1 (no poverty); 2 (zero hunger); 5 (gender equality); 11 (sustainable cities and communities); 15 (life on land); and 16 (peace, justice and strong institutions). Of particular concern is that in over 38% of contexts with high and extreme fragility, progress on SDG 16 has decreased, and in 28%, it has decreased on SDG 1, showcasing limited economic recovery from COVID-19 and the effects of compounding crises. Only 2 contexts are on track to achieve SDG 1 while none are on track to achieve SDG 16. By way of comparison, 43% of contexts exposed to medium to low fragility are on track to achieve SDG 1, indicating that progress to end poverty is being made almost exclusively in contexts with relatively lower exposure to fragility. Among contexts exposed to high and extreme fragility, 16 out of 60 with data availability are on track to achieve SDG 13 (climate action), and 9 are on track to achieve SDG 12 (responsible consumption and production). However, the overall picture is one of net regression on SDG achievement from projected and expected trends presented in the 2022 States of Fragility report.



**Figure 2.3. Almost all contexts facing high and extreme fragility are not on track to achieving the Sustainable Development Goals**



Note: The figure shows only the Sustainable Development Goals (SDGs) for which sufficient data on progress are available (i.e. with context coverage of more than half in each group). In each panel, the SDGs are listed in descending order starting with those for which progress reversed or stalled in the highest proportion of contexts. Medium to low fragility contexts are all contexts on the OECD fragility framework. Only the category on track or maintaining achievement means that the specific SDG goal will be attained.

Source: Authors' calculations based on data in Sachs, Lafortune and Fuller (2024<sup>[9]</sup>), *Sustainable Development Report 2024: The SDGs and the UN Summit of the Future*, <https://s3.amazonaws.com/sustainabledevelopment.report/2024/sustainable-development-report-2024.pdf>.

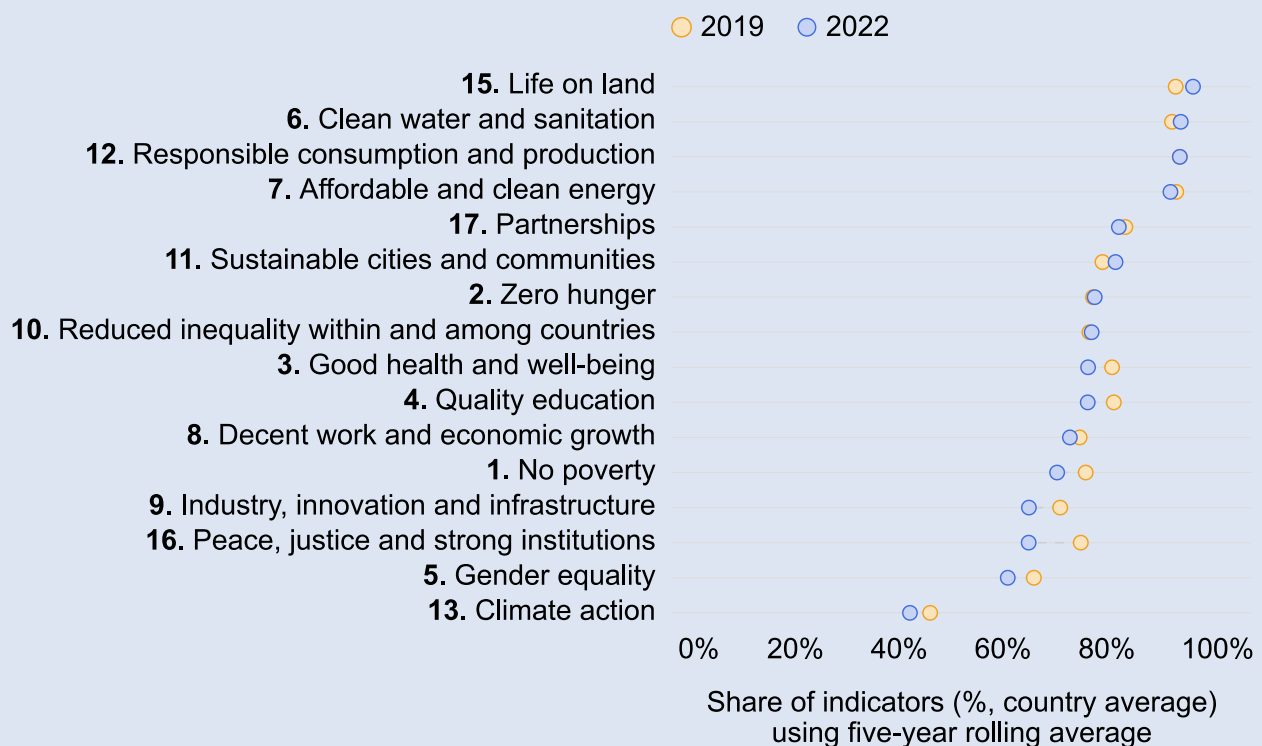
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### Box 2.3. The state of data to track progress on the Sustainable Development Goals

There are widely known gaps in the availability, timeliness and quality of data to track progress on the SDGs worldwide (Kitzmueller, 2019<sup>[12]</sup>) including for data on marginalised groups. For instance, international comparable data on goals related to SDGs 5 (gender equality), 13 (climate action) and 16 (peace, justice and strong institutions) are available for fewer than half of the world's countries (Min, Chen and Perucci, 2024<sup>[13]</sup>). Data quality challenges and gaps tend to be more acute in contexts with high and extreme fragility, due in part to insufficient resources allocated to their statistical systems (Medina Cas, Alem and Bernadette Shirakawa, 2022<sup>[14]</sup>), and this is often symptomatic of their lower levels of administrative capacity, particularly for contexts experiencing extreme fragility or conflict.


Based on the World Bank's statistical performance indicators, contexts with high and extreme fragility improved their reporting, on average, on just 5 of the 16 SDGs in 2019-22 – a decline compared with 2015-19 when reporting improved on 10 of the 16 goals. The rate of reporting has declined for critical goals, particularly for SDGs 1 (no poverty), 5 (gender equality), 9 (industry, innovation and infrastructure) and 16 (peace, justice and strong institutions). Data gaps create blind spots for policy makers, with lack of granularity, accuracy and comparability being particularly acute in regard to vulnerable groups (e.g. the displaced, the homeless, and ethnic and religious minorities) and for gender-specific indicators (World Bank Group, 2021<sup>[15]</sup>).

### Figure 2.4. Sustainable Development Goal data coverage is declining in contexts exposed to high and extreme fragility



Note: Data are based on a five-year rolling average of data availability of indicators across each SDG as per the methodology of the World Bank Statistical Performance Indicator framework.

Source: World Bank Group (2021<sup>[15]</sup>), *World Development Report 2021: Data for Better Lives*, <https://www.worldbank.org/en/publication/wdr2021>; Kitzmueller, Brian and Gerszon Mahler (2019<sup>[12]</sup>) "Are we there yet? Many countries don't report progress on all SDGs according to the World Bank's new Statistical Performance Indicators", <https://blogs.worldbank.org/en/opendata/are-we-there-yet-many-countries-dont-report-progress-all-sdgs-according-world-banks-new>; World Bank Group (2024<sup>[16]</sup>), *Statistical Performance Indicators (database)*, <https://github.com/worldbank/SPI>.

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## TRENDS IN CONTEXTS WITH HIGH AND EXTREME FRAGILITY

This section focuses on the main intersecting trends within and across each of the six dimensions of fragility, with an emphasis on how sources of risk and resilience combine in various ways to produce different outcomes. This is not an exhaustive analysis. Rather it showcases the adaptability of the framework to analyse fragility at different levels, as a means to make sense of how the world works and how policies can be designed to address interconnected challenges.

### *POLITICAL UNREST, VIOLENCE AND ECONOMIC FRAGILITY CONTINUE TO RISE, BUT PROGRESS IS POSSIBLE EVEN IN CONTEXTS EXPOSED TO EXTREME FRAGILITY*

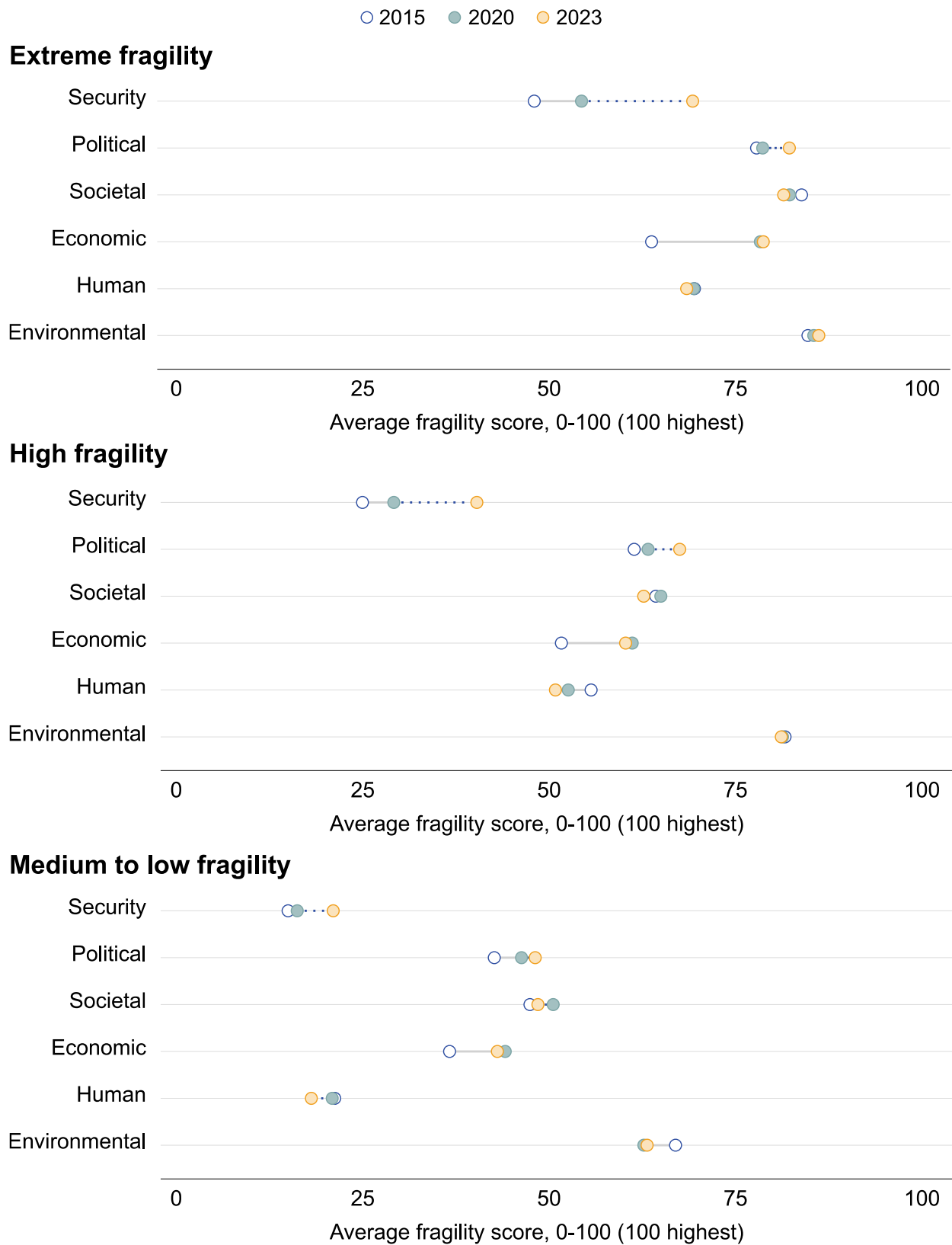
Across all dimensions, the biggest shifts observed since 2015 and 2020 have occurred in the security, political and economic dimensions (Figure 2.5). Violence of all types is a symptom and driver of fragility. Responding to drivers of fragility is becoming ever more urgent, as recourse to violence increases. Peacefulness has declined 12 out of the last 16 years (Institute for Economics and Peace, 2024<sub>[17]</sub>). The 2021-23 period recorded some of the highest fatality rates since the Rwandan genocide in 1994, stemming primarily from ongoing conflicts in Ethiopia, the Middle East, Sudan, and Ukraine (Davies et al., 2024<sub>[18]</sub>). And while the OECD fragility framework does not yet capture the data for 2024, indications are that the trend of deteriorating security looks set to accelerate following the surge of political violence in 2024, with nearly 200 000 events recorded in that year alone (Raleigh, 2024<sub>[19]</sub>). Sudan's fragility has increased significantly since the country-wide civil war broke out in April 2023, severely affecting local populations and pushing Sudan ever closer to state collapse and humanitarian catastrophe (International Crisis Group, 2024<sub>[20]</sub>). Additional conflicts in the West Bank and Gaza Strip and Lebanon, and the uncertain futures of Syria and Yemen, have amplified the concerns around fragility in

the Middle East that were identified in the 2022 report. These crises are emblematic of a broader regional fragility that goes far beyond the geopolitical and security concerns most frequently cited to include distinct economic, environmental and societal fragility intersections.

For those contexts exposed to high levels of fragility, what particularly stands out is the large increase in political fragility since 2015. Over this period, political fragility has increased in 28 of 43 contexts (and notably in populous contexts such as Bangladesh, as discussed in Chapter 4, Nigeria and Pakistan), where it often intersects with environmental and societal drivers and where the case for upstream structural and systemic prevention is growing stronger. For contexts experiencing medium to low levels of fragility, there has been important deterioration across the political and societal dimensions. However, the divergence of profiles in the medium to low fragility space is broad, and the aggregate figure masks some notable and concerning pockets of fragility that are highlighted later in this section.

In some other dimensions, the fragility framework shows that progress is being made or is possible even in contexts most exposed to fragility. There have been modest improvements in the human dimension in nearly all contexts (17 of 18) exposed to extreme fragility. There has also been progress in effective policy responses to multidimensional challenges such as the impact of COVID-19 or environmental fragility, as evident in Iraq's response to climate and environmental fragility (Chapter 4). There is a wide divergence of experience across contexts, even those in the same region, as illustrated in the Horn of Africa. Ethiopia had been making genuine progress, as noted in previous *States of Fragility* reports, but its fragility rapidly increased due to the Tigray war. Though fragility subsequently declined, apart from political and societal fragility, after the signing of a peace agreement in November 2022, the earlier gains have not been recovered. In contrast, Somalia has taken positive steps, notably in the political and societal dimensions, and is making strides in building its economic resilience even though it started from a lower baseline (Chapter 4).

**Figure 2.5. Fragility increased the most in the security, political and economic dimensions across all contexts (2015-23)**





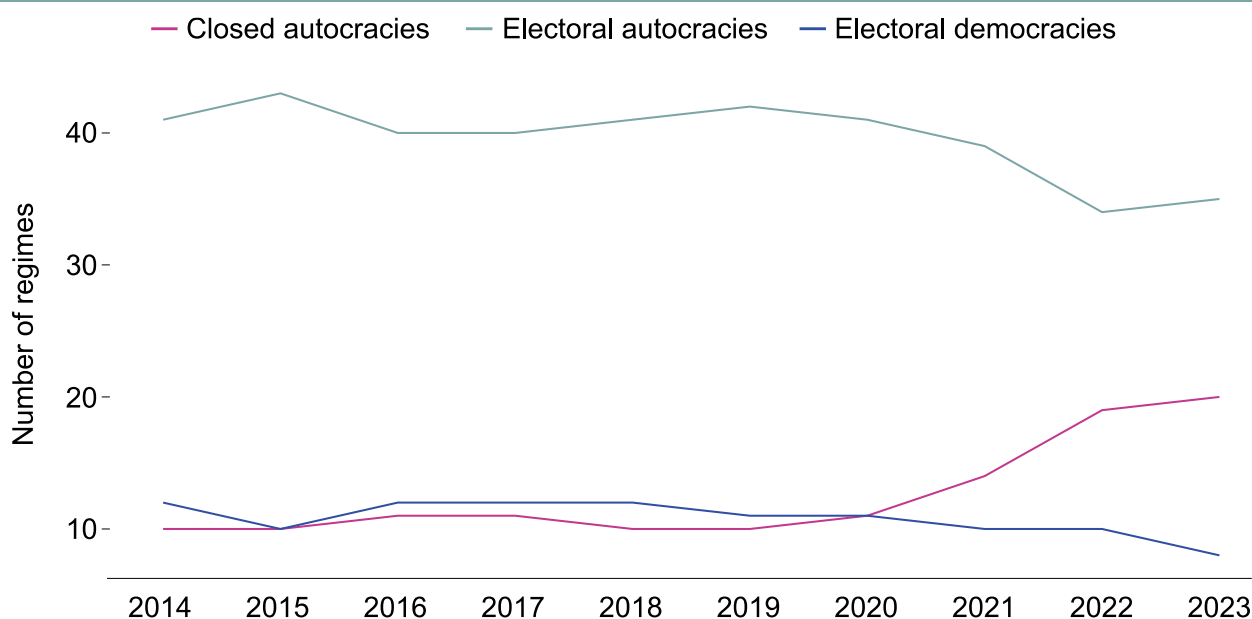
## UNPACKING TRENDS ON DEMOCRACY AND AUTOCRACY IN CONTEXTS WITH HIGH AND EXTREME FRAGILITY

### *POLITICAL AND SOCIETAL FRAGILITY ARE HIGHLY CORRELATED AND DETERIORATED BETWEEN 2019 AND 2023*

Political and societal fragility increased in most contexts from 2019 to 2023. The clearest sign is the growing trend towards autocratisation, irrespective of a context's level of fragility (Figure 2.6). Among high and extreme fragility contexts, slightly more than half (34) of the regimes became more autocratic and 14 became more democratic, while the quality of democracy in another 15 stayed about the same,<sup>2</sup> as measured by the Varieties of Democracy (V-Dem) Liberal Democracy Index (LDI).<sup>3</sup> Autocratisation happened most often through processes of gradual

backsliding (in 25 contexts) and through coup d'états (in 9 instances) (Box 2.4). Between 2019 and 2023, the number of closed autocracies doubled from 10 to 20 alongside a parallel decrease, from 42 to 35, in the number of electoral autocracies. Of the eight electoral democracies classified as experiencing high fragility in 2023, only four were continuously democratic from 2019 to 2023; the other four experienced regime changes in that time period. The LDI also shows an overall deterioration in the quality of democracy across all contexts, including in ODA-eligible contexts with medium to low fragility, with reverberating impacts on societal fragility. In contexts with high or extreme fragility, the deterioration in quality and levels of democracy occurred in relation to elections; freedom of association for opposition parties and civil society operating space; and freedom of expression including press and media freedom, academic freedom, and freedom of cultural expression.<sup>4</sup>

**Figure 2.6. Contexts exposed to high and extreme fragility are growing more autocratic**



Note: This figure uses V-DEM's "Regimes of the World" classification noting that West Bank and Gaza Strip as well as Somalia and Somaliland are classified as two separate contexts in that data.

Source: Coppedge and et al. (2024<sub>[21]</sub>), "V-Dem [Country-Year/Country-Date] Dataset v14", <https://doi.org/10.23696/mcwt-fr58>.

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Though exposure to higher levels of fragility has implications for democracies as much as for autocracies, democracies tend to outperform autocracies in several areas, for instance in terms both of stability and predictability of economic growth (Lundstedt et al., 2023<sup>[22]</sup>) and of many human development- and conflict-related indicators. Democratisation in states with low capacity, many of which experience high and extreme fragility, does not impact economic development negatively (Knusen, 2019<sup>[23]</sup>). Nevertheless, democratisation often coincides with periods of increasing corruption and clientelism (Lundstedt et al., 2023<sup>[22]</sup>), with the least corruption presenting in highly effective democracies and stringent autocracies. By many measures, however, democracies outperform autocracies, including in terms of levels of education enrolment, infant mortality and access to public goods (Lundstedt et al., 2023<sup>[22]</sup>). One reason could be that democracy tends to promote mechanisms of accountability, both vertical (e.g. elections and the risk of leader turnover) and diagonal (e.g. the watchdog role of media and civil society). Liberal democracies also tend to have higher levels of government effectiveness than many autocracies (Infographic 2.3). There are some notable exceptions. Some autocratic contexts in Asia with high levels of political fragility are not classified as being exposed to high or extreme fragility since they possess significant points of resilience that cancel out risks or insufficient resilience carried in other dimensions of fragility.

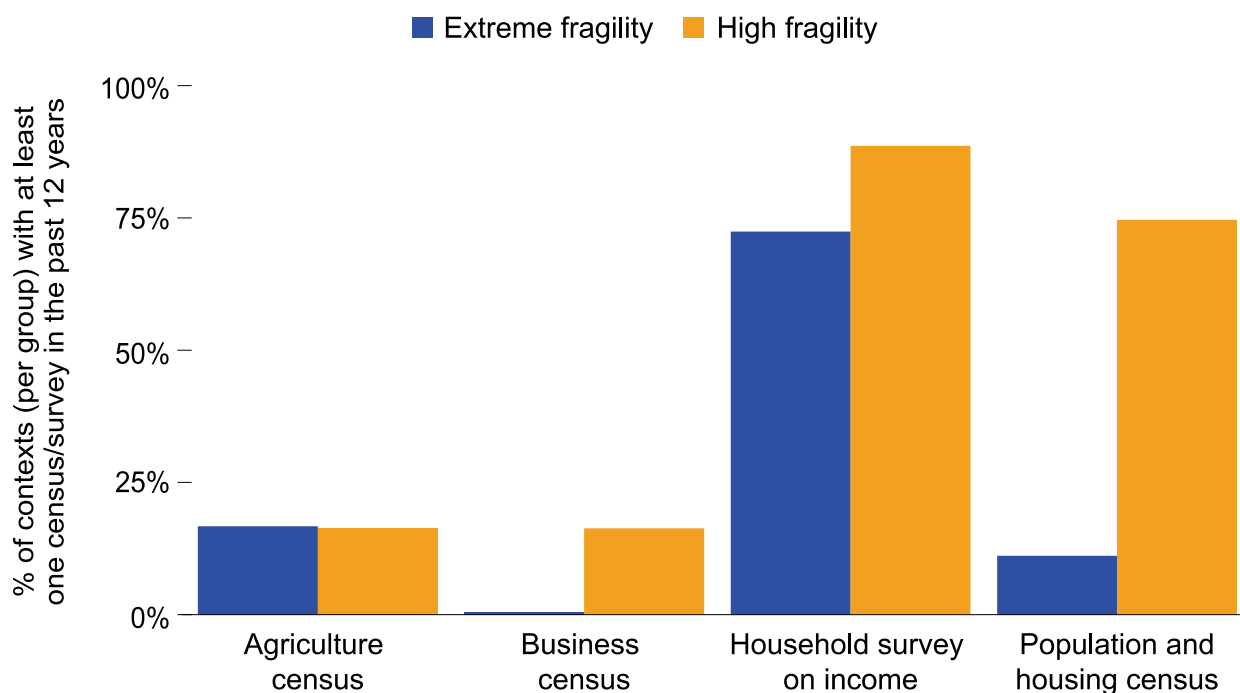
***POLITICAL ELITES ARE MOTIVATED BY THE EXPEDIENCY OF CERTAIN REGIME TYPES, PERSONAL PREFERENCES AND INSTITUTIONAL CONSTRAINTS***

Analysis of systems of governance, and of how power works within those systems, points to several underlying components of fragility that influence pathways to autocratisation, including the perceived expediency of a regime type, institutional capacities and elite motivation.

There is a large diversity of governance systems among autocracies with high fragility. Among the 20 closed autocracies with high and extreme fragility in 2023, there were 9 military regimes, 1 hereditary regime and 10 one-party regimes.<sup>5</sup> Some contexts can be classified as states fractured by elite competition or challenged from below (Luckham, 2021<sup>[24]</sup>) that have limited control over their territories and contested monopolies of violence; others are regimes deploying violence to ensure their survival, while many have competitive elections and/or hegemonic parties. In addition, many contexts exposed to high and extreme fragility are hybrid regimes where provision of services, security and other public goods resides with state authorities and customary, informal or other non-state entities. These systems of governance may overlap, coexist and/or compete (Caparini, 2022<sup>[25]</sup>) and tend to operate on the basis of “personal transactions in which political services and allegiances are exchanged for material rewards in a competitive manner”<sup>6</sup> (de Waal, 2016<sup>[26]</sup>).

State capacity, defined as a mixture of coercive and administrative capacity, tends to be lower in high and extreme fragility contexts (Figure 2.7). Lack of statistical knowledge or legibility in regard to the breadth and depth of the state’s knowledge about its citizens and activities (M. Lee, 2017<sup>[27]</sup>) as well as associated factors such as levels of education and incentives are key impediments to building resilience. This tends to be exacerbated in the face of international community withdrawals. As seen with Somalia (Chapter 4), developing nationally produced and owned statistical data (e.g. censuses and household surveys) that are in a standardised format, timely and comparable and building national statistical office capacity are both critical to enable key functions of the state such as collecting tax revenues and providing public goods. In contexts with higher exposure to fragility, a large share of the population often does not have official identification papers and birth certificates, which can prevent them from accessing employment and financial services, participating in elections, and receiving government financial support.

**Figure 2.7. Statistical information is severely lacking in contexts with high and extreme fragility**



Note: This figure measures the number of contexts in each category (high and extreme fragility) which have done at least one of these types of census over the past twelve year period (2012-2023).

Source: World Bank Group (2024<sup>[16]</sup>), *Statistical Performance Indicators (database)*, <https://github.com/worldbank/SPI>.

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Given these characteristics, how elites in high and extreme fragility contexts perceive their relative fragility and power is a significant determining factor in transitions away from or towards autocracy. Historically, over two thirds of transitions from autocracy to democracy have occurred within three to five years after a violent internal shock (e.g. a coup or political assassination) or external shock (e.g. hegemonic withdrawal) (Miller, 2021<sup>[28]</sup>). The prevalence of coups in recent years offers valuable insights into elite motivations and choices, as discussed in Box 2.4. Severely limited resilience of state institutions incentivises narrowly framed transactional decision making among political leaders. Where political options are limited, coups are often seen as an efficient means to attain political objectives in contexts with high or extreme fragility.

## Box 2.4. Features of coups in contexts with high and extreme fragility

The frequency of coups is noticeable where militaries are deeply embedded in the political-economic fabric of a context. The number of attempted and successful coups has been increasing, with important implications for thinking on peacebuilding, conflict prevention and specific issues such as security sector engagement (Chapter 3). Over 2021–23, there were ten coups in contexts experiencing high or extreme fragility. Nine of these were military coups. Six of the ten occurred in the Sahel region alone, where several contexts are characterised by low levels of human security, including localised subnational security fragility and large populations of forcibly displaced persons.

A prominent feature of contexts affected by coups is the established presence of direct military power or the military's maintenance of the regime for long periods of time. Myanmar, continuously ruled by the military from 1962 to 2011, is an example (Maizland, 2022<sup>[29]</sup>), and its 2021 coup precipitated a worsening of existing security fragility. In the Sahel region, new military juntas or post-coup governments have sought alternative sources of legitimacy and security and of economic and diplomatic support. Russia, for instance, has been particularly involved in the realm of security, but other regional and neighbouring contexts have also engaged through measures including economic assistance (Singh, 2022<sup>[30]</sup>).

Source: Maizland (2022<sup>[29]</sup>), *Myanmar's Troubled History: Coups, Military Rule, and Ethnic Conflict*, <https://www.cfr.org/background/Myanmar-history-coup-military-rule-ethnic-conflict-rohingya>; Wilén (2024<sup>[31]</sup>), 'Contagious coups in Africa? History of civil-military imbalance', <https://doi.org/10.1093/afraf/adae011>; Danish Institute for International Studies (2023<sup>[32]</sup>), 'The 'politics of coups' shape the response to West Africa's military juntas', <https://www.diiis.dk/en/node/26399>; Singh (2022<sup>[30]</sup>), 'The myth of the coup contagion', <https://www.journalofdemocracy.org/articles/the-myth-of-the-coup-contagion/>.

In many contexts, and not only those experiencing coups, there has been a markedly greater willingness in recent years to use violence as a bargaining tool to retain or seize power. This is especially a feature of high and extreme fragility contexts where power resides outside state systems and institutions. For instance, in the Democratic Republic of the Congo (DRC), power is distributed through dynamic patronage networks of "big men" that straddle different political marketplaces and through *ad hoc* alliances rather than formal institutions (Schouten, 2021<sup>[33]</sup>). These networks do not constitute an integrated political marketplace but "operate in and between different local marketplaces and the national marketplace" (Schouten, 2021<sup>[33]</sup>). In the DRC and other contexts such as the Central

African Republic, these practices are closely associated with the threat or application of violence to apply pressure on individuals or groups and to secure resources, as protection or as part of negotiations and bargaining (Caparini, 2022<sup>[25]</sup>).

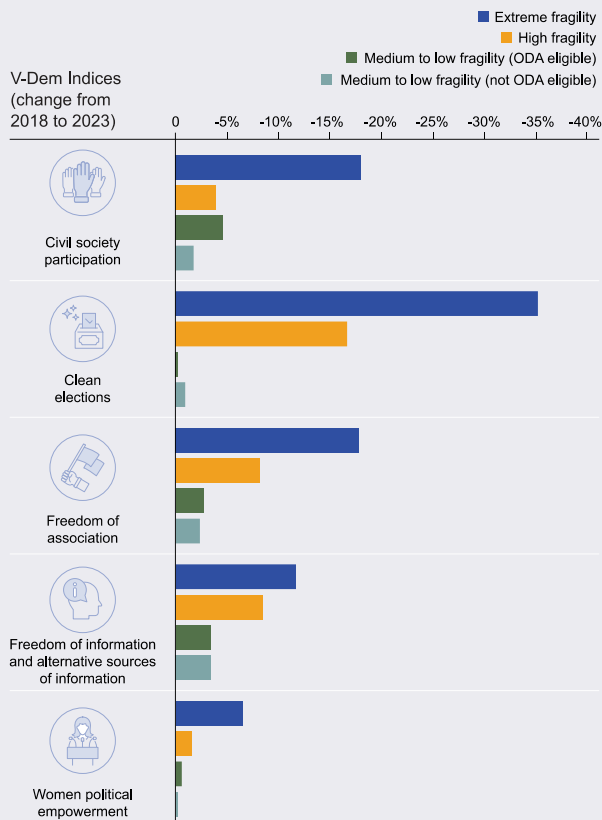
Peace and development initiatives to help prevent conflict and incentivise growth should look beyond regime type to the factors that influence the nature of a political settlement and to the ways fragility across all dimensions impacts the political marketplace, incentivising violence as an efficient means to achieve political and economic objectives.



### Infographic 2.3. Political fragility and governance effectiveness in contexts with high and extreme fragility

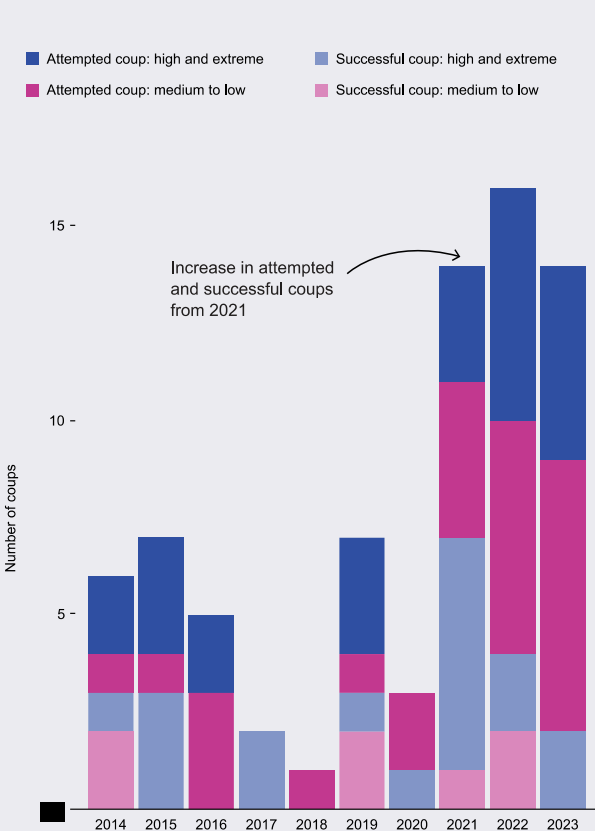
#### Democratic backsliding is particularly strong in contexts exposed to high and extreme fragility

Backsliding in contexts exposed to high and extreme fragility is visible in reduced electoral integrity, civil society participation and freedom of association.



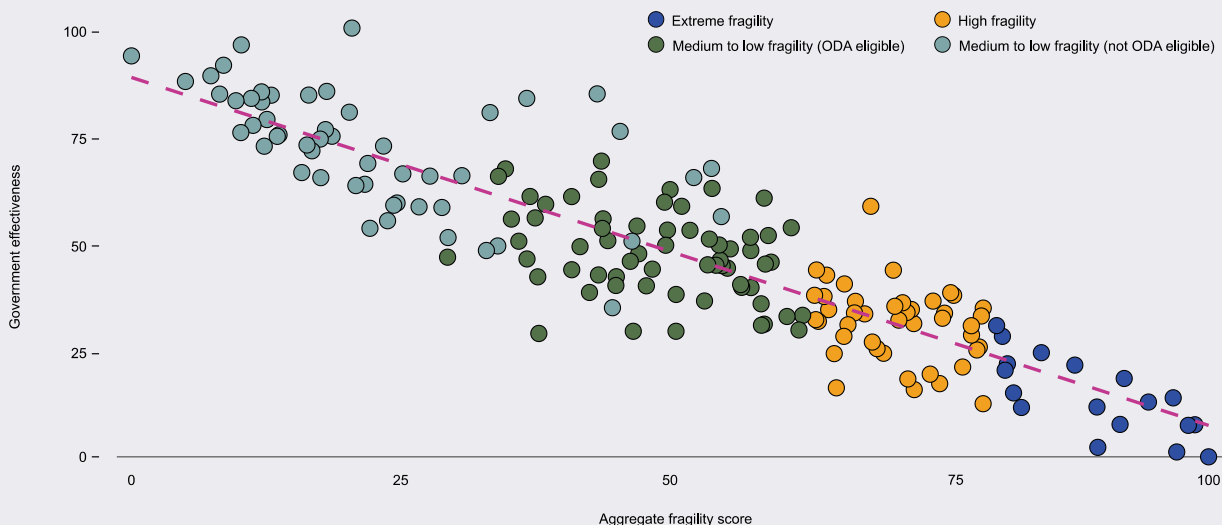
#### Contexts in high and extreme fragility are more prone to coups

Ten coups have occurred in contexts exposed to high and extreme fragility since 2021, six of which happened in the Sahel – a region characterised by high levels of human and security fragility.



#### Government effectiveness and fragility are correlated (2023)

Government effectiveness, which measures perceptions of the quality of public services and of the civil service, is lower in contexts with a higher fragility score.



Note: Bottom graph: use of the government effectiveness variable which captures perceptions of the quality of public services, the quality of the civil service and the degree of its independence from political pressures, the quality of policy formulation and implementation, and the credibility of the government's commitment to such policies and the aggregate fragility score (bottom graph). The following V-Dem indices were used for the top graph: v2x\_cspart (civil society participation); v2x\_frassoc\_thick (freedom of association); v2x\_freexp\_altinf (freedom of information and alternative sources of information); v2xel\_frefair (clean elections) and v2x\_gender (women political empowerment). Certain indicators in the clean elections index are only measured during election years.

Source: Coppedge et al. (2024<sup>[21]</sup>); Author's calculations based on Peyton et al. (2025<sup>[34]</sup>); World Bank Group (n.d.<sup>[35]</sup>).

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## INTERSECTING TRENDS IN DIGITALISATION, VIOLENCE AND GENDER POINT TOWARDS THE NEED TO PRIORITISE YOUTH ENGAGEMENT

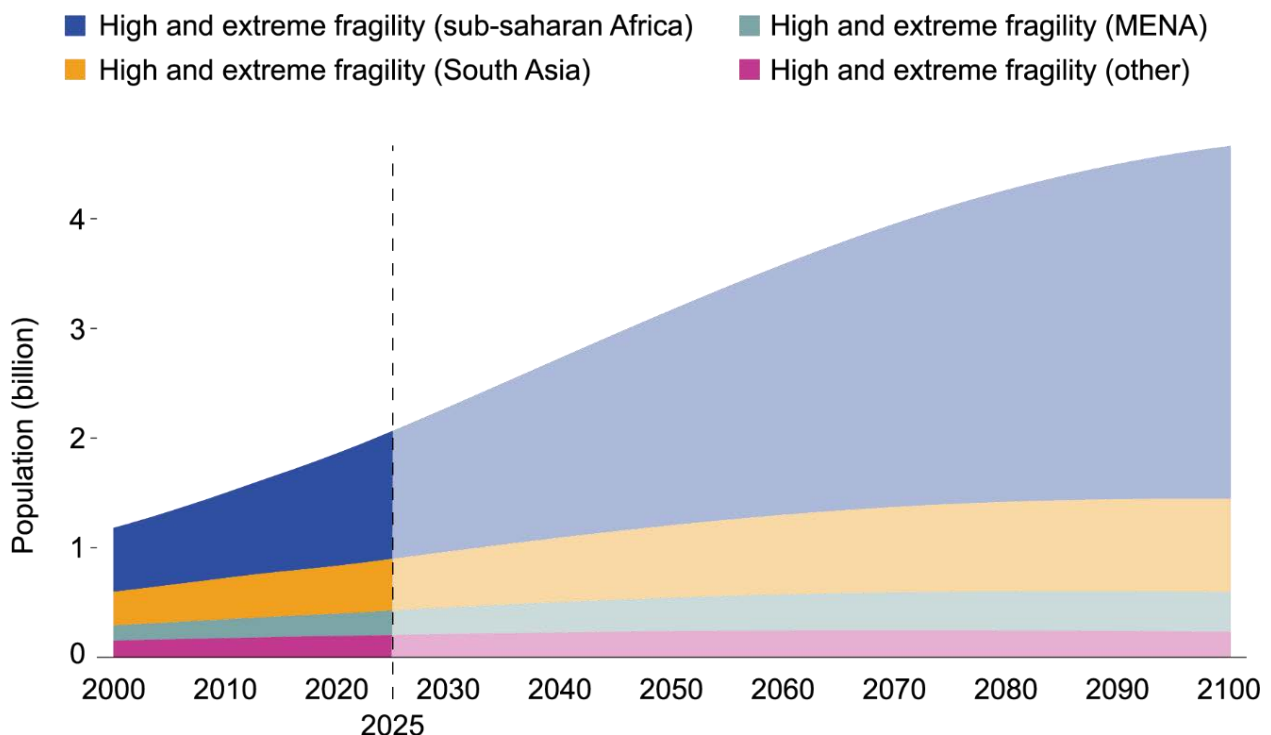
The impact of fragility on young populations in high and extreme fragility contexts exemplifies the interplay of risks and resilience that drive unique presentations of fragility profiles across the OECD fragility framework. Consistent with global trends, political, security and economic factors are prominent across youth narratives. But at a context level, these intersect with other aspects of risk and resilience that can be equally if not more important. This section looks at four such aspects: political agency, the risks and opportunities associated with digitalisation, inequalities and gender divides and the potential of different sources of resilience to be a means to development and peace.

### YOUNG POPULATIONS ARE AT THE CENTRE OF POLITICAL-ECONOMIC CHANGES

Student protests linked to environmental, economic and political fragility are a notable feature across the globe and, in 2024, increased significantly. For example, transnational youth-led groups are raising the alarm about climate and environmental threats, using platforms like Fridays for the Future to make their voices heard. Interestingly, while conflicts are widely covered in the media, particularly those in the Middle East, only 20% of the 32 000 demonstrations recorded by the Armed Conflict Location & Event Data Project in 2023 and 2024 were related to conflict (Murillo and Paris, 2024<sup>[36]</sup>). These types of activities are emblematic of the contrasting power and vulnerability of young populations, which is most apparent on the continent of Africa.


According to the UN, about half of the world's population is between the ages of 25 and 65. These populations are not distributed equally across the world. Africa is the only region that has far more younger people than older people, and most of the youth population is and will continue to be concentrated in the high and extreme fragility contexts of sub-Saharan Africa (Figure 2.8).

**Figure 2.8. Population growth is projected to be concentrated in contexts exposed to high and extreme fragility in sub-Saharan Africa**



Note: South Asia includes Bangladesh, Pakistan and Afghanistan. MENA stands for Middle East and North Africa.

Source: UN DESA (2024<sup>[11]</sup>), *2024 Revision of World Population Prospects* (database), <https://population.un.org/wpp/>.

StatLink  <https://stat.link/dkilan>

This demographic transformation is neither inherently progressive nor regressive. This matters for policy makers considering how to engage, and they are not the only ones focusing on this demographic. The political and economic aspirations and grievances of youth vary according to class, gender and whether populations are based in urban or rural locations. But these dynamics intersect with combinations of drivers of fragility across all dimensions. Youth are an audience to be captured, and their agency confers significant political value with both positive and negative potential. Youth can be incentivised to join gangs and militias but also civil society and enterprise groups. How this demographic interacts with digital trends illustrates the complex challenges for youth engagement.

### *RISK AND OPPORTUNITIES OF DIGITALISATION FOR YOUTH IN CONTEXTS WITH HIGH AND EXTREME FRAGILITY*

Across all contexts, the digital aspect of youth power, political engagement and enterprise is a rapidly developing feature, though it manifests in divergent ways and with pronounced gender and class dimensions. Internet use is lowest in contexts with high and extreme fragility; less than 43% of the population in those contexts uses the Internet, which is less than half the share in the most connected regions<sup>7</sup> (Our World in Data, 2023<sub>[37]</sub>). The ability of young populations to harness the potential of digital platforms to improve their lives is complicated by other aspects of digital technologies. There are plenty of examples of positive change and innovation: mobile payments such as M-Pesa in Kenya and the National Payment System in Somalia (Bareisaite, Goyal and Karpinski, 2022<sub>[38]</sub>), for instance, and the growth of low-cost internet services, digital entrepreneurship, digital education and public services digitalisation. For each of these, there are unfortunately negative examples such as cybersecurity threats (including data breaches and fraud), job displacement and cost barriers that compound existing drivers of fragility. Critical shortfalls across the human dimension of fragility, but especially in education, compromise digital literacy and drive digital gaps and gender-based divides (Benveniste and Angel-Urdinola, 2023<sub>[39]</sub>).

However, despite low levels of digital literacy, young populations in all contexts are finding ways to develop their knowledge and build markets by “linking and learning” across growing digital networks (Sakwa and Njoki, 2022<sub>[40]</sub>). For instance, digital financial platforms in Tanzania have empowered microenterprises by providing access to mobile banking, creating economic progress even where traditional banking is scarce. Such technologies allow

individuals to manage funds, which fosters financial inclusivity and local economic development. Yet, without widespread access to digital tools, these benefits remain limited to certain demographics, deepening the digital divide and leading to uneven progress within regions and across socio-economic groups. For those cut off from supporting sources of resilience, access to an online gig economy can improve labour mobility but also simultaneously drive wage disparity, inequality and exclusion (Yassien, 2023, pp. 7-8<sub>[41]</sub>).

A capacity expectations gap is emerging with young populations increasingly aspiring to digital futures for which there is little infrastructural support. Over 80% of Africa’s youth in school aspire to work in high-skilled occupations, but only 8% find such jobs (AUC/OECD, 2024<sub>[42]</sub>). A recent OECD survey of digital policy and regulatory frameworks in East Africa found that only 1 of 14 contexts, Kenya, had a youth empowerment policy (AUC/OECD, 2024<sub>[42]</sub>); 12 of the 14 contexts are exposed to high or extreme fragility. These findings point to a lack of resilience that poses risks where it connects with other disparities between contexts with extreme, high and medium to low fragility. For example, the growth of cyber and artificial intelligence (AI) platforms puts contexts with high and extreme fragility at risk of further marginalisation; vulnerability to cyber surveillance and digital imbalances of power such as AI-enabled decision making (Rizk and Cordey, 2023<sub>[43]</sub>); and the privatisation of knowledge and public goods (Beetham, 2023<sub>[44]</sub>). For contexts with already weak sources of resilience, these are substantial impediments to sustainable development.

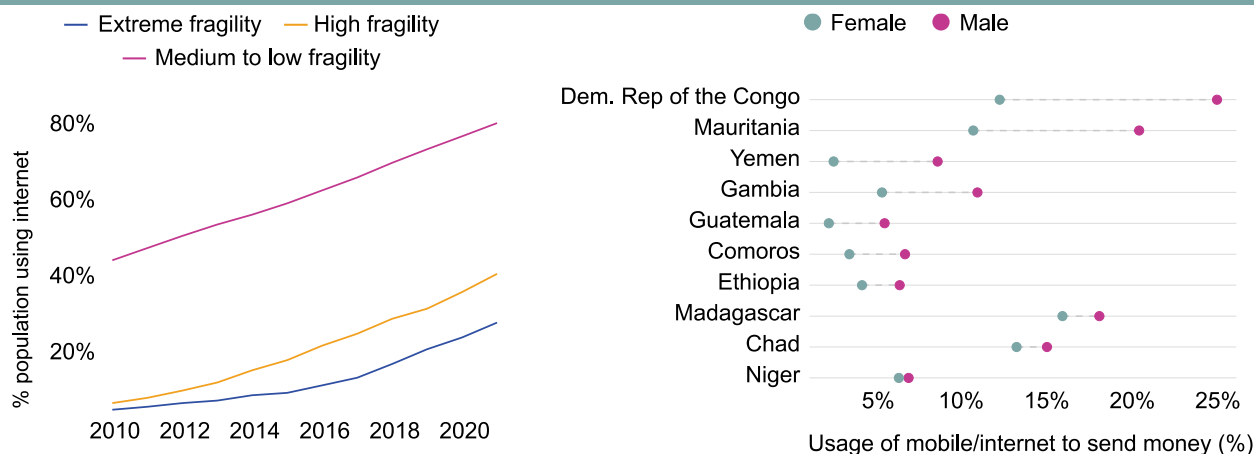
### *SOCIAL MEDIA AS AN ARENA FOR INEQUALITY AND DIGITAL DIVIDES*

In the political space, youth who feel detached from traditional political systems are strengthening their voice and agency by leveraging digital platforms to share information, mobilise participation, and shape electoral and political processes (Sakwa and Njoki, 2022<sub>[40]</sub>). Social media, especially, plays a significant role in how a country’s image and internal policies are scrutinised by international and internal audiences, leading to consequences that transcend borders. For example, in countries where gender-based inequalities are more pronounced (Chapter 4), online discourse about women’s rights can shape international public opinion, potentially attracting criticism that influences diplomatic relationships and pressures governments to reform. On key measures of digital accessibility – internet use, digital skills and mobile

phone ownership (UN Children's Fund, 2023<sup>[45]</sup>) – young women are increasingly excluded. This digital gender gap intersects with other sources of fragility that deepen


women's safety and security concerns, constrain mobility, and can artificially reinforce restrictive sociocultural norms (Figure 2.9) (Mboob, Osam and Robinson, 2022<sup>[46]</sup>).

**Figure 2.9. Digital divides by fragility classification and gender**



Note: The chart on the left uses the share of individuals using the internet. The chart on the right, from 2022, uses the "Used a mobile phone or the internet to send money (% age15+)". Data for this chart is only available for 22 out of 61 contexts exposed to high and extreme fragility but was used for illustrative purposes.

Source: World Bank (2025<sup>[47]</sup>), Gender Data Portal, <https://genderdata.worldbank.org/>; World Bank (2024<sup>[48]</sup>), World Development Indicators, <https://databank.worldbank.org/source/world-development-indicators>.

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### **PATHWAYS OF RESILIENCE FOR YOUTH: FOCUSING ON THE HUMAN DIMENSION OF RESILIENCE**

The ambitions of young people in contexts exposed to high and extreme fragility can be a source of resilience but also, if thwarted, impact on fragility. African youth, increasingly digitally connected, aspire to high-skilled occupations in the formal sector, and yet most employment remains informal with limited potential for skills development and productivity (AUC/OECD, 2024<sup>[42]</sup>). At a regional level, high levels of informality correlate with areas where high and extreme fragility are concentrated. An estimated 82% of all workers in Africa are informal – the highest share of informal employment globally – compared to 56% for Latin America and the Caribbean (LAC) and 73% for ODA-eligible contexts in Asia (AUC/OECD, 2024<sup>[42]</sup>). In contexts exposed to high and extreme fragility, bridging the gap between emerging digital capabilities and the foundational components for economic performance, skills, education and other aspects of human capital, must account for drivers of fragility that lie beyond the scope of policy approaches elsewhere, such as poverty, conflict or societal restrictions.

Amidst the pressure to adopt digital innovations, governance considerations are often given short shrift,

though they play a critical role in driving appropriate digitalisation trajectories (OECD, 2021, p. 47<sup>[49]</sup>). This compromises resilience building. (For contexts at risk of armed conflict and violence, governance considerations intersect with approaches for conflict prevention, as discussed in Chapter 3.) Many donors and partners are already developing initiatives to empower youth agency. The Digify Africa organisation offers transnational digital and business skill training to young Africans, including on linking with private sector partners. In Mozambique, the focus is on addressing educational disparities and teacher shortages – just 15% of students older than 25 have completed lower secondary education versus nearly 29% in Angola, a context that like Mozambique is experiencing high fragility (AUC/OECD, 2024<sup>[42]</sup>). Also in Mozambique, initiatives such as +EMPREGO aim to boost youth qualifications for available jobs by building public-private partnerships and, in Cabo Delgado province for example, to improve youth access to employment and self-employment. Such initiatives are also consistent with thinking on upstream conflict prevention discussed in Chapter 3. Similarly, in Mauritius, projects aimed at skills training for marginalised groups, in particular women and youth, have contributed to a steady increase in women's labour force participation since 2005 (AUC/OECD, 2024<sup>[42]</sup>).

## THREATS TO GENDER EQUALITY ARE EVOLVING AND HARD WON GAINS NEED PROTECTING

Gender inequality is one of the root causes of fragility and a key indicator of development trajectories. As noted, no context experiencing high or extreme fragility is on track to achieve SDG 5 on gender equality and empowering all women and girls. Consistent with previous *States of Fragility* reports, women and girls in contexts with high and extreme fragility are more exposed to distinct health risks, such as maternal mortality, female genital mutilation and early pregnancies. They tend to have lower educational outcomes – out of discrimination but also as a consequence of higher health risks; experience higher levels of gender discrimination, and lower access to social protection, which further undermines their human capital with consequences across all dimensions of fragility (OECD, 2022, p. 4<sub>[50]</sub>).

Poor working conditions and lower pay are also an established feature in all contexts with high and extreme fragility with pronounced impact in contexts such as DRC, Malawi, Madagascar, and Kenya where job destruction and creation as a result of energy transitions can lead to new spatial and gender inequalities (OECD, 2023<sub>[51]</sub>). Gender inequality is a feature in all 61 contexts with high and extreme fragility but there is significant variation of equality trends across contexts. The Gambia stands at one end of the spectrum, and though it retains severe fragility on key measures such as youth not in employment, education, or training (NEET), since 2014, it has demonstrated progress on issues such as women’s political empowerment (Coppedge et al., 2024<sub>[21]</sub>), and economic participation opportunity (World Economic Forum, 2024<sub>[52]</sub>). From a very low baseline, gender equality has progressed steadily since the transition to a democracy following the fall of President Yahya Jammeh in 2017. In line with the emphasis on gender informed strategies highlighted in the example of Colombia in Chapter 4, gender initiatives have been a pronounced feature of development and peace processes in The Gambia, covering transitional justice, constitutional reform, national development, and security sector reform. The increase in the recruitment and promotion of women police officers is one example of a series of resilience building measures across state institutions (Gambia, 2024<sub>[53]</sub>). Some progress, especially associated with women’s economic empowerment, can also be observed in Solomon Islands and Guinea, though in both cases departing from low baselines. In other cases, progress toward legal gender equality under the law was prominent in sub-Saharan African with six contexts enacting 20 legal

changes including: Equatorial Guinea, Lesotho, Rwanda, Sierra Leone, Togo, and Uganda (World Bank, 2024, p. 7<sub>[54]</sub>).

At the other end of the spectrum there is more cause for concern especially linked to political transitions and conflict. Eight of the ten contexts with the widest gender gap are exposed to high and extreme fragility (World Economic Forum, 2024<sub>[52]</sub>), five of these contexts are also exposed to organised violence: Chad, DRC, Mali, Niger, and Sudan. This figure does not include Afghanistan, where access to data is a significant impediment (though not an impossible impediment as shown in Mariam Safi’s contribution in Chapter 4). Reflecting the more recent discriminatory edicts by the Taliban regime, that restrict movement and opportunities for women and girls, Afghanistan has recorded the largest decline in women’s economic empowerment up to 2023 (Coppedge et al., 2024<sub>[21]</sub>). In other contexts, with traditionally stronger performance on gender indicators, there are concerning signs of deterioration. Between 2014 and 2023, Nicaragua, has shown a notable decrease in women’s political empowerment, reflected in measures such as the outlawing of feminist groups (Coppedge et al., 2024<sub>[21]</sub>; Vílchez, 2022<sub>[55]</sub>). As seen in Deqa Yasin’s contribution in Chapter 4, risks to the lives of women and girls are also evolving through increased exposure to online threats. Though autocratic contexts have continued to curtail women’s rights and gender equality (Chenoweth and Marks, 2022<sub>[56]</sub>), the instrumentalisation of fragility by contexts such as Russia as outlined in Chapter 1, is often associated with democratic backsliding: the impact of democratic backsliding on women and girls needs to be carefully monitored to inform preventive measures.

Sexual and gender-based violence continues to be a prevalent feature of conflict-affected contexts, frequently deployed as a tactic of war (de Silva de Alwis, 2023<sub>[57]</sub>). For example, the use of sexual violence as a means for revenge was a pronounced feature of the conflict in Tigray leaving a devastating impact on estimated “40 to 50 percent of women and girls in the Tigray, Amhara, Afar, and Oromia regions of Ethiopia” (Bekele and Eckles, 2023<sub>[58]</sub>). These findings co-exist with remarkable accounts of bravery, such as the 49 women-led organisations in Sudan pushing for a more inclusive peace process, in extremely politically constrained circumstances (UN Women, 2024<sub>[59]</sub>).

In all contexts with high and extreme fragility, violence against women is closely associated with inequality but the pressures driving this are often closely linked to political, economic and societal pressures (Infographic 2.4). Disparities in human development are greatest in contexts



exposed to extreme fragility in the Middle East and South Asia, including in Afghanistan, Iraq, Syria and Yemen where the gap between women's human development and men's is the widest (Infographic 2.4). However, as with findings elsewhere in this chapter, contexts often show distinct and contrasting trends linked to societal and political fragility at local levels. For example, Iraq has established gender equality and non-discrimination as a component of all five pillars of its Decent Work Country Programme including: employment for women, youth and other vulnerable groups; education that promotes equal opportunities in accessing quality education, training and adequate skills; labour rights protection focused on ensuring adequate protection for all workers; transition to a formal economy, protecting workers in the informal economy; and the expansion of social protection and the strengthening the ability of individuals and enterprises (OECD, 2024, p. 270<sub>[60]</sub>). At the same time it has amended laws on marriage age, custody rights and protections for women and children, that have raised concerns on societal, including ethnic and religious sensitivities (ReliefWeb, 2025<sub>[61]</sub>).

The incidence of child marriage is also slowly declining globally, although the pace of progress is insufficient to attain the SDG target by 2030. This trend also masks variations across regions and income groups, with the incidence of child marriage declining overall in South Asia but increasing among the poorest wealth quintile in sub-Saharan Africa (UN Children's Fund, 2023<sub>[62]</sub>). The 15 contexts with the highest rate of girls marrying by the age of 18 are all exposed to high or extreme fragility. A confluence of factors – conflict, natural disasters compounded by climate change and public health crises – threaten to slow further progress. For example, in Bangladesh, months of drought and the immediate aftermath of natural disasters such as cyclones are associated with an increased risk of child marriage in rural, agricultural-dependent areas (Save the Children, 2023<sub>[63]</sub>). Child marriage contributes to other adverse outcomes as girls are taken out of school early and put at higher risk of dying during pregnancy or childbirth. All ten of the contexts with the highest education exclusion rates for girls are exposed to either high fragility (Djibouti, Guinea, Mali and Niger) or extreme fragility (Afghanistan, CAR, Chad, Eritrea, Equatorial Guinea, and South Sudan) (UNESCO, 2024, p. 8<sub>[64]</sub>).

The incidence of female genital mutilation (FGM) has been declining overall in the past 30 years and all but one of the fifteen contexts with the highest prevalence are exposed to high and extreme fragility.<sup>8</sup> At the same time, some contexts (e.g. Burkina Faso) have made significant progress in eliminating the practice while rates remain high in other

contexts including Somalia and Gambia at 99% and 73%, respectively (UN Children's Fund, 2024<sub>[65]</sub>). However, in July 2024, The Gambian parliament voted to uphold the ban on FGM (United Nations, 2024<sub>[66]</sub>).

In more than half of contexts experiencing high and extreme fragility, attitudes to violence against women are showing improvements. Attitudes on violence against women,<sup>9</sup> as measured by the OECD's Social Institutions and Gender Index, shows improvement in 36 of the contexts most exposed to high and extreme fragility since 2021, and available data suggest norms and attitudes are slowly changing. However, data on sexual and gender-based violence relies on sources that are infrequently updated, including demographic and health surveys, and in most contexts with extreme fragility these can be difficult to collect.

### *AS RISKS TO GENDER EQUALITY EVOLVE IN CONTEXTS WITH HIGH AND EXTREME FRAGILITY AND AS RESPONSES ARE CHALLENGED, IS A RESET REQUIRED?*

Gender equality and women's economic empowerment offer transformative potential in contexts experiencing high and extreme fragility and have been an important focus for the DAC (OECD, 2022<sub>[67]</sub>). The share of ODA commitments with gender objectives increased from around 37% in 2014-15 to 48% in 2022-23. However, after peaking in 2018-19, commitments to contexts with high and extreme fragility have slightly decreased. Contexts with extremely fragility that are also conflict-affected and receive high amounts of ODA tend to have a low focus on gender equality. Contexts such as Syria, Yemen and Afghanistan that receive over USD 1 billion had gender equality objectives in less than one-third of ODA (OECD, 2024, p. 41<sub>[68]</sub>). Given the issues affecting Afghan women outlined in Chapter 4, the low integration of gender equality objectives into aid to Afghanistan risks contributing to a deeper entrenchment of the backsliding of the rights of women and girls.

If support for gender equality starts with the planning and design of development programmes, then the above trends on gender equality stress the need for swift adjustments to existing practices. DAC members have been proactive in addressing gender-based inequalities by establishing innovative funding channels for women's rights organisations, girls education, and implementing climate-smart agricultural programmes designed to improve the economic status of women (OECD, 2024, p. 27<sub>[60]</sub>). A similarly agile approach will be required to address concerns about the associated impact of democratic backsliding and a backlash against progress in gender equality. This will challenge existing ways of engaging on issues of gender equality and

sexual and gender-based violence. For example, this will include confronting visible attacks online and in person on women and women's issues, while also developing better ways to assess and respond to perceived instances of 'gender washing', especially by autocratic regimes (Bush and Zetterberg, 2023<sup>[69]</sup>). Measures such as the DAC Recommendation on Ending Sexual Exploitation, Abuse, and Harassment in Development Co-operation and Humanitarian Assistance (OECD-DAC, 2024<sup>[70]</sup>) and the DAC Recommendation on Gender Equality and the Empowerment of All Women and Girls in Development Co-operation and Humanitarian Assistance (OECD-DAC, 2024<sup>[70]</sup>)(2024) will be essential to navigate the emerging landscape across all contexts, regardless of their exposure to fragility.

Finally, calls to address the availability of data on women and girls have been largely ignored. Major data gaps continue to exist for contexts with high fragility and there are critical gaps for those exposed to extreme fragility. While the data included in this report outlines some of the breadth of issues, patterns and connections, the full potential of this type of analysis is far from realised. More systematic sex-disaggregated data collection across all contexts and all types of data will be necessary for accurate assessments to inform better responses in all contexts.

### *WHAT IS KNOWN ABOUT THE LIVES OF YOUNG MEN IN CONTEXTS WITH HIGH FRAGILITY*

According to research by the OECD (2019<sup>[71]</sup>), norms related to masculinities are another relevant factor in explaining gender inequality within society (Chancel et al., 2022<sup>[72]</sup>). Multiple drivers of fragility impact the lives of young men in contexts with high and extreme fragility. As highlighted in contributions on Colombia and Bangladesh in Chapter 4, the combination of access to digital technologies, lack of economic opportunity and protests lead or incentivise young men towards negative coping capacities. In this sense, the backsliding observed in improving the lives of women and girls is symptomatic of reduced or stressed resilience among young men. In many contexts, young men are also exposed to compounding expectations and pathways that shape the choices that they make. Calls for integrating positive masculinities, through means such as art and social media, have struggled to compete with more traditional narratives around masculinities and the perspectives on the roles of women (Feki et al., 2017, p. 266<sup>[73]</sup>). It is important to

educate young men on women's perspectives, experiences and challenges but also to recognise that men also experience gender inequalities and depend on health, education and power over economic resources to advance in their lives (Pichat, 2022<sup>[74]</sup>).

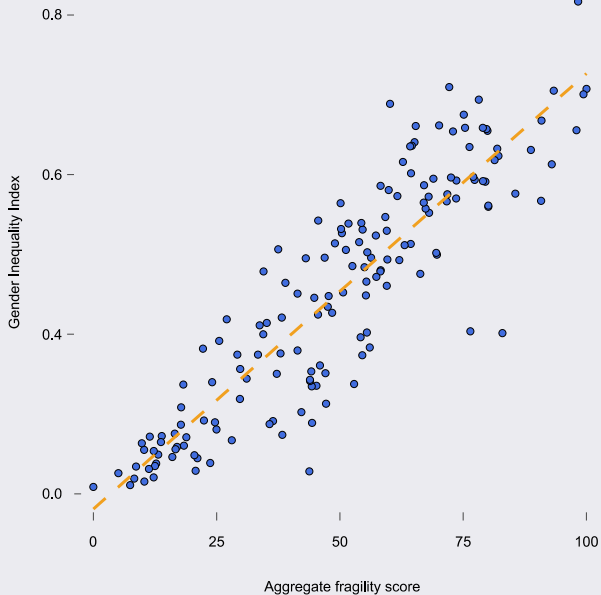
Implicit in many of the contributions to Chapter 4 of this report is an idea that the needs of men are changing in many contexts. While sparse, the analysis on this issue that is available suggests two salient issues affecting the lives of men in contexts exposed to high and extreme fragility. One is the ongoing strain for men in the process of accumulating human capital and the destruction or erosion of their human capital and ability to be productive members of society. There is often a pronounced class dimension to these issues linking health, general education and job-specific training (Jacobsen, 2006, pp. 6-23<sup>[75]</sup>). The second issue is the changes in roles and identities of men in transitioning economies, often associated with migration from rural to urban areas or transitions from pre-industrial to industrial economies. In most contexts with high or extreme fragility, armed conflict and violence also significantly impact how men view their roles and identities. Addressing these issues should not come at the expense of measures to improve the lives of women. But they likely require tailored approaches that, for now at least, are in notably short supply, which fosters the drift towards negative coping capacities.

Young men also are typically most exposed to the negative impacts high levels of violence affecting physical, psychological and social functioning (World Health Organization, 2024<sup>[76]</sup>). The indirect costs of organised violence in terms of mental health and generational trauma feed an increasingly complex dynamic for young men and for women. Rates of anxiety, depression and post-traumatic stress disorder are two to three times higher among people affected by armed conflict (Carpiniello, 2023<sup>[77]</sup>). As seen in the perspective on forced displacement in Venezuela (Chapter 4) these include women who are victims of gender-based violence and children exposed to high levels of collective violence, who are more likely to develop chronic diseases. The impacts are particularly problematic in contexts that have experienced protracted conflict as mental health problems may indirectly contribute to future cycles of violence when collective trauma and past grievances increase the risk of future conflict (Oestericher, Taha and Ahmadi, 2024<sup>[78]</sup>).

## Infographic 2.4. Women continue being left behind in most contexts with high and extreme fragility

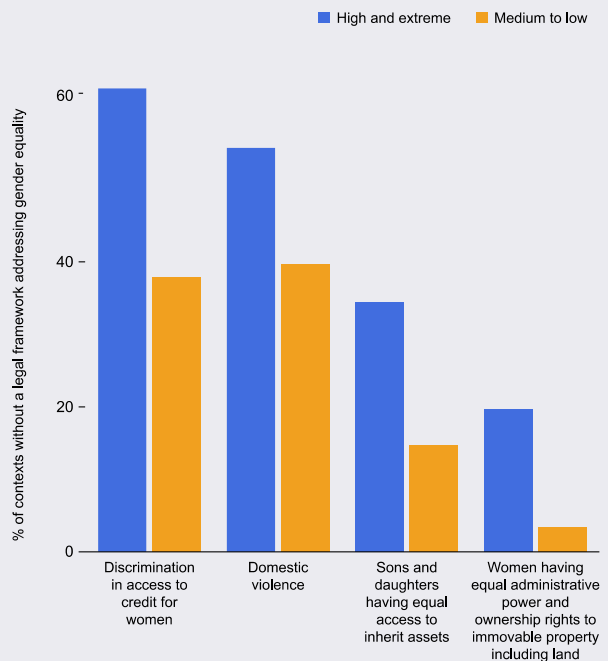
### Gender inequality is highly correlated to fragility

Contexts exposed to high and extreme fragility tend to have higher levels of gender inequality.



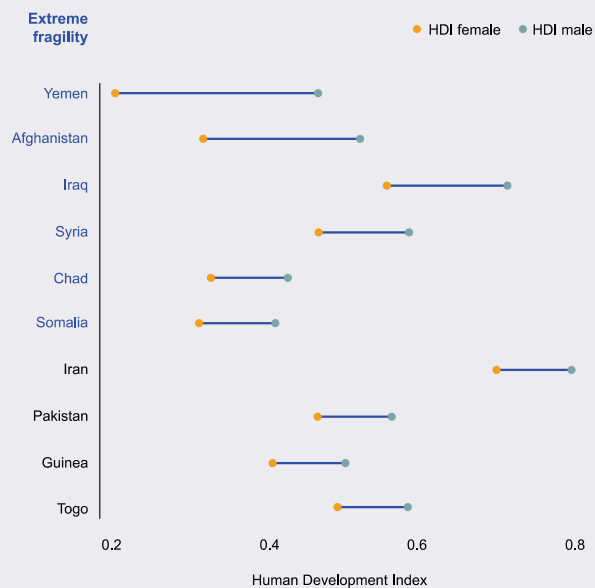
### Contexts in high and extreme fragility are less likely to have laws and regulations on gender equality

The most fragile contexts often lack legal frameworks to protect women from violence and discrimination and to promote their empowerment.



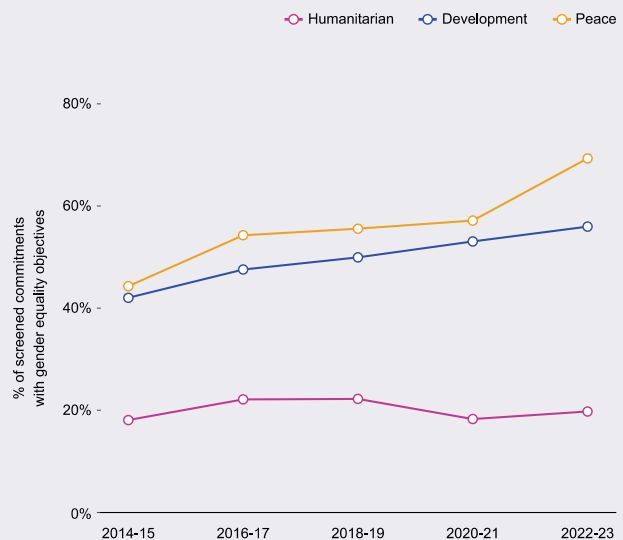
### Gaps between men and women in human development outcomes are acute in the most fragile contexts

Six of the contexts with the largest gaps in the Human Development Index (HDI) (mean years and expected years of schooling, life expectancy at birth and gross national income per capita) between men and women are exposed to extreme fragility.



### Humanitarian Development Assistance Committee (DAC) Official Development Assistance (ODA) targeting gender equality objectives is low and stagnating in contexts exposed to high and extreme fragility

Humanitarian DAC ODA with gender equality objectives is stagnating in contrast to increasing development and peace ODA.



Note: Only 163 contexts on the fragility framework also have data on the gender inequality index (GI) which is a composite metric of gender inequality using three dimensions: reproductive health, empowerment, and the labour market. A low GI value indicates low levels of inequality between women and men, and vice-versa. The Human Development Index (HDI) values for male versus female take the most recent year (2022). Data on gender equality objectives takes two-year averages for commitments made by DAC members.

Source: World Bank (2024<sup>[79]</sup>); UNDP (2024<sup>[80]</sup>); UNDP (2024<sup>[81]</sup>); OECD (2024<sup>[82]</sup>).

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## VIOLENCE IS INCREASING AND PRESENTING DIFFERENT CHARACTERISTICS DEPENDING ON THE CONTEXT

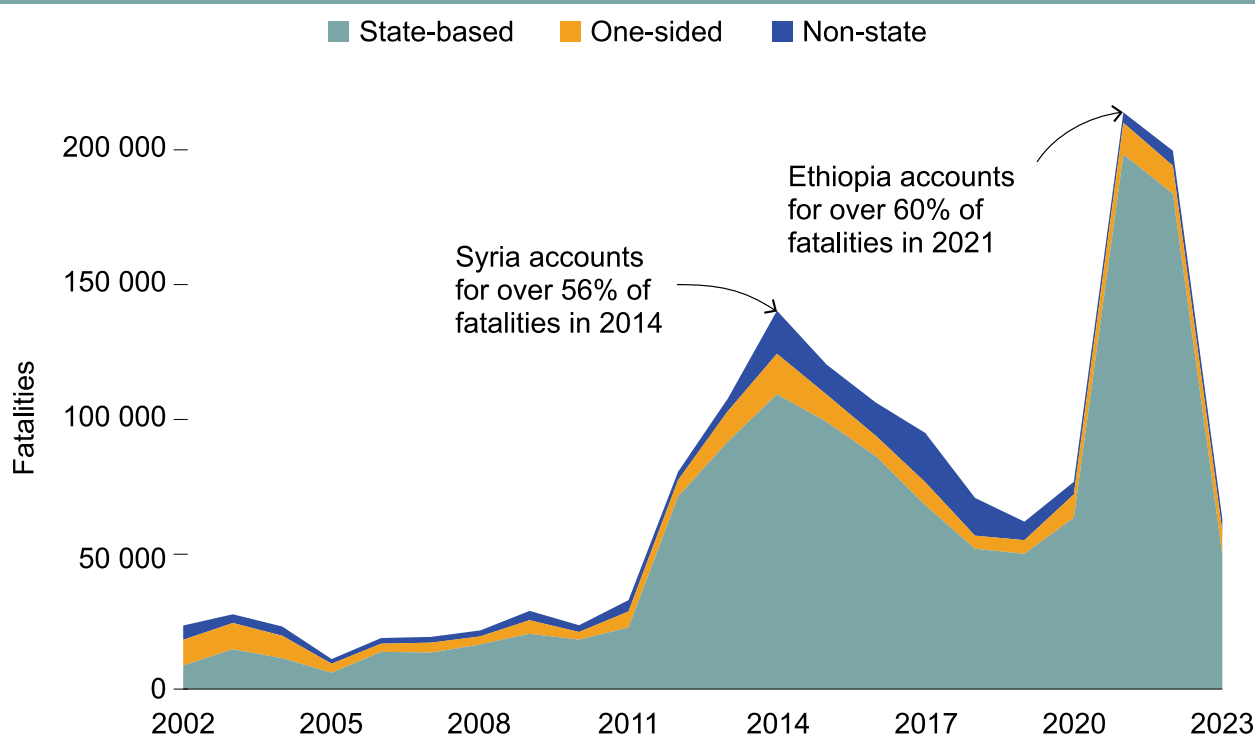
In 2025, the OECD multidimensional fragility framework identifies 29 contexts as experiencing high to severe levels of fragility in the security dimension. Of these, 25 are also experiencing high to severe fragility in the political dimension, an indication of the interlinkage between high levels of political fragility and different types of violence.

Conflict and war have become more prevalent and diffused among high and extreme fragility contexts. In 2023, 24 contexts with high or extreme fragility were conflict-affected and<sup>10</sup> eight were in a state of war. In addition, the number of state-based armed conflicts is now at an all-time high (59), and 47 of these involve at least one high or extreme fragility context<sup>11</sup> (Figure 2.10). These figures are

consistent with the trends of an increasing number of internationalised intrastate conflicts.<sup>12</sup> In 2023, 19 of 20 such conflicts occurred in contexts with high and extreme fragility, which is consistent with the assessment that many of these contexts exist in a “conflict trap” (Milante, Mueller and Muggah, 2021<sup>[83]</sup>).

Reflecting the spatial distribution of violence, approximately 14% of the population residing in contexts with high and extreme fragility from January 2024 to December 2024 were directly exposed to organised violence<sup>13,14</sup> (ACLED, 2024<sup>[84]</sup>) (Infographic 2.5). Such exposure to organised violence significantly affects how fragility is experienced, with important heterogeneity among these contexts and even among those at war. For instance, while approximately 55% of Myanmar’s population was exposed to an event of organised violence in 2024, the same was true for only 14% of Ethiopia’s population.

**Figure 2.10. Organised violence in contexts facing high and extreme fragility peaked in 2021-22**



Note: The percentage for Syria and Ethiopia reflects fatalities out of the total occurring in contexts exposed to high and extreme fragility.

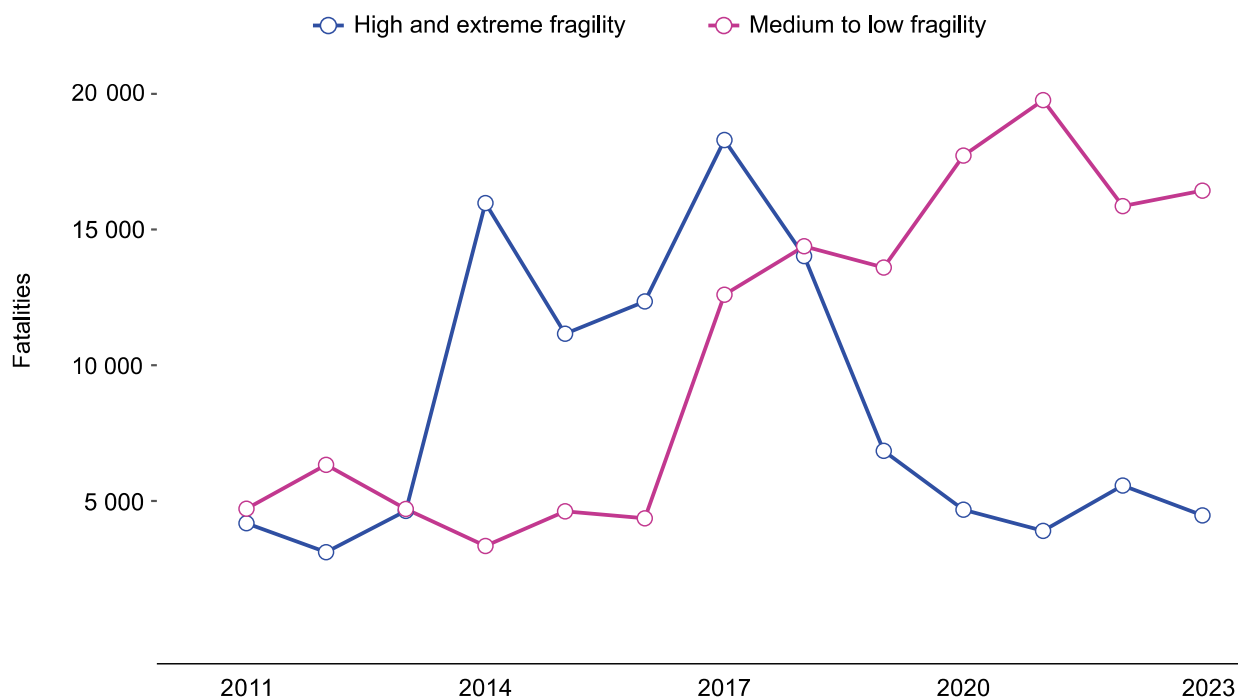
Source: Davies, et al. (Davies et al., 2024<sup>[18]</sup>), “Organized violence 1989-2023, and the prevalence of organized crime groups”, <https://doi.org/10.1177/00223433241262912>; Sundberg and Melander (2013<sup>[85]</sup>), “Introducing the UCDP Georeferenced Event Dataset”, <https://doi.org/10.1177/0022343313484347>.

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The increase in non-state violence, especially in contexts with high and extreme fragility, is one of the most significant trends of recent years. From 2010 to 2023, non-state violence increased by 71%, peaking in the period from 2014 to 2018. From 2021 to 2023, non-state conflicts were concentrated in the DRC, Mali, Nigeria, South Sudan, Sudan

and Syria. Reflecting the global spread of violence, non-state violence was more prevalent in medium to low fragility contexts than in high and extreme fragility contexts from 2018 onwards, largely due to infighting between organised criminal groups in contexts located in Central and South America (Figure 2.11).

**Figure 2.11. Non-state violence now causes more fatalities in contexts exposed to medium to low fragility rather than those facing high and extreme fragility**



Note: Contexts in medium to low fragility refers to ODA and non-ODA eligible contexts.

Source: Davies, et al. (2024<sup>[18]</sup>), "Organized violence 1989-2023, and the prevalence of organized crime groups", <https://doi.org/10.1177/00223433241262912>; Sundberg and Melander (2013<sup>[85]</sup>), "Introducing the UCDP Georeferenced Event Dataset", <https://doi.org/10.1177/0022343313484347>.

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Overall deaths from terrorism have increased (Institute for Economics and Peace, 2024<sup>[86]</sup>), with trends fluctuating over the past three years, especially in contexts with extreme fragility<sup>15</sup>. There have been important changes in the geography of terrorism, which has decreased in Afghanistan (following the Taliban takeover in mid-2021) while attacks have increased in the Sahel region (Institute for Economics and Peace, 2024<sup>[86]</sup>).

The Hamas-led attacks on Israel on 7 October 2023 constituted the largest single terrorist attack since 9/11 (Institute for Economics and Peace, 2024<sup>[86]</sup>) and looks set to reverse a regional trend for declining terrorism in the

Middle East. While this report does not have the data to assess the impact of these events in detail, it seems that the event has prompted significant changes in the region's fragility profile.

Overall, the trends point to a diversification of the use of violence for political and economic purposes and the increasing need for new thinking on upstream preventative measures (Chapter 3) that balance state and societal resilience with incentives in the political-economic space. The experience of Colombia, presented in Chapter 4, offers insights into such measures.



### **THE HUMAN TOLL OF VIOLENT CONFLICT IS CONCENTRATED IN CONTEXTS WITH HIGH AND EXTREME FRAGILITY**

The human impact of violent conflict is concentrated in contexts with high and extreme fragility. The years 2021, 2022 and 2023 each accounted for more annual fatalities than any prior year since 1994 (the year of the Rwanda genocide) (Davies et al., 2024<sup>[18]</sup>). A decrease in the share of fatalities occurring in contexts with high and extreme fragility is mainly attributable to the signing of a peace agreement between Ethiopia and the Tigray People's Liberation Front in November 2022, which lowered the conflict level. The declining share also reflects rising fatalities in medium to low fragility contexts specifically due to Russia's war of aggression in Ukraine since 2022. Russia and Ukraine are classified as experiencing medium to low fragility. Including fatalities from state-based, non-state violence and one-sided violence, over half (32) of all contexts facing high and extreme fragility experienced at least 25 fatalities in any given year from 2021 to 2023. These results are already grim, but they do not reflect data for 2024, which are not available at the time of publishing. Conflict events surged by 25% in 2024, which is already being described as "an extraordinarily vicious year" (Raleigh, 2024<sup>[19]</sup>).

### **THROUGH A FRAGILITY LENS: WHY IS VIOLENCE REACHING RECORD LEVELS?**

There is no simple answer to this question, but three specific presentations of violence demonstrate how combinations of fragility drive and derive from different types of violence.

#### *Violence is increasing due to specific combinations of risk and resilience*

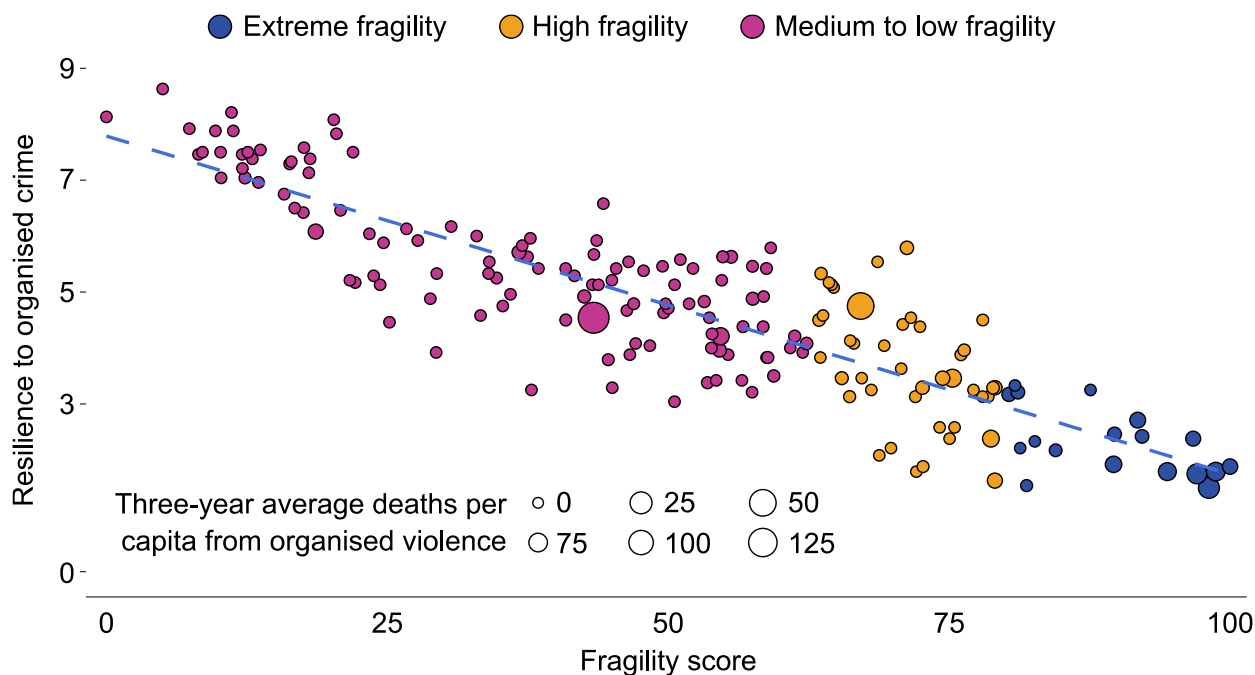
Increasing human and societal fragility in contexts exposed to or at high risk of violence is a significant indicator of the potential for long conflict cycles, as sources of resilience diminish over time. For example, the occurrence of one-sided violence in contexts with high and extreme fragility more than tripled from 2010 to 2023, peaking in 2014 due to conflicts in the Central African Republic, Iraq and Nigeria and again in 2021 due to conflicts in the DRC and Ethiopia. The profiles of these conflicts vary significantly in terms of rising risks and weak or declining sources of resilience including food insecurity, different types of disease, economic collapse, destruction of healthcare infrastructure,

and higher maternal mortality rates and neonatal fatalities, among others (Savell, 2023<sup>[87]</sup>).

Many conflict zone fatalities occur due to indirect effects of war, and these are likely to be more profound in contexts with the greatest fragility. In the case of healthcare, for example, conflict can cause and compound the destruction of health, water and sanitation infrastructure as well as disrupt medical supply chains, prevent patients from seeking care due to fear of violence and lead to a brain drain of trained health professionals. These in turn lead to a decrease in key sources of resilience, lowering the quality of care, which may ultimately lead to a surge in infectious diseases, and increasing maternal and newborn mortality rates and disease-related deaths (Savell, 2023<sup>[87]</sup>). When malnutrition and disease are associated with economic collapse, which can lead to distortion in the supply of and demand for food and basic goods, these health impacts are concomitantly responsible for a large part of conflict-related fatalities. In the case of the Tigray war in Ethiopia, for example, estimates suggest that there were between 150 000 and 200 000 people dying as a result of starvation and more than 100 000 dying due to lack of healthcare (Fisher and Jackson, 2024<sup>[88]</sup>). In such contexts, it is important to emphasise that women and children are more likely to bear the indirect costs in high-conflict regions and rural areas where the state has a smaller presence (Savell, 2023<sup>[87]</sup>).

Rapid urbanisation offers opportunities for the spread of organised crime and associated violence. The urbanisation rates of 3.5% yearly in high and extreme fragility contexts lead to a doubling of the urban population roughly every 20 years.<sup>16</sup> Such rapid population growth in peri-urban areas is an important risk factor for violence (Elfversson and Höglund, 2023<sup>[89]</sup>), particularly when these areas are disconnected from power centres and public service delivery mechanisms. This allows organised crime groups to establish transport nodes for illicit financial flows, leverage land value capture and real estate markets, and establish territorial control, including as providers of basic services in the absence of state or other providers (Sampaio, 2024<sup>[90]</sup>). In many cities, there is a blurring of the line between criminal and political violence. Lagos serves as an illustration: Political parties and elites there perpetuate violence to preserve the unequal distribution of power and resources by recruiting gangs that attack rivals, intimidate party members and rig elections, often becoming especially active prior to elections (Adzande, Meth and Commins, 2024<sup>[91]</sup>).

**Figure 2.12. Contexts with higher levels of aggregate fragility have lower levels of resilience to organised crime**



Source: Davies, et al. (2024<sup>[18]</sup>), "Organized violence 1989-2023, and the prevalence of organized crime groups", <https://doi.org/10.1177/00223433241262912>; Sundberg and Melander (2013<sup>[85]</sup>), "Introducing the UCDP Georeferenced Event Dataset", <https://doi.org/10.1177/0022343313484347>; Global Initiative Against Transnational Organized Crime (2023<sup>[92]</sup>), *Global Organized Crime Index 2023 (dataset)*, <https://ocindex.net/downloadshttps://ocindex.net/downloadshttps://ocindex.net/downloads>.

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The interplay of specific combinations of risk and declining or diminished resilience at subnational levels drives violence in other ways as well, especially around the distribution of political power and state resources between the state and the periphery and among various subnational actors (Wolff, Ross and Wee, 2020<sup>[93]</sup>). These patterns are evident in Nigeria, where different types of organised violence coexist, due to the limitations of a security sector that struggles to provide security to all parts of the country equally. Examples include armed banditry in the northwest in the form of cattle rustling and kidnapping (Madueke et al., 2024<sup>[94]</sup>); counter-insurgency campaigns against Islamist militant groups in the northeast; pastoralist-farmer conflicts in the Middle Belt region; and occasional outbreaks of violence in the southern half of Nigeria as a result of electoral competition, banditry and cultism (Carboni, 2023<sup>[95]</sup>).

#### *Violence is increasing for its political expediency*

Many conflicts occur at the subnational level in "geographically, economically, or politically peripheral areas where state capacity is weak or mostly absent" (Raleigh and Linke, 2018<sup>[96]</sup>). In such configurations,

violence can be constitutive of subnational governance – for instance, it can be used as a tool of competition between political agents. The increase in non-state armed groups and subnational patterns of conflict is frequently associated with the establishment of different forms of parallel governance structures due to the lack of effective territorial control of certain states. At least 14 out of 18 contexts with extreme fragility have contestation of the state's monopoly on violence by a myriad of actors including insurgencies, rebel groups or organised criminal groups. On average, in 2023, the central governments of contexts with extreme fragility control approximately 76% of their territories as opposed to 87% in contexts with high fragility and 95% in contexts classified with medium to low fragility.<sup>17</sup> As such, an estimated 150-160 million people live in areas where non-state armed groups provide parallel governance structures e.g. access to justice, basic services and security (Lilja et al., 2024<sup>[97]</sup>). Areas of rebel governance e.g. areas controlled by Islamist extremist groups, are usually part of competitive statebuilding strategies in which control is exclusively held by rebel groups; these differ from areas of criminal governance. Far from being limited to contexts with high and extreme fragility, parallel

governance structures are prevalent in both rural and urban areas across a wide variety of contexts.

State-embedded actors are regarded as the most dominant perpetrators of organised crime (Global Initiative Against Transnational Organized Crime, 2023<sup>[98]</sup>) in all regions. They are especially prevalent in contexts with higher levels of fragility: 17 of the 20 contexts with the highest average on this metric are exposed to high and extreme fragility. Examples include Venezuela and the former Baathist regime in Syria, with state-embedded actors relying heavily on narcotics trafficking (Pelcastre, 2023<sup>[99]</sup>) of cocaine in the former and captagon in the latter. Contexts in Central Africa are particularly affected by a combination of a high degree of state-embedded actors and low resilience to organised crime.

In LAC in particular, criminal governance is usually a form of hybrid governance whereby criminal groups are embedded with state power through symbiotic arrangements between the state and criminal organisations, for instance through collusion, co-optation, intimidation and/or bribery (Lessing, 2021<sup>[100]</sup>). As such, this system of divided sovereignty is often present in areas with limited or non-existent state infrastructural power such as

informal settlements in urban areas, peripheral rural areas and border zones (Feldmann and Luna, 2022<sup>[101]</sup>). In some major urban contexts, for example, militias intervene in the provision of services such as education, health, social services, land tenure, property rights and housing that are neglected by the state, acting as brokers in a coercive client-patron relationship while having shared interests and entanglements with state, political and business actors (Pope and Sampaio, 2024<sup>[102]</sup>).

The diversification of organised violence can also be connected to shifts in regional geopolitics, especially where regional and middle powers seek to manipulate or capitalise on fragility and conflict to achieve their foreign policy objectives. Foreign policy interventions by these actors often bypass existing international institutions and forums and support authoritarian regimes, which undermines traditional conflict resolution and peacemaking processes (International Institute for Strategic Studies, 2023<sup>[103]</sup>). However, the expediency of such approaches is open to question, as short-term gains, often focused on the security and economic dimensions, can evolve to become strategic losses (Box 2.5).

## Box 2.5 Building strategic resilience: Contrasting outcomes of security sector support

### Hybrid tactics, multidimensional fragility and the targeting of security sectors

Russia has deployed hybrid interventions across the African continent that are implemented by both state and independent state-aligned actors such as Africa Corps (Ramani, 2023<sup>[104]</sup>), previously known as the Wagner group. Most of the contexts Russia engages with, including Burkina Faso, Mali and Niger, experience severe to high political and security fragility, which is often associated with authoritarian regimes or weak democratic institutions (Siegle, 2023<sup>[105]</sup>). Operationally, the focus is on 1) undermining human and societal resilience while at the same time protecting specific security institutions and economic factors for resilience through elite co-optation (Siegle, 2023<sup>[105]</sup>); 2) creating barriers to internal regime challengers, or “coup-proofing” (Plichta, 2024<sup>[106]</sup>); 3) repressing protests and/or fighting against insurgents; and 4) securing access to renewable and non-renewable natural resources, particularly critical minerals and hydrocarbon assets. Since the escalation of the war in Ukraine, this focus has also partly facilitated Russia’s sanctions evasion strategy. Its interventions in Africa have often been calibrated to exploit security vacuums through the manipulation of the information ecosystem with disinformation campaigns, election interference, support for coup leaders and to extraconstitutional claims on power. Russian disinformation campaigns, principally though not exclusively focused on Central and West Africa, have targeted at least 22 contexts (including 16 exposed to high and extreme fragility) and account for nearly 40% of all disinformation campaigns in 2023-24 in Africa (Africa Center for Strategic Studies, 2024<sup>[107]</sup>).

### ***What can be learned from Russian hybrid tactics?***

Russia's capitalisation of opportunities for "quick, transitory gains" in contexts that are plagued by high political and security fragility (Galeotti, 2021<sup>[108]</sup>) and its attempts to influence contexts' internal political settlements offer insights into what targeted and transactional interventions can achieve. Russia's instrumentalisation of fragility further reflects a narrow focus informed by the symbiotic relationship between the Kremlin, oligarchs and organised criminal groups (Caparini, 2022<sup>[25]</sup>). However, despite the prevailing narrative, Russian influence and success have been mixed, especially where the emphasis on security sector assistance in the absence of governance measures has led to volatile outcomes, as shown in the following examples:

- **Northern Mozambique.** The Wagner Group's security intervention in Cabo Delgado province against Islamist militant groups lasted less than two months due to military failures, leading to its rapid withdrawal (Ramani, 2023<sup>[104]</sup>).
- **Madagascar.** Russia's attempt to support several opposition candidates in Madagascar's 2018 elections was primarily motivated by its interest in the country's chromium reserves and strategic location in the Indian Ocean (Ramani, 2023<sup>[104]</sup>). The Russian efforts failed, and the newly elected president, Andry Rajoelina, refused Russian offers of support in the aftermath of the election.
- **Central African Republic.** The country has been described as a laboratory for Russia to perfect its methods (Valade and Di Roma, 2022<sup>[109]</sup>). In exchange for access to natural resources, Russia provided military and political support to President Touadéra through the Wagner Group, including supplying a national security advisor, and paramilitary and civilian trainers for the Central African Republic president. Their access to natural resources has not gone uncontested, especially at local levels, where the Wagner Group has used widespread violence against civilians around mining areas. Russian soft power initiatives and disinformation campaigns – for instance through the popular station Radio Lengo Songo now on a sanctions list, which has offered pro-Russian views (Stanyard, Vircoulon and Rademeyer, 2023<sup>[110]</sup>) – have complemented the security support.

### ***Lessons on security sector resilience in Ukraine***

Though Ukraine's fragility levels are increasing, the fact that it continues to be classified with medium to low fragility speaks to its underlying resilience, as demonstrated by its security sector. Since 2014 and in the face of a clear threat from Russia, Ukraine has achieved remarkable security sector governance progress across education, training, and organisational control for its military and police forces. Donor assistance and civil society mobilisation were key to these achievements (Beliakova and Detzner, 2023, p. 6<sup>[111]</sup>). In particular, the strengthening of its civilian oversight and control of the security sector, now tested in war, contrasts with the short-term and transactional delivery of security sector assistance across Africa and in a different way with Russian security sector governance weaknesses, especially related to command and control and pervasive corruption (Beliakova and Detzner, 2023, p. 6<sup>[111]</sup>). Though Russia retains an advantage in terms of military mass, the fact that Ukraine has been able to withstand three years of conventional war to the degree that it has points to the geostrategic value of building resilience across development, peace and security structures.

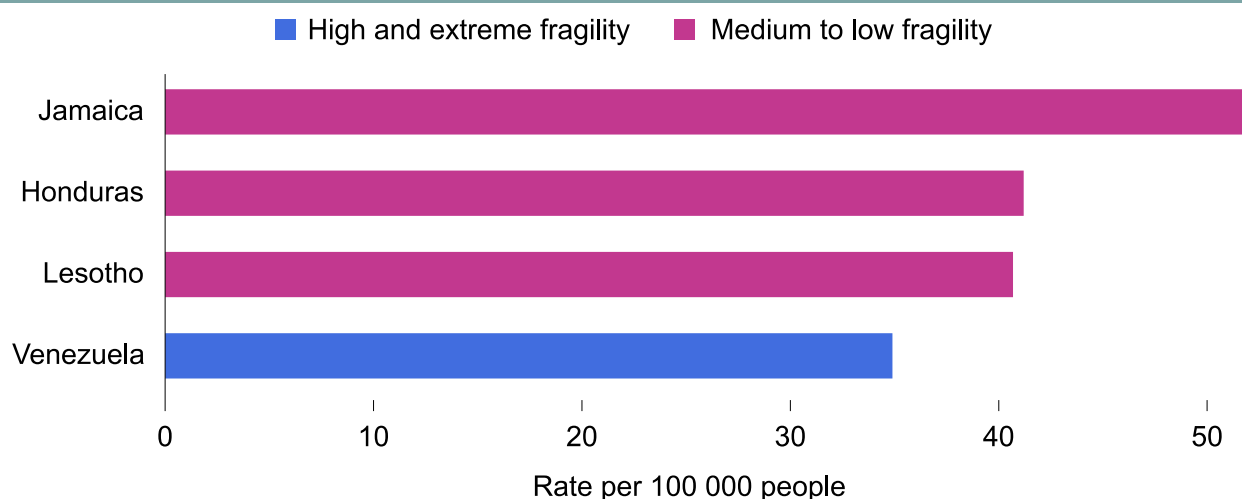
Source: Ramani (2023<sup>[104]</sup>), *Russia in Africa: Resurgent Great Power or Bellicose Pretender?*; Siegle (2023<sup>[105]</sup>), "Intervening to undermine democracy in Africa: Russia's playbook for influence", <https://africacenter.org/spotlight/intervening-to-undermine-democracy-in-africa-russias-playbook-for-influence/>; Plichta (2024<sup>[106]</sup>), "Russia's mercenaries are bolstering autocratic regimes in the Sahel", <https://theloop.ecpr.eu/russias-mercenaries-are-bolstering-autocratic-regimes-in-the-sahel/>; Africa Center for Strategic Studies (2024<sup>[107]</sup>), *Mapping a Surge of Disinformation in Africa*, <https://africacenter.org/spotlight/mapping-a-surge-of-disinformation-in-africa/>; Galeotti (2021<sup>[108]</sup>), "Active measures: Russia's covert global reach", <https://www.marshallcenter.org/en/publications/marshall-center-books/russias-global-reach-security-and-statecraft-assessment/chapter-14-active-measures-russias-covert-global-reach/>; Caparini (2022<sup>[25]</sup>), *Conflict, Governance and Organized Crime: Complex Challenges for UN Stabilization Operations*, <https://doi.org/10.55163/NOWM6453>; Valade and Di Roma (2022<sup>[109]</sup>), "Comment la Centrafrique est devenue le laboratoire de la propagande russe en Afrique", [https://www.lemonde.fr/afrique/article/2022/06/08/comment-la-centrafrique-est-devenue-le-laboratoire-de-la-propagande-russe-en-afrique\\_6129431\\_3212.html](https://www.lemonde.fr/afrique/article/2022/06/08/comment-la-centrafrique-est-devenue-le-laboratoire-de-la-propagande-russe-en-afrique_6129431_3212.html); Stanyard, Vircoulon and Rademeyer (2023<sup>[110]</sup>), *The Grey Zone: Russia's Military, Mercenary and Criminal Engagement in Africa*, <https://globalinitiative.net/analysis/russia-in-africa/>; Beliakova and Detzner (2023<sup>[111]</sup>), *Security Sector Governance and Reform in Ukraine*, <https://peacerep.org/wp-content/uploads/2023/11/SSG-Report-v3-FINAL-.pdf>.

### *Violence is increasing for its economic expediency*


While fatalities from organised violence are concentrated in high and extreme fragility contexts, some of the highest homicide rates are found in middle-income contexts exhibiting medium to low fragility. According to 2021 homicide data, which are the most recently available and complete, only one of the ten contexts on the 2025 fragility framework with the highest homicide rates are classified as exposed to high and extreme fragility. Homicide rates are highest in LAC and sub-Saharan Africa, though rates vary across contexts within the regions, with the highest rates being largely urban phenomena with high geographical concentration. Ajzenman and Jaitman (2016<sub>[112]</sub>), for

instance, estimated that 50% of crimes happening in five cities in Latin American contexts were concentrated in 3.0-7.5% of street segments. A UN global study of homicides published in 2023 found that in LAC more than 50% of homicides are linked to organised crime; the victims and main perpetrators are young men; and most homicides are perpetrated using firearms (UN, 2023, p. 3<sub>[113]</sub>). Weapons are acquired through a variety of means: from stockpiles left over from civil wars (e.g. in El Salvador and Guatemala), obtained in collusion with state and private security groups (e.g. illicit sales), and purchased in illicit markets whose existence is facilitated by the sales of legal and illegal firearms, including 3-D printed weapons (Lazaro, 2024, p. 5<sub>[114]</sub>).

**Figure 2.13. Several contexts exposed to medium to low fragility have the highest rates of deaths per homicide (2021)**



Note: Data from 2021 was chosen as it had a larger number of contexts with available data compared to 2022 and 2023.  
Source: Igarapé Institute (2024<sub>[115]</sub>), *Homicide Monitor*, dataset; <https://homicide.igarape.org.br/>.

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The political and economic expediency of violence varies by context, but certain common elements can be highlighted. For example, the largest cocaine-producing contexts and the main exit points for cocaine exports are located in LAC, and violence has flared when trade routes and networks have changed such as when they expanded to port cities in Costa Rica and Ecuador (International Crisis Group, 2023<sub>[116]</sub>). Beyond the cocaine trade, criminal organisations have also spread and diversified their activities to encompass extortion, including, in the Northern Triangle, environmental crime and, in some contexts, other types of narcotics trade. At the same time, institutional weakness has allowed organised crime groups to impose criminal

governance in certain areas and to infiltrate state institutions and influence elections, notably through violence, in other contexts (Muggah, 2017<sub>[117]</sub>). Economic factors of fragility – the high level of wealth and social inequalities in Latin America, urban poverty due to poor-quality economic growth, and youth unemployment – have likely facilitated recruitment to organised criminal groups and/or armed groups (Muggah, 2017<sub>[117]</sub>). In parallel, violence has increased in the region despite democratic transitions and economic growth in some contexts, and attempts by these contexts' governments to control crime have often led to worse outcomes (Vilalta, 2020<sub>[118]</sub>).



In other words, a decline in violence has not necessarily accompanied declines in political and economic fragility. Jamaica, a context experiencing medium to low fragility, is an example. It has made progress on macroeconomic reforms (World Bank, 2024<sub>[119]</sub>) and security sector reforms (Asmann, 2021<sub>[120]</sub>) as part of a difficult development and peace transition. But these have not yet had an impact on the political economy of Jamaica's gang violence, which is responsible for most homicides (Dalby, 2022<sub>[121]</sub>).

In conflict-affected contexts, widespread corruption, breakdown in the rule of law, limited government oversight and opportunities to infiltrate as well as collude with state-based actors all offer opportunities for different types of criminal actors to expand their economic ambitions through violent means. Many non-state armed groups profit from illicit activities to finance their armed struggle, gaining political power to "protect and expand their economic rackets", while in other situations, criminal organisations enter the formal political space (Jackson, Weigand and Tindall, 2023<sub>[122]</sub>). Myanmar offers an example of how criminal activities can flourish in conflict-affected areas. Following the military coup and outbreak of civil war in 2021, large-scale, illegal rare earth mining escalated (Global Witness, 2024<sub>[123]</sub>), heroin production doubled (UN, 2023<sub>[124]</sub>), and human trafficking increased to service prison-like cyber-scam centres, many in borderland regions between Myanmar and Thailand and controlled by the Myanmar military or ethnic militias affiliated with the military (Taylor, 2024<sub>[125]</sub>).

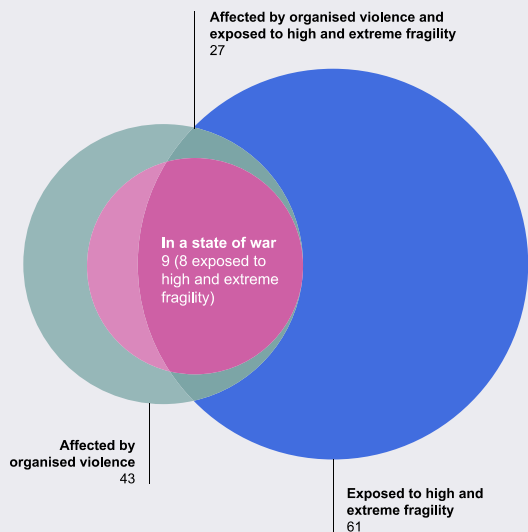
### *THE PRESENCE OF ORGANISED VIOLENCE COMPROMISES POLICY RESPONSES TO POVERTY AND INCENTIVISES NEGATIVE COPING CAPACITIES*

Nearly 40% of the multidimensional poor, or 455 million people, reside in contexts marked by fragility, conflict or violence (OPHI/UNDP, 2024<sub>[126]</sub>). The experience of organised violence directly impacts on the social, political and economic order, setting the stage for cycles of exclusion and violence. On one level, the existence of organised violence can deny support to isolated or targeted communities suffering from poverty, which compounds over time as "conflict debt" (Mueller and Techasunthornwat, 2020, p. 2<sub>[127]</sub>). On another level, organised violence intersects with a variety of pre-existing and new drivers of fragility that can compel positive and negative reactions. As seen with the evolution of the conflict economy in Sudan (Chapter 4), local institutions and the private sector can exhibit significant economic resilience. However, in almost all cases, these factors of resilience are insufficient to negate the broader impact of conflict on poverty while it continues. Nor can they mitigate the impacts where the intersections between conflict and poverty are much more complex, linking weak state capacity, a weak private sector, a lack of security on the part of the state or other non-state actors, weak resilience, low levels of societal trust and compliance, and polarisation, whether driven by ideological, ethnic, linguistic or religious factors (Mueller and Techasunthornwat, 2020, p. 10<sub>[127]</sub>). The importance of tailoring policy responses to these complex contexts is discussed in Chapter 3.

## Infographic 2.5. Features of organised violence in contexts with high and extreme fragility

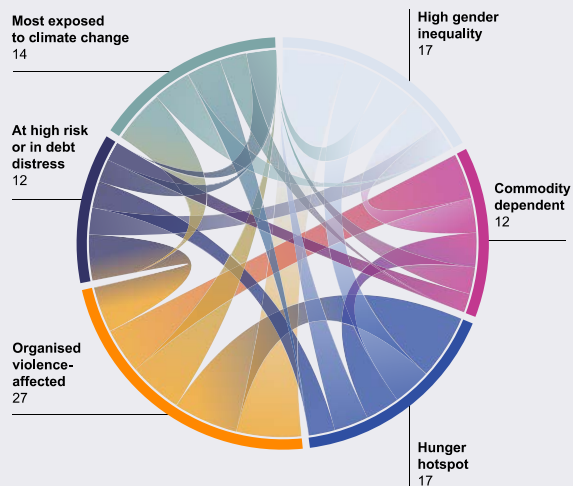
### Organised violence is both a cause and a symptom of fragility

In 2023, 27 out of 61 contexts exposed to high and extreme fragility were affected by organised violence (state-based, non-state and one-sided violence). 24 were conflict-affected while 8 were in a state of war (over 1 000 battle deaths in one year).



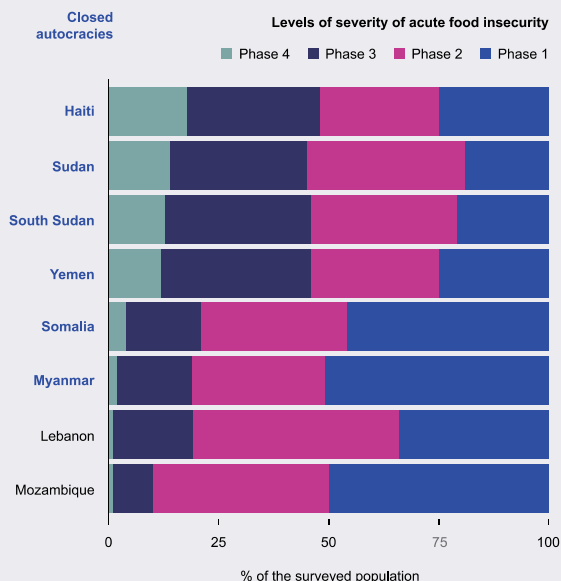
### Organised violence intersects with multidimensional risks, exacerbating overall fragility

Organised violence can exacerbate other drivers of fragility, while erupting due to drivers of fragility.



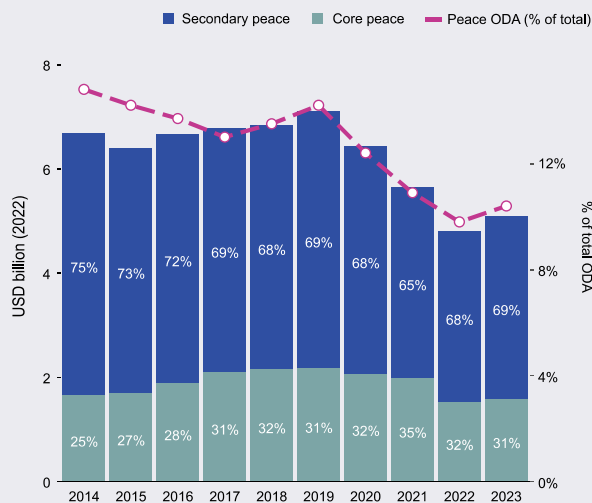
### Organised violence and poor governance compound food insecurity

Of the 27 contexts exposed to organised violence, 17 are hunger hotspots and 11 are both hunger hotspots and closed autocracies. Haiti, Sudan, South Sudan and Yemen face particularly acute food insecurity: More than 45% of their populations face crisis or worse levels of food insecurity.



### DAC ODA for peace in 2023 in contexts exposed to high and extreme fragility was at its second lowest volume since 2004

The 28% decline in DAC peace ODA to these contexts from USD 7.1 billion (2019) to USD 5.1 billion (2023) was driven by secondary peace objectives (in volume). However, both categories declined at similar rates, explaining why the ratio between core and secondary peace has remained stable across time.



Note: Organised violence-affected contexts are those that experience state, non-state and one-sided violence with above 25 fatalities for 2023. A context is commodity dependent when more than 60% of its total merchandise exports are composed of commodities. There were 22 hunger hotspots in the outlook period from November 2024 to May 2025. Higher gender inequality refers to a score equal or higher to 0.5 on UNDP's Gender Inequality Index. Contexts most exposed to climate change are those that rank > 144 on ND-GAIN Exposure in the Notre Dame - Global Adaptation Initiative Country Index. Secondary and core peace are defined in Annex A. At high risk or in debt distress refers to contexts in these categories on the Joint Bank-Fund Debt Sustainability Framework for Low Income Countries. 10 contexts with high and extreme fragility have over 1 000 battle deaths in 2023 but there are eight wars in these contexts.

Source: Davies, et al. (2024<sup>[18]</sup>); Sundberg and Melander (2013<sup>[85]</sup>); UNDP (2024<sup>[80]</sup>); UNCTAD (2023<sup>[128]</sup>); FAO/WFP (2024<sup>[129]</sup>); World Bank Group (2024<sup>[130]</sup>); Notre Dame Global Adaptation Initiative (2024<sup>[131]</sup>); IPC (2024<sup>[132]</sup>); OECD (2024<sup>[82]</sup>).

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## CONTEXTS EXPERIENCING HIGH AND EXTREME FRAGILITY CONTINUE TO DRIVE AND HOST MOST FORCED DISPLACEMENT

Multidimensional fragility, conflict and persecution are driving forced displacement to unprecedented levels. In 2023, more than 126 million people were refugees or internally displaced, according to the UN Refugee Agency (2024<sup>[133]</sup>) (Infographic 2.6 gives detailed methodology). This constituted a 32.5% increase in the number of people forced to flee their homes since 2021, reflecting the devastating upheavals caused by the war in Sudan, Russia's war on Ukraine, and armed conflict across the Middle East during the intervening two years. Not only are more people than ever forcibly displaced, but the entrapment of populations in war zones is also a growing phenomenon.

Over 100 million refugees and internally displaced persons (IDPs) fled from contexts exposed to high and extreme fragility, representing 80% of all refugees and approximately 80% of all forcibly displaced persons (Infographic 2.6).<sup>18</sup> Moreover, a record-breaking 2.7 million people applied for asylum in OECD countries in 2023, a 30% increase over the number of new applicants in 2022. Altogether, OECD countries granted international protection to 676 000 refugees in 2023, 15% more than the previous year and the highest level since 2017. Notably, four of the top five origin contexts for asylum applicants to the OECD in 2023 are classified as exposed to high or extreme fragility: Venezuela (270 000 applicants), Syria (171 000), Afghanistan (150 000) and Haiti (76 000) (OECD,

2024, pp. 12-39<sup>[134]</sup>). Nonetheless, even with the sharp rise in refugees to OECD countries, it is the contexts experiencing high and extreme levels of fragility that still host the vast majority of the world's refugees and IDPs – all in all, 81 million people, almost two thirds (64%) of the total forcibly displaced population worldwide. Contexts exposed to high and extreme fragility host approximately 80% of all IDPs. The majority of all refugees and IDPs who are living in low- and middle-income contexts have been displaced for more than five years.

Under international and many national laws, states must protect forcibly displaced populations, either by granting asylum to those fleeing across borders or by safeguarding the rights of their own citizens who are internally displaced. Hosting forcibly displaced persons can reinforce a context's pre-existing fragilities and carries an economic, political and societal cost. In the short term, economic impacts are subnational, mainly affecting urban areas, areas in the vicinity of refugee camps, and local communities hosting the displaced as they put pressure on social service systems and natural resources. In the medium to long term, distribution and inclusion-oriented policies can reduce the financial cost of hosting such populations and possibly offer positive opportunities for the socio-economic integration of both the displaced and host communities.

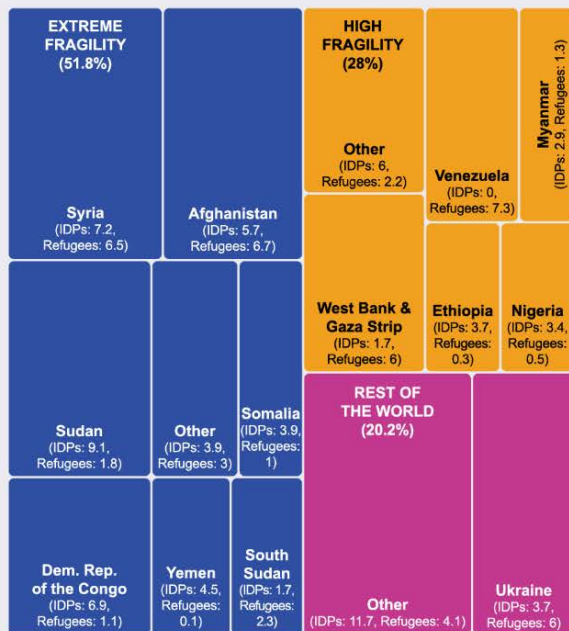
In the host contexts that experience the greatest fragility, the forcibly displaced often face a capability trap whereby neither the state nor the host community has the capacity to offer social or economic opportunities. Even with inclusive policies, fragility limits realistic opportunities for practical solutions, such as socio-economic empowerment of the displaced.

## Infographic 2.6. Most forcibly displaced persons flee from and are also hosted in contexts exposed to high and extreme fragility

### Most forcibly displaced originate from contexts exposed to high and extreme fragility

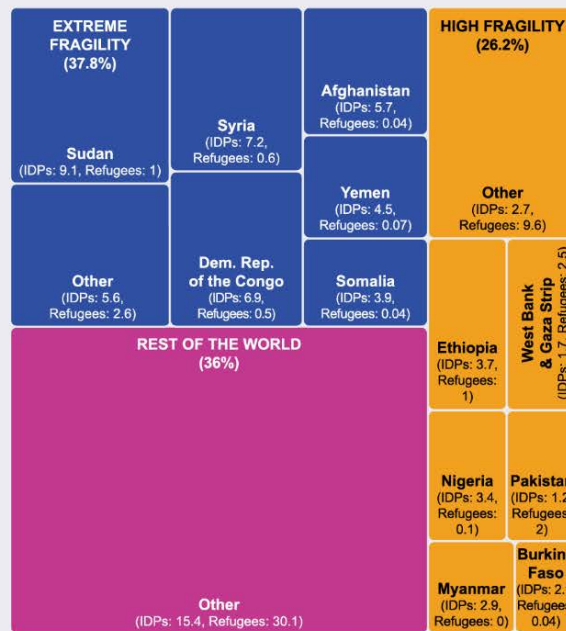
#### Context of origin

79.8% of all refugees and IDPs have fled from contexts with high and extreme fragility.



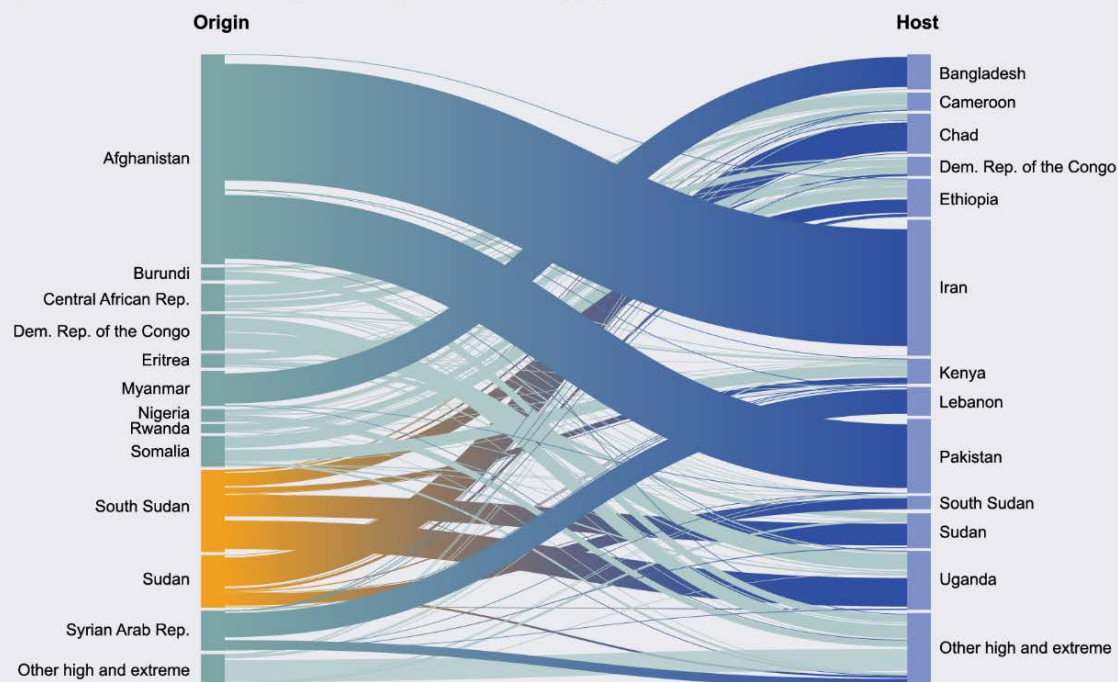
#### Host context

Contexts facing high and extreme fragility host 64% of all refugees and IDPs.



Information for each context on IDPs and Refugees is in millions of people.

### Refugee flows between contexts exposed to high and extreme fragility



Note: Forced displacement refers to the totality of IDPs and refugees at the end of 2023, including the following population groups: refugees, asylum seekers, other people in need of international protection, refugees under the UN Relief and Works Agency for Palestine Refugees in the Near East Mandate, conflict IDPs and disaster-related IDPs. Refugee flows at the bottom only include recognized refugees and asylum seekers. Rest of the world refers to contexts in medium to low fragility and those off the framework.

Source: International Displacement Monitoring Centre (2024<sub>[135]</sub>); UNHCR (2024<sub>[136]</sub>).

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### *POLITICAL, SECURITY AND ECONOMIC INTERESTS AFFECT SOLUTIONS TO FORCED DISPLACEMENT*

Forced displacement first and foremost constitutes a human rights and humanitarian problem. Historically, responses have primarily relied on humanitarian aid, but there is increasing recognition of the value of development and peace approaches and progress in deploying them (OECD, 2024<sup>[137]</sup>; INCAF/OECD, 2023<sup>[138]</sup>). The political economy of forced displacement plays an important role in shaping responses to displacement, with possibly harmful consequences.

Parties to a conflict, including state and non-state actors, may use the forced displacement of populations for specific security or political objectives. Such instrumentalisation can include the deliberate emptying or crowding of specific territories (e.g. forcing refugees into or out of internal displacement camps or settlements) to extend security control as well as attempting to change the ethnic make-up of an area for political purposes (Steele, Schwartz and Lichtenheld, 2024<sup>[139]</sup>).

Governments of host contexts also may try to use the presence of refugee populations to bargain with international partners for certain political outcomes such as legitimising or preserving the power of authoritarian regimes, gaining international recognition, or improving relations with foreign partners. Economic outcomes in the form of maximising external development finance can also be forms of instrumentalisation of refugee and migrant presence (Koch, Weber and Werenfels, 2018<sup>[140]</sup>) playing on perceived fears of onward migration to countries that provide development co-operation.

Populist perceptions about possible negative economic consequences of the presence of displaced populations also may be instrumentalised in local public discourse for political purposes. This can raise tensions and trigger restrictive or securitised approaches to forced displacement. Illicit smuggling and trafficking networks may take advantage of displaced people who are trying to reach countries of asylum or other destinations but are finding legal pathways restricted.

## **ECONOMIC TRENDS HAVE PROVEN TO BE IMPORTANT DRIVERS AND SYMPTOMS OF FRAGILITY**

The combination of slow economic recovery from the COVID-19 pandemic, persistently high inflation and rising financing costs form a trio of challenges for contexts exposed to high and extreme fragility. On average, incomes in contexts exposed to high and extreme fragility stopped catching up with those facing medium to low fragility around 2015 (World Bank, 2024<sup>[48]</sup>). Contexts exposed to high and extreme fragility accounted for 72% of the world's extreme poor in 2024, a fact that underscores their importance in the global fight against poverty. In a higher interest rate environment globally, public debt levels and debt servicing costs increased. Creditor structures have become more fragmented, complicating the process of addressing debt challenges. FDI has been decreasing since 2012, in line with a global downward trend, while remittances offer a lifeline to many households and account for a substantial share of GDP in many contexts. Fiscal space is a major challenge for contexts facing high and extreme fragility, which reduces their capacity to respond to shocks, and governments have struggled to fiscally consolidate. With financing costs increasing, many of these contexts face a difficult balancing act between cutting expenditure and raising revenue, choices that can have knock-on impacts in terms of social unrest and the resilience of the population.

Fragility can itself impact the global economy, as seen in recent disruptions in global trade. Wheat prices increased in every country across the globe as a result of the Russian invasion of Ukraine, with large wheat-importing countries being acutely affected (Devadoss and Ridley, 2024<sup>[141]</sup>). Normally, about 15 percent of global trade passes through the Suez Canal and the Red Sea, but since 2023 and the start of the escalation of conflicts across the Middle East, the Houthi regime in Yemen has attacked more than 80 ships passing through the Red Sea, seizing one and sinking two (Chapter 1). An international maritime coalition is present in the Red Sea, protecting passing ships from Houthi attacks (Gambrell, 2024<sup>[142]</sup>), but as a consequence of the Houthi attacks, many shipping companies have rerouted their ships around the Horn of Africa, and traffic through the Suez Canal and Bab El-Mandeb Street has decreased significantly (Bogetic et al., 2024<sup>[143]</sup>), increasing travel time by ten days or more on average and driving up costs. The Panama Canal, also essential to world trade, had to reduce traffic in 2024 due to an ongoing drought that



resulted in lower water levels and is associated with environmental fragility (Kamali et al., 2024<sup>[144]</sup>).

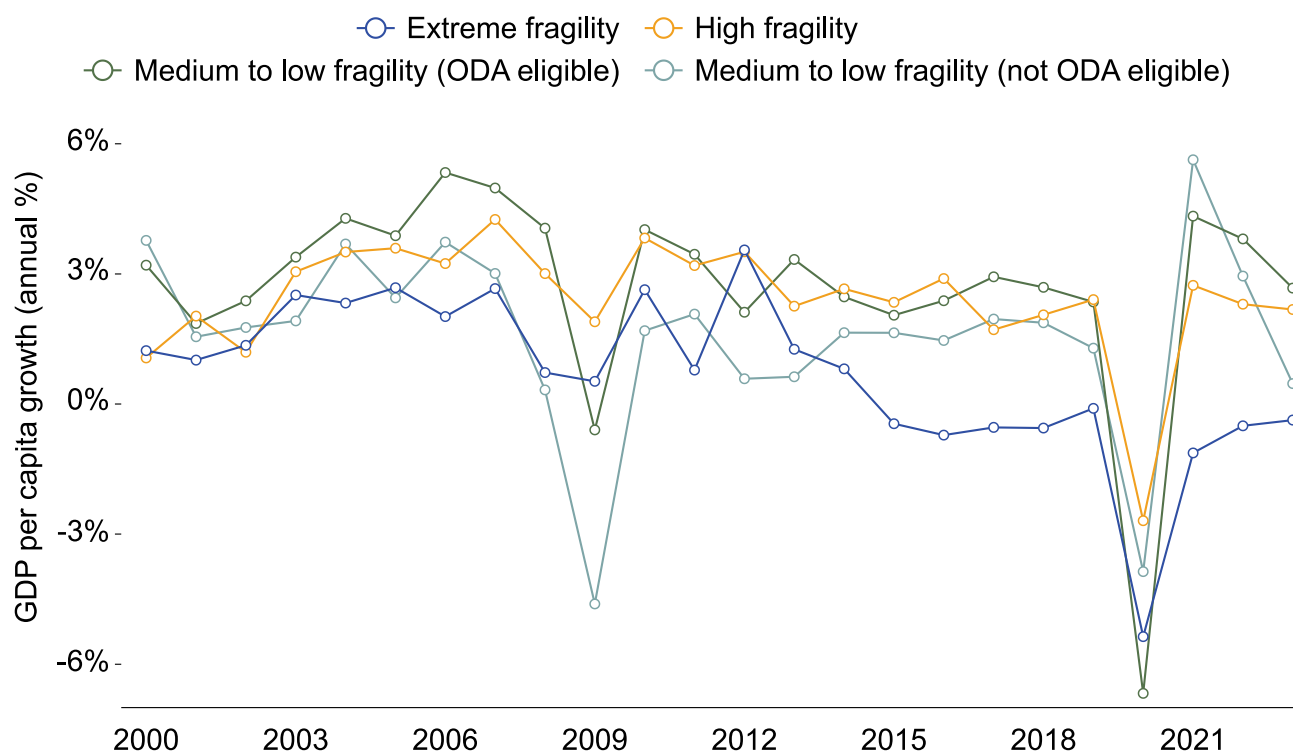
### THE HIGHER THE LEVEL OF FRAGILITY, THE HARDER THE RECOVERY HAS BEEN FROM THE PANDEMIC

As noted throughout this report, high and extreme fragility can be experienced by many types of economies. Between 2010 and 2023, Bangladesh and Ethiopia were the top growth performers with annualised growth rates of 8.8% and 10.1% respectively, while Yemen and Equatorial Guinea experienced the lowest annualised growth rates of -5.9% and -5.2% respectively (World Bank, 2024<sup>[48]</sup>). Of the 61 contexts classified on the 2025 fragility framework as experiencing high and extreme fragility, 34 are middle income and 26 are low income. One context, Venezuela, is unclassified (World Bank, 2024<sup>[145]</sup>). In general, growth rates in contexts experiencing high and extreme fragility continue to be lower, on average, and more volatile than in

contexts with medium to low fragility (OECD, 2022<sup>[146]</sup>). This is the opposite of what could be expected through theories of convergence and catch-up growth.


Growth remains flat or even negative since the pandemic. Contexts with high and extreme fragility had similar or smaller decreases in per capita GDP growth than the rest of the world during the pandemic. But unlike contexts with medium to low fragility, those experiencing high and extreme fragility have largely missed out on the recovery. Median per capita GDP growth in contexts experiencing high fragility has stabilised at about 2%. Contexts exposed to extreme fragility experienced the COVID-19 shock from an already negative position, and their median per capita growth rate has not been positive since 2015 (Figure 2.14). 32% of contexts facing high and extreme fragility are poorer in 2023 than in 2019 – 18 out of the 57 contexts for which data is available (World Bank, 2024<sup>[48]</sup>).

**Figure 2.14. Contexts facing high and extreme fragility had lower median gross domestic product per capita growth (annual %) post COVID-19 than contexts with less fragility**



Note: Median GDP per capita growth (annual %) was used from the September 2024 World Development Indicators database.

Source: Author's calculations based on the World Bank (2024<sup>[48]</sup>), *World Development Indicators*, <https://databank.worldbank.org/source/world-development-indicators>.

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Post COVID, economies exposed to fragility are still experiencing welfare losses that leave deep scarring on economies, societies and potentially politics. Low- and middle-income countries will likely suffer more severe long-term losses due to the effects of school closures on human capital formation (Decerf et al., 2024<sub>[147]</sub>). In the wake of the pandemic, global poverty rates increased, reversing a decade-long trend of falling poverty rates. This reversal occurred in all regions except for LAC (Castaneda Aguilar et al., 2024<sub>[148]</sub>). While global extreme poverty dropped to pre-pandemic levels in 2024, the concentration of extreme poverty in contexts facing high and extreme fragility has increased (Chrimes et al., 2024<sub>[149]</sub>)

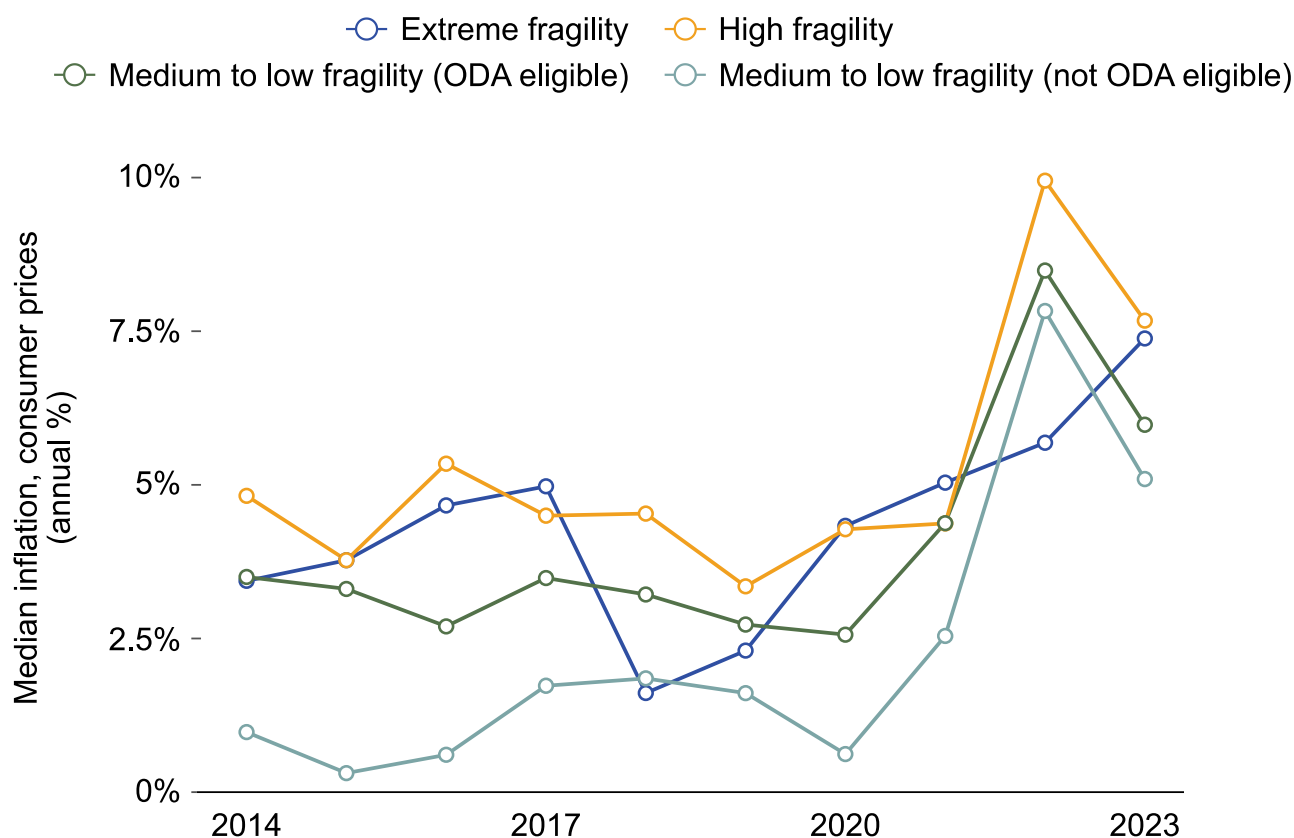
Consistent export-led growth and domestic market development have proven elusive in many contexts of high and extreme fragility. Historically, export-oriented growth has been an important source of foreign exchange and revenue for countries that have traded their way to increased prosperity, such as those in Southeast Asia. Current account balances can provide a snapshot, with a deficit generally indicating that a context is importing (and paying for) more goods than it is exporting (and earning from).<sup>19</sup> Contexts experiencing high and extreme fragility continue to accrue current account deficits: while the median deficit has reduced somewhat for contexts experiencing extreme fragility since 2020, the median current account deficit for contexts facing high fragility has increased from 2.5% in 2021 to 4% in 2022 (World Bank, 2024<sub>[48]</sub>). Contexts facing high and extreme fragility tend to trade less, and across a less diversified range of products, than contexts facing medium to low fragility. In terms of

value, in 2022, two-thirds of the exports from contexts facing high or extreme fragility are minerals, or food, and animal products (United Nations, 2024<sub>[150]</sub>).

Contexts facing high and extreme fragility tend to have less-diversified economies, a reliance on imported consumption products, and a narrow set of export sectors that are prone to volatile commodity prices. There are 26 contexts exposed to high or extreme fragility which are commodity dependent to energy (10), agriculture (10) and mining (6) (UNCTAD, 2023<sub>[128]</sub>). The current phase of exceptional volatility in commodity prices makes sustainable growth even harder, impacting on government finances, leading to uneven public investment, and affecting domestic inflation (Mohammad et al., 2023<sub>[151]</sub>).

High inflation rates persist, particularly for food and energy items that represent a large share of people's consumption in contexts exposed to high and extreme fragility, affecting households' welfare and adding to social pressures. Contexts with high fragility also have experienced a higher peak and a slower retreat of inflation than have contexts experiencing medium to low fragility, while inflation in contexts exposed to extreme fragility continues to rise. Global inflation was driven by massive fiscal stimulus packages during the pandemic, a surge in economic activity after the pandemic, disruptions in supply chains, and skyrocketing commodity prices especially for food and energy. Median inflation for contexts with high fragility peaked at 10% in 2022 and declined to 7.7% in 2023. The increase in inflation in contexts experiencing extreme fragility was smaller in 2022, but that increase continued through 2023 (Figure 2.15).

**Figure 2.15. Median inflation post COVID-19 is highest in contexts exposed to the greatest fragility**



Note: Median inflation, consumer prices (annual %) was used from the September 2024 World Development Indicators database.

Source: Author's calculations based on the World Bank (2024<sup>[48]</sup>), *World Development Indicators*, <https://databank.worldbank.org/source/world-development-indicators>.

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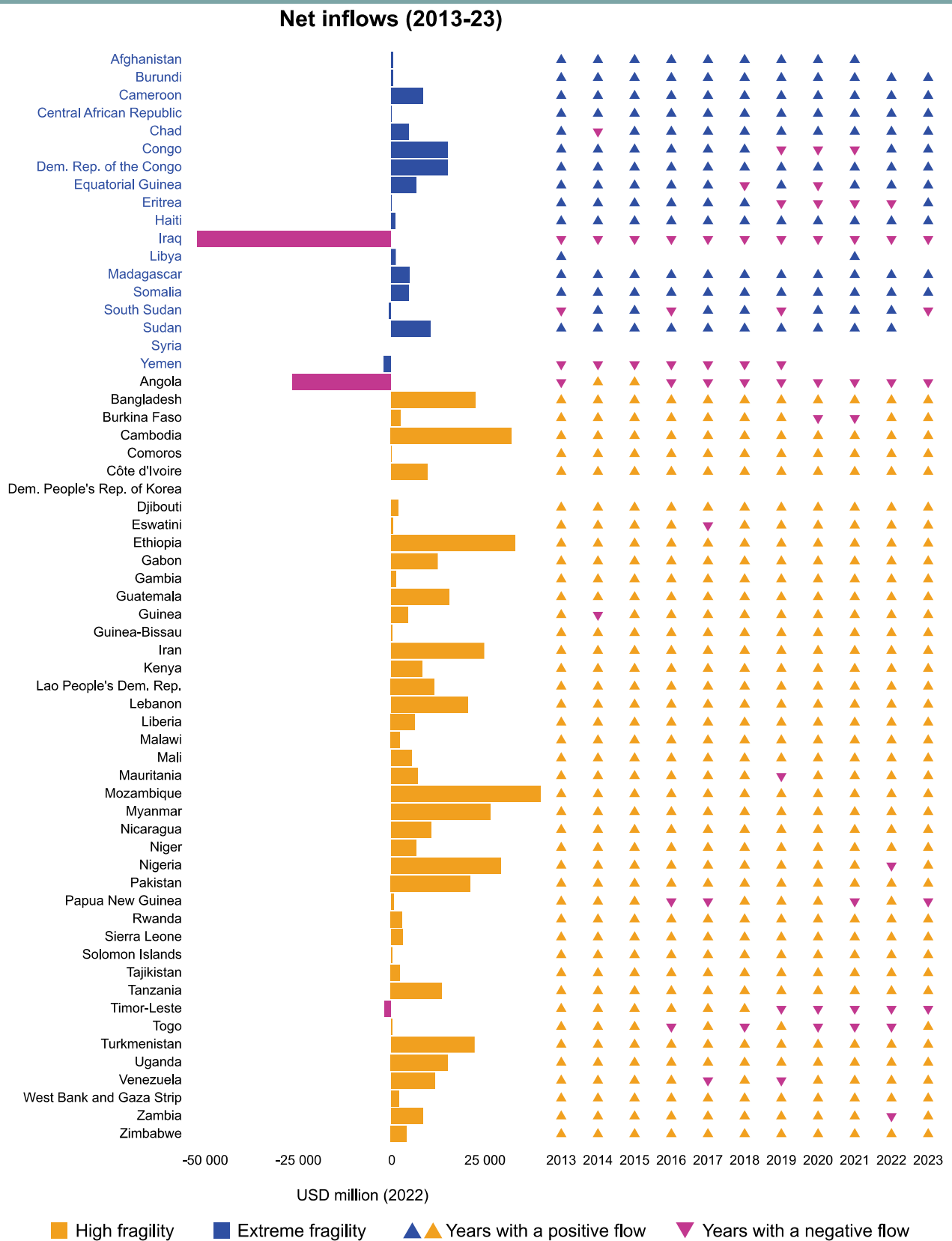
However, inflation rates vary considerably across contexts. In 2023, for instance, Lebanon experienced an inflation rate of 221%, while the rate for Burkina Faso was just 0.74%. 15 of the 61 contexts in high and extreme fragility had double-digit inflation. As food and energy items represent a significant share of households' consumption in contexts experiencing high and extreme fragility, their purchasing power is more affected by higher inflation rates in these categories. At the same time, the fiscal pressures faced by governments can translate into pressure on subsidies for basic foods and fuel, potentially impacting in turn on social unrest.

Total FDI to contexts experiencing high and extreme fragility has been declining since it peaked in 2012 in line with a global downward trend. These contexts received less than 5% of global net FDI inflows in 2023 though they

represented a quarter of the world's population. On average, contexts facing high and extreme fragility have received less than 2% of yearly global net FDI inflows since 1990. Since 2010, developing contexts that experience medium to low fragility have consistently seen a higher net FDI inflow as a share of GDP than contexts experiencing high and extreme fragility (World Bank, 2024<sup>[48]</sup>).

The lower FDI flows are a symptom, not a cause, of fragility, however. While Angola and Iraq experienced significant disinvestment, most but not all contexts experiencing high and extreme fragility had a positive net FDI inflow in 2023, and their share of FDI is approximately equal to their share of global GDP. Subdued investment in high and extreme fragility contexts is indicative of their challenging business environments and limited investment opportunities (Figure 2.16).

**Figure 2.16. Foreign direct investment in contexts facing high and extreme fragility (2013-23)**



Note: Foreign direct investment, net inflows (BoP, current US\$) from the September 2024 World Development Indicators database.  
 Source: Author's calculations based on the World Bank (2024<sup>[48]</sup>), *World Development Indicators*, <https://databank.worldbank.org/source/world-development-indicators>.

Remittances continue to be an important source of foreign exchange in contexts exposed to high and extreme fragility and a lifeline to many households (Figure 2.17). Remittance flows to these contexts exceeded USD 134 billion in 2023 compared with USD 70 billion in 2010.

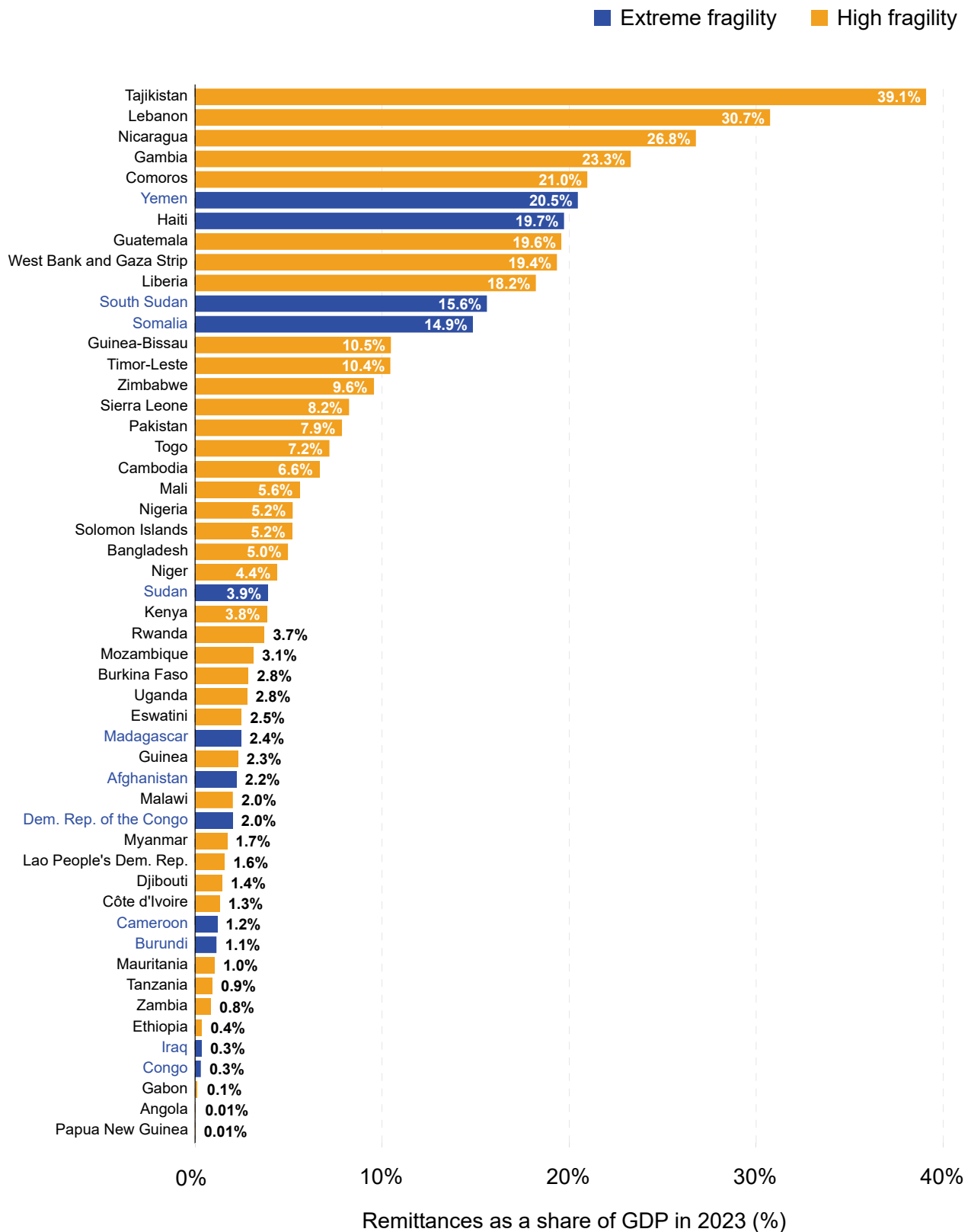
While contexts experiencing medium to low fragility receive far greater remittance flows by volume, the amounts received by contexts facing high and extreme fragility are more important economically, representing an aggregate 4.3% of their GDP versus 1.4% of GDP for the contexts facing medium to low fragility. This proportion varies a lot by context and by year: for some individual high and extreme fragility contexts, remittances constitute a much larger share of national income. Remittances constituted

more than 20% of GDP for 6 such contexts in 2023 and more than 10% of GDP for 14 contexts.

The volume of these flows can change depending on developments within the contexts themselves as well as in the contexts where remittances are sent from. For example, remittance flows to Tajikistan represented nearly 40% of its GDP in 2023, reflecting a surge of remittances from Russia due to the relocation of Russian companies and citizens, the appreciating Russian ruble exchange rate at the time, and higher demand in Russia for migrant workers (Kim, 2023<sup>[152]</sup>). In Nicaragua, remittances accounted for more than 25% of GDP or USD 4 billion, as high political and economic pressure drove many to migrate elsewhere, primarily to the United States.



**Figure 2.17. Remittances in 2023 account for over 10% of gross domestic product in 14 contexts with high and extreme fragility**



Source: World Bank (2024<sup>[153]</sup>), Migration and Development Brief 40 – June 2024 dataset,

<https://documents1.worldbank.org/curated/en/099714008132436612/pdf/IDU1a9cf73b51fcad1425a1a0dd1cc8f2f3331ce.pdf>

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***INCREASING GROWTH AND DECREASING INEQUALITY  
ARE BOTH NEEDED TO INCREASE WELFARE AND  
RESILIENCE***

Contexts exposed to extreme and high fragility accounted for 72% of the world's extreme poor<sup>20</sup> in 2024. Poverty remains highly concentrated, geographically and socioeconomically, in contexts with high and extreme fragility, and sub-Saharan Africa accounts for nearly 67% of the world's extreme poor (Christoph Lakner, 2024<sub>[154]</sub>). Current projections suggest that by 2040, this share of the world's extreme poor living in contexts with high and extreme fragility could surge to 92%.<sup>21</sup>

Contexts experiencing extreme fragility and conflict carry the highest poverty burden. To achieve broad development goals, both extreme and moderate poverty must be reduced. One-fourth of the population in contexts with high and extreme fragility live below the extreme poverty line of USD 2.15 per day. Even above this threshold, income security is elusive and fragile; 78% of the population in these contexts live on less than USD 6.85 per day, the poverty line for upper middle-income countries, meaning that even small shocks can have outsized impacts on welfare.

Despite the decline in global inequalities between countries, income inequality within countries has increased over the past two decades and remains one of the most pressing issues in global development. Within most contexts with high and extreme fragility, income inequality has increased considerably. In the Middle East and North Africa region, home to six contexts with high or extreme fragility, the top 10% of earners capture nearly 58% of total income; by comparison, the top 10% in Europe holds roughly 36% (Chancel et al., 2022, p. 11<sub>[72]</sub>).

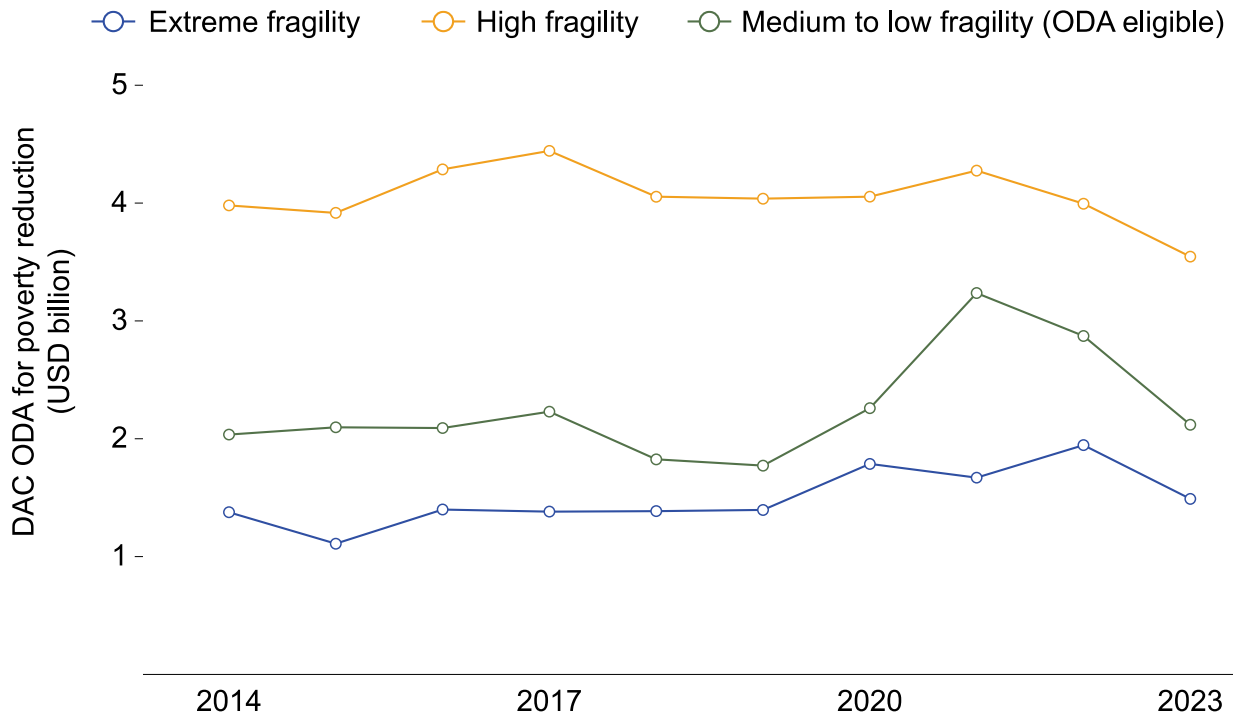
Wealth inequality often has a more enduring impact on societies than income inequality. Assets, property and inheritance tend to be passed down by generation, remaining concentrated within a small segment of the global population. According to the 2022 World Inequality Report, the top 10% of the global population controls 76% of the world's wealth while the bottom 50%, including the population in all contexts exposed to high and extreme fragility, owns merely 2% (Chancel et al., 2022, p. 3<sub>[72]</sub>). The COVID-19 pandemic exposed and exacerbated inequalities. Persistent disparities, particularly in contexts lacking progressive taxation and redistributive policies, continue to reinforce economic divides within societies, underscoring

the need for policy reforms to achieve more balanced economic growth. This pattern is evident not only in contexts exposed to high and extreme and high fragility but also in those with medium to low fragility. Given these trends and in light of projections that GDP growth rates will stagnate, reducing extreme poverty will be challenging.

Concentration of wealth among elites results in their disproportionate economic power, which frequently translates into political influence. In environments where elites capture political processes, a concentration of power can foster corruption and lack of accountability and erode democratic processes, degrading political and societal resilience. Analysis by the World Bank (World Bank, 2024<sub>[155]</sub>) and others also suggests that reducing inequality and implementing redistributive measures contribute to poverty reduction even in slow-growth environments.

The level of non-income inequalities in societies are as important as income levels to tracking progress towards reducing and eliminating poverty. In addition to monetary deprivation, unequal access to quality education, healthcare, political processes, and physical and legal security perpetuates the cycle of poverty by depriving individuals of the tools they need to improve their socioeconomic status (Spicker, 2020<sub>[156]</sub>). Constraints on access to justice in high and extreme fragility contexts affect a range of issues from personal and property rights to the availability of formal or informal dispute resolution mechanisms (OECD, 2022<sub>[146]</sub>). Such limitations tend to entrench elite capture and the inequalities that benefit the ruling elite in the short term and also limit a society's ability to increase the human capital needed to exit fragility over the longer term. Regional differences in multidimensional poverty mirror the differences in rates of extreme poverty. In sub-Saharan Africa, for example, the high rate of extreme poverty can be explained not only by populations' lack of monetary assets but also by indicators such as low rates of educational enrolment and access to sanitation. Considering deprivation as a multifaceted phenomenon is important when considering policy options that will improve people's welfare, even if the policy will not immediately raise consumption levels (World Bank, 2024<sub>[155]</sub>). Ending poverty and reducing inequalities are interlinked (OECD, 2024, p. 20<sub>[60]</sub>), and in high and extreme fragility contexts, the success of policy options such as social safety nets, rural development, closing gender income gaps, and designing equitable revenue generation depends on the ability of policy designers to navigate the combinations of fragility that affect policy delivery.

**Figure 2.18. Trends in official development assistance for poverty reduction, by classification of fragility (2014-23)**



Note: Author's own calculations for ODA going towards poverty reduction.

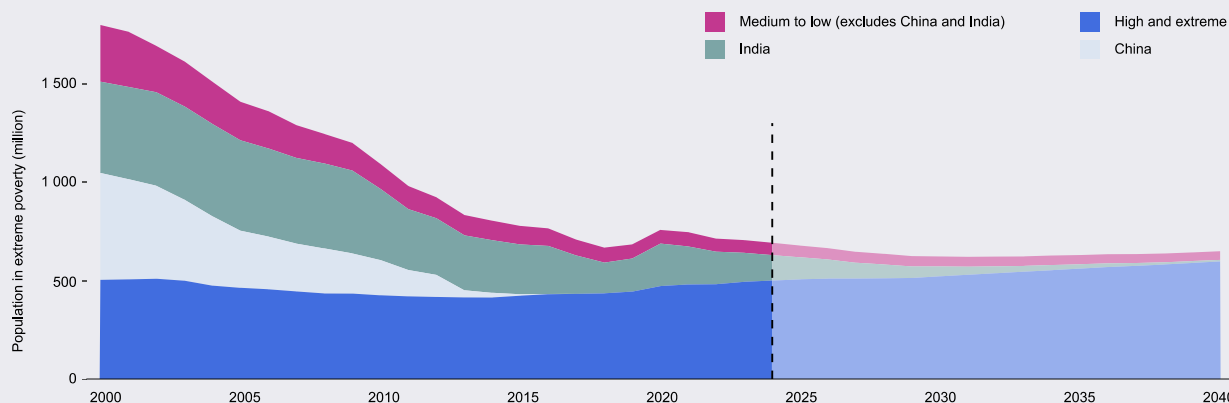
Source: OECD (2024<sup>[82]</sup>), *OECD Data Explorer*, *Creditor Reporting System (flows) database*, <http://data-explorer.oecd.org/s/z1>.

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## Infographic 2.7. Extreme poverty is concentrated in contexts with high and extreme fragility

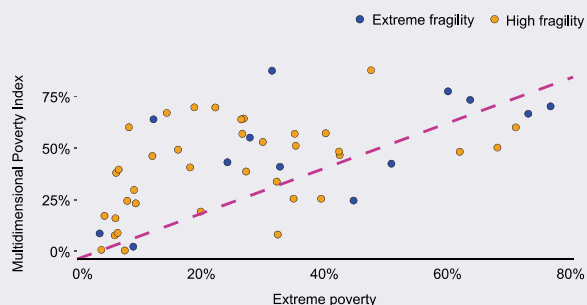
### Extreme poverty, under USD 2.15, is and will continue being concentrated in contexts exposed to high and extreme fragility

In 2000, 28% of the world's extreme poor lived in contexts in high and extreme fragility while they are projected to account for 92% in 2040. Extreme poverty reduction in China followed by India accounted for most of the extreme poverty reduction from 2000 to 2024.



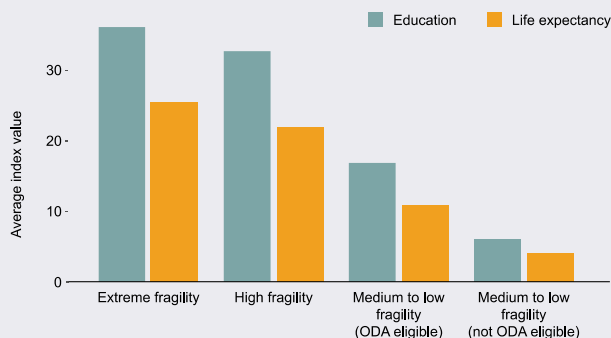
### Multidimensional poverty surpasses extreme poverty, measured by consumption or income, for most people in high and extreme fragility (2022)

Multidimensional poverty in health, education and living standards is higher than the extreme poverty headcount ratio for the majority of contexts exposed to high and extreme fragility. Fragility exposes people to deprivations that cannot be measured by income alone.



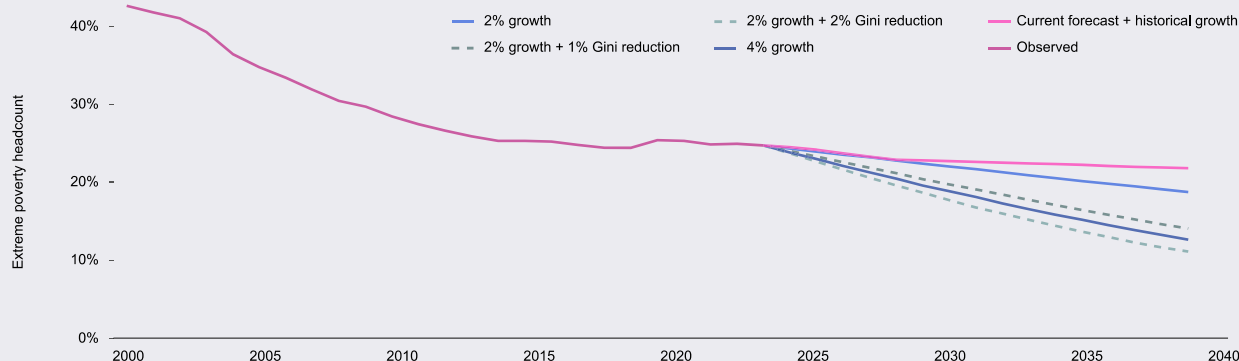
### Higher fragility is associated with larger inequalities in education and life expectancy

Populations living in high and extreme fragility face significantly higher inequalities in education and life expectancy, with direct implications for quality of life, as well as social mobility and the ability to reduce poverty and inequality over time.



### Increasing economic growth and lowering income inequality are key for reductions in extreme poverty in contexts exposed to high and extreme fragility

Higher growth brings faster reductions in extreme poverty, and the effect is accelerated when growth is associated with reduced income inequality.



Note: The figure comparing multidimensional poverty index and extreme poverty is based on population percentages in 2022. Source: Lakner and al. (2024<sub>[154]</sub>); World Bank (2024<sub>[155]</sub>); OPHI/UNDP (2024<sub>[126]</sub>); OPHI and UNDP (2024<sub>[157]</sub>); UNDP (2024<sub>[158]</sub>).

### *CONTEXTS IN HIGH AND EXTREME FRAGILITY ARE STILL EXPERIENCING A FISCAL SQUEEZE*

High and extreme fragility are associated with very limited fiscal space, which reduces the capacity to respond to shocks (Infographic 2.8). Even with the international support provided, contexts with high and extreme fragility were not able to expand their public spending during the COVID-19 crisis to the same extent as ODA-eligible and non-ODA-eligible contexts experiencing medium to low fragility. For example, for contexts facing high and extreme fragility, the median primary balance<sup>22</sup> expanded to 3% and 2.7% respectively at the peak of the pandemic, indicating a lower level of fiscal stimulus than the same figures for ODA-eligible and non-ODA eligible contexts facing low to medium fragility (5.9% and 4.7% respectively) (IMF, 2024<sub>[159]</sub>).

Contexts experiencing high and extreme fragility also struggled more with fiscal consolidation after the crisis. Their median primary balance has not yet recovered to pre-pandemic levels, remaining at -2.4% and -0.1 respectively in 2022. Fiscal challenges increase fragility for all contexts, but for contexts facing high and extreme fragility fiscal constraints can be binding due to their limited fiscal capacity, low domestic resource mobilisation, rising debt levels, and constraints on borrowing (IMF, 2024<sub>[160]</sub>).

Limited fiscal space is closely connected to the tax-to-GDP ratio. The median ratio among contexts experiencing high fragility in 2022 stood at 12.5%, and 8.7% for contexts experiencing extreme fragility – both well below 15%, a generally accepted level required for effective state functioning and development (UNU-WIDER, 2023<sub>[161]</sub>). 42 contexts exposed to high and extreme fragility had ratios below 15% and 20 contexts were below 10%. Low tax-to-GDP not only results in a low level of tax collection in a limited fiscal space, but is also connected to the question of legitimacy of state institutions in that it affects citizens' expectations of provision of public services, their participation in political processes and the functioning of the social contract (Besley and Mueller, 2021<sub>[162]</sub>; Weigel, 2020<sub>[163]</sub>; OECD, 2022<sub>[146]</sub>). Moreover, there is evidence that conflict risks drop significantly when fiscal capacity increases (Besley and Mueller, 2021<sub>[162]</sub>) and that countries with strong fiscal institutions are able to protect public investment even in crises.

Fiscal reforms can increase the quality and efficiency of taxation and expenditure, freeing up resources to invest more in human and physical capital, enhance growth, and offer more targeted support to those in need. However, conflict sensitivity is needed. The reforms required to achieve more sustainable government financing and greater fiscal space can be highly politically and socially sensitive, for example if they involve changes to food and energy subsidies, social spending, civil service wages, tax increases, or the military apparatus (Mawejje, 2024<sub>[164]</sub>).

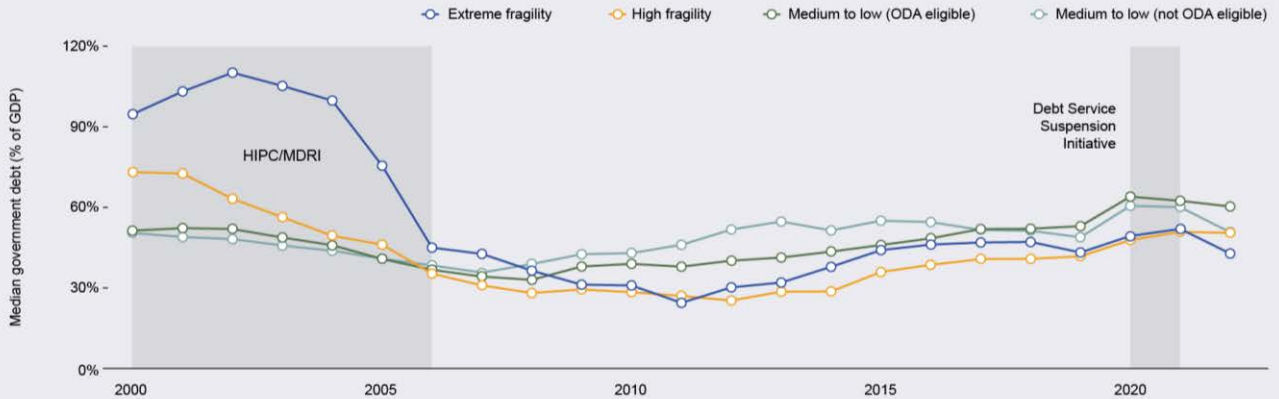


## Infographic 2.8. Contexts with high and extreme fragility face significant fiscal risks

### Public debt-to-GDP ratios are rising

25 contexts in high and extreme fragility are in or at high risk of debt distress.

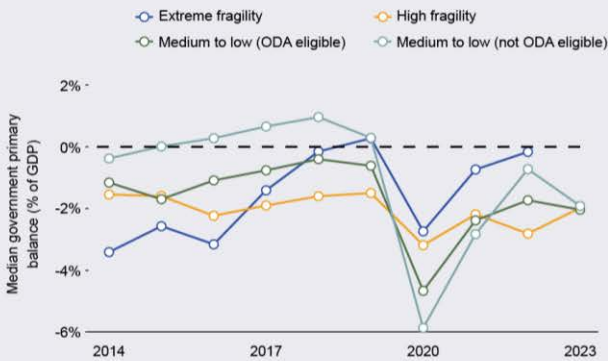
While debt levels remain lower than in the pre-Heavily Indebted Poor Countries (HIPC)/Multilateral Debt Relief Initiative (MDRI) era, they are trending upwards, especially for contexts in high fragility.



### Contexts in high fragility struggle with fiscal consolidation

Balancing budgets can require painful choices between tax increases and spending cuts.

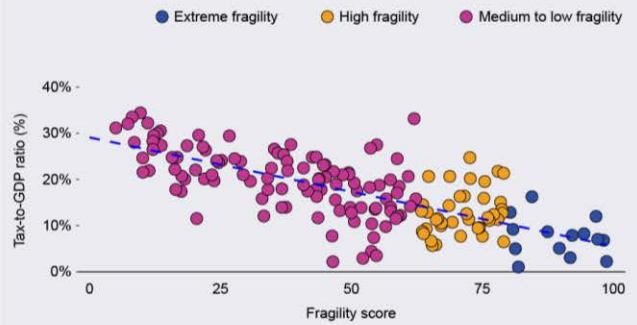
Contexts in high and extreme fragility had limited space for spending during the COVID-19 pandemic, and high fragility contexts had weak consolidation afterwards.



### Low tax-to-GDP ratios are an important factor in limited fiscal space

42 contexts in high and extreme fragility had tax revenues of less than 15% of GDP, a generally accepted benchmark for effective state functioning and state development.

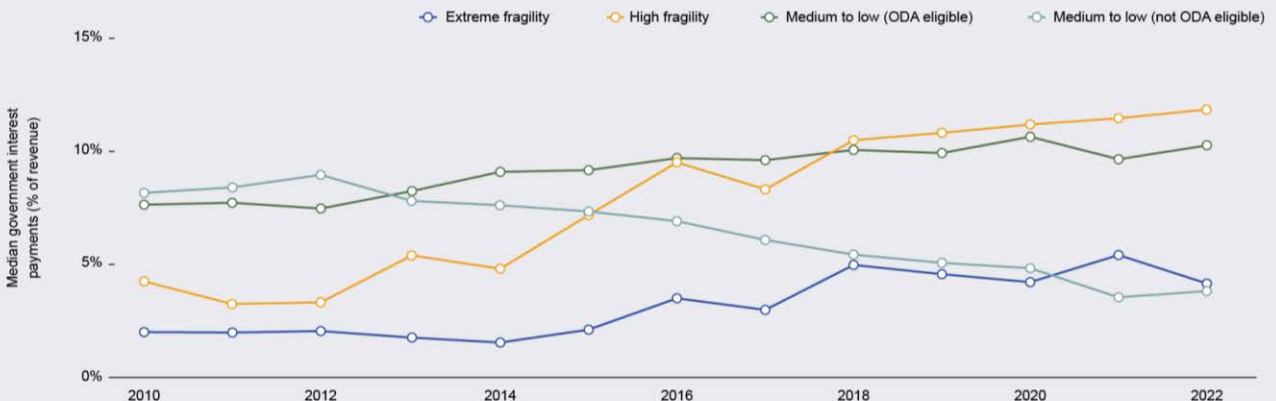
Broadening the tax base is of paramount importance to maintain debt sustainability and ensure the state's capacity to act.



### Government interest payments have increased in a global environment of high financing costs

In 2022, ten contexts in high and extreme fragility dedicated more than 10% of their GDP to debt interest payments.

There is an increasing divergence in public debt levels and interest payments between contexts in high versus extreme fragility.



Note: Indicators include: median general government gross debt (% of GDP) at top, general government primary net lending borrowing (% of GDP) in the middle-left, tax-to-GDP ratio in the middle-right and median government interest payments (% of GDP). To treat missing data, the tax-to-GDP ratios were taken by calculating the most recent year of data availability for each context from 2012 onwards.

Source: Author's calculations based on the World Bank (2024<sup>[48]</sup>); IMF (2024<sup>[159]</sup>); UNU-WIDER (2023<sup>[161]</sup>).

StatLink <https://stat.link/60jiul>

## *BUFFERS PROVIDED DURING THE COVID YEARS HAVE ERODED*

During the pandemic, historic steps were taken to frontload and reprioritise development funds and to provide international support to liquidity and debt sustainability, in particular through the USD 650 billion general allocation of Special Drawing Rights in 2021<sup>23</sup> (IMF, 2021<sub>[165]</sub>) and the Debt Service Suspension initiative of 2020-21<sup>24</sup> (World Bank Group, 2022<sub>[166]</sub>).

These initiatives provided important buffers. In contexts of high and extreme fragility in 2021, international reserves increased to a median 5.5 months of import cover, i.e. the number of months those reserves could sustain continued imports without access to additional foreign currency. By 2022, median reserves dropped to four months of import cover, and seven contexts with high (6) and extreme fragility (1) had international reserves of less than three months – a threshold widely considered to be the minimum level of reserve coverage adequacy (World Bank, 2024<sub>[48]</sub>). Holding sufficient reserves will be an ever more important buffer against increasing shocks and may mitigate the impacts of exchange depreciation and high public debt (Coulibaly et al., 2024<sub>[167]</sub>).

### *Debt is a rapidly growing concern*

The median debt-to-GDP ratio of contexts with high and extreme fragility has increased markedly since 2018 from approximately 42% to 50% in 2022. While the median debt-to-GDP ratio remains below the levels seen before the debt relief initiatives in the 1990s and 2000s, the share of their revenue that governments spend on debt interest payments is increasing. Debt interest payments by contexts experiencing high fragility have increased sharply since 2010, while interest payments by contexts experiencing extreme fragility have increased more gradually, reflecting their more limited access to global capital markets. Ten contexts experiencing high fragility dedicate more than 10% of their revenue to interest payments (World Bank Group, n.d.<sub>[35]</sub>).

Joint World Bank and International Monetary Fund (IMF) debt sustainability assessments of low-income countries found that at least 25 contexts experiencing high and extreme fragility are in or at high risk of overall debt distress. Six of these contexts are assessed as having

unsustainable debt – that is, the steps needed to stabilise debt levels are not considered economically or politically feasible – being Djibouti, Ethiopia, Lao People's Democratic Republic, Malawi, Zambia and Zimbabwe<sup>25</sup> (World Bank, 2024<sub>[130]</sub>).

These figures may well be undercounts. While data coverage and international reporting are more established for external debt, some contexts such as Mozambique are increasingly resorting to domestic debt, including high-interest bank loans and arrears, which can lead to additional vulnerabilities for the public sector and risk crowding out domestic financing for the private sector (IMF, 2024<sub>[168]</sub>; IMF, 2024<sub>[169]</sub>). Further, public debt levels are often underreported, and hidden debts are usually only revealed during defaults, downturns or through an IMF programme. Hidden debts can include opaque lines of credit, non-disclosed sovereign guarantees and debts contracted through state-owned enterprises (Horn et al., 2023<sub>[170]</sub>; Saavedra, Francisco and Rivetti, 2024<sub>[171]</sub>).

The changing profile of debt in contexts of high and extreme fragility underscores the challenges of successfully navigating diverse and sufficient types of financing for development, as was highlighted in the 2022 edition of the *States of Fragility* report (OECD, 2022<sub>[146]</sub>). Globally, changes to the structure of debt, especially the growing role of private creditors, bondholders, and non-Paris Club members, have been well documented (Chabert, Cerisola and Hakura, 2022<sub>[172]</sub>). These same changes have implications for fragility (Box 2.6) and are visible in contexts facing extreme fragility and in a more pronounced way in contexts facing high fragility, given the additional instruments (e.g. loans, bond markets) that they have had access to, especially prior to COVID-19 crisis.

These changes to the availability of different types of debt have allowed the public and private sectors<sup>26</sup> access to a greater volume and diversity of development finance. There can be significant opportunity costs to not making use of these new sources of finance – or from holding too high a level of foreign reserve – in the form of foregone investments in development. As Kharas and Dooley (2021<sub>[173]</sub>) put it, the dilemma for many emerging markets and developing countries is whether to “borrow and risk a debt crisis, or choose austerity and risk a development crisis”.

The changing profile of debt can also come with often-higher borrowing costs, more opaque terms, repayment schedules that are harder to change in the event of a shock. Only one private creditor participated in the DSSI, for example (World Bank Group, 2022<sup>[166]</sup>) and even when mechanisms are in place, borrowers are likely to be hesitant to make use of them for fear of triggering a credit risk

downgrade, further reducing access to and increasing the cost of market borrowing in future (Fitch Ratings, 2021<sup>[174]</sup>) Such changes in debt composition can also complicate and protract debt restructuring processes, though some progress has been made to improve the speed of restructurings<sup>27</sup> (Pazarbasioglu, 2024<sup>[175]</sup>).

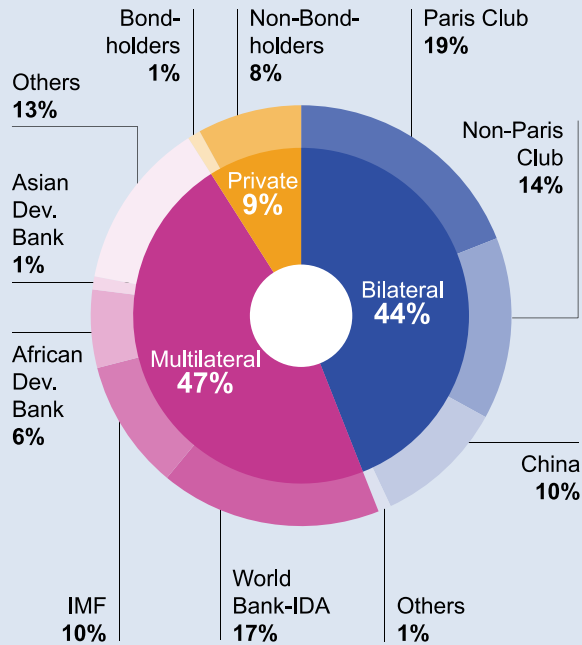
### **Box 2.6. The changing structure of borrowing is impacting on fragility**

The borrowing structure of public and publicly guaranteed debt owed to external creditors by contexts facing high fragility has changed markedly over the 2010-22 period. While the share of bilateral debt has remained roughly stable, the share of private debt has increased and the share of multilateral debt has decreased. As of 2022, China is the largest bilateral creditor to contexts experiencing high fragility and the second-largest creditor overall after the International Development Association (IDA). Among bilateral creditors, the share of debt owed to members of the Paris Club has halved, while the share owed to China has almost tripled. The IDA and the IMF remain the largest of the multilateral creditors. As of 2022, contexts exposed to high fragility owe more than a quarter of their external debt to private creditors, an increase of ten percentage points since 2010. Most of that debt is in bonds.

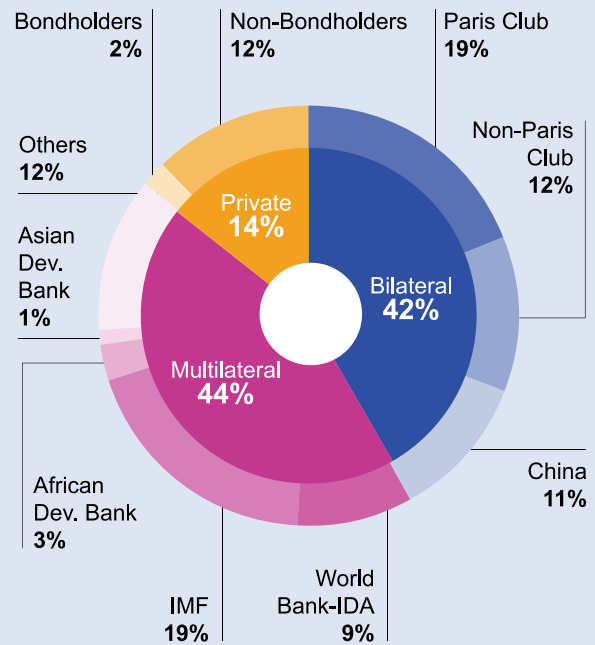
For contexts facing extreme fragility, the borrowing structure has remained more stable. Bilateral debt plays a much more prominent role than it does for high fragility contexts, and the limited share of private debt reflects the lack of access for extreme fragility contexts to this private market instrument. The IMF is the largest multilateral and overall creditor, and the role of IDA has markedly declined (Figure 2.19).

**Figure 2.19. Public and publicly guaranteed debt owed to external creditors**

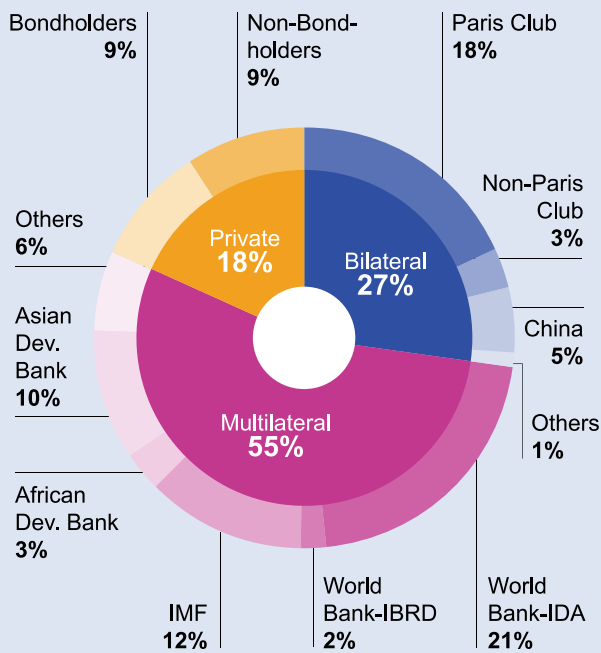
**Extreme fragility end-2010**



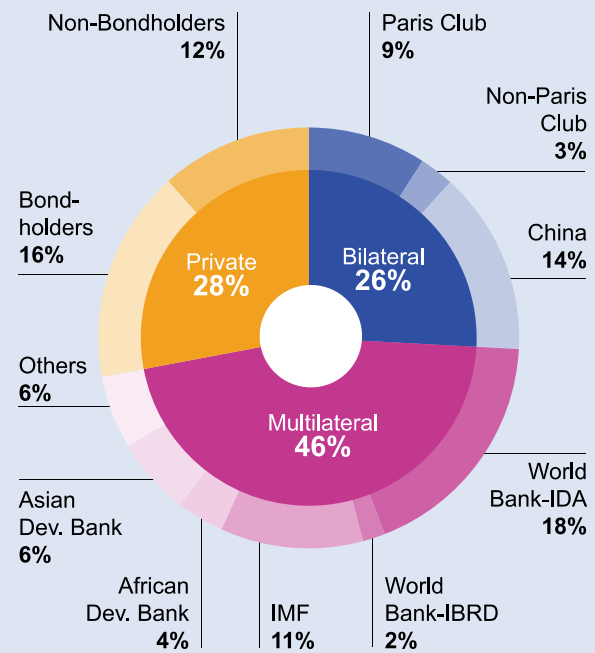
**Extreme fragility end-2022**




**High fragility end-2010**



**High fragility end-2022**



Source: World Bank (2024<sup>[176]</sup>), *International Debt Statistics Database*, <https://databank.worldbank.org/source/international-debt-statistics>.

StatLink  <https://stat.link/cvadew>

## ENVIRONMENTAL FRAGILITY, CONNECTED TO FOOD INSECURITY AND VIOLENCE, IS ADDING PRESSURE IN ALL CONTEXTS

From Valencia in Spain to Baghlan in Afghanistan climate hazards and disasters are increasing and devastating communities across many of the 177 contexts on the OECD multidimensional fragility framework. Climate change disproportionately affect contexts with high and extreme fragility, exacerbating the impacts of extreme weather events, overwhelming limited factors of resilience and compounding other drivers of fragility across all dimensions. Of the 27 contexts identified by the Institute for Economics and Peace (2024, p. 17<sub>[177]</sub>) as ecological threat hotspots, 11 are classified as experiencing high fragility and 16 as experiencing extreme fragility on the OECD fragility framework.

### *BRACING FOR THE FRAGILITY OF CLIMATE TIPPING POINTS*

Six out of nine interconnected earth system planetary boundaries are now significantly breached, moving humanity away from the mostly stable conditions of the past 10 000 years (Potsdam Institute for Climate Impact Research, 2024<sub>[178]</sub>). 2024 was also the warmest year on record – more than 1.55°C above pre-industrial levels (World Meteorological Organization, 2025<sub>[179]</sub>), thereby superseding the 1.5°C long-term objective set in the Paris Agreement. Evidence on climate and environmental drivers of fragility is growing, strengthening the case for anticipating the impact of climate tipping points thinking through their significant implications for conflict prevention and crisis preparedness (Chapter 3). Recent research on climate tipping points suggests that 15 out of 16 identified tipping points are active<sup>28</sup> (McKay et al., 2022<sub>[180]</sub>). Triggering climate tipping points risks disrupting the climate on a global scale, but as with the cascading impact of the COVID-19 pandemic the impact is likely to fall disproportionately on contexts with high and extreme fragility (OECD, 2024, p. 10<sub>[181]</sub>). Where fragility is already concentrated, such as in Central America, the potential direct and cascading impact of extreme heat will significantly disrupt the balance of risks and sources of resilience, even in tropical areas that traditionally encounter high levels of extreme heat during certain times of the year (OECD, 2024, pp. 35-36<sub>[181]</sub>). This will compound existing sources of fragility across all dimensions particularly among vulnerable populations in rural

areas and for indigenous communities, likely exacerbating food insecurity (Ley, 2023<sub>[182]</sub>).

Contexts facing higher levels of environmental fragility, including ecological threats are more likely to have higher levels of conflict but it is the manner of their interaction with sources of resilience that determines their impact on people and systems. The multiplier effect identified by the Institute for Economics and Peace (2024, p. 2<sub>[177]</sub>) crosscuts all dimensions of fragility, and its finding that water risk in sub-Saharan Africa is more closely correlated to weak governance and poor infrastructure than to low rainfall illustrates that combinations of fragility change from context to context. In this sense, the environmental risks are not just what the Institute calls “threat amplifiers” that can intensify ongoing conflicts, but are also fragility amplifiers that can feed multiple casual chains and feedback loops. As exemplified in the example on building climate resilience in sub-Saharan Africa (Chapter 4) responses for building resilience capacity are emerging but need to grow their reach and scale for visible impact in contexts with high and extreme fragility.

### *ACUTE FOOD INSECURITY AND MULTIDIMENSIONAL FRAGILITY GO HAND IN HAND*

Ecological threats including climate change, biodiversity loss, food insecurity and water scarcity are strongly correlated as drivers of fragility. Additionally, for most contexts exposed to high and extreme fragility, deficiencies in their resilience to the impact of environmental fragility makes policies on adaptation and mitigation extremely challenging. The combined effect of these drivers of fragility are most visible in areas such as food security. Out of 22 contexts identified in November 2024 by the World Food Programme and Food and Agriculture Organisation of the UN (FAO/WFP, 2024<sub>[129]</sub>), 20 are exposed to high or extreme fragility. In seven of these, more than 1 million people were in Phase 4 Emergency or Phase 5 Catastrophe/Famine levels of food insecurity. The context with the most affected people by far was Sudan (6.4 million), followed by Myanmar, South Sudan and Haiti, each with more than 2 million people exposed to IPC Phase 4 or 5 levels of food insecurity. Nigeria, Somalia, and the West Bank and Gaza Strip each had over a million people exposed to emergency or catastrophe/famine levels of food insecurity, and the latter also had the highest number of people exposed to famine (FAO/WFP, 2024<sub>[129]</sub>).



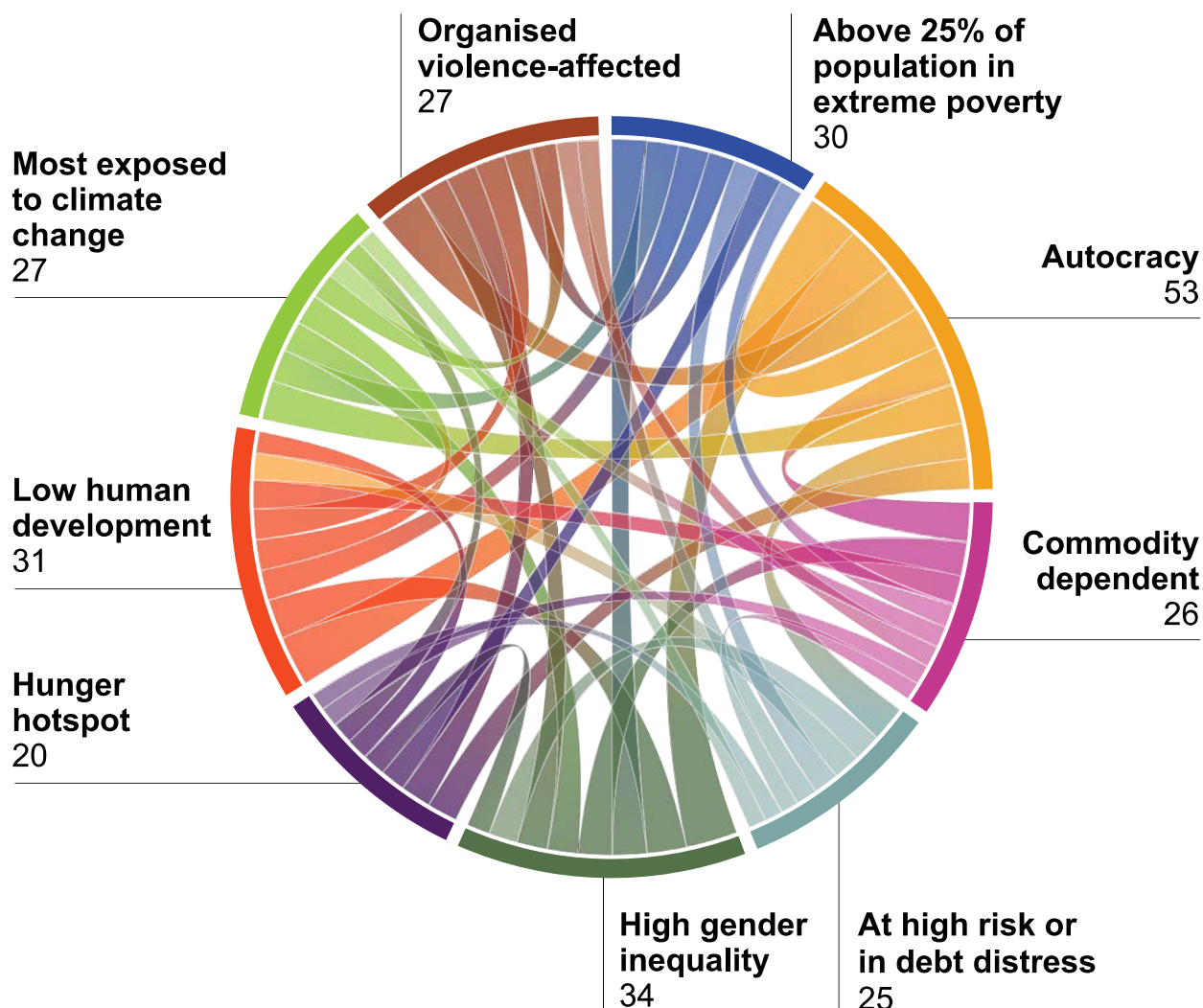
For most contexts with high and extreme fragility, food systems are under immense pressure. Several factors are responsible including their slow recovery from the impact of COVID-19 pandemic, the associated impact of food and energy price inflation, and the regionally specific impact of armed conflict. According to the Food Security Information Network, there are almost 282 million people in 59 countries and territories who are acutely food insecure and in need of urgent assistance (Global Network Against Food Crises, 2024, p. 9<sub>[183]</sub>); 43 of these contexts have high or extreme exposure to fragility. This trend was noted in previous editions of the States of Fragility reports, and the fact that it continues points to a critical failure to achieve progress on SDG 2 (zero hunger) for the contexts with the greatest need of assistance.

The intersection of climate and environmental fragility and security fragility often presents a unique set of challenges in contexts with high fragility and recent or ongoing experience of conflict. Fragility associated with conflict and armed violence was identified as the primary driver of hunger in many of these hunger hotspots, where it disrupted food systems, displaced populations and obstructed humanitarian access (FAO/WFP, 2024<sub>[129]</sub>). Evidence on the relationship between climate and conflict suggests that various forms of violence could increase under the projected warming scenarios and in light of the lack of projected impact adaptations and policy interventions to cope with the changing conditions. (VoxDev, 2024<sub>[184]</sub>). For example, in Afghanistan, the impact of drought and flooding goes hand in hand with falling agricultural yields that result from insufficient demining and the contamination attributable to munitions (Norwegian People's Aid, 2024<sub>[185]</sub>; Amini, 2024<sub>[186]</sub>).

## LEARNING FROM REGIONAL FRAGILITY: INTERSECTIONS, DIVERSITY AND THE SEARCH FOR RESILIENCE

The analysis in this chapter shows how politics, violence and economic trends connect with each other and with other drivers of risk and sources of resilience in various combinations across the different dimensions of fragility. The many ways these currents intersect result in a wide range of presentations of fragility. Very different types of contexts experience high or extreme fragility, and their fragilities influence and are influenced by those in contexts exposed to medium and low fragility (Figure 2.20). Applying this fragility analysis at a regional level can help deepen understanding of regional dynamics and the specific interplay of drivers of risk and sources of resilience. It can help show how approaches can be adapted to address different trends, including at the subnational level, for instance in border areas and river basins. Analysing fragility experienced by regions as well as individual contexts offers opportunities to think about how sources of resilience can be bolstered and exposure to risk mitigated or reduced (Chapter 3). Building on the analysis of the main trends in the 2025 multidimensional fragility framework, this section focuses on the state of fragility in Central Asia, Central America and Coastal West Africa. In these three very distinct regions, fragility manifests most plainly in relation to politics, violence and fragmentation but also through more complex connections across dimensions. Understanding fragility across and between contexts in each region can help tailor effective responses even where exposure is medium or low.

**Figure 2.20. Sources of risk in contexts exposed to high and extreme fragility**



Note: Organised violence-affected contexts are those that experience state, non-state and one-sided violence with above 25 fatalities for 2023. A context is commodity dependent when more than 60% of its total merchandise exports are composed of commodities. There were 22 hunger hotspots in the outlook period from November 2024 to May 2025. Higher gender inequality refers to a score equal or higher to 0.5 on UNDP's Gender Inequality Index. Contexts most exposed to climate change are those that rank > 144 on ND-GAIN Exposure in the Notre Dame - Global Adaptation Initiative Country Index. Autocracies are contexts classified as closed or electoral autocracies on V-DEM's Regimes of the World grouping. Low human development refers to contexts with an HDI lower than 0.55. Extreme poverty refers to the USD 2.15 poverty line.

Source: Davies, et al. (2024<sub>[18]</sub>), "Organized violence 1989-2023, and the prevalence of organized crime groups", <https://doi.org/10.1177/00223433241262912>; Sundberg and Melander (2013<sub>[85]</sub>), "Introducing the UCDP Georeferenced Event Dataset", <https://doi.org/10.1177/0022343313484347>; UNDP (2024<sub>[80]</sub>), Gender inequality index (GII), database, <https://hdr.undp.org/data-center/composite-indices>; UNCTAD (2023<sub>[128]</sub>), "The state of commodity dependence 2023", <https://unctad.org/publication/state-commodity-dependence-2023>; FAO/WFP (2024<sub>[129]</sub>), "Hunger Hotspots: FAO/WFP early warnings on acute food insecurity, November 2024 to May 2025 outlook", <https://www.wfp.org/publications/hunger-hotspots-fao-wfp-early-warnings-acute-food-insecurity-november-2024-may-2025>; World Bank Group (2024<sub>[130]</sub>), Debt Sustainability Analysis (DSA), overall debt distress (dataset), <https://www.worldbank.org/en/programs/debt-toolkit/dsa>; Notre Dame Global Adaptation Initiative (2024<sub>[131]</sub>), "Notre-Dame - Global Adaptation Initiative Country Index", <https://gain.nd.edu/our-work/country-index/>; IPC (2024<sub>[132]</sub>) "Integrated Food Security Phase Classification", <https://www.ipcinfo.org/>; *Human Development Index (HDI)*, database, <https://hdr.undp.org/data-center/human-development-index#/indicies/HDI>; Coppedge et al. (2024<sub>[21]</sub>), "V-Dem [Country-Year/Country-Date] Dataset v14", <https://doi.org/10.23696/mcwt-fr58>; Lakner and al. (2024<sub>[154]</sub>), Reproducibility package (partial data and code) for Poverty, Prosperity and Planet Report 2024 (datasets), <https://reproducibility.worldbank.org/index.php/catalog/189>; World Bank (2024<sub>[155]</sub>), Poverty, Prosperity, and Planet Report 2024: Pathways Out of the Polycrisis, <https://hdl.handle.net/10986/42211>; UN DESA (2024<sub>[11]</sub>), *2024 Revision of World Population Prospects* (database), <https://population.un.org/wpp/>.

StatLink  <https://stat.link/my1fgs>

## CASE STUDY: MANAGING FRAGMENTATION IN CENTRAL ASIA

The breakup of Central Asia as an integrated Soviet region was neither planned nor anticipated and in turn has driven many of the fragilities that continue to manifest today. Yet this fragmentation has also incentivised a drive for greater regional alliances, initiatives and integration that are expressions of a search for resilience (Chapter 1). In a world that is clearly fragmenting, the example of Central Asia's search for resilience can point to preventative ways of managing fragmentation, focusing on preparedness to prevent and address fragility rather than react to it. And while isolation can be understood as a negative coping mechanism to deal with fragility, the experience of Central Asian contexts also indicates that in the long run a return to connectivity and integration could prevail.

Central Asia as a region is not exposed to high fragility per se. However, the region's conditions, history and development help explain the fragilities that manifest at different levels in the individual contexts of Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan. Each of these displays very different characteristics, exposure to risks and sources of resilience. Tajikistan and Turkmenistan are exposed to high levels of fragility while all other contexts are classified as experiencing medium to low fragility (OECD, 2025<sup>[187]</sup>).

Each context in the region also experiences specific fragilities at both subnational and transboundary levels that could be missed or misinterpreted through a strictly context-level analysis of fragility. Fragility and conflict also manifest in contested areas of Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan where subnational pockets of fragility persist in the shadow of national-level resilience and coping capacities. In these spaces, many of the structural drivers of fragility linked to nation-building across the political, socio-economic and security dimensions after independence have intersected with environmental drivers such as water and land (Chmykh et al., 2021<sup>[188]</sup>; Kalra and Saxena, 2021<sup>[189]</sup>).

Many of the fragilities manifesting in Central Asia can be traced to the broken linkages that resulted from the breakup of the Soviet Union. A region-wide fragility lens helps highlight how the fragmentation and the multiplication of regional alliances can be understood as a search for resilience in the face of increased competition for resources, trade and geopolitical alignment (Chapter 1).

Central Asia is usually understood as the grouping of five post-Soviet states that emerged as independent republics

after the collapse of the Soviet Union. Moscow, historically the political, economic and administrative centre, had developed Central Asia as an interconnected entity feeding into Russia, with the Soviet republics, Autonomous Regions and other enclaves effectively sharing access to resources (de Waal, 2024<sup>[190]</sup>; Chmykh et al., 2021<sup>[188]</sup>; Kalra and Saxena, 2021<sup>[189]</sup>). Internal Soviet borders between individual republics only became international frontiers after 1991.

### *Multidimensional fragility across borders*

An example of the regional interlinkages between political, security and societal dimensions of fragility is in the Ferghana Valley, which spans three countries. The internationalisation of borders after independence led to greater militarisation and reduced freedom of movement, acutely affecting the ethnic, cultural and economic enclaves in the Ferghana Valley that had evolved throughout the Soviet period. At the same time, the social distinctions that resulted from the political, economic and social transformation following independence exacerbated growing tensions between communities (Chmykh et al., 2021<sup>[188]</sup>; Kalra and Saxena, 2021<sup>[189]</sup>; OSCE Academy Bishek, 2013<sup>[191]</sup>). Although a number of these issues have been solved through political agreements (e.g. the demarcation of disputed frontiers between Tajikistan and the Kyrgyz Republic), some areas continue to be exposed to tensions and conflict risks that can flare when historical grievances are triggered by other drivers such as access to water or land for pasture.

At the same time, sources of resilience and coping capacities can also be found at the subnational level, for instance through the critical role of community-based dispute resolution mechanisms that have helped manage eruptions of ethnic tensions and through community co-operation to address local issues where the state has limited presence (OSCE Academy Bishek, 2013<sup>[191]</sup>). Since independence, such cross-border conflicts have consistently been contained despite periodic flare-ups. However, conflict management in future may become more difficult as a result of demographic and climate changes, particularly if the region's economies fail to achieve sufficient rates of long-term growth in productivity and incomes.

Linking the environmental and economic dimensions, water provides a vivid and often-cited illustration of interconnected fragilities and broken linkages. In Soviet times, the upstream countries that are naturally endowed with rich water resources would feed the downstream

agricultural countries in spring and summer in return for energy (gas and coal) in winter. This balance and sharing of resources broke down after the countries gained independence: Upstream contexts now strive to capitalise on their water resources to produce homegrown energy through hydropower, with severe consequences on downstream contexts that are still heavily dependent on irrigation for their growing populations and their agricultural production. In addition, climate change is melting the region's glaciers and affecting reserves as well as driving sudden extreme weather events that have significant economic consequences, as was shown by the severe flooding that struck Kazakhstan in spring 2024.

The Aral Sea catastrophe and other environmental disasters linked to overexploitation and mining during the Soviet era provide further examples of inherited cross-boundary manifestations of fragility in the region.

Finally, in the economic dimension, Russia's war of aggression against Ukraine in 2022 was initially expected to have a markedly negative impact on Central Asian economies due to their levels of economic integration and reliance on remittances from Russia. However, the Central Asian economies have displayed a notable level of resilience in withstanding the shock (OECD, 2022<sub>[192]</sub>). They have managed to use the situation to their geopolitical advantage, attracting further support from the West as alternative trade routes and energy suppliers and, particularly in the case of Kazakhstan and Uzbekistan, as counterweights to Russian influence in the region.

### *Responding to regional fragility: What policy responses look like*

Governments and their international partners need both to know how to mitigate and manage these fragilities and to understand how they are part of a wider system of fragilities that they are able to only partially address. They also need to comprehend their own role in the systems of fragility (OECD, 2018<sub>[193]</sub>), though this is an area that some analysts see as a weakness in Central Asia (Kalra and Saxena, 2021<sub>[189]</sub>).

### **Regionalisation**

In response to the broken linkages created by the emergence of independent nation states, Central Asian contexts have sought to build regional initiatives that help "re-integrate" and mitigate some of the risks they experience. Regionalisation efforts have strengthened in reaction to Russia's full-scale invasion of Ukraine, as countries seek to mitigate the risk of conflict. Likewise,

international partners have sought to promote regional approaches in their relations with the Central Asian contexts. Organisations such as the Collective Security Treaty Organization, the Shanghai Cooperation Organisation, the Eurasian Economic Union and the Organization of Turkic States,<sup>29</sup> and even China's Belt and Road Initiative, are usually seen through the prism of Russian and Chinese efforts to extend their influence over the region. But they can also be seen as means for the Central Asian contexts themselves to improve their access to the rest of the world and balance their international partnerships through so-called multi-vector foreign policies (Kazantsev, Medvedeva and Safranchuk, 2021<sub>[194]</sub>). These goals are also reflected in the Central Asian contexts' membership in the Organization for Security and Co-operation in Europe; their partnership and co-operation agreements (PCAs) with the European Union (EU);<sup>30</sup> the EU's long-standing Strategy on Central Asia, adopted in 2007 and updated in 2019; engagement with the European Bank of Reconstruction and Development: participation in the NATO Partnership for Peace initiative; and their respective bilateral security co-operation arrangements.

This "spaghetti bowl" of multi-vector foreign policies (Kazantsev, Medvedeva and Safranchuk, 2021<sub>[194]</sub>) is a reflection of their efforts to balance relations, mitigate against the domination of any single foreign partner or neighbour, and address some of the structural weaknesses in terms of security and access to international markets inherited from their Soviet past. Several concrete initiatives point to real integration attempts, such as cross-border infrastructure projects and visa policies, yet this marked tendency for regional initiatives falls short of deeper integration, as Central Asia remains a set of five contexts where political and economic elites seek to preserve the independence and stability of their respective systems (de Waal, 2024<sub>[190]</sub>; Jordanova, 2023<sub>[195]</sub>).

### **Connectivity**

Central Asia is a natural land bridge for trade and culture and is central to the historic Silk Road. But the emergence of independent states and an infrastructure historically directed towards Moscow created regulatory and physical barriers to both trade and transport. In addition, the region's geography – it is in the middle of a considerable land mass – makes connections to the rest of the world challenging, especially for Uzbekistan, which is one of only two double-landlocked countries in the world. Improving regional connectivity in Central Asia is a major priority for governments and their international partners. The concept of connectivity is used to refer to a range of issues from



multimodal transport and trade to Internet connectivity, digitalisation and private sector development that can help build resilience through integration.

Russia and China have provided the main markets for Central Asian goods (energy, minerals, etc.) since independence, developing their influence alongside each other in soft competition and, to some extent, in complementary security and economic roles (de Waal, 2024<sup>[190]</sup>; Kazantsev, Medvedeva and Safranchuk, 2021<sup>[194]</sup>). Türkiye has played an important regional role both as a conduit for access to Europe through the Caucasus and as a cultural counterweight to the larger neighbours. Western partners encourage regional co-operation in Central Asia. The EU Strategy for Central Asia highlights regional co-operation and connectivity within the region as a cross-cutting priority for energy, the environment, climate, water, security and socio-economic development (European Commission, 2019<sup>[196]</sup>), with a political focus through the EU-Central Asia International Conference on Connectivity (Global Gateway) that took place in November 2022 in Uzbekistan and through EU-Central Asia ministerial meetings. Likewise, the United States government's Central Asia Strategy focuses on encouraging regional connectivity between Central Asian countries (US Department of State, 2019<sup>[197]</sup>).

Russia's war of aggression against Ukraine has provided renewed impetus for improved connectivity in Central Asia. The so-called Middle Corridor provides a valuable – and now invaluable – alternative to the northern route through Russia (OECD, 2023<sup>[198]</sup>). International partners are working with the region's governments to address the structural disadvantages of geography, borders and diverging regulatory regimes to improve integration into global transport, trade and supply chains (OECD, 2023<sup>[199]</sup>). For Russia, the region offers access to alternative markets in the south and east, given the closure of Western markets since 2022.

### Isolation

Turkmenistan's long-standing policy of isolation and neutrality, made possible by its natural endowment in hydrocarbons, can be seen as a contrasting response to existing fragilities. By maintaining a closed autocratic system where the state controls all the country's assets and external relations, Turkmenistan has managed to remain stable, though reliable data remain scarce and an accurate understanding of the context is therefore challenging. Recently, however, the country has begun to open up somewhat, seeking World Trade Organization accession, engaging more with international organisations, and working to establish itself as a transport and energy hub in the region. These initiatives are still in their infancy but

mark an important shift in policy. Uzbekistan had also tended towards isolation, with the exception of military co-operation through bases that provided access to Afghanistan, and fragility has noticeably decreased since the gradual opening up and economic reform programme since 2018.

### *CASE STUDY: HOW RISING INSECURITY FEEDS REGIONAL FRAGILITIES IN COASTAL WEST AFRICA*

The coastal West African contexts of Benin, Côte d'Ivoire, Ghana, Guinea and Togo are experiencing a spike in security-related incidents linked to violent extremist groups operating since 2022, particularly in the northern regions of Benin and Togo (Eizenga and Gnauguenon, 2024<sup>[200]</sup>). This has been accompanied by a small but growing flow of refugees (more than 110 000) from conflict-affected contexts in the Sahel who have settled in coastal West Africa (UN Refugee Agency, 2024<sup>[201]</sup>). These developments have prompted fears of a risk of contagion that could manifest in spillovers of economic, political and security fragility from the Sahel to coastal West African contexts. This case study explores the diverse fragility profiles of these contexts and the evolution of regional and context-level fragility and reviews the policy responses of international donors and national authorities.

#### *Increased security fragility, localised grievances and geopolitical change*

Increases in security incidents have the potential to connect with other prevalent fragilities in the often less-developed northern areas of coastal West Africa (Silla, 2022<sup>[202]</sup>) and feed into existing grievances around limited government service delivery and intercommunal tensions (Eizenga and Gnauguenon, 2024<sup>[200]</sup>). Violent extremist groups active in the region have been adept at exploiting these localised grievances and public resentment over heavy-handed state responses (Eizenga and Gnauguenon, 2024<sup>[200]</sup>).

Policy responses from international donors, including the United States' ten-year plan for coastal West Africa, have focused on preventing the spread of violent extremism in alignment with national development plans and in co-ordination with coastal West African governments (USAID, 2024<sup>[203]</sup>). This strategy, based on the vision set forth in the 2019 United States Global Fragility Act, focuses on strengthening social cohesion as well as enhancing the responsiveness of the governments and security forces. However, apart from an increase to Côte d'Ivoire starting in 2020, peace ODA towards other contexts in the region has generally been decreasing or, in the case of Togo, has



stagnated. Some nationally led plans have aimed to address deteriorating security, such as the Côte d'Ivoire's *Programme Spécial du Nord*, which combined an increased security presence with investment in infrastructure and social programmes in the northern border regions (Eizenga and Gnauguenon, 2024<sub>[200]</sub>). There are also regional responses such as the Accra Initiative established by Benin, Côte d'Ivoire, Ghana and Togo to combat violent extremism, prevent terrorist attacks and fight transnational organised crime (Eizenga and Gnauguenon, 2024<sub>[200]</sub>).

The move in early 2024 by the military-ruled Sahel states (Burkina Faso, Mali and Niger) to leave the Economic Community of West African States (ECOWAS) and form their own breakaway organisation, the Alliance of Sahel States, marked a geopolitical rupture that may also worsen the economic situation in the Sahel and the security situation in coastal West African contexts (Edds-Reitman and Boakye, 2024<sub>[204]</sub>). Landlocked Sahel contexts are likely to see increased economic fragility due to higher import costs and higher labour costs resulting from restrictions on free movement, as they will be cut off from their main trade routes that connect to seaports. This fragility could in turn affect coastal West African contexts, disrupting their economies (e.g. trade and investment) via spillovers of insecurity and worsening international co-operation with neighbours. For instance, economic disruptions through export and FDI channels due to the Sahel conflicts may lead to losses amounting to 1.3% of GDP in Ghana (Raga, Lemma and Keane, 2023<sub>[205]</sub>).

### *Rapid social change and urbanisation*

Presently, coastal West African States are spending increasing amounts on humanitarian and security operations to the detriment of development budgets (Edds-Reitman and Boakye, 2024<sub>[204]</sub>). This may create additional challenges, since all these contexts, apart from Ghana, face severe levels of human fragility; past increases in military expenditure were correlated with lower spending on health and education (in Ghana and Togo specifically) (Raga, Lemma and Keane, 2023<sub>[205]</sub>). In parallel, these contexts are also undergoing processes of rapid demographic growth, inward migration towards coastal areas and urbanisation, with most of the population and infrastructures concentrated in coastal zones (Dada, Almar and Morand, 2024<sub>[206]</sub>). This has implications for social investments in terms of ensuring that infrastructure, human capital and the provision of housing can keep pace with the

rates of population and urban growth. In particular, economic activity is concentrated around the Abidjan-Lagos corridor, which could be connected by a highway in the future; the corridor is home to 75% of commercial activities in West Africa (Africa Investment Forum, 2024<sub>[207]</sub>) and will likely become one of the largest urban areas (megapolopolis) by 2100 (French, 2022<sub>[208]</sub>).

### *Intertwined economic and environmental fragility as commodity exporters*

At the same time, most contexts in coastal West Africa have relatively fragile economies that are heavily dependent on specific commodities that included, in 2022, aluminium ore for Guinea (48% of its exports), cocoa beans, paste and butter for Côte d'Ivoire (24% of its exports) and gold for Ghana (20% of its exports) (Growth Lab, 2023<sub>[209]</sub>). Several of these contexts, among them Côte d'Ivoire, Guinea and Togo, also have lower levels of economic complexity than they did a decade ago while this has improved for Benin and Ghana in terms of the complexity and diversification of their export baskets (Growth Lab, 2023<sub>[209]</sub>). Their economic structure, oriented towards commodity exports, may exacerbate their overall fragility as commodity markets are often volatile in terms of their price structure. Some of these products are also associated with increased environmental fragility and large-scale informal employment. For instance, the artisanal and small-scale gold mining sector in Ghana accounts for 35% of its gold production and is associated with environmental fragility (land degradation, river pollution and mercury exposure) as well as economic fragility (informality and illicit financial flows) (Adranyi, Stringer and Altink, 2024<sub>[210]</sub>). Similarly, in Côte d'Ivoire, cocoa accounts for 45% of world production but has many negative economic and environmental externalities (Le Monde, 2024<sub>[211]</sub>). Specifically, cocoa production has led to the destruction of most of the country's forests and to widespread pollution (environmental fragility) and also employs an increasing number of children, with many producers living under the extreme poverty line due to low wages (societal and economic fragility) (True Price; Sustainable Trade Initiative, 2022<sub>[212]</sub>). At the same time, Côte d'Ivoire captures the lower end of the cocoa value chain. On the macroeconomic side, Togo is at high risk of debt distress while Ghana is facing important economic challenges that have become salient in the aftermath of the austerity measures that were implemented to solve its external debt crisis and obtain emergency IMF funding (Simons, 2023<sub>[213]</sub>).

### *Differing historical trajectories and political systems*

The contexts in the region vary widely in terms of their histories and trajectories of institutional development, reinforcing the need for tailored policy approaches. Ghana stands out as regards its lower levels of political fragility but also is often lauded as one of the few stable democracies in sub-Saharan Africa, characterised by competitive elections and peaceful transitions of power since it became a democracy in 1992. However, there have been some signs of strain in terms of satisfaction with democracy since 2017 (Afrobarometer, 2024<sup>[214]</sup>), with dissatisfaction linked to Ghana's current economic situation and debt distress. Benin is a typical case of gradual democratic backsliding through the introduction of electoral reforms that imposed stringent new procedural requirements and through attacks on the independence of the media and the judiciary (International IDEA, 2023<sup>[215]</sup>). Togo has remained a stable autocracy since 1967 under the Gnassingbé family; elections have been held but are neither free nor transparent. Guinea experienced a stark decline in democracy due to the 2021 military coup that overthrew President Conde, who was running for a third term amid widespread popular support for a two-term limit, leading to the militarisation of society, violent crackdowns against opposition parties and shrinking media space (Siegle and Wahila, 2025<sup>[216]</sup>). Côte d'Ivoire has been characterised by divides around ethnicity and two civil wars (in 2002-07 and 2010-11) and is now ruled by President Ouattara, who most recently won an election in 2020 that was boycotted by the opposition and marked by post-electoral violence.

Many of these contexts, including Guinea and Togo, have high degrees of ethnic polarisation, discrimination and instrumentalisation for political gains. In Guinea, each of its three autocratic leaders historically provided patronage (jobs and contracts) and investments primarily to his home region with fault lines running between the Fulani and Malinke ethnic groups (Gerber, 2013<sup>[217]</sup>). Similarly, in Togo, the civil service and military are dominated by northern ethnic groups, especially groups associated with the president, while the largest of the ethnic groups in demographic terms is underrepresented in these institutions (International IDEA, 2023<sup>[215]</sup>). Another source of insecurity and tension has been farmer-herder conflicts in the northern areas of these contexts.

### *CASE STUDY: POCKETS OF REDUCED FRAGILITY AMID REGIONAL RISKS IN CENTRAL AMERICA*

The massive migrant outflows from Central America<sup>31</sup> in recent years can be traced back to several intertwined historical and current drivers of fragility. People are leaving Central America to search for better economic opportunities but also to escape mismanaged economic policies; malign foreign investment strategies, especially in extractive sectors; and state violence, environmental degradation and land dispossession (Carare, 2023<sup>[218]</sup>). The fragility profiles of four contexts – El Salvador, Guatemala, Honduras and Nicaragua – demonstrate clearly how drivers of risk and resilience combine to present distinct challenges within and across national borders.

Nicaragua and Guatemala both experience high fragility. Since 2015, Nicaragua has become increasingly vulnerable due to its political crisis and authoritarian governance, which is reflected in the deterioration of most of the indicators for the political and societal dimensions. Guatemala presents a different pattern: notably high fragility in the human dimension and a growing trend towards poverty, particularly noticeable in rural areas and among vulnerable groups such as the Indigenous population and Afro descendent populations, which accounts for 43.8% of Guatemala's total population (Mamo, 2024<sup>[219]</sup>). Honduras has moved from high to medium to low fragility thanks to slight improvements in all dimensions except security. While it shows resilience in the political and economic dimensions, Honduras still experiences fragility in the environmental and security dimensions that may undermine gains in other areas. El Salvador experiences medium to low fragility, showing resilience in the economic and human dimensions, yet has high levels of societal fragility.

#### *THE FRAGILITY INTERSECTIONS THAT MATTER FOR CENTRAL AMERICA*

Central America is particularly prone to disaster risks. The region has the second-highest incidence of disaster occurrence (UN, 2023<sup>[220]</sup>), with events ranging from seasonal cyclonic activity, hurricanes, earthquakes and droughts to floods, volcanic activity, fires and extreme temperatures. The Northern Triangle countries (El Salvador, Guatemala and Honduras) alone recorded 359 disasters between 1900 and 2022, with meteorological events being the most frequent and severe, causing 62% of the total deaths and 86% of financial costs (OECD, 2024<sup>[82]</sup>). Given these risks and their potential impact on fragilities, the region needs to emphasise disaster preparedness and

mitigation strategies that link national, regional and global dependencies.

Latin America and the Caribbean<sup>32</sup> more broadly are also a key source of global resilience, hosting almost 60% of terrestrial life on the planet and diverse marine and freshwater ecosystems (UNEP, 2016<sup>[221]</sup>) as well as almost 20% of the world's oil reserves and 25% of its strategic metals (ECLAC, 2023<sup>[222]</sup>). The Central America region is also rich in biodiversity, containing 5-12% of the world's flora and fauna (International Union for Conservation of Nature and Natural Resources, 2024<sup>[223]</sup>). However, much of the extraction of biological wealth and mineral resources from this environment has been mismanaged, leading to significant fragility across economic, societal and human dimensions. Even policies that aimed to stimulate economic growth through privatisation, deregulation and trade liberalisation, particularly in extractive industries such as mining, logging and agribusiness, often hurt vulnerable populations, with negative outcomes compromising or outweighing gains. For instance, 28% of Nicaragua's territory was allocated for mining concessions (Asociación Centroamericana Centro Humboldt, 2023<sup>[224]</sup>). The expansion of mining has led to land dispossession and environmental degradation, sparking protests that are sometimes followed by violent repression.

### *How environmental and economic intersections shape societal and political fragility*

The political economy of Central America has been profoundly shaped by collective action groups that viewed democracy not as an avenue for equitable governance but as a tool to extend their extractive dominance (Hernández, 2020<sup>[225]</sup>). Instead of fostering inclusive and participatory governance, these groups have used their influence to shape policies and institutions in ways that protect their interests. This has led to a situation where democratic institutions exist in name but function in a manner that perpetuates inequality and social exclusion, leaving marginalised communities struggling to achieve representation or justice within the existing democratic framework (Rozbicka et al., 2020, pp. 1-23<sup>[226]</sup>).

In Guatemala, mining projects have become flashpoints of contestation around social and environmental injustice. For instance, the Escobal mine has been the centre of intense conflict as Indigenous Xinka communities have repeatedly voiced their opposition to mine operations on the grounds that it produces environmental pollution and violates their territorial rights. Despite widespread community protests and a court-ordered suspension, the mine has continued

operations due to pressure from influential economic interests and state authorities (Aguilar, 2021<sup>[227]</sup>; Washington Office on Latin America, 2022<sup>[228]</sup>). This example is replicated across the region, where isolated, underrepresented and disempowered Indigenous communities often suffer from higher rates of poverty, lower levels of educational attainment and limited access to healthcare linked strongly to the contexts' governance of natural resources. The political economy associated with international business interests and national elite governance of resources is not limited to mining but extends, with similar effects, to large-scale agricultural projects and energy megaprojects. The distorting impact on democracy should not be underestimated, as flawed and corrupted democracies with high social and environmental costs can drive negative, and often violent, coping capacities among populations cut off from a political settlement (Fajardo, 2021<sup>[229]</sup>). According to Global Witness, Guatemala recorded dozens of murders of environmental and land rights activists, often in connection with extractive industries.

### *Violence as a symptom and cause of multidimensional fragility in Central America*

Despite efforts towards democratisation and economic growth in Central America, the region continues to struggle with pervasive violence, high homicide rates and widespread insecurity (Dominguez, 2019<sup>[230]</sup>). In the Northern Triangle countries, democratisation has not translated into improved public services or safety. These countries remain among the most violent in the world, with homicide rates often exceeding 30 per 100 000 inhabitants – far above the global average. In recent years, El Salvador has reversed the trend with a dramatic decline in violent deaths that were largely due to gang violence. In 2022, the homicide rate dropped to below 8 per 100 000 inhabitants, compared to a staggering 50 per 100 000 in 2018. The homicide rate in 2023 was the lowest in the country's history, according to government records. The hardline tactics behind the lower numbers have garnered widespread domestic approval. Many Salvadorans, especially those living in gang-controlled areas, have expressed relief at the decline in violence and extortion, which has allowed greater freedom of movement and economic activity. President Nayib Bukele's approval ratings have climbed to above 80% (Sheridan and Escobar, 2024<sup>[231]</sup>). While the current strategy has shown short-term success in curbing violence, questions remain as to whether its gains can be consolidated through measures to address the underlying drivers of fragility that can incentivise gang

membership such as structural factors, lack of educational opportunities and unemployment. Limitations on freedom of speech and freedom of assembly raise other concerns regarding the resilience of democratic structures in El Salvador.

Meanwhile, transitions to democratic governance in the region have often been superficial, with weak institutions and corruption hindering the development of effective law enforcement and judicial systems and narrowing economic gains to a small elite while leaving large segments of the population living with poverty and inequality. Organised crime, drug trafficking and gang violence have flourished, as criminal groups exploit institutional weaknesses and corruption in order to control territories and engage in illicit activities; the persistent violence and intimidation from these groups are frequently cited as a driver of forced migration.

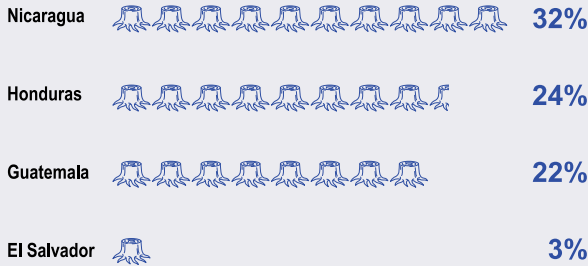
The human capital outflow associated with migration from the Northern Triangle countries further compounds economic fragility. Between 2018 and 2021, 407 000 people on average left the region each year (Congressional Research Service, 2024<sup>[232]</sup>). The region also has some of the highest remittance dependency levels in the world: Nicaragua and El Salvador, for instance, rely on these inflows for 27% and 24% of their respective GDP. Households often depend on these remittances to cover basic needs such as food, housing and education. Remittances are also a more stable source of foreign income than either FDI or ODA in many Central American contexts. Yet, the cost of remittances is higher in Central America than globally, a barrier to maximising their potential.

## Infographic 2.9. Fragility in Central America

### While 5-12% of the planet's biodiversity can be found in Central America, it is increasingly threatened

Nicaragua, Honduras and Guatemala have lost between a fifth and one third of their humid primary forest in the past two decades.

#### % humid primary forest loss since 2001

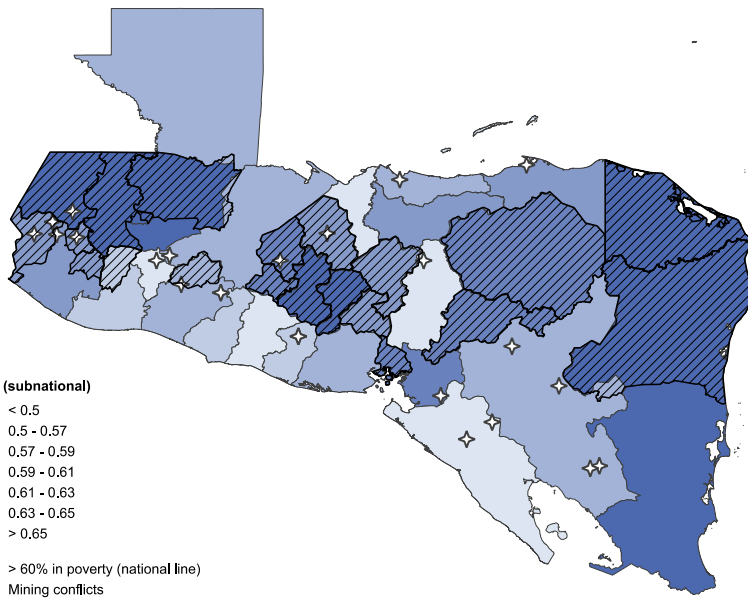


### Natural disasters, from 2021-2023, caused the internal displacement of:

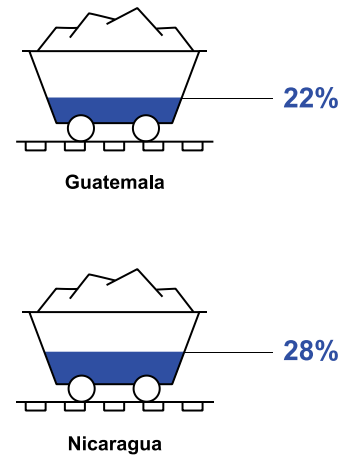
217 000 people



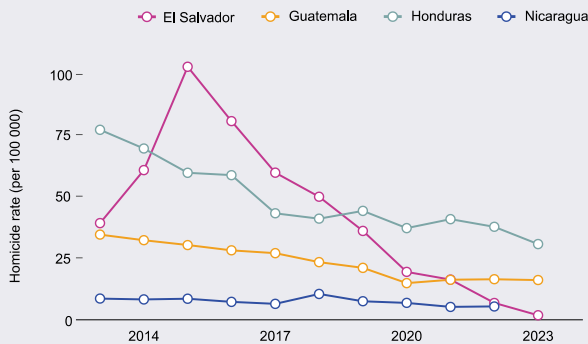
#### People experiencing food insecurity at crisis levels or worse:



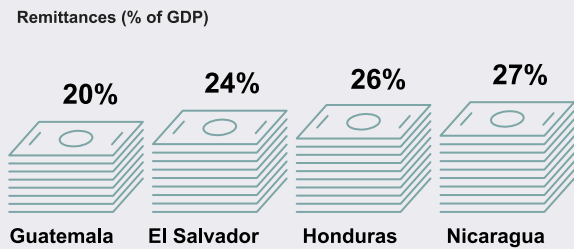
#### Territory conceded to mining concessions:



### Homicide rates in most Central American contexts have decreased in the past decade, but remain high



### Remittances account for one fifth to one quarter of GDP value, due to large migrant outflows



Note: Biodiversity figures refer to the following contexts in Central America: Guatemala, El Salvador, Honduras, Nicaragua, Costa Rica, and Panama). Global Forest Watch defines primary forests as "mature natural humid tropical forest cover that has not been completely cleared and regrown in recent history". The mining conflicts relate to metal ores, industrial minerals and construction materials after 2000. Homicide data for Nicaragua is not available after 2022. Internal displacement figures refer to cumulative figures from 2021 (16 810), 2022 (140 600) and 2023 (59 760) (new displacements as well as movements from people already living in displacement are counted). Sub-national poverty data availability: Guatemala and Nicaragua (2014), Honduras (2019) and El Salvador (2022). Source: A. Morales-Marroquín et al. (2022<sup>[233]</sup>); Global Forest Watch (2025<sup>[234]</sup>); Asociación Centroamericana Centro Humboldt (2023<sup>[224]</sup>); Leah Temper, Daniela del Bene and Joan Martínez-Alier (2015<sup>[235]</sup>); EAtlas (2025<sup>[236]</sup>); UN ECLAC (2025<sup>[237]</sup>); World Bank (2024<sup>[153]</sup>); Igarapé Institute (2024<sup>[115]</sup>); International Displacement Monitoring Centre (2024<sup>[135]</sup>); IPC (2024<sup>[132]</sup>).



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## NOTES

- <sup>1</sup> The findings from the analysis undertaken for this report are based on data available up to mid-October 2024.
- <sup>2</sup> There are 61 high and extreme fragility contexts on the OECD fragility framework but 63 regimes. This discrepancy is due to Varieties of Democracy's classification of Somaliland as a separate entity and the West Bank and the Gaza Strip as separate entities. All contexts with changes between -0.005 and/or 0.005 change on the liberal democracy index from 2019 to 2023 were classified as having stayed the same (neither autocratised or democratised).
- <sup>3</sup> This index measures the quality of democratic institutions – most notably those related to the rule of law, checks and balances, and civil liberties.
- <sup>4</sup> Several V-Dem mid-level indices were considered to provide a better understanding of which aspects of democracy have deteriorated the most in the past five years.
- <sup>5</sup> These conclusions and calculations are the authors' own calculations based on the classification of closed autocracies used in a 2019 V-Dem working paper available at [https://v-dem.net/media/publications/users\\_working\\_paper\\_22.pdf](https://v-dem.net/media/publications/users_working_paper_22.pdf).
- <sup>6</sup> This refers to the concept of political marketplace.
- <sup>7</sup> Internet usage figures are based on World Bank World Development Indicators with minor processing by Our World in Data.
- <sup>8</sup> This finding draws on data from the UN Children's Fund on the percentage of girls who have undergone female genital mutilation as reported by place of residence and household wealth quintile.
- <sup>9</sup> This indicator measures the percentage of women who consider a husband/partner to be justified in hitting or beating his wife/partner.
- <sup>10</sup> Conflict-affected contexts are those that experienced 25 or more battle-related deaths in 2021. Contexts in a state of war are those that experienced 1 000 or more battle-related deaths in 2021.
- <sup>11</sup> These are the authors' calculations based on data from the Uppsala Conflict Data Program. A conflict is classified as occurring in a high or extreme fragility context if one of the parties to the conflict originates from a context experiencing fragility.
- <sup>12</sup> An internationalised intrastate conflict is one with the involvement of foreign governments with troops.
- <sup>13</sup> This is based on the Armed Conflict Location & Event Data project definition of organised violence as including battles, explosions and/or remote violence, and violence against civilians.
- <sup>14</sup> Events were filtered by organised violence and data was available for 54 out of 61 contexts exposed to high and extreme fragility.
- <sup>15</sup> Data on incidents, hostages and injuries from terrorism are reliant on figures published by the Institute for Economics and Peace, which uses a proprietary tool, the Dragonfly TerrorismTracker database.
- <sup>16</sup> This figure is based on the authors' own calculation using weighted average population means.
- <sup>17</sup> This was calculated using a population weighted average based on data availability for 172 contexts out of 177 on the OECD multidimensional framework.
- <sup>18</sup> These percentage calculations only consider contexts on the OECD multidimensional fragility framework.
- <sup>19</sup> Globally, current account imbalances were receding in 2023 as large current account imbalances in commodity-exporting countries were declining in the wake of falling commodity prices. For further information see <https://www.imf.org/en/Publications/ESR/Issues/2024/07/12/external-sector-report-2024>.
- <sup>20</sup> Extreme poverty is defined as living on less than USD 2.15 per day.

<sup>21</sup> Author's calculations based on the reproducibility package for the World Bank's Poverty, Prosperity and Planet Report 2024, referenced in the infographic.

<sup>22</sup> The primary balance is the difference between a government's revenue and its non-interest expenditure (i.e. what it is spending not including debt payments). A primary surplus is when revenues exceed non-interest government expenditures.

<sup>23</sup> Special Drawing Rights is a reserve asset made up of a basket of hard currencies, designed to supplement IMF members' own foreign currency reserves. The USD 650 Billion SDR allocation during the pandemic was designed to shore up global liquidity, with SDR credited to IMF members' accounts in proportion to their membership quota.

<sup>24</sup> The Debt Service Suspension Initiative (DSSI) was set up by the G20 to suspend debt service payments by participating countries from May 2020 to December 2021, in order that financial resources could be concentrated on fighting the pandemic and responding to its impacts.

<sup>25</sup> The sustainability of debt reflects a technical assessment and judgement of the likelihood a country will be able to meet its current and future financial obligations. In practice this means that to be sustainable, the primary balance needed to stabilise a country's debt under both the baseline and realistic shock scenarios is assessed as being politically and socially acceptable, and consistent with preserving a satisfactory level of growth while making progress towards the authorities' development goals. For further information, see <https://www.imf.org/en/Publications/Policy-Papers/Issues/2018/02/14/pp122617guidance-note-on-lic-dsf>.

<sup>26</sup> Note that this analysis includes debt taken on by private companies, if it is publicly guaranteed.

<sup>27</sup> The principle initiative was the Common Framework for Debt Treatments beyond the Debt Service Suspension Initiative, set up by the Group of Twenty and endorsed by the Paris Club. It is an attempt to structure and speed up debt restructuring processes by bringing together a broader set of official creditors. Private creditors are not automatically covered, but borrowers are required to seek at least as favourable terms from their other official bilateral and private creditors. Recent debt restructurings under the framework for Chad, Ghana and Zambia have taken less and less time to complete as stakeholders have become more familiar with the recently introduced Common Framework process and built trust.

<sup>28</sup> The global climate tipping points identified were Arctic winter ice (collapse); boreal forest (northern expansion); boreal permafrost (abrupt thaw); Amazon rainforest (dieback); mountain glaciers (loss); West Antarctic ice sheet (collapse); Greenland ice sheet (collapse); Labrador Sea and subpolar gyre (collapse); Atlantic Meridional Overturning Circulation (collapse); Barents Sea ice (abrupt loss); Sahel East African monsoon (greening); East Antarctic ice sheet (collapse); boreal permafrost (collapse); boreal forest (southern dieback); low-latitude coral reefs (die-off); and East Antarctic subglacial basin (collapse). The list is based on tipping points identified in 2019 research by Lenton et al., available at <https://www.nature.com/articles/d41586-019-03595-0>.

<sup>29</sup> The Collective Security Treaty Organization includes Armenia, Belarus, Kazakhstan, Kyrgyzstan, Russia and Tajikistan. The Shanghai Cooperation Organisation includes Belarus, China, India, Iran, Kazakhstan, Kyrgyzstan, Pakistan, Russia, Tajikistan and Uzbekistan. The Eurasian Economic Union members are Armenia, Belarus, Kazakhstan, Kyrgyzstan and Russia. The Organization of Turkic States includes Azerbaijan, Kazakhstan, Kyrgyzstan, Türkiye and Uzbekistan.

<sup>30</sup> Among these are the EU's enhanced PCAs with Kazakhstan and Kyrgyzstan; its enhanced PCA under negotiation with Uzbekistan; and PCAs with Tajikistan and Uzbekistan.

<sup>31</sup> The Central America region is considered here as comprising Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua and Panama.

<sup>32</sup> Central America and its hinterland are the set of countries in the Latin America region.







# 3 THE STATE OF RESPONSES TO CRISES AND FRAGILITY

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*This chapter analyses the policy and financing responses to contexts with high and extreme fragility: development finance including official development assistance; the critical questions facing the prevention agenda; emerging ideas on politically constrained environments, economic partnerships and working with the private sector. It concludes with a separate section focused on analytics that explores the potential of new data and methodologies to enhance responses to fragility at the subnational level.*



# In Brief

## The state of responses to crises and fragility

- **Donors responded to global crises with record volumes of official development assistance (ODA) and other concessional finance in 2023 amounting to USD 258.4 billion.** The volume of aid from all donors to contexts facing high and extreme fragility in 2023 was USD 92 billion.
- **Within this total, aid from OECD Development Assistance Committee (DAC) countries to contexts with high and extreme fragility amounted to USD 70.1 billion, a 2% increase over 2020 and representing 52% of DAC members' country allocable aid.** However, the share of their total ODA allocated to these contexts dropped to its second-lowest level in 20 years.
- **Of DAC members' ODA to contexts with high and extreme fragility in 2023, 31% was humanitarian aid, 58.6% was for development and 10.4% for peace.** The volume of peace ODA is now at its second lowest since 2004.
- **DAC donors and their multilateral counterparts gave USD 19.4 billion of humanitarian ODA to contexts exposed to high and extreme fragility in 2023, of which 81% was channelled through multilateral agencies and NGOs.** They provided USD 60.9 billion of development ODA and 8 billion of peace ODA to contexts facing high and extreme fragility, of which 73% was channelled through mechanisms other than multilateral agencies and NGOs.
- **In the space of ten years, DAC members' support for climate-related development finance more than doubled for contexts facing high and extreme fragility, reaching USD 12.7 billion in 2021-22.** Multilateral providers more than tripled their support to USD 16.3 billion in 2021-22. A large part of this increase was provided in the form of loans. Borrowing, especially on non-concessional terms, can prove challenging to access and service for contexts with limited fiscal space.
- **The geopolitical and human security potential of conflict prevention is being ignored. ODA to conflict prevention remains at near-record low levels.** In 2023, ODA for conflict prevention to contexts facing high and extreme fragility amounted to less than 4% of total DAC members ODA (USD 1.7 billion).
- **It is time to make a peace offer to development actors.** Fragility analysis supports the view that for conflict prevention activities to succeed, there must be serious economic and development underpinnings. Harnessing and networking progress on data analytics that are adapted to geopolitical realities can drive better engagement on upstream conflict prevention.
- **The contested geopolitical context is making it harder to support sustainable development trajectories where political dialogue is constrained.** Disengaging comes at a cost, but DAC members' efforts to develop a principles-based approach and strengthen the knowledge base will help improve both decision making and coherence with foreign and security actors in politically constrained environments.
- **DAC members, international financial institutions (IFIs) and other development partners are looking to new sources of financing and different types of economic partnerships that involve both public and private sectors.** These approaches should be considered as strategically important rather than only transactional or technical, and they may provide new entry points for policy dialogue. The success or failure of this shift will depend on how well these new investments and approaches are tailored to and address the different dimensions of fragility.
- **Evidence suggests that donors may overlook pockets of fragility within countries or areas of subnational conflict.** Expanding analysis to the subnational level offers deeper insights and details that are often masked by the so-called tyranny of averages prevalent in cross-country comparisons.

The diversity of fragility profiles identified in Chapter 2 requires cohesive development and peace responses to build resilience, mitigate risks and prevent conflict. The leading role in finding pathways to reduce fragility belongs to the context and society themselves. But international partners and organisations can play important supporting roles in finance, analysis, capacity development, diplomacy and partnerships. Over the last ten years, global policy and financing discussions have evolved significantly, for example in terms of mobilising domestic and international funds for development, implementing the humanitarian-development-peace (HDP) nexus, undertaking UN reform, evolving (IFIs, and laying the groundwork for progress on conflict prevention. However, as gradual reform has encountered a series of shocks, global financing and policy approaches are challenged to keep pace with the needs of contexts facing high and extreme fragility.

This chapter starts with an analysis of how, where and in what proportion ODA is being provided across contexts with high and extreme fragility. It then looks at two key areas for policy progress in a turbulent world: first, the vital importance of realising the potential of conflict prevention, and second, the benefits of emerging ideas on economic partnership, including through core economic systems and working with the private sector. The chapter concludes with an exploration of the potential of new data and methodologies to inform these engagements through an enhanced understanding of fragility at the subnational level.

## FINANCIAL RESPONSES TO FRAGILITY

ODA has been a generally stable resource for contexts exposed to high and extreme fragility. Volumes of foreign direct investment (FDI), by contrast, are significantly more volatile, especially for contexts exposed to extreme fragility.

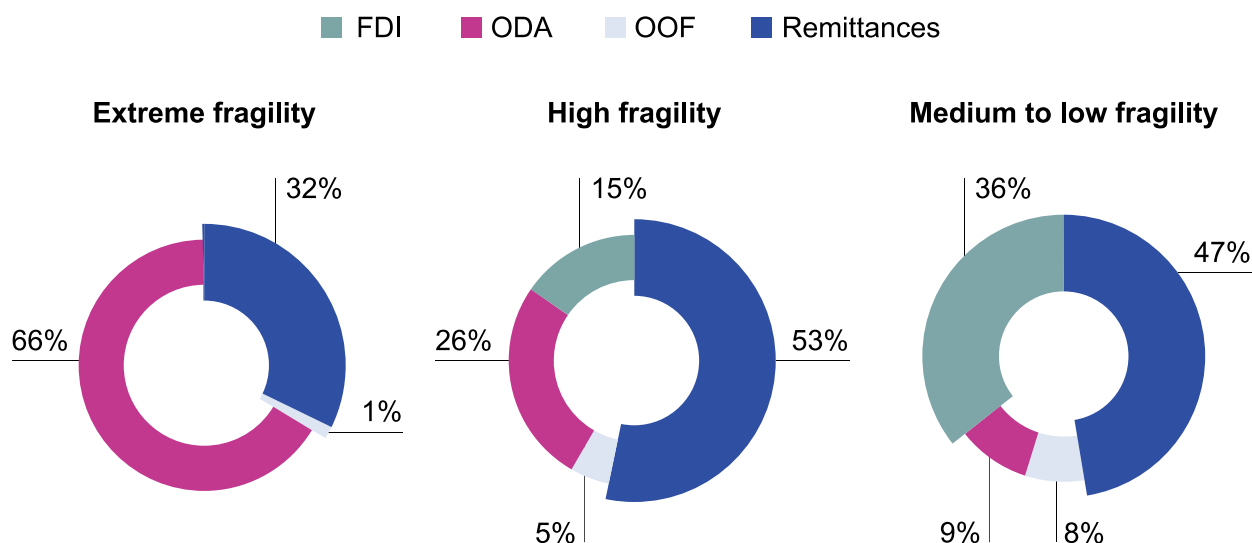
From 2020 to 2023, ODA from official donors to contexts facing high and extreme fragility declined. While the donor community increased its historically high commitment of

ODA during the COVID-19 crisis, the consistency of ODA, particularly in contexts in high and extreme fragility, has been tested on multiple fronts. The impact of Russia's war of aggression against Ukraine, a cost-of-living crisis in many DAC member countries and a need for humanitarian assistance that has far outstripped recent donor commitments are just three of the factors that impact financial responses to fragility. The drive to respond to climate and environmental fragility has also been a prominent, and positive, feature of shifting ODA patterns. At the same time, the balance between peace and development policies is increasingly problematic for several reasons discussed in this chapter. This section focuses on the scale of ODA that is targeting fragility, and focuses on the latest three years of data availability; highlighting ODA trends to contexts with high and extreme exposure to fragility including systemic shortfalls in peace ODA.

This report does not yet capture the ODA cuts announced by several OECD DAC members as these are not currently reflected in the Creditor Reporting System, which only includes data up to 2023. These cuts were proposed due to competing domestic priorities, including defence and welfare, and are likely to have serious implications for the foreign, development and economic policies of donors and partners.

### *AS THEIR FRAGILITY RISES, CONTEXTS RECEIVE A LARGER SHARE OF ODA AS PART OF THEIR EXTERNAL DEVELOPMENT FINANCING*

ODA remains a critical resource, especially in contexts with extreme fragility, where it accounts for two-thirds of total external financing in 2023 (Figure 3.1). For instance, the aggregate volume of ODA in 2023 to these contexts was more than twice that of remittances and 540 times that of FDI.<sup>1</sup> In contexts exposed to high fragility, ODA accounts for only 26% of external financing compared to remittances (53%) and FDI (15%). Within these trends there is significant variation (Chapter 2).

**Figure 3.1. External development finance by fragility category, 2023**

Note: OOF means other official flows. Percentages for contexts in high and extreme fragility were rounded explaining why they do not add up to 100%.  
 Source: World Bank Group (2024<sub>(1)</sub>), *World Development Indicators* (database), <https://databank.worldbank.org/source/world-development-indicators>; OECD (2024<sub>(2)</sub>), *OECD Data Explorer, Creditor Reporting System (flows) database*, <http://data-explorer.oecd.org/s/z1>.

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### **DESPITE GROWING VOLUMES OF ODA OVERALL, THE PROPORTION OF COUNTRY ALLOCABLE ODA GOING TO CONTEXTS IN HIGH AND EXTREME FRAGILITY DECLINED**

Overall ODA from all official providers reached record levels in 2023 of USD 258.4 billion, representing a 23% increase over 2020. Of this total, net ODA to contexts exposed to high and extreme fragility from all development co-operation providers, including outflows from multilateral institutions, reached USD 92 billion in 2023. This represents a 9% decrease from the record-high volume in 2020.

Of this USD 92 billion total, DAC countries provided USD 70.1 billion in ODA to contexts exposed to high and extreme fragility, accounting for 52% of their country allocable aid<sup>2</sup>. This was the second-lowest share in the past two decades, after 2022, of DAC countries' country allocable ODA to contexts in high and extreme fragility. The proportion of DAC countries' country allocable ODA going to such contexts averaged 64.8% from 2012-21, then declined to about 51-52% in 2022 and 2023. The 2023 decline in DAC assistance to high and extreme fragility contexts stands in stark contrast to the total DAC ODA volume of USD 222.9 billion – an all-time high. From 2019 to 2023, DAC countries nearly doubled their ODA to medium to low fragility contexts, driving most of the increase in their country allocable aid. This is especially the case with Ukraine which received more than one-fifth of all

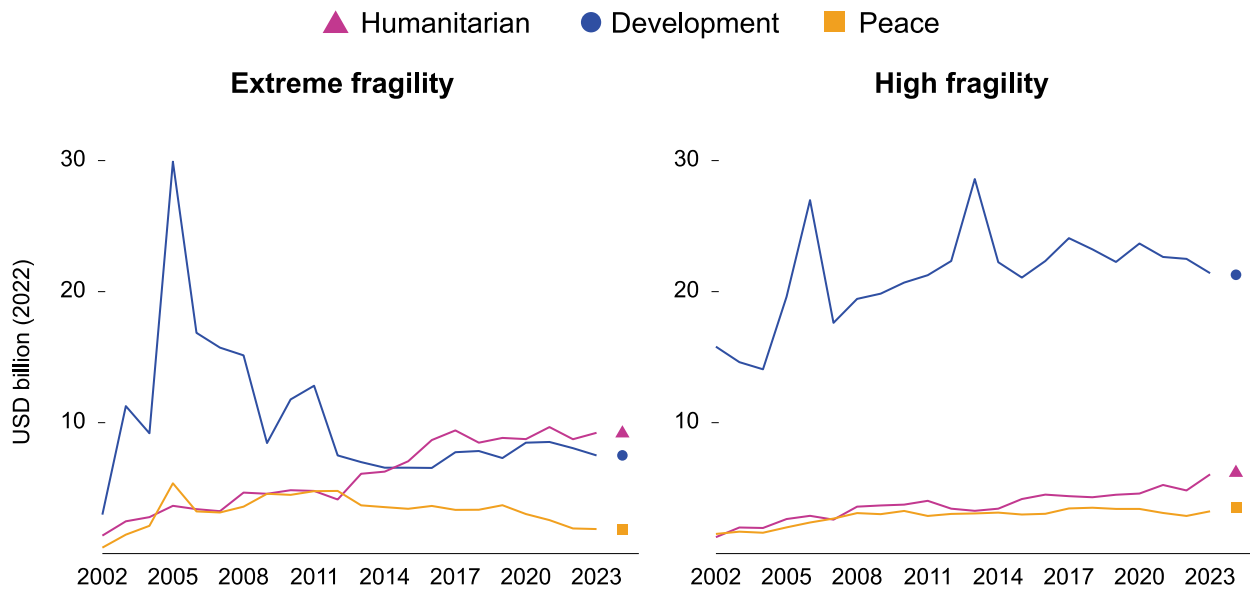
DAC countries' country allocable aid in 2023. A large portion of DAC countries' ODA also went to in-donor refugee costs (USD 32.5 billion).

### **DAC MEMBERS' ODA TO CONTEXTS WITH HIGH AND EXTREME FRAGILITY FOR PEACE AND DEVELOPMENT DECLINED FROM 2020 TO 2023 WHILE HUMANITARIAN ODA INCREASED**


DAC donors and their multilateral counterparts gave USD 19.4 billion of humanitarian ODA to contexts exposed to high and extreme fragility in 2023, of which 81% was channelled through multilateral agencies and NGOs. They provided USD 60.9 billion of development ODA and 8 billion of peace ODA to contexts facing high and extreme fragility, of which 73% was channelled through mechanisms other than multilateral agencies and NGOs.

In 2023, 31% of DAC ODA to contexts with high and extreme fragility was humanitarian, 58.6% for development and 10.4% for peace. DAC members' ODA for development and peace to contexts facing high and extreme fragility has declined since 2020 (Figure 3.2 and Figure 3.3). The combined share of DAC members' ODA for these two pillars of the HDP nexus fell to a record low in 2023. In contrast, humanitarian aid to these contexts has increased in volume and as a share of the total, reaching an all-time high in 2023 (USD 15.9 billion).

**Figure 3.2. Development Assistance Committee members Official Development Assistance across the Humanitarian Development Peace nexus to contexts exposed to fragility, 2002-23**



Source: OECD (2024<sup>[2]</sup>), *OECD Data Explorer, Creditor Reporting System (flows) database*, <http://data-explorer.oecd.org/s/z1>.

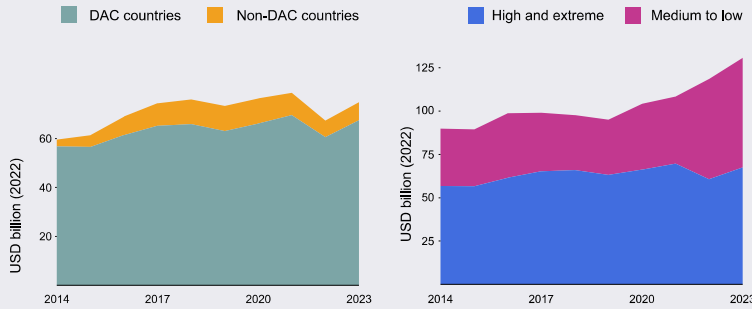
StatLink  <https://stat.link/vx9ojl>

### Infographic 3.1. Official development assistance to contexts in high and extreme fragility

#### In 2023, ODA to contexts exposed to high and extreme fragility accounted for 52% of Development Assistance Committee (DAC) countries' country-allocable aid, or USD 70.1 billion<sup>1</sup>, the second lowest proportion in the past two decades

ODA from DAC countries to contexts exposed to high and extreme fragility peaked in 2021 with important oscillations in the next two years.

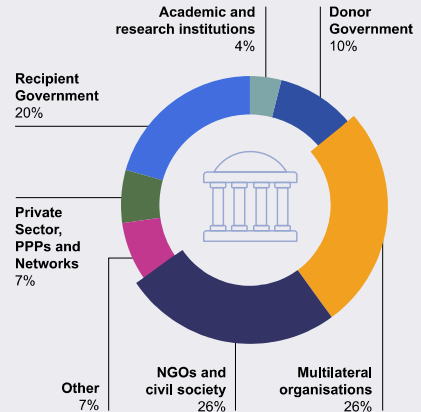
While DAC countries' ODA to contexts in medium to low fragility almost doubled from 2019 to 2023, DAC ODA to contexts in high and extreme fragility increased by 7% over the same period.



<sup>1</sup> Country-allocable aid refers to country-allocable ODA given to ODA-eligible contexts that are also assessed in the fragility framework.

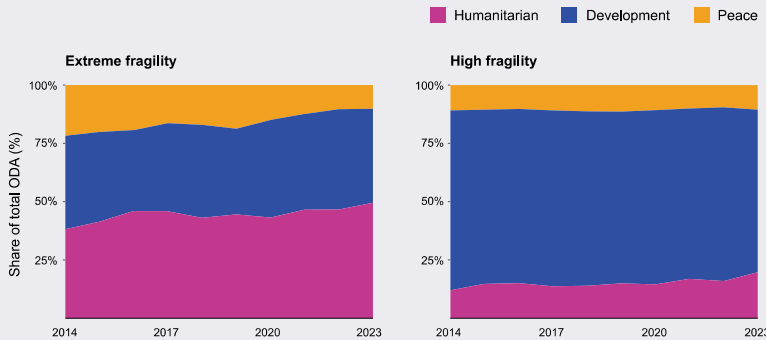
#### DAC ODA to contexts exposed to high and extreme fragility by channel (2023)

DAC members' ODA is mostly channeled through multilateral organisations or NGOs and civil society (52% combined).



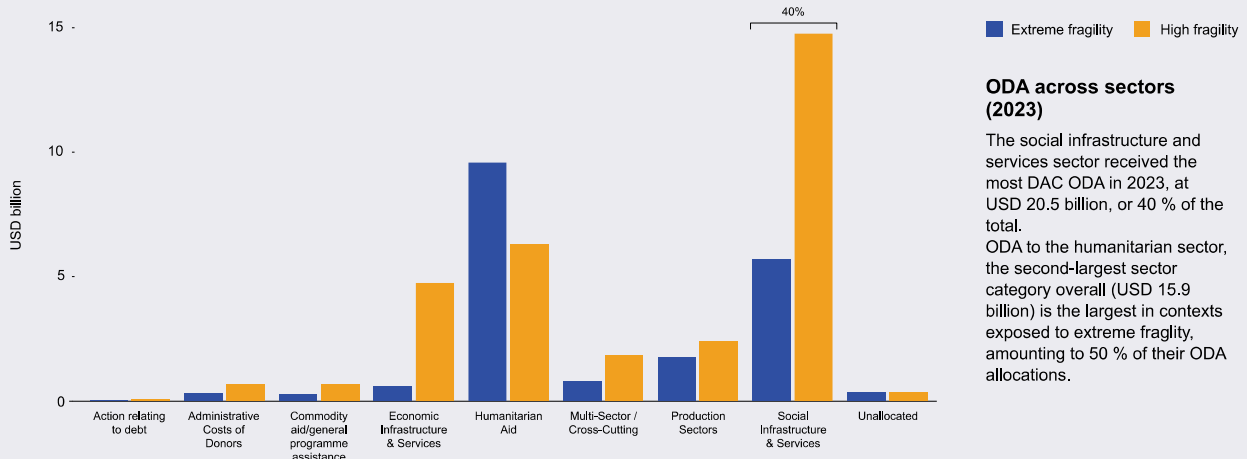
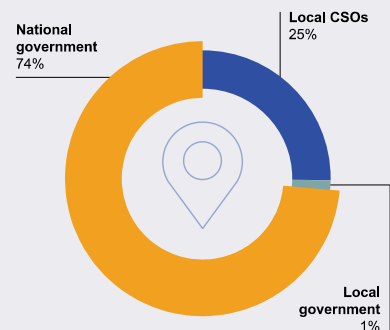
#### DAC ODA across the humanitarian-development-peace (HDP) nexus

For contexts facing extreme fragility, DAC members' ODA has increasingly been for humanitarian objectives while the proportion dedicated to peace has declined. In contrast, in high fragility contexts, the allocation has stayed stable overall with only a slight recent increase in allocations to humanitarian objectives.



#### DAC ODA to contexts exposed to high and extreme fragility for localisation (2023)

In 2023, DAC members allocated USD 6.3 billion as localised ODA – interpreted as channeled through local CSOs, local and national governments.



#### ODA across sectors (2023)

The social infrastructure and services sector received the most DAC ODA in 2023, at USD 20.5 billion, or 40% of the total. ODA to the humanitarian sector, the second-largest sector category overall (USD 15.9 billion) is the largest in contexts exposed to extreme fragility, amounting to 50% of their ODA allocations.

Source: OECD (2024<sup>[2]</sup>), *OECD Data Explorer, Creditor Reporting System (flows) database*, <http://data-explorer.oecd.org/s/z1>; OECD (2025<sup>[3]</sup>), *DAC2A: Aid (ODA) disbursements to countries and regions database*, <http://data-explorer.oecd.org/s/od>.



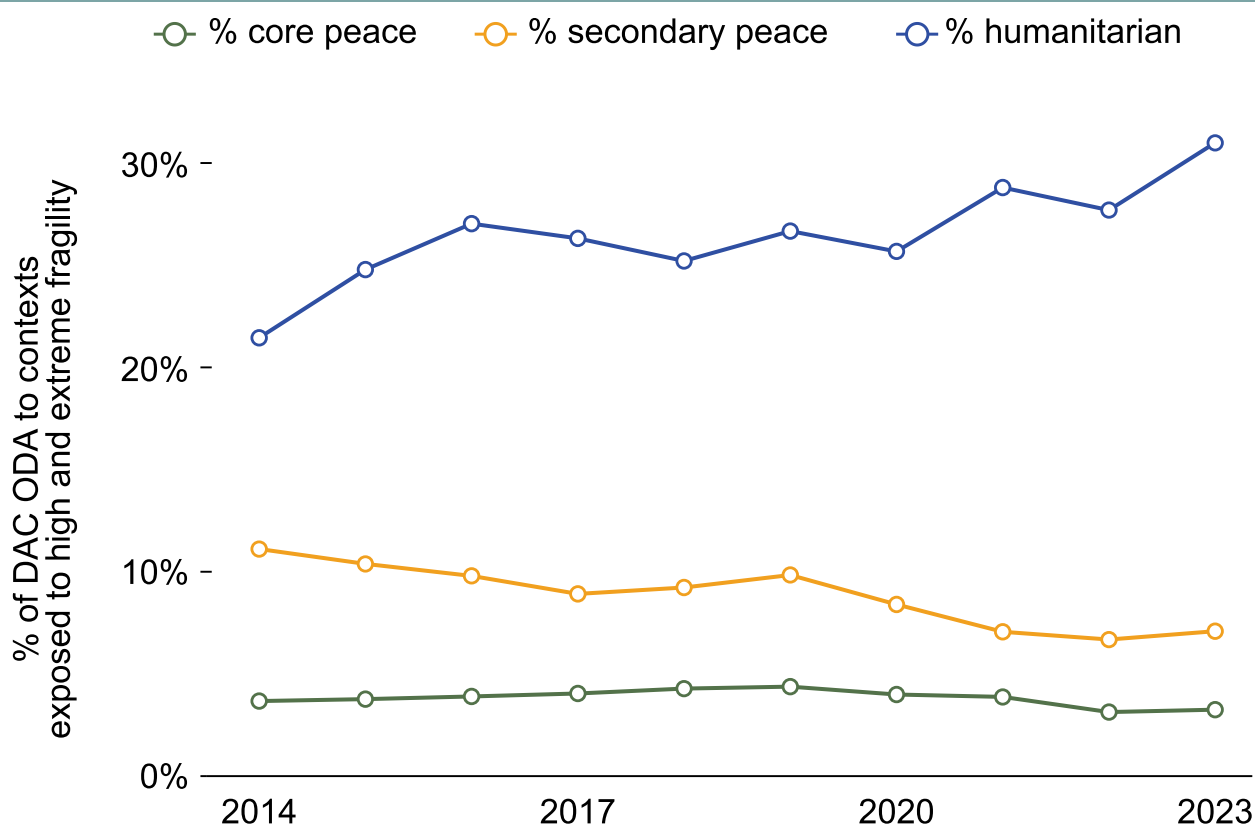
**DAC MEMBERS' ODA IN CONTEXTS FACING HIGH AND EXTREME FRAGILITY WAS INCREASINGLY ALLOCATED FOR HUMANITARIAN PURPOSES AND LOCALISED ODA DECLINED**

DAC donors spent USD 6.3 billion as localised ODA in contexts exposed to high and extreme fragility in 2023. Localised ODA refers to ODA channelled through country-based non-governmental organisations (NGOs) and subnational and national governments. Most localised ODA (74%) is channelled through national governments. The 2023 volume of localised ODA was almost one fifth less than in 2020 and mainly concentrated in contexts exposed to high fragility. This is critical as much of this assistance is used for building resilience to risks associated with environmental and human fragility (see the Solomon Islands example discussed in Chapter 4). Little more than 1% of localised ODA was channelled through

subnational governments, and 25% was channelled to local CSOs, an increase in proportion and an increase in volume compared to 2020. Monitoring these figures in the next ten years will provide an important indicator of the extent to which locally-led approaches to development are being applied.

Sectoral allocations in 2023, in percentage terms, were generally consistent with 2020. The exception was humanitarian aid, which has increased in proportion from a 26% to a 31% share. Social infrastructure and services received the biggest share of any sector (40% or USD 20.5 billion) of total in DAC members' ODA in 2023, lower than in 2020. Economic infrastructure and services received USD 5.3 billion or 10.5%; production sectors USD 4.2 billion or 8.1%, and multi-sectoral and cross-cutting aid amounted to USD 2.6 billion (5.1%).

**Figure 3.3. The share of DAC members ODA for humanitarian assistance increased while the share for peace activities, especially secondary peace, has decreased, 2014-23**



Source: OECD (2024<sup>[2]</sup>), *OECD Data Explorer, Creditor Reporting System (flows) database*, <http://data-explorer.oecd.org/s/z1>.

StatLink  <https://stat.link/trqha9>

### SHORTFALLS ACROSS THE PEACE PILLAR ARE UNDERMINING RESILIENCE IN MANY CONTEXTS

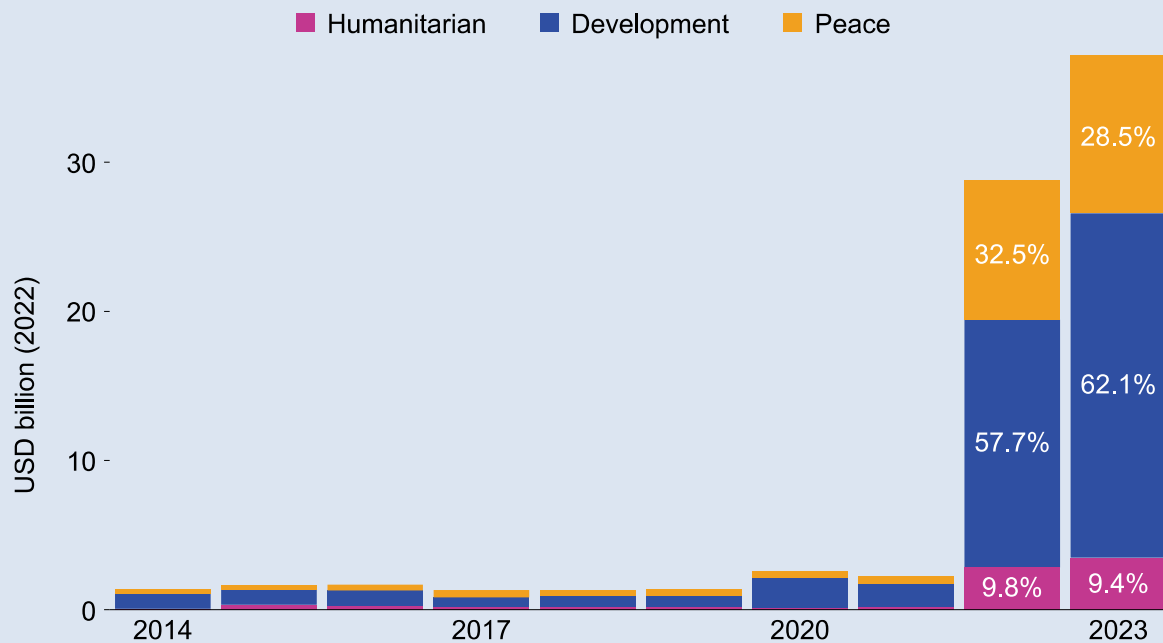
The volume of DAC members' ODA to peace reached an all-time high of USD 26.7 billion in 2023, following increases the previous year mainly allocated to Ukraine,

which received USD 9.3 billion in 2022 and USD 10.6 billion in 2023 (Box 3.1). However, this increasing trend is not matched for DAC peace ODA allocations to contexts facing high and extreme fragility, which are at their second lowest level since 2004.


#### Box 3.1. ODA to Ukraine

Though Ukraine is classified as experiencing medium to low fragility (Chapter 2), the international response to Russia's armed aggression against Ukraine has had a highly significant impact on the volume of ODA for Ukraine and a secondary impact on ODA support for contexts facing high to extreme fragility. In the space of a year, official donors' ODA towards Ukraine increased by more than 13 times from USD 2.2 billion in 2021 to USD 28.8 billion in 2022. This trend has continued into 2023, with total ODA increasing to USD 38.9 billion, of which over 99% is from DAC members. As a result, Ukraine became the largest-ever single country recipient of international aid in a single year. Development ODA accounted for 62.1% of the total volume in 2023, peace ODA for 28.5% and humanitarian assistance for 9.4% (Figure 3.4). In 2023, 49% of total ODA was delivered in the form of budget support and 50% was channelled through the Ukraine government compared with 32% and 38%, respectively, in 2022.

**Figure 3.4. Official donors' ODA across the HDP nexus to Ukraine spiked in 2023**



Source: OECD (2024<sub>[2]</sub>), *OECD Data Explorer, Creditor Reporting System (flows) database*, <http://data-explorer.oecd.org/s/z1>.

StatLink  <https://stat.link/8kwegc>

In contexts with high and extreme fragility, DAC peace ODA declined by 28% from 2019 to 2023, amounting to USD 5.3 billion in 2023. The persistently low level of peace financing is at odds with today's diverse and growing peacebuilding needs, with 2023 witnessing the highest number of violent conflicts since 1946. The decline occurred mostly due to secondary peacebuilding<sup>3</sup> (OECD, 2023<sup>[4]</sup>). Among secondary peacebuilding objectives, some of the sharpest declines since 2019 were in critical areas of concern: aid for "public sector policy and administrative management" (-79%), "legal and judicial development" (-66%) and "legislatures and political parties" (-53%). Even within the core peacebuilding strand, there were notable declines in

ODA disbursed for "participation in international peacekeeping operations" (-84%) and for "security system management and reform" (-37%).

Decreases in funding for secondary peacebuilding leave important activities for building resilience, such as those associated with governance and justice and crisis management, dependent on a small handful of donors, thereby creating additional risks in terms of long-term and predictable funding. For instance, the largest three donors for legal and judicial development to contexts facing high and extreme fragility – the United States, Australia and European Union (EU) institutions (Box 3.2) – have been responsible for 60% of support over the last ten years.

### Box 3.2. EU civilian crisis management experience: What works?

#### The design of EU Civilian Common Security and Defence missions is unique

The EU Common Security and Defence Policy (CSDP) is the main policy framework that enables the EU to take a leading role in peacekeeping operations, conflict prevention and the strengthening of international security. As such, the CSDP is an integral part of the EU's integrated approach to crisis management, drawing on both civilian and military assets. Through the deployment of civilian CSDP missions, EU Member States support and strengthen partner countries' civilian security capacities through monitoring, mentoring and advising national institutions and by taking up an executive role when agreed. Since 2003, the EU has deployed 25 civilian CSDP crisis management operations. The design of civilian CSDP operations is unique in that staff are largely drawn from experts in the justice and home affairs authorities of EU Member States. The EU Council Working Committees, which are part of the Common Foreign and Security Policy, take all decisions related to the political control and strategic direction of the civilian CSDP missions. In 2024, the EU maintained 12 civilian CSDP crisis management operations.

#### Aligning internal and external priorities and resources to stay engaged

At the onset of missions, two strategic-level dynamics have to be balanced: the often-extreme urgency in which the decision making is taking place and the equally strong drive for "doing it right". These are also weighed against the projected "cost of inaction". This is an important (albeit non-explicit) element of the decision-making process, which is also contingent upon factors such as the short duration of the deployment (with mandates not exceeding two years at a time, albeit being renewable), the identified needs (which will determine the operational objectives for the mission as agreed with the host state or states), and the continued and highest possible degree of local ownership and buy-in of the host country or countries. This process takes place against the backdrop of the envisaged financial and human investments, which are large: resources are drawn from the EU Common Foreign and Security Policy budget and human resources are drawn from EU Member States' services. Against this complex backdrop, the civilian CSDP missions endeavour to generate the best possible results in executing their mandates in order to deliver on the political and policy decisions made by the EU Member States. Their experiences provide for some indications of "what works".

#### The Ukraine example shows the value of remaining present on the ground

Following the unjustified, full-scale Russian invasion of Ukraine, the European Council rapidly adjusted the mandate of the EU Advisory Mission to Ukraine (EUAM Ukraine) to allow it to address the urgent needs and new security context in Ukraine. The decision by EU Member States to not only maintain, but also to scale up the EUAM Ukraine proved to be instrumental for attracting critically needed additional resources for Ukraine. The strengthened dialogue with the national authorities at all levels, including at local level, was essential for co-ordinating international emergency relief

efforts and providing to partners the information needed to ensure well-informed and timely policy responses at a time when the war disrupted or compromised established communications channels.

The adjustment in the scope, nature and scale of the EUAM Ukraine's mission allowed it to better adapt to needs, which emerged at very high speed: Bringing the mission to border crossing points was essential to provide information and the offer to support Ukraine's Prosecution Service in investigating and prosecuting alleged crimes against humanity became a pivotal part of Ukraine's efforts to co-ordinate the international response to these crimes etc.

### **Responding to regional fragility and spillovers: The value of establishing a single operation in neighbouring countries**

In December 2023, the EU created the EU Security and Defence Initiative in support of West African countries of the Gulf of Guinea based on the needs identified and formulated by the four concerned countries (Benin, Côte d'Ivoire, Ghana and Togo). The initiative aimed at boosting regional-level co-ordination and helping local actors more effectively carry out regional or cross-border actions, including both a civilian and a military pillar; it is the first time that the civilian and military CSDP is deploying together at the same time and under the same framework. As such, the two are perceived and conceived as a single entity while being modular and flexible. In its first phase, the civilian side of the initiative will base six advisors in EU delegations across the region to do a contextual analysis of concrete needs and develop advisory and training projects.

### **Combining technical knowledge and proactive operations for robust engagement**

As the mandate delivery progresses, more flexibility or robustness assist missions in taking on tasks that are not expressively foreseen but may emerge. The main mandate of the EU Advisory Mission to the CAR (EUAM RCA) is to help restore state authority and good governance across the country, but actions such as fighting illicit trafficking at some point started to appear as necessary corollaries of the principal mission mandate to help reinstate state authority in the country. By tackling illicit trafficking, the mission contributed to recovering illegal gains that otherwise would have benefited various armed groups that are contesting state authority. The mission works with a number of state bodies, including the customs service (on goods and merchandises) and the water and forest management services (on protected species and mobile inspection brigades). These actions are supported by the mission's mentoring and advising functions under the rule of law component to streamline internal anti-corruption measures across the above-mentioned services.

### **Committing to the long term: Building strategic-level commitment**

As conflicts become more complex, globalised and intertwined, the EU has refined its strategies to better address crises outside its borders. The EU Global Strategy for the EU's Foreign and Security Policy sets out an integrated approach to the EU's engagement in external conflicts and crises. A central objective for the civilian CSDP is to maintain strong partnerships with host countries as well as the participation and support of what the strategy calls third states and other partners, including local actors and others present in the field, as part of a joined-up approach. The integrated approach further respects the different roles, legal obligations and constraints of actors in crisis situations with a view to maximising the potential for mutual reinforcement on different levels. The EU Civilian CSDP Compact: Towards More Effective Civilian Missions, published in May 2023, further consolidated this approach, presenting 20 concrete commitments taken by EU member states and institutions to improve the capabilities and effectiveness of civilian CSDP missions.

Source: European Union (2022<sup>[5]</sup>), *The Common Security and Defence Policy: Civilian Compact*, [https://www.eeas.europa.eu/eeas/civilian-compact\\_en](https://www.eeas.europa.eu/eeas/civilian-compact_en).

### ***A GROWING ROLE FOR NON-DAC COUNTRIES AND IFIs IN AID TO CONTEXTS EXPOSED TO HIGH AND EXTREME FRAGILITY***

ODA from multilaterals to contexts facing high and extreme fragility has increased by 50% since 2015, and ODA from non-DAC countries more than doubled in the same period.<sup>4</sup> Multilaterals provided USD 37.2 billion in 2023 to these contexts, and non-DAC countries USD 12.3 billion. The role of non-DAC countries and multilaterals is particularly salient in regard to humanitarian and development ODA, respectively. Non-DAC countries allocated 59% of their development assistance to contexts facing high and extreme fragility as humanitarian ODA in 2023; multilaterals provided mostly development ODA (83%). Most non-DAC countries' humanitarian ODA (85%) in 2023 went to Syria.<sup>5</sup>

IFIs provided 71% of the USD 37.2 billion provided by multilaterals to contexts facing high and extreme fragility in 2023, followed by 17% for other multilaterals and 12% from the UN system.<sup>6</sup> From 2015 to 2023, IFIs increased their ODA to contexts in high and extreme fragility from USD 16.1 billion to USD 25.4 billion. The increasing use of IFIs and multilaterals is closely correlated with the shifting behaviour of DAC countries: In 2023, they provided 38% of their net ODA to contexts exposed to high and extreme fragility as multilateral outflows, the highest proportion in the past two decades.<sup>7</sup> In light of the trends identified in Chapter 1, these changes can be interpreted as a shift on the part of DAC countries that are looking for alternative partners to the governments in these contexts and especially in politically constrained environments.

#### **Box 3.3. ODA to the West Bank and Gaza Strip**

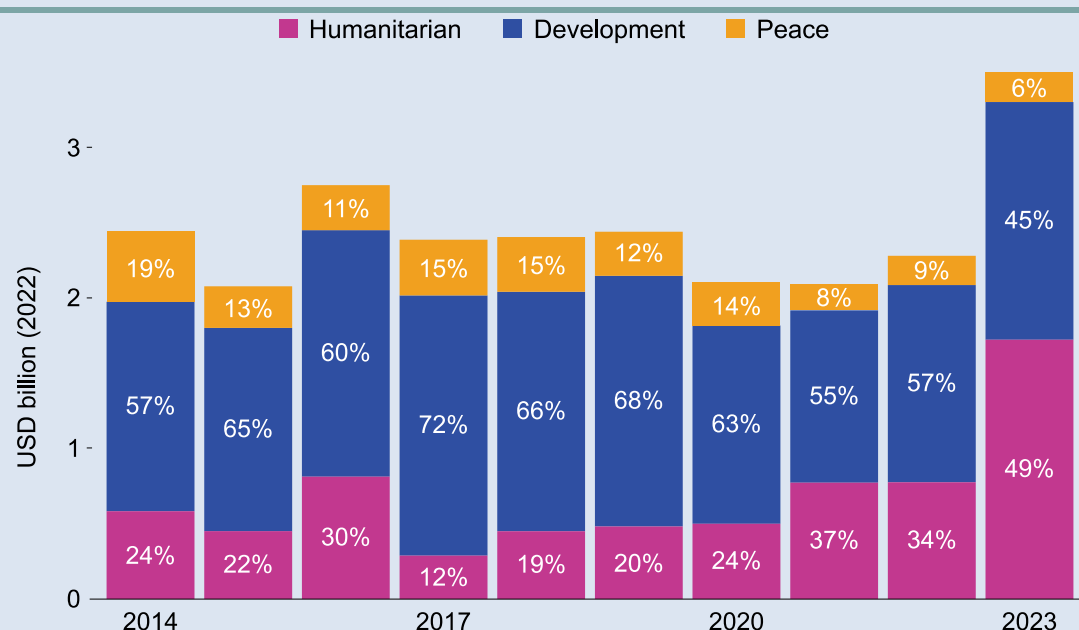
Acknowledging the significant deterioration in the security dimension since late 2023, the current edition of the OECD fragility framework only picks up on the earliest impact and therefore does not reflect the reality of the current situation. However, for future work in the region, especially work focused on recovery and reconstruction, data availability for the West Bank and Gaza Strip is a significant point of concern. By the end of 2023, the latest analytical year, only 20 of the 56 indicators used by the OECD fragility framework were available in the most recent year, making the capture of recent and future trends and changes more complex, especially in the environmental dimension that accounts for most of the missing data.

#### **ODA to the West Bank and Gaza as a reference point for future engagement**


Overall, official donors' ODA towards the West Bank and Gaza Strip remained stable from 2014 to 2022 and increased by 53% from 2022 to 2023. The proportion and volume of humanitarian ODA have increased overall since 2017, peaking at 49% of allocations in 2023 (USD 1.7 billion). The volume and proportion of peace ODA decreased between 2020 and 2023 (Figure 3.5). Two non-DAC countries, the United Arab Emirates and Qatar, accounted for 28% and 11%, respectively, of humanitarian aid allocations to West Bank and Gaza Strip in 2023. Also in 2023, most ODA (53%) was channelled through multilateral organisations; 20% through donor governments and 13% through NGOs and civil society.



**Figure 3.5. Volume and breakdown of official donors HDP ODA to West Bank and Gaza Strip, 2013-22**



Note: Some percentages for yearly figures of HDP to West Bank and Gaza Strip were rounded to the nearest number explaining why they do not add up to 100%.  
Source: OECD (2024<sub>[2]</sub>), OECD Data Explorer, Creditor Reporting System (flows) database, <http://data-explorer.oecd.org/s/z1>.

StatLink  <https://stat.link/wclbyo>

### *CLIMATE-RELATED DEVELOPMENT FINANCE, WHILE SEEN AS AN OPPORTUNITY, CAN BE DIFFICULT TO ACCESS*

Climate change and environmental degradation bring impacts across multiple dimensions of fragility. Many contexts have reduced capacities to manage these. To better tailor their financing to needs, donors should (1) adapt funding mechanisms to increase accessibility and debt sustainability; (2) invest in financial preparedness and governance to manage shocks; (3) consider how populations relate to their natural environment and earn a living over the long term; (4) better link financing with policy dialogue and capacity development; and (5) integrate climate considerations across the HDP nexus (OECD, 2023<sub>[6]</sub>).

Climate-related development finance commitments to contexts experiencing high to extreme fragility increased significantly over the past ten years.<sup>8</sup> DAC members' support more than doubled for these contexts, from USD 5.4 billion on average in 2013-14 to USD 12.7 billion in 2021-22, while multilateral providers more than tripled their support from USD 4.6 billion (2013-14) to USD 16.3

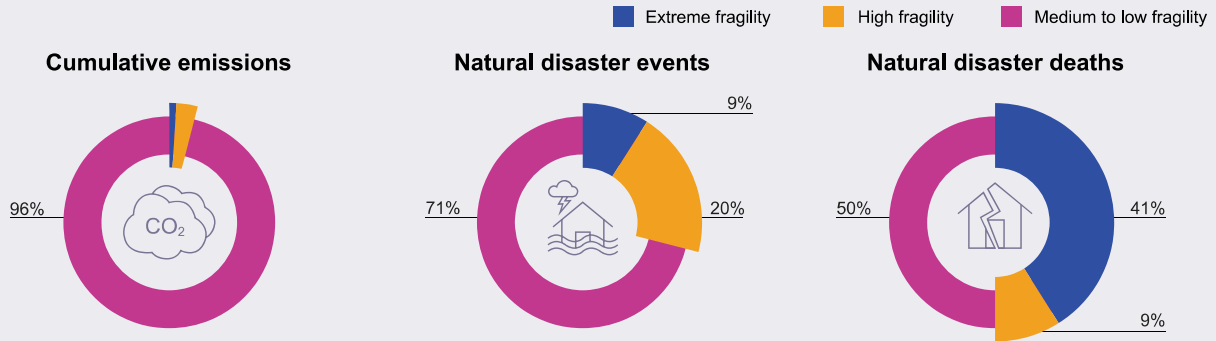
billion (2021-22). A large part of this increase was provided in the form of loans, especially to contexts facing high fragility that had greater access to lending over the period than those facing extreme fragility. Caution is required around the limited fiscal space many contexts have to service their debt and respond to environmental shocks (OECD, 2023<sub>[6]</sub>). While this shift towards lending has allowed the rapid expansion of climate-related development financing globally, especially for mitigation, it comes at a cost: borrowing, especially on non-concessional terms, can prove challenging in the face of high to extreme fragility.

The more fragility a country experiences, the less climate-related development finance it receives. Despite the overall increase, most climate-related development finance continues going to contexts experiencing medium to low fragility. In 2021-22, DAC members allocated about 25.6% of their climate-related development finance to contexts experiencing high and extreme fragility but only 5.3% to contexts with extreme fragility. For high to extreme fragility contexts, the main multilateral providers of climate-related development finance are traditional multilateral development banks (MDBs) rather than vertical funds.

### Infographic 3.2. Climate and environmental fragility in contexts exposed to high and extreme fragility

Contexts in high and extreme fragility are disproportionately affected by natural disasters which are exacerbated by climate change

Contexts exposed to high and extreme fragility account for less than 4% of cumulative CO<sub>2</sub> emissions despite representing one-quarter of the world's population. Yet they are home to 29% of natural disaster events and 50% of deaths from these (2010-23).

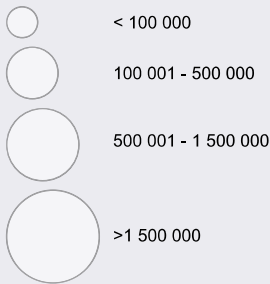


Eastern Democratic Republic of the Congo (DRC) has been conflict-affected since 1996, causing widespread forced displacement (internally and regionally).

Artisanal mining is widespread but is part of complex conflict dynamics and constitutes a source of financing for armed groups.

Mineral extraction in the DRC is linked to environmental fragility, and its large reserves of critical minerals (e.g. cobalt, coltan) which are key for the green transition.

**Internally displaced**

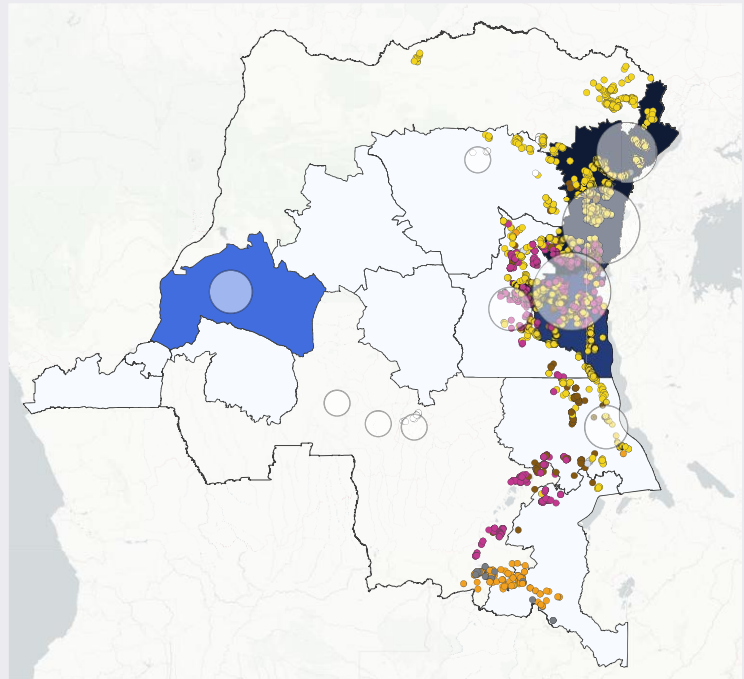


**Artisanal and small-scale mining**

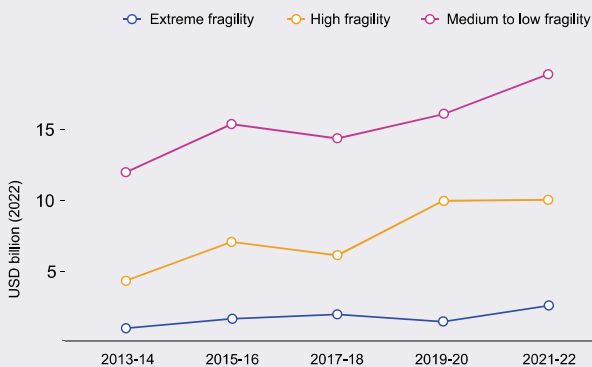
- Cassiterite
- Coltan
- Copper
- Diamond
- Gold
- Other
- Wolframite

**Fatalities (2019-23)**

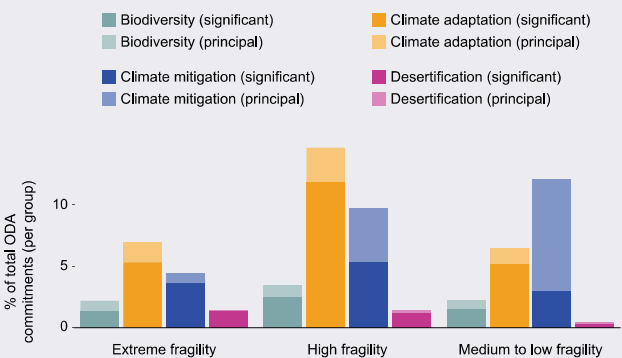
- 50 - 200
- 201 - 500
- 501 - 2 000
- 2 001 - 9 000



DAC members' climate-related commitments in 2021-22 have increased overall. Medium to low fragility contexts received 60% of the total against 32% and 8% for high fragility and extreme fragility contexts respectively



The percentage of DAC ODA marked as principal or significant in 2022-23 is the highest in contexts exposed to high fragility. ODA marked as principal or significant is larger as a proportion of total ODA commitments for the climate adaptation and mitigation markers compared to the biodiversity and desertification ones



Note: Only mines visited after 2015 were included in the artisanal and small-scale mining category which covers Eastern DRC. 'Other' includes several minerals (amethyst, cobalt, manganese, mixed minerals, pyrochlore sapphire and tourmaline). Climate-related commitments refer to concessional and developmental as well as not concessional or not primarily developmental flows from DAC members. Source: OECD (2024<sub>(2)</sub>); OECD (2024<sub>(7)</sub>); EM-DAT (2024<sub>(8)</sub>); UNHCR (2025<sub>(9)</sub>); Davies, Engström and Öberg (2024<sub>(10)</sub>); Sundberg and Melander (2013<sub>(11)</sub>); IPIS (2025<sub>(12)</sub>).

## *MAKING THE HUMANITARIAN DEVELOPMENT PEACE NEXUS WORK IN A FRAGMENTED LANDSCAPE*

The rising violence and geopolitical instability discussed in Chapter 1 underscore the importance of striving to ensure that actors across the HDP nexus seek ways to maximise the sum of their parts. As noted in Chapter 2, fragility profiles differ significantly across contexts, and the six dimensions of fragility are highly interconnected. These show the need for tailored, context-specific approaches across the range of humanitarian, development and peace activities. Each context, on the other hand, contends with a changing and diverse constellation of aid channels, donors and donor policies. The interaction of donors and partners through their respective systems can in part be understood through their allocation of resources and their ability to adapt to the requirements of working in contexts with high levels of fragility.

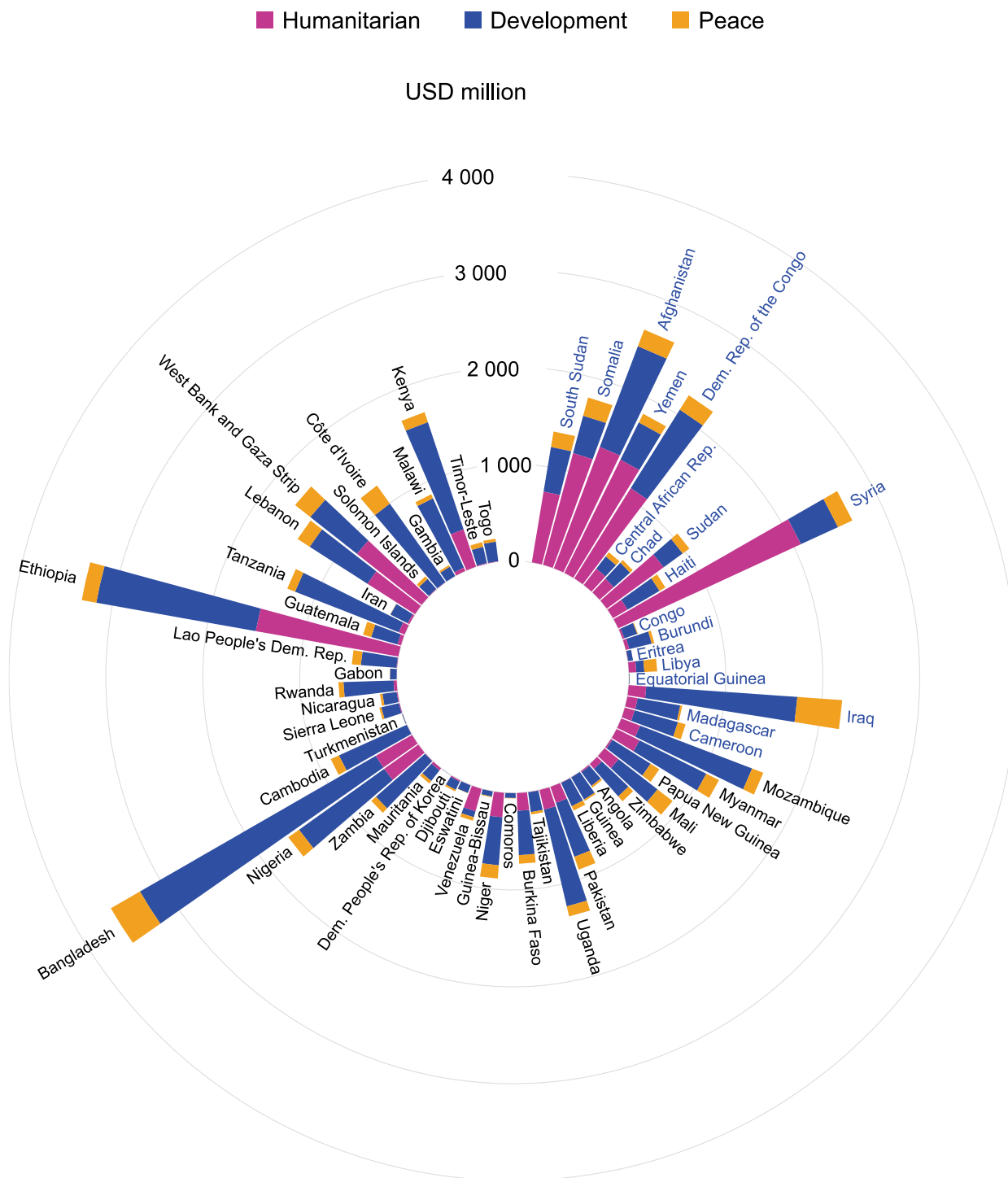
### *Aid allocation and fragility are not correlated*

The allocation of ODA across the HDP nexus does not always align with the degree of exposure to fragility at the regional or context level, as illustrated in Figure 3.6. The mix of ODA across the HDP nexus often highlights imbalances and blind spots in donor approaches, but also signs of progress. The share of humanitarian ODA in DAC members'

total ODA in contexts facing extreme fragility jumped from one-quarter in 2012 to one-half in 2023. A similar trend is playing out in contexts facing high fragility, where humanitarian ODA increased by a third, from USD 4.6 billion in 2020 to USD 6.1 billion in 2023. (Ethiopia and West Bank and Gaza illustrate this shift). These trends align with global ODA increases for humanitarian purposes, which more than tripled from USD 11.9 billion in 2012 to USD 40 billion in 2023, with USD 28.4 billion provided by DAC members.

Several contexts facing extreme fragility that are conflict affected, among them the Democratic Republic of the Congo (DRC) and Somalia, and receive large volumes of humanitarian ODA, though Somalia's decreasing fragility suggests that development assistance is addressing crucial elements of resilience (Chapter 4). Protecting such gains, retaining support for the basics of development and enabling the private sector will be significant elements of sustainable transition approaches away from extreme fragility in contexts such as Somalia. Some contexts, for instance Iraq, also appear to be responding to sustained development co-operation, making real progress on building resilience (Chapter 4). Development ODA continues to flow even to some politically constrained environments facing extreme fragility, notably Afghanistan, Myanmar and Syria.

**Figure 3.6. Distribution of DAC ODA across the HDP nexus pillars according to level of fragility, 2023**



Note: Fragility is ordered in the same order as Infographic 2.1 in Chapter 2.  
 Source: OECD (2024<sub>[2]</sub>), *OECD Data Explorer, Creditor Reporting System (flows) database*, <http://data-explorer.oecd.org/s/z1>.

### *DAC members' systems are still adapting to be fit for fragility*

The way ODA is allocated across the HDP nexus in contexts with high and extreme fragility points to missed opportunities for more joined-up approaches across and between the different pillars of the nexus (Figure 3.6). Outdated and inconsistent practices continue to be an issue, especially where donor co-ordination is lacking. For example, fragmented and transaction-heavy approaches to budgets, resource allocation systems, or accounting and oversight (Institute for State Effectiveness, 2017<sup>[13]</sup>) often overwhelm and confuse institutions with low capacity in many contexts with high and extreme fragility, generating frustrations and inefficiencies. The changing ambitions of contexts with high and extreme fragility, outlined in Chapter 1, make it imperative to address these issues to support more durable partnerships.

Progress is possible, and efforts spearheaded by the international community in Yemen over the past few years,

for example, show how better co-ordination, dialogue and alignment of different approaches to development can help international partners provide financing and expertise that is more strategic and consistent with the needs of the partner government (OECD DAC/INCAF, 2023<sup>[14]</sup>).

Likewise, many DAC members are adapting their systems to capture the benefits of fragility analysis to drive more informed, targeted and aligned approaches in contexts with high and extreme fragility. Despite the magnitude of the challenges in many such contexts, many OECD DAC members are rising to the task and demonstrating commitment and innovation to find effective responses to the drivers of fragility. A prime example is Korea, which has restructured its development co-operation architecture, partnered with multinational organisations to implement programmes, and increased its budget for support to contexts facing high and extreme fragility by nearly fourfold (Box 3.3).

#### **Box 3.4. Korea case study: Adapting for contexts facing high fragility and conflict**

In 2024, the Korea International Cooperation Agency (KOICA) introduced transformative changes in its programme for contexts exposed to high and extreme fragility and conflict, recognising that persistent humanitarian needs are deeply embedded in cycles of fragility and require a systemic response. Korea's primary objective was to address the structural drivers of fragility by fully operationalising the HDP nexus across its programme portfolio. To achieve this, three key measures were implemented: a significant budget increase, a comprehensive restructuring of the administrative architecture and the adoption of innovative approaches to programme delivery.

##### **A nearly fourfold increase in the budget**

To respond to the surging demand for humanitarian assistance, it is essential to address the structural issues in high and extreme fragility contexts and prevent conflicts at their root. Stable budget allocation is crucial for ensuring the success of this preventative approach. Korea's budget for supporting contexts with high and extreme fragility and conflict through KOICA nearly quadrupled in 2024 compared with 2023, rising from USD 25.25 million to USD 94.88 million. By leveraging the expanded budget, Korea has established a foundation for integrated and long-term support to respond to drivers of fragility. This approach not only addresses the persistent shortage of humanitarian funding but also aligns with the OECD DAC Recommendation on the HDP nexus.

##### **Comprehensive restructuring of its administrative architecture**

In early 2024, KOICA undertook a comprehensive restructuring of its administrative architecture for supporting contexts with high and extreme fragility and conflict. This involved elevating the status of the department responsible for humanitarian aid and the HDP nexus and establishing a team dedicated exclusively to supporting country programmes.

Prior to these changes, KOICA's projects were dispersed across multiple teams based on regional divisions. The absence of a dedicated unit resulted in the lack of a comprehensive and consistent strategy to effectively address fragility in priority contexts. However, with the launch of the new specialised team in 2024, a single team started to manage



previously fragmented projects under a unified strategy. This change has also enabled the conceptualisation of new project models integrating fragility considerations.

Additionally, the humanitarian aid division was upgraded from a department to a bureau, with three parallel sub-units established under it: the Humanitarian Aid Office, the Emergency Response Team, and the Conflict, Fragility and HDP Nexus Team. This restructuring laid the foundation for moving beyond conceptual discussions of the HDP nexus and enabling its practical implementation and application within projects.

### **Comprehensive overhaul of project implementation methods**

KOICA also has reformed its project implementation approach to include transitioning to long-term projects, scaling up individual projects, actively utilising multilateral channels and ensuring budgetary flexibility through the formation of regional projects.

Previously, KOICA's projects in contexts with high and extreme fragility and conflict were conducted in isolated, stand-alone formats that targeted single countries and had an average duration of three years. This fragmented approach limited the effectiveness of interventions, often leading to short-term engagements that ended prematurely. Additionally, there was no dedicated strategy for selecting and concentrating on specific dimensions of fragility where Korea could provide meaningful contributions.

To overcome these challenges, KOICA restructured its project formation and implementation methods starting with new projects in 2024. The first step involved selecting and focusing on six key areas of fragility, with one or two programmes implemented within each area. The six areas are strengthening political, economic, and social integration within communities; enhancing community capacity for conflict prevention and management; reintegration of conflict-affected areas; fostering civil peacebuilding; addressing vulnerabilities in high-risk areas affected by climate change and natural disasters; and, finally, strengthening capacity to respond to food crises.

In total, KOICA has established eight programmes aligned with these dimensions, actively utilising the expertise of multilateral channels to ensure the most effective execution. Specifically, each of the eight programmes has been matched with a key partner organisation for implementation: the International Organization for Migration, United Nations Development Programme (UNDP), UN Refugee Agency (UNHCR), UN Population Fund, UN Children's Fund, World Food Programme, International Federation of Red Cross and Red Crescent Societies, and International Committee of the Red Cross. KOICA has established strategic partnerships with these eight organisations in consideration of their specialty and comparative advantage in sub-areas.

Each of the eight programmes consists of one or two regional projects, with each regional project supporting up to four countries. Unlike the previous stand-alone projects that focused on single countries, the new programme-based model accommodates cross-border interventions. This approach reflects the fact that fragility transcends national boundaries and also promotes flexibility in budget management across countries by supporting multiple countries within a region. Moreover, each programme adopts a long-term perspective with a focus on preventive approaches to conflict. These long-term programmes have durations of up to nine to ten years and are implemented in three phases. The initial phase lasts two to three years, after which project outcomes are assessed and findings are incorporated into the subsequent phase for continued implementation. KOICA's shift to a multilateral, programme-based model enhances budgetary flexibility, ensures sustained engagement, and promotes more effective conflict prevention and resilience-building efforts.

Source: Contributed in 2025 by the Conflict, Fragility and HDP Nexus Team at KOICA.

As highlighted in Chapter 1, relationships between development providers and recipients are being challenged by competing political, economic and security approaches. This section considers three areas of engagement with significant implications for how donors and partners respond to drivers of fragility: conflict prevention, working in politically constrained environments and staying engaged in core economic systems, including the private sector.

## REDUCING FRAGILITY AND PREVENTING CONFLICT: MAKING DEVELOPMENT WORK FOR PEACE

Despite sustained increases in organised violence and the strength of the arguments and the business case for conflict prevention presented in the *Pathways for Peace* report by the UN and World Bank (2018<sup>[15]</sup>), the response has been uneven and underwhelming (World Bank Group,

2023<sup>[16]</sup>). In particular, there has been little progress on the *Pathways for Peace* recommendation that security and development approaches should be compatible, aligned and mutually supportive. OECD analysis conducted in 2023 highlighted a range of trends associated with peace and conflict prevention that suggest a substantial rethink is required if the conceptual potential of conflict prevention is to be translated into operational effectiveness (OECD, 2023<sup>[4]</sup>).

The good news is that there are a number of organisations and individuals examining different parts of the prevention conundrum. The pressure they all face is the urgent need for a political or operational breakthrough. This first subsection identifies the main challenges associated with prevention – measuring impact, resourcing what works, making development work for prevention, and packaging prevention analysis for political and operational decision making. Box 3.5 sets the stage with a review of what conflict prevention entails.

### Box 3.5. Getting a grip on what conflict prevention entails

This report broadly adheres to the understanding of conflict prevention as defined by Lund (2023<sup>[17]</sup>): “any structural or intercessory means to keep intrastate or interstate tensions and disputes from escalating into significant violence and use of armed force, to strengthen the capabilities of potential parties to violent conflicts for resolving such disputes peacefully, and to progressively reduce the underlying problems that produce those issues and disputes”. It accepts that preventive action can occur at any stage of a conflict cycle and agrees with the view that prevention is uniquely forward looking and focused on anticipating and addressing a crisis before it has fully manifested (Minor, 2024, p. 8<sup>[18]</sup>).

Distinguishing different and relevant types of action is an often difficult yet essential aspect of effective conflict prevention. Fundamentally, this means acknowledging the conceptual distinction between proactive efforts that are undertaken before significant violence has arisen at all – and where fragility analysis can play an important role in identifying combinations of pressure and resilience – and reactive efforts undertaken after armed conflict has ensued (Lund, 2023<sup>[17]</sup>). Three generally accepted categories are applied here:

- **direct conflict prevention** including dispute resolution, mediation, ceasefires, peace agreements and incentives without using violence, and immediate measures in the face of crisis to mitigate triggers and drivers of escalation
- **structural conflict prevention** focused on efforts to address the drivers of conflict to ensure that violent conflict does not arise in the first place or if it does, that it does not reoccur
- **systemic conflict prevention** focused on transnational factors such as arms sales, illicit financial flows, and organised crime or environmental degradation.

Source: Inter-Agency Standing Committee (2020<sup>[19]</sup>), “Exploring peace within the humanitarian-development-peace nexus (HPDN)”, <https://interagencystandingcommittee.org/humanitarian-development-collaboration/issue-paper-exploring-peace-within-humanitarian-development-peace-nexus-hdpn>.

## ALLEVIATING THE CONUNDRUM OF MEASURING CONFLICT PREVENTION

The collective inability to bring the debate on measuring prevention to an operationally feasible conclusion is a substantial impediment to progress. This issue impacts more on the structural and systemic approaches to conflict prevention, where presenting the case for policy and political support is hardest and where concerns persist about allocating resources to addressing crises that may never happen (Mueller et al., 2024, p. 18<sub>[20]</sub>). There is nothing new about this, but the reluctance to broaden the debate beyond causation and consider pragmatic options to prevent conflict is leaving many donors and partners struggling to respond or adapt to crisis, ceding initiative to others (as noted in Chapter 1). However, analytical progress is being made and a stronger evidence base is emerging to strengthen arguments for preventive action.

The innovative UN Peacebuilding Impact Hub (UN, 2024<sub>[21]</sub>) and the UNDP Crisis Offer are conceptually and operationality significant, with the former gathering and synthesising valuable data on impact and effectiveness and the latter clearly pointing to the potential for development actors to play a stronger role. Other equally relevant changes have been introduced: across IFIs, especially within their respective fragility strategies, and among countries including France, the United Kingdom and the United States that are investing in new versions of stabilisation, prevention and development doctrine. Advances in artificial intelligence (AI) and data analytics for prevention (Mema, Lamont and Diogenes, 2024<sub>[22]</sub>), including foresight, are also gaining momentum, and much of the analysis points to the potential for more upstream prevention and the associated goods that can go with it including for addressing multidimensional drivers of fragility. For example, there is a possibility to strengthen social safety nets aligned with conflict prevention through employment programmes (Mueller et al., 2024, p. 29<sub>[20]</sub>). Each of these approaches and ideas connects with thinking on fragility, resilience and development. Together, they provide alternative options to address or work around the measuring conflict prevention impasse.

### *Fragility analysis as a building block for measuring prevention*

Working with the findings of fragility analysis as a means to measure policy impact over time offers a good enough base from which to consider the impact of prevention policies in most contexts. While it is important to acknowledge that analysing fragility has not advanced

sufficiently to attribute causation, as analytical capacity improves in areas such as subnational fragility analysis, the potential to provide more nuanced pictures to inform upstream prevention should grow. The application of fragility analysis for conflict prevention can help identify the states of fragility that development actors can most usefully target as a means to alleviate upstream drivers of conflict; this application is consistent with resilience-driven approaches and can complement direct and more traditional structural approaches to conflict prevention.

Even where causation is uncertain, the value of reducing fragility in its own right – including as a public good – should be a sufficient basis for more proactive development action. Reducing fragility helps address the risk from a variety of shocks and types of potential crises, including conflict. While direct conflict prevention approaches are more focused on political and security concerns, fragility analysis has the particular advantage of uncovering upstream drivers across all six dimensions of fragility. In this regard, measures to reduce fragility can be consistent with those applied for structural and systemic conflict prevention. In the current geopolitical context, this matters as much for contexts with no immediate history of violent conflict as for those that appear trapped in generational cycles of conflict.

OECD research conducted for this report found, unsurprisingly, that the political and security dimensions of fragility were most closely correlated to the trajectory of a descent to armed conflict or high levels of violence. As shown in Figure 2.20 in Chapter 2, analysing cross-dimensional intersections helps uncover combinations of drivers of fragility that can matter for conflict in a given context. Addressing risks and building coping capacities across these combinations fall most often within the development sphere. Recent analysis for the International Monetary Fund (IMF) also points to this potential, where the assumption “that estimating conflict risk is equivalent to ascertaining the extent to which a country is exposed to fragility” was found to be a valuable way to capture the unique multidimensionality of profiles across a “continuum of fragility from countries which are in stable peace to countries suffering from open violence” (Mueller et al., 2024, p. 8<sub>[20]</sub>).

### ***DIRECT CONFLICT PREVENTION: RESOURCES ARE WEAKEST WHERE THE NEED AND EVIDENCE FOR EFFECTIVENESS ARE STRONGEST***

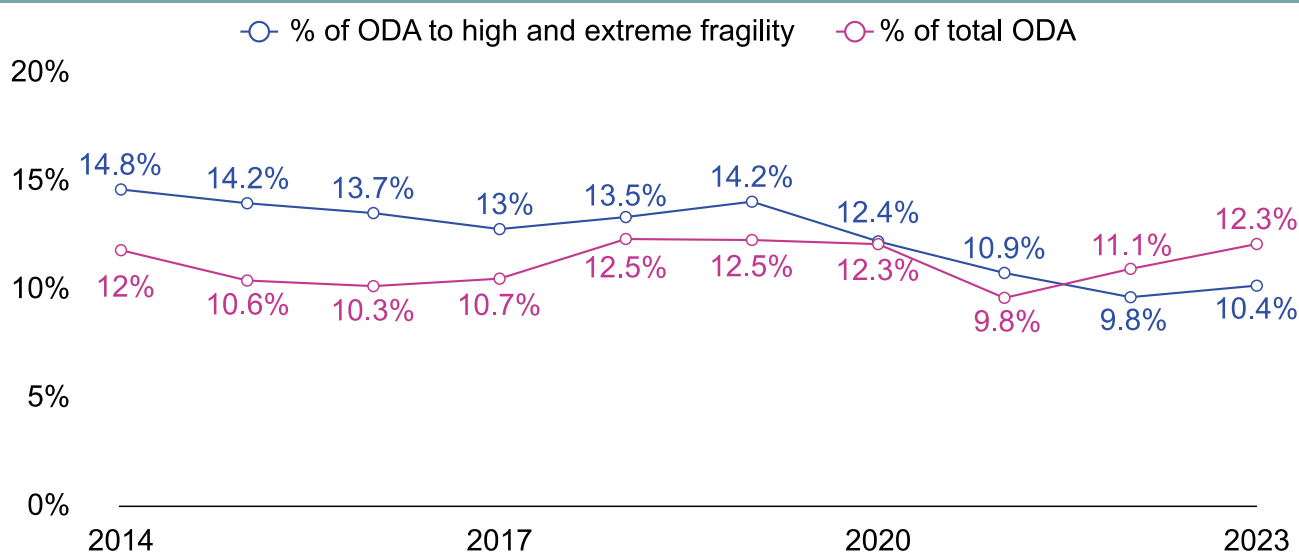
The international appetite for direct prevention measures appears to be on the decline despite a number of positive

outcomes over the last 30 years, among them the Economic Community of West African States diplomatic intervention in Gambia in 2017, the UN deployment of the preventive peacekeeping mission UNPREDEP to the Republic of North Macedonia (then Macedonia) during the 1990s, and the Association of Southeast Asian Nations mediation of the territorial dispute between Thailand and Cambodia over the Preah Vihear Temple between 2008-11, to name just a few.

DAC members' ODA for conflict prevention, a subset of peace ODA, decreased as a share of total ODA in contexts affected by high and extreme fragility since 2014. In 2023, ODA for conflict prevention to these contexts amounted to

less than 4% of total DAC ODA (USD 1.7 billion). A ten-year record low investment in preventing crises was reached in 2022 (with only slightly higher numbers in 2023). This is at odds with the volume of spending from DAC members in reaction to some of the most acute symptoms of crises in developing countries, with around USD 62 billion disbursed on humanitarian assistance and in-donor refugee costs in 2023. Consider that in 2023, the economic cost of violence for the ten most affected countries, among them seven contexts experiencing high to extreme fragility, ranged from 21.3% to 68.6% of their gross domestic product (Institute for Economics and Peace, 2024, p. 3<sub>[23]</sub>). Given the proven cost-effectiveness of conflict prevention and the increasing necessity, why has there been so little progress?

**Figure 3.7. DAC members' peace expenditure as a percentage of their total ODA, 2014-23**



Source: OECD (2024<sub>[2]</sub>), *OECD Data Explorer, Creditor Reporting System (flows) database*, <http://data-explorer.oecd.org/s/z1>.

StatLink  <https://stat.link/ewusvb>

The structural trends outlined in Chapter 1 have undoubtedly complicated thinking on strategic options for peace, creating the potential to overload dependencies on other instruments of foreign, defence and development policy. Additionally, a more diverse set of actors have assumed significant responsibility for peace mediation and peacebuilding – bilaterally, individually and in concert. The motivations of these actors vary, ranging from mirroring UN approaches to more transactional approaches (Hellmüller and Salaymeh, 2025<sub>[24]</sub>). These trends and practices appear to be driving the decline of support for instruments capable of mitigating the worst impacts of conflict, leaving vacuums that belligerent actors can exploit through the instrumentalisation of fragility.

The decreased appetite for peacekeeping is one example of shifting state preferences despite evidence on the effectiveness of the peacekeeping instrument (Hegre, Hultman and Nygård, 2019<sub>[25]</sub>; Wane, Williams and Kihara-Hunt, 2024<sub>[26]</sub>). Funding shortfalls are one of a number of reasons why peacekeeping missions are struggling to fulfil mandates. This is an especially pressing issue for African Union peace support missions, where operational and logistical capabilities are falling short of requirements (UN, 2023<sub>[27]</sub>). The reliance on a small number of donors to fund the bulk of peace activities is an additional point of vulnerability. The United States (27.89%) is the largest funder of UN peacekeeping, followed by China (15.21%) (UN, 2024<sub>[28]</sub>). More broadly, already vulnerable peace

financing is heavily dependent on the United States, the EU and Germany. Together, these three donors provided almost 58% of DAC members' total peace spending in 2023. Facing these issues, multilateral organisations, especially the UN, are now challenged to reassert and reimagine their place and function. Addressing the resources shortfalls for direct prevention is one step, and this is an area where mediation, building state capacity and peacekeeping interventions have a proven track record (Hegre and Nygård, 2017<sup>[29]</sup>; Institute for Economics and Peace, 2024<sup>[30]</sup>). Addressing the untapped potential of upstream systemic and structural conflict prevention is arguably the bigger challenge as it confronts established siloes across development and peace structures.

### *STRUCTURAL AND SYSTEMIC CONFLICT PREVENTION: THE PREVENTATIVE VALUE OF DEVELOPMENT*

ODA can contribute to sustaining peace, a concept developed by the UN as central to a holistic approach to preventing the outbreak and recurrence of conflict.<sup>9</sup> By extension, development activities can and should be a central component of upstream (structural) and systemic conflict prevention. Considering structural and systemic pressures and the nature of political settlements is an important step towards adapting policies to deliver growth and development – i.e. the idea “that peace will only succeed if it has serious economic underpinnings” (Dercon, 2023, p. 190<sup>[31]</sup>) and where development focus is concentrated in areas where the needs of a country's population, from education to safety nets, are largely unmet (Dercon, 2023, p. 317<sup>[31]</sup>). Consistent with the structural emphasis on drivers of conflict and fragility, the scope for measures with, or contributing to, preventive impact should thus extend beyond the peace community to development actors. This connects with approaches for building resilience, though both must be adapted to the relevant political narratives for potential donors and partners (Minor, 2024, p. 32<sup>[18]</sup>). As is the case for financial and economic interventions in contexts with high and extreme exposure to fragility, ensuring the positive peace impact of ODA requires deep contextual knowledge of the drivers of fragility, complemented by conflict sensitivity, real-time political economy analysis and sufficient agility to respond to changing circumstances. For example, addressing the inequalities affecting women exposed to conflict and high and extreme fragility is crucial for preventive measures aimed at building more stable and peaceful societies (Goemans and Loudon, 2021, pp. 6-7<sup>[32]</sup>). Crucially, peace investments must also acknowledge and as far as possible engage with the reality and potential of local

political settlements where legitimate and longstanding issues around local authority and ownership of peace and development processes (Campbell, 2018<sup>[33]</sup>).

There is a tendency among many donors to see peace funding and policy as distinct from development policy and practices. This distinction is compromising both peace and development effectiveness in addressing fragility. The data on ODA trends in contexts exposed to fragility suggest that any financing and efforts for conflict prevention that were already low in 2017 (UN; World Bank, 2018, p. xxvii<sup>[15]</sup>) are even lower today. This unwillingness to engage contrasts with growing evidence on the value of approaches in the structural and systemic space where the impact of employment programmes – demobilising and reintegrating combatants (Blattman and Annan, 2016<sup>[34]</sup>) or youth-focused initiatives such as those highlighted by the Vice President of Colombia, Francia Márquez, in Chapter 4 – can directly challenge the incentives to use violence highlighted in chapters 1 and 2 of this report. In more recent analysis, Mueller et al. (2024, pp. 20-22<sup>[20]</sup>) present compelling evidence for how macroeconomic policies can support and address these issues by reducing violence in part through employment opportunities that also tend reduce fragility.

### *PACKAGING PREVENTION ANALYSIS FOR THOSE IN POWER: CHANGING THE PEACE OFFER*

Clear messaging and well-organised evidence of the value of conflict prevention are essential. Communications will vary according to the context and the type of prevention approach required to reduce the potential for armed conflict and violence. Restating the case for development as a multipurpose instrument of statecraft, and where appropriate as a component of effective foreign policy (Chapter 1), can lay the groundwork for communicating the reasons for supporting conflict prevention. If the analytical potential exists, how can it be used to drive conflict prevention fit for current challenges?

On an analytical level, the ecosystem of frameworks and indices offers a valuable comparable resource to inform the policies of humanitarian, development and peace (including security) actors. There is however a significant organisational challenge: harnessing the upstream value of fragility analysis, the current value of impact analysis and the potential of subnational fragility analysis alongside predictive, foresight, and scenario-based tools. To meet the challenge requires building a complementary and open system capable of producing synthesised analysis to inform and guide policies of all actors.



Again, there are positive developments that point to the potential for more analytically grounded, accessible and impactful approaches for conflict prevention. For example, the introduction of ten-year strategies to prevent conflict and promote stability in six contexts under 2019 US Global Fragility Act considers many of the issues highlighted in this chapter and positions the United States to lead new-era preventive approaches geared to geopolitical realities and increased self-sufficiency for partner contexts. Similarly, the application of risk and resilience assessments by the World Bank and African Development Bank is informing the development of more tailored solutions. Programmes to address crisis prevention (de Greiff, 2024<sup>[35]</sup>) and UN support for national prevention strategies also are the kinds of innovation that will be necessary to increase the likelihood of a breakthrough (Christianson, Herdt and Nadolny, 2023<sup>[36]</sup>; Kumskova and Hilbert, 2024<sup>[37]</sup>).

UN leadership on prevention will also be crucial, especially as it considers the future offer of the Peacebuilding Commission and Peacebuilding Fund. In this regard, how the UN Peacebuilding Commission develops its prevention offer, including the thinking on national prevention strategies, will be a significant reference point for future implementation of prevention approaches. The conceptual strength of a strategy for conflict prevention rests on its ability to connect with and complement existing efforts that address the form and causes of violence and its ability to identify unattended gaps that require attention. These include identifying what parts of existing structures and approaches have value for preventive effect. Three issues must be addressed if that value of strategic thinking on conflict prevention is to be protected: the bureaucratic burden on countries, conceptual sensitivity around prevention strategies and the need for context-specific knowledge.

### *Adapting approaches for conflict prevention*

First, the capacity to implement policies towards strategic goals varies considerably while acknowledging that some countries, among them Kenya, Timor-Leste and South Africa have enacted or integrated aspects of national prevention strategies (Forcada and Monnier, 2024<sup>[38]</sup>). In many contexts with high and extreme fragility, there can often be a proliferation of national strategies – on development, economic recovery, security and other issues – that places a bureaucratic burden on already limited capacity at state and local levels with the real risk of diminishing policy returns. Prevention as a stand-alone

strategy will often struggle against more established and accepted state and regional processes. To protect the value of the content, it may be necessary to reconceive the offer to make it accessible, acceptable and workable for all actors, donors and partners alike. The application of strategic prioritisation exercises can be a useful way for contexts to ensure the appropriate balance of capacity to strategic goals (OECD DAC/INCAF, 2023, p. 29<sup>[14]</sup>).

Second, the concept of a prevention strategy can be problematic in some contexts where the perception that such a strategy is needed can be viewed as stigmatising in much the same way that a label of fragile can be perceived. Understanding the political settlement within which a strategy is expected to work is key to building an approach that may not require a formal strategy per se and creating a new framework for either donors or partners (Monnier and Scherrer, 2024, pp. 11-14<sup>[39]</sup>). In this regard, the idea of prevention strategies as “a system of efforts at multiple levels and stakeholders to address a comprehensive set of risk and protective factors for all forms of violence” has significant potential (Monnier and Scherrer, 2024, p. 16<sup>[39]</sup>). This would allow the value of prevention to be integrated across established frameworks, which would minimise the risk of unnecessarily adding to the administrative burden through strategy multiplication or duplication; be politically more sensitive; and offer the advantage of diversifying the measurement indicators, especially those associated with structural or systemic prevention.

Third, good strategy depends on tailored approaches for external factors actively opposing or disrupting progress towards desired outcomes: It accommodates the reality that plans rarely proceed in a sequenced manner. As noted in Chapters 1 and 2, the profiles of contexts with high and extreme fragility are diverse and dynamic. In several contexts, state and non-state economic objectives intersect with violent means, reflecting the fact that violence is not just an outcome but a choice. As seen in the analysis on coups in Chapter 2, the incentives to use violence can be a strong driver in the relationships between violence and economic activity (Blattman and Annan, 2016<sup>[34]</sup>). It can also be reflected in the loss of political control due to diminished resilience across vital state capacities such as control of territory, fiscal capacity and revenue collection. Strategies must therefore be calibrated to integrate responses to specific issues for certain contexts, such as high levels of gender-based violence, transnational organised crime (Geneva Centre for Security Sector Governance, 2024<sup>[40]</sup>), or specific presentations of urban fragility and violence.

### *Building networks for delivering on conflict prevention*

As risks accumulate and resilience degrades, no one factor is responsible for violence (Monnier and Scherrer, 2024<sup>[39]</sup>). Integrating thinking on prevention across existing policies and strategies, including those focused on resilience in economic, societal, environmental and human dimensions, could significantly help donors and partners move beyond the so-called projectised approaches that treat conflict prevention as something distinct from development.

Operational progress for enacting conflict prevention depends on delivering the right analysis at the right time to the most appropriate actors in the development and peace space. In a competitive geopolitical landscape, networked approaches for conflict prevention can be an integrated part of new development co-operation partnerships. The innovation of the UN Peacebuilding Impact Hub was an important step towards a more networked approach to knowledge and practice for peacebuilding, including conflict prevention. The hub is already proving its worth, including its particularly valuable function for mapping and sharing information on good practices. Scaling that capacity to include new approaches to upstream conflict prevention that can identify and support the prevention value of development approaches could provide the stimulus necessary for more actors within and outside the UN system to respond to prevention analysis.

However, in many contexts, the UN is not in the lead or can have a limited role in influencing conversations relevant to either direct or structural and system prevention. This is most apparent where local actors and their external allies prefer to work in parallel tracks. Adapting networked approaches to conflict prevention in such situations will require bilateral leadership with close support from organisations with relevant access in a given context, such as regional organisations, bilateral actors and financial institutions. This will be an important aspect for finding approaches that address structural prevention as well as systemic prevention and are capable of informing responses to intersecting transnational challenges such as food insecurity, economic stress, climate change, migration, gender inequality and humanitarian needs. Giving political leaders a stake in the process and potential outcomes – i.e. the costs and benefits of acting or not acting (Bernhagen, 2013<sup>[41]</sup>) – is another way of increasing political visibility, investment and traction.

### *THE PRESSING NEED TO MITIGATE THE POLICY AND OPERATIONAL DISSONANCE IN SUPPORT TO THE SECURITY SECTOR*

The support for security sector reform and governance (SSR/G) stands as a useful point of reference for the current limitations and future potential of conflict prevention. For all contexts, a well-governed security sector can help strengthen the legitimacy and authority of the state and foster trust and societal resilience (Geneva Centre for Security Sector Governance, 2024, p. 4<sup>[40]</sup>). Where this dynamic is compromised or absent, supporting SSR/G is a frequently core component of building governance resilience based on how security and justice sectors support sustainable development and peace. For donors, support of SSR/G exemplifies how investing in peace can protect not just sustained engagement on development but also facilitate the effective management of other instruments of state, particular where defence and security assists are being used to delivery security sector assistance.

The delivery of security sector assistance (SSA) without or with insufficient support for SSR/G can lead to unintended consequences. Increased military capacity in the absence of enhanced governance of the security sector may, for example, lead to unconstitutional changes of government, as noted in Chapter 2. The tactical expediency of SSA should not come at the cost of sustainable peace and development objectives. This type of engagement is not limited to the defence sector, and the combination of weak legal, judicial and policing frameworks can also erode the basis for human security in contexts exposed to fragility. In 2023, two-thirds of women in such contexts, and 1.25 billion women worldwide, lacked legal protections against domestic violence.<sup>10</sup>

Enhancing the funding and operational alignment of SSA and SSR/G activities in contexts experiencing high fragility would serve to mitigate the risk of unintended outcomes (Box 3.6). Progress in this area will depend in part on adapting financial instruments in high fragility contexts to enable better decision making across the security-development nexus. Thinking and practice on ownership of SSG/R also must evolve to address political, operational and financial realities. Existing approaches to building local ownership of peace and development policies frequently fall short due to concerns around donor risk, partner accountability, political will, and competing security and development priorities. The political economy associated with conflict and violence distorts and impedes support for sustainable peace and inclusive development. Constant vulnerability to all forms of violence coupled with limited

state capacity undermines the integrity of economic and security systems in contexts exposed to fragility, eroding the basis for peace and development.

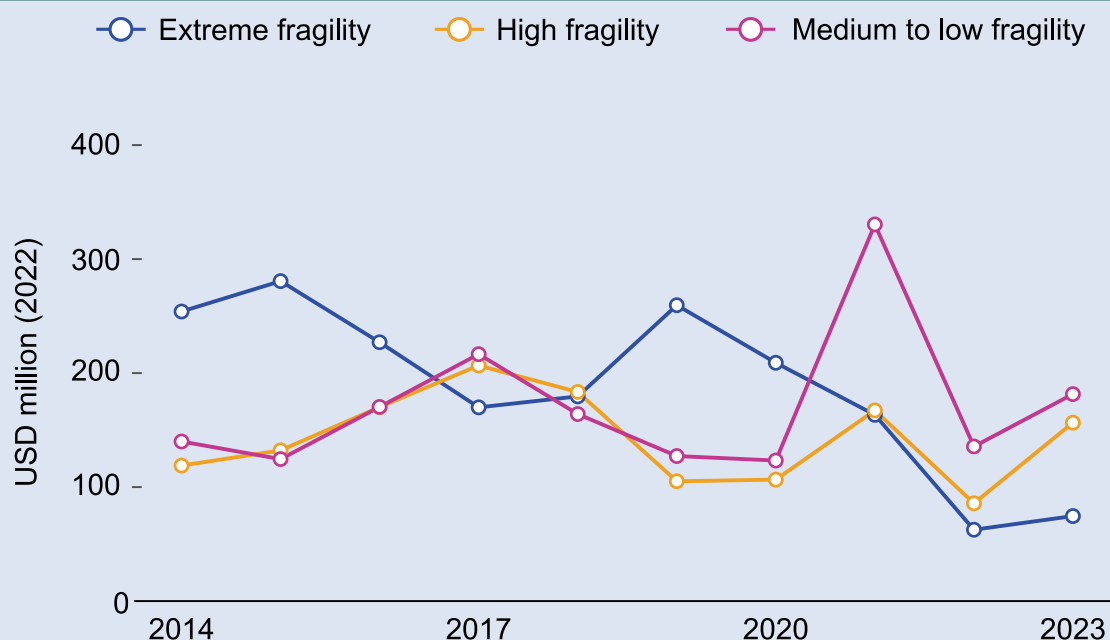
Improving the sustainability and predictability of funding for SSR/G is a fundamental enabler of sustainable development. This includes knowing (as far as is possible) what falls outside of the ODA envelope, including to non-state actors, and what this means for partner states' decision making on SSR/G and SSA. Integrating the

comparative advantage of IFIs can help build expertise, embed competence and foster sustainability for SSR/G and SSA. At national levels, evaluation of the funding landscape for the security sector should include a closer examination of the management of debt, revenue and expenditure needed for building more sustainable security sector systems. Effective financial management is essential for the delivery of SSR/G. However, strategies and programming have frequently failed or struggled to pay sufficient attention to public finance issues.


### Box 3.6. Conflict prevention and the future of SSR/G

Cohesive security-development strategies among donors and partners are notably absent in contexts experiencing high to extreme fragility, which undermines conflict prevention and restricts the effectiveness of peace and development initiatives. This is reflected in the steady decline of financing for SSG/R. In high and extreme fragility contexts, SSR financing from official donors has been on an overall downward trend since 2015, with an especially marked decrease from 2021 to 2022.

In 2023, DAC members allocated USD 244 million in ODA to security system management and reform in contexts with high and extreme fragility. This volume amounted to 4.6% of their total peace ODA in 2023. This is the second lowest share of DAC ODA for this objective since 2007. A similar trend is evident in financing for SSG/R by official donors, which include multilateral institutions: these donors allocated only 3.1% of their total peace ODA, or USD 249 million to this objective in 2023. Two multilateral actors were among the top ten official donors for security system management and reform in 2023: the EU and the UN Peacebuilding Fund. Together, these two multilateral actors accounted for 34% of all funding allocated to these objectives by official donors in 2023. ODA for security system management and reform is not the only funding relevant to the security sector, as there can be significant overlap between development programmes and security issues. But blind spots on the connections between security and development are compromising partnerships, effectiveness and achievement of objectives. Building on initiatives such as UN-World Bank Humanitarian-Development-Peacebuilding Partnership and forthcoming OECD work on the future of SSR/G, the time is right for a regenerative discussion to guide practice on SSR/G in the coming decades. Broader and deeper dialogue with partner contexts and channelling the comparative advantages of IFIs will be essential parts of this process.

**Figure 3.8. DAC members' ODA to security sector governance and reform, 2014-23**

Source: UN (forthcoming<sup>[42]</sup>), Challenging Thinking on Policy and Funding for Security Sectors in Fragile and Conflict-affected Contexts; OECD (2024<sup>[21]</sup>), *OECD Data Explorer, Creditor Reporting System (flows) database*, <http://data-explorer.oecd.org/s/z1>.

StatLink  <https://stat.link/ozm4b6>

## WORKING IN POLITICALLY CONSTRAINED ENVIRONMENTS

As development co-operation increasingly operates within a global context marked by geopolitical competition, climate-related challenges and greater socioeconomic insecurity (Chapter 1), some governments are implementing policies that influence the nature of their relations with other actors. As a result, opportunities for constructive dialogue can be significantly reduced, which impacts the effectiveness and scope of joint development co-operation efforts. In this context, a politically constrained environment refers to the state of a relationship between political entities, for instance between a DAC member government and a partner government or between other actors involved in development co-operation, where the space for and the quality of political dialogue are severely limited, deficient or non-existent. For partner countries, the environment can include, among other features, an undemocratic or unconstitutional change of government, human rights violations, contested elections armed insurgencies, or corruption at scale. The constraints can also stem from decisions, policies or strategic priorities within DAC member countries that affect

the nature and openness of the partnership. It becomes a challenge for DAC members to continue supporting sustainable development trajectories and the needs of the population in these situations.

DAC members have expressed their intention to stay engaged in these complex settings (OECD DAC, 2023<sup>[43]</sup>). Yet doing so in practice requires a candid assessment of the different options and partnerships available, the trade-offs and risks involved and the main drivers of decision making beyond development objectives, and above all a clear understanding of the overarching objective for the decision to stay engaged. In a contested geopolitical environment, it may be tempting to disengage development assistance from contexts that are challenging to work in. But, as discussed in Chapter 1, disengaging can have a significant political and economic cost for DAC members that their partners' fragility, directly or indirectly, inevitably will continue to impact (Fabre and Spencer Bernard, 2024<sup>[44]</sup>). Ongoing efforts among DAC members to develop a principles-based approach should help bring much-needed strategic and operational clarity for more astute engagement by humanitarian, development and peace actors. Such an approach could also establish a valuable communications link to foreign and security actors who

grapple with similar questions and are themselves limited by political, legal and operational challenges.

A strong knowledge base is essential for decision making relating to politically constrained environments, especially as most are exposed to high or extreme levels of fragility. In cases where political, economic and civil crises compound with other drivers or risks to challenge sources of resilience, and in situations where everything is a priority, fragility analysis can provide the contextual nuance to support the prioritisation and sequencing of ODA support, especially beyond humanitarian interventions. For example, Switzerland has emphasised the monitoring of trajectories of democratic reversals and increased authoritarianism as a means to inform context-adapted responses. Acknowledging that engaging in politically constrained environments comes with dilemmas and trade-offs, Switzerland considers the need to maintain engagement as “more effective and efficient than withdrawing and re-entering in a country” (Swiss Agency for Development and Cooperation, 2023<sup>[45]</sup>). Its approach, framed in eight areas for action,<sup>11</sup> is tailored to consider the state of political settlement (e.g. creeping and steep democratic backsliding or democratic collapse) with response options that can range from incremental to bold (including being prepared to freeze programmes) and up to the option of seizing programmes (but with a commitment to maintain a minimum level of communications). Given the fragility trends around political, economic and societal fragility discussed in Chapter 2 and learning from Switzerland’s initial experience, the case for a shared set of principles for staying engaged and peer learning from practical experiences is worthy of careful consideration by OECD DAC members.

## SUPPORTING CORE ECONOMIC SYSTEMS THROUGH A TAILORED APPROACH TO ECONOMIC PARTNERSHIPS

Many development partners are looking to shift from traditional humanitarian, development and peace approaches to a greater emphasis on promoting inclusive growth (Collier, Besley and Khan, 2017<sup>[46]</sup>), using a wider variety of financing mechanisms. The development goal of aid then is in building self-reliance over time (Green, 2025<sup>[47]</sup>). OECD members have long-term interests in seeing that contexts facing high to extreme fragility become increasingly significant trade and investment partners of the future, often alongside the goal of promoting investment opportunities for their companies.

Close to 50% of the EU’s Global Gateway countries, for example, are exposed to high and extreme fragility (Fabre and Spencer Bernard, 2024<sup>[44]</sup>). Attracting investment and increasing jobs are common priorities for both the leadership and the population in these contexts, though this is often accompanied by caution or even activism regarding potential social, political or environmental risks (Chapter 4). The success or failure of such a shift in approach will depend on how well these new investments and approaches are tailored to and address the different dimensions of fragility. It has to be win-win.

Economic development alone is insufficient to exit fragility (OECD, 2022<sup>[48]</sup>). Thus, partnerships for economic development should be seen not as a stand-alone exercise but as one part of a broader approach to the different dimensions of fragility. While economic growth is likely more effective in reducing monetary poverty than multidimensional poverty, there can be multiple channels of impact depending on the country or sector. Increased agricultural productivity, for example, can decrease food prices and improve nutrition while also increasing incomes for farmers. Investments in nutrition, health and education directly address resilience in the human dimension of fragility. But these can also be seen as a social investment in human capital, future growth and the ability of individuals to participate in the benefits of growth. Within the economic sphere, private sector approaches cannot do the heavy lifting alone: Some of the most important partnerships are those that support basic economic systems and services through periods of crisis or shock.

As both macroeconomic risk and fragility intensify globally, donors and specialist agencies are working to better tailor their interventions to take account of the different dimensions of fragility and support foundational systems and services. The DAC’s International Network on Conflict and Fragility and the OECD have championed the importance of context-specific knowledge and conflict sensitivity in carrying out and adapting financial and economic interventions in contexts with high to extreme exposure to fragility.

In some contexts, access to public decision making or business opportunities in the private sector can be an important form of control and source of power, often more important than the revenue itself. The governance and security challenges discussed in Chapters 2 and 4, can create perverse incentives for elites to sabotage reforms for a more business-friendly environment. Economic assets and institutions can constitute conflict fault-lines that need to be de-instrumentalised – for example, control over the



central bank or high value natural resources – and it is not always clear what the role of the international community should be in achieving this.

Yet the ODA trends analysed in this report show that while grants remain critical, ODA alone cannot shoulder the financing needs of contexts facing high and extreme. There is a direct line of sight between the goals of addressing fragility, supporting economic systems, and the financing for development agenda being discussed in 2025 at the 4th International Conference on Financing for Sustainable Development (FfD4) in Seville, Spain.

There is also plentiful evidence that with an appropriate approach, financing for development interventions can contribute to sustainable peace and development in contexts facing high and extreme fragility. In crisis situations, interventions could prioritise the key economic and financial systems that are essential for basic services and social protection and to reduce the risk of economic collapse (Cliffe et al., 2023<sup>[49]</sup>). But external ODA flows or private investments also bring their own political economy, incentives and potentially unintended consequences. Without a tailored approach, financing for development interventions can at worst cause actual harm, including triggering or contributing to conflict, and at best can miss opportunities and fail to achieve their potential (OECD, 2024<sup>[50]</sup>; Sonno, 2024<sup>[51]</sup>).

Support for economic systems, if done well, can be seen as contributing to structural and systemic conflict prevention. These benefits apply as well to other manifestations of fragility. The scope of such support is potentially very large, extending across domestic and international sources of financing and stimulating economic governance and reform as well as trade and investment linkages. Such support could entail: ongoing capacity development and support for systems; policy and political dialogue; mutually beneficial trade, investment and development agreements; and strategic, ad hoc interventions at key times before during, or after different kinds of shock.

Homegrown financial resilience is one of the most effective mechanisms for managing multiple sources of shock, reducing poverty and building resilience to associated risks. There is evidence, for example, that conflict risk drops dramatically with increases in fiscal capacity (Besley and Mueller, 2021<sup>[52]</sup>; OECD, 2022<sup>[48]</sup>). But contexts cannot build up their own fiscal capacity in a short period of time, especially during a period of high debt.

Models for engagement by bilateral donors may be changing, but there are important aspects that should be

retained. For example, support for public financial management and tax revenues help support the development of social contracts (OECD, 2022<sup>[48]</sup>). Certain IFIs and bilateral donors have continued to play an important role in staying engaged through budget support operations, sometimes at the sub-national level, even as most bilateral donors have reduced or ended their use of budget support (Infographic 3.3).

Banking and finance sector questions usually receive less attention, especially in contexts facing extreme fragility, where specific instruments may be needed. It is easy to see interventions in these sectors as sequenced after immediate needs. But financial services provide a critical lifeline to businesses and populations in fragile and crisis settings at all times and are also critical to enable humanitarian action. Indeed, humanitarian cash transfers can be leveraged to help develop the enabling environment for later financial markets development and deepening while informal financial services can help build consumer trust in financial products and institutions (Cook et al., 2024<sup>[53]</sup>; Murray and Fox, 2024<sup>[54]</sup>).

Trade- and investment-related partnerships could provide additional support for exiting fragility. While generalisations are difficult, contexts exposed to high and extreme fragility generally trade less and at a lower point in the value chain – meaning they are more likely to export primary products than higher-value intermediary or processed products. Trade-related partnerships could involve preferential trade agreements but also trade financing or facilitation, support for reforms (Fleuriet and Vertier, 2024<sup>[55]</sup>); assistance meeting standards and managing climate impacts; support for economic integration processes (Chapter 1); or engagement with the World Trade Organization (WTO). Many contexts facing high to extreme fragility are pursuing membership of the WTO, which has established a Trade for Peace Programme.<sup>12</sup>

### *TAILORING FINANCIAL AND ECONOMIC INTERVENTIONS TO REDUCE FRAGILITY*

A policy focus on growth or exports alone will not be enough. How support is delivered, and the type of growth it encourages, is especially important in contexts experiencing high to extreme fragility. Approaches and measures of success need to be carefully calibrated to prioritise inclusion, the social contract and conflict sensitivity considerations, in discussions of debt issues, private investment, taxation and remittances among others.

Equally, stability does not necessarily equal development. Macroeconomic stability is a central goal of many economic partnerships, and is key to reducing fragility. As organisations such as the IMF work to adapt and refine their role, there will be important strategic lessons to learn on how to pursue macro stability and support long term development in contexts of high to extreme fragility. There are cases of impressive macro stability even through challenging periods, but this commitment to certain policy targets does not necessarily mean the foundations are in place to support long-term growth or for the growth gains to be felt by the population at large. Meeting external debt commitments, for example, can mask a build-up of arrears or domestic debt that crowds out access to finance for the economy as a whole. Fiscal consolidation can exacerbate social or political tensions, or erode the social and economic investments with long-term benefits for growth, human development and the green transition.

It will be important to supplement technical expertise, quantitative measures and traditional frameworks in a given policy area with fragility expertise and qualitative, context-specific knowledge. Transplanting best practices from elsewhere may be ineffective and even damaging,

distracting institutions that are thinly spread. Tailoring and adaptability are especially important since these types of interventions – fiscal consolidation, raising taxes, trade openness, job creation, coverage of social safety nets – can be deeply controversial. The payoffs from structural reforms are therefore likely greatest when they are carefully sequenced and reflect a reasonably broad community understanding and social consensus (Budina et al., 2023<sup>[56]</sup>).

Economic interventions can provide strategic opportunities, and should not be considered purely transactional or technical exercises left exclusively to technical agencies or donor co-ordination groups. Private sector development approaches or large macro packages can provide entry points for policy and political dialogue that may not otherwise be available. And there is a strong case for institutionalising political as well as technical-level discussions on macroeconomic developments between specialist agencies and the donorship at large, in a confidential setting if need be. Important stresses or surprises - the payment of civil servant salaries, the meeting of policy triggers to disperse funds, the impact of shocks on inflation - can have significant knock-on impacts to humanitarian, development and peace systems.

### Infographic 3.3. Economic partnerships in contexts facing high and extreme fragility

#### Economic opportunities can help build resilience

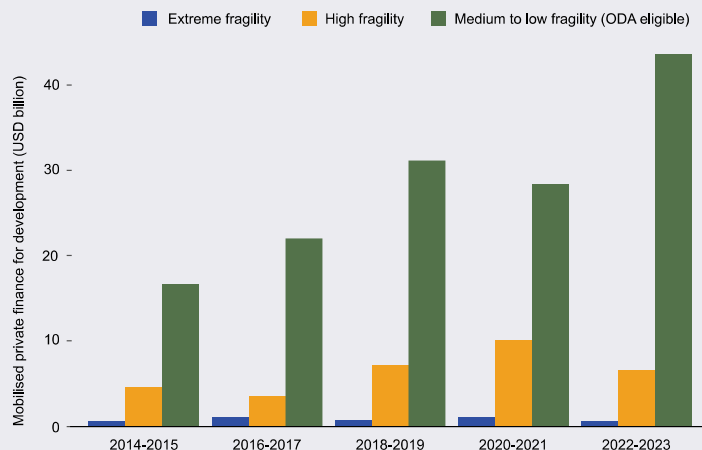
Investments by multinational enterprises can be peace-positive when they add resources and skills to the local economy, and peace-negative when they extract resources.

A reduction in unemployment can decrease the likelihood of violence and the severity of conflict.

In Yemen, International Finance Corporation, Proparco, and FMO investments into a private company, HSA Yemen, helped preserve access to food during periods of food insecurity.

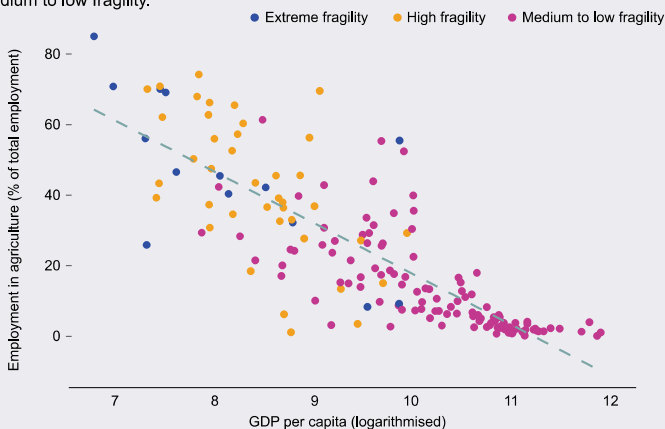


#### Mobilised private finance for development has increased globally, despite decreasing FDI flows, but remains concentrated in contexts in medium to low fragility



#### Agricultural development is a high priority for most contexts exposed to extreme and high fragility

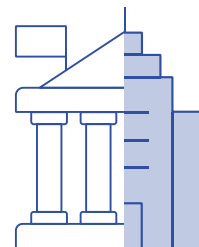
People are twice as likely to earn their living in agriculture compared to countries exposed to medium to low fragility.



#### A strategic approach to resilience includes both public sector and private sector development

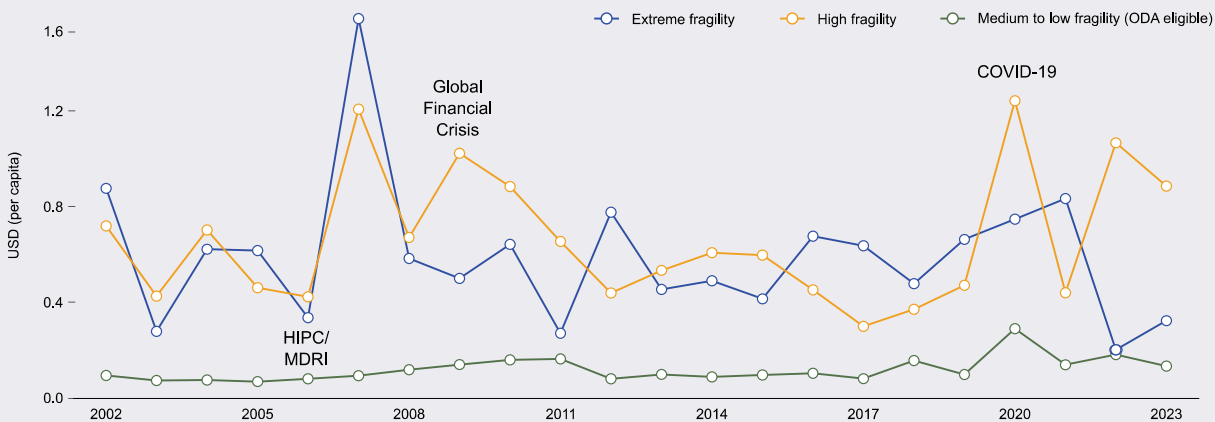
Businesses in contexts exposed to extreme fragility see their biggest challenges as access to finance, political instability, and lack of reliable electricity.

Partners can support the business environment. Average regulatory quality has consistently worsened over the past 15 years in contexts with extreme fragility.



#### Greater fiscal capacity can reduce conflict risk and support growth

Partnerships can support fundamental economic systems, the ability to respond to shocks, share the returns from growth and invest in development. Over 20 years, an average 50% of support for Public Financial Management was budget support, with increases in response to shocks.



Source: Sonno (2024<sup>[51]</sup>); Mueller et al. (2024<sup>[20]</sup>); Thompson and Brien (forthcoming<sup>[57]</sup>); Elgin et al. (2021<sup>[58]</sup>); OECD (2024<sup>[21]</sup>).

## ENGAGING THE PRIVATE SECTOR IN CONTEXTS AFFECTED BY HIGH AND EXTREME FRAGILITY

DAC members increasingly use private sector instruments and partnerships to complement more traditional approaches to development co-operation, using aid to support enabling environment reform as well as private investments<sup>13</sup> (de Mello e Souza, 2021<sup>[59]</sup>). Meanwhile, contexts facing extreme to high fragility need investment and high-quality employment opportunities (Basile and Neunuebel, 2019<sup>[60]</sup>; Thompson, 2020<sup>[61]</sup>).

Most development finance institutions (DFIs) and private sector tools were developed for stable middle-income countries (Infographic 3.3). Consequently, even when applied to high fragility contexts, they tend to focus on certain types of transactions in the most stable locations. DFIs tend to have limited opportunities to invest in fragile contexts: economies are small, economic activity is limited, large investments are few, and environmental, social and governance and business integrity risks can be high. Unlike other forms of development co-operation, many private sector or blending operations cannot simply be wound down. An equity stake, guarantee or lending agreement generally implies a long-term relationship.

Despite these challenges there is wide recognition that the private sector is a critical source of resilience, facilitating access to key basic services even when government services are limited. Moreover, local firms persist even in extreme circumstances, and OECD research suggests there is a high degree of private sector dynamism and opportunity in many if not most contexts facing high to extreme fragility. The example of leveraging the private sector to build resilience in the DRC discusses some of the opportunities and challenges in (Chapter 4).

Local knowledge is key and can be supported by local partners or humanitarian, development and peace actors with substantial field presence. There is significant variation in opportunity and risk between contexts and within the

same context. Analysis of risk, for example, illustrates that country-level risk premia are not good indicators and that subnational and sectoral analysis can be a more accurate way of assessing risks (Sonno et al., 2024<sup>[62]</sup>). Generalised and inaccurate perceptions of risk have real financial consequences, affecting access to capital, the price of financing, and the volume of FDI flows (Wilke et al., 2024<sup>[63]</sup>; Sonno et al., 2025 (forthcoming)<sup>[64]</sup>).

Private sectors facing high to extreme fragility are not monolithic phenomena, and they are not all good or all bad, appropriate or inappropriate as partners. (Box 3.7) They are complex social phenomena that serve a variety of distinct functions and that can vary hugely in activities and actors between locations and sectors. Even in situations of active violent conflict, economic activity does not come to a halt. Rather, the economic structure evolves, and its agents adapt to the needs, opportunities and necessities of the circumstances. For example, different experts distinguish between the “coping economy” that sustains the livelihood of the population; the “shadow economy” that is unregulated and may be illicit, the “combat economy” that directly supports the conflict itself (Goodhand, 2004<sup>[65]</sup>; Ballentine and Nitzschke, 2005<sup>[66]</sup>); and the “legitimacy economy” (Huddleston and Wood, 2021<sup>[67]</sup>) where the mobilisation of economic resources by authorities is used to enhance local legitimacy. Huddleston and Wood (2021<sup>[67]</sup>) for example argue that economic activities should be evaluated and enabled or inhibited depending on three criteria: whether they are exploited by security and political actors to reinforce their dominance over society without accountability, whether they enable activities that promote peace, and whether they provide value to people in terms of income and life essentials.

Not all growth is equal. The kind of private sector that are most effective for reducing fragility and poverty is a matter of debate, and these opportunities will vary from context to context (Box 3.7). DAC members are supporting fundamental research into public policy and economic growth to reduce fragility and conflict (Centre for Economic Policy Research, 2024<sup>[68]</sup>).

### Box 3.7. Private sector characteristics and constraints in contexts of high to extreme fragility

Private sector dynamics vary significantly by context and sector, and the analysis in this box should be read as a summary of general trends only. While challenges are often significant, OECD research reports a high degree of private sector dynamism in many if not most contexts facing high to extreme fragility and a clear prioritisation of private sector development by leaders.

According to OECD research, in contexts facing high to extreme fragility contexts, agriculture and industry make up an even larger proportion of the economy than in other developing economies and services make up a smaller proportion. In economies facing high and extreme fragility more than in economies facing low to medium fragility, there is a mismatch between the sectoral composition of the economy and sectoral composition of the workforce (Thompson and Brien, forthcoming<sup>[57]</sup>).

In contexts with fragility, 40% of the total workforce is employed in (usually low productivity) agriculture – double the share in other developing contexts. In high and extreme fragility contexts, on average more than 60% of employment is informal compared with just over 40% in other developing contexts experiencing medium to low fragility, and in 19 high and extreme fragility contexts, more than 80% of the workforce is employed in the informal sector (Thompson and Brien, forthcoming<sup>[57]</sup>).

This means that people stay stuck in underemployment in low productivity sectors with limited opportunity, especially subsistence agriculture. On average, informality is more pervasive in contexts facing high to extreme fragility compared to contexts facing low to medium fragility (Thompson and Brien, forthcoming<sup>[57]</sup>). Across all types of contexts, women as well as relatively younger, older and less educated workers are more likely to be employed informally, and informal firms rarely formalise, despite this being a common policy priority (Ohnsorge and Yu, 2022<sup>[69]</sup>).

OECD research suggests that even within similar industries, firm size is smaller in contexts with high and extreme fragility than in developing contexts with medium to low exposure for reasons that are more likely related to distortions in their economy than their level of development or income (Thompson and Brien, forthcoming<sup>[57]</sup>). In contexts facing high and extreme fragility, many businesses are coping capacities for people who are underemployed due to a lack of quality employment opportunities, and who may undertake a mix of wage work, agriculture and self-employment (Banerjee and Duflo, 2007<sup>[70]</sup>). Outside of state-owned enterprises, there is also a missing top of large firms that in other economies are more likely to export, be off-takers for primary and intermediate goods from smaller firms, and invest more and pay their workers more (Ciani et al., 2020<sup>[71]</sup>).

In World Bank Enterprise Surveys (World Bank Group, 2024<sup>[72]</sup>),<sup>14</sup> access to finance is among the major obstacles most frequently identified by respondents in contexts with high and extreme fragility, with more than 40% of companies in high fragility contexts and more than 60% in extreme fragility contexts at least partially credit constrained. Lack of reliable electricity and political instability also rank as among the biggest obstacles, with more than 70% of firms saying they experience electrical outages compared with 50% in other developing contexts with medium to low fragility. Businesses in contexts facing high and extreme fragility also report confronting higher levels of corruption across the board than businesses in other developing contexts with lower fragility. More than 20% of businesses reported at least some bribery incidence; nearly one in five reported that a gift or informal payment is required to secure government contracts, for operating and import licences and construction permits, or to obtain electrical and water connections (Thompson and Brien, forthcoming<sup>[57]</sup>).

Source: Thompson and Brien (forthcoming<sup>[57]</sup>), "Resilience, peace, and private sector development"; Ohnsorge and Yu (eds) (2022<sup>[69]</sup>), *The Long Shadow of Informality: Challenges and Policies*, <https://hdl.handle.net/10986/35782>; Ulyssea (2020<sup>[73]</sup>), "Informality: Causes and consequences for development", <https://doi.org/10.1146/annurev-economics-082119-121914>; Banerjee and Duflo (2007<sup>[70]</sup>), "The economic lives of the poor", <https://doi.org/10.1257/jep.21.1.141>.



Donors, DFIs, and local partners and governments have high momentum and commitment. This is evidenced by the fact that despite the obstacles, some investments *are* being made. Public investments in support of the private sector and mobilisation of private sector funds become more limited the more fragile the context – but they do still happen (Infographic 3.3). Many multilateral and bilateral DFIs and MDBs have made policy commitments to increase their portfolios in contexts of high to extreme fragility, and specific initiatives or instruments have been established in recent years, such as the IDA-IFC-MIGA Private Sector Window (IDA, 2024<sup>[74]</sup>), the UNHCR-IFC Joint Initiative (UN Refugee Agency, 2022<sup>[75]</sup>) and the African Development Bank's work on Peace Finance (Box 3.8). Humanitarian actors are looking to alternate financial mechanisms, included blended finance approaches, in a bid to complement or replace traditional grant funding by private investors or pension funds (Farber et al., 2024<sup>[76]</sup>; Overseas Development Institute, 2024<sup>[77]</sup>). DAC members have put forward ambitious roadmaps for mobilising private capital and supporting trade and economic transformation (UK International Development, 2023<sup>[78]</sup>; European Commission, 2023<sup>[79]</sup>). Bilateral DFIs such as British International Investment, FMO and Proparco have become vocal about the need to undertake investments into contexts facing high and extreme fragility and the challenges associated with doing so (Proparco, 2024<sup>[80]</sup>), supported by initiatives such as the Humanitarian and Resilience Investing Initiative initiated by the World Economic Forum (2025<sup>[81]</sup>) and the Africa Resilience Investment Accelerator<sup>15</sup> (Infante and Kucharski, 2024<sup>[82]</sup>).

As noted, new forms of economic partnerships in contexts with high and extreme fragility can succeed only if they are designed with a context's features and fragilities in mind. A common theme is the need to work within the specificities and opportunities of the individual context and adapt the development co-operation product offer to fit the context as it is, rather than the other way around. While risks may be high for international investors and donors, considerable economic life is already underway, and existing businesses have found a way to survive.

There is an opportunity to think more strategically about how private sector initiatives and investments contribute to addressing fragility. In practice, the gap between fragility expertise and private sector development practice can be large. For instance, DFIs often bring a naturally transactional focus, with well-defined operational policies, product offers, and risk appetites, requiring grant financing in higher risk contexts that may not always be available (DFI Working Group on Blended Concessional Finance for

Private Sector Projects, 2023<sup>[83]</sup>). Connecting the dots between different actors could support more realistic, principles-based conversations about the trade-offs, challenges, what is achievable, what risks to take on, and donor and partners' roles in a specific context. Bridging this gap could help make both types of actors more effective in terms of both contextual knowledge and contribution to longer-term development. At the context level, those investing in the private sector may have a certain level of access to decision makers and policy dialogue that in some contexts is becoming harder to achieve for other donors.

While private sector development is often framed in terms of increasing the volume of private financing, in contexts with higher levels of fragility this may not necessarily be the immediate goal when working within the existing economic ecosystem. Responses aimed at increasing agricultural productivity and people's ability to get products to market even within the informal sector are likely to make a critical difference for incomes in high and extreme fragility contexts in the medium term. The International Finance Corporation's Africa Fragility Initiative, for example, aims to use advisory and investment support to foster business development and local market champions and improve the delivery of goods and services (International Finance Corporation, 2022<sup>[84]</sup>).

Support from donors, as partners and shareholders, can help bridge the gap between the types of intervention or investment that investors or IFIs are more readily equipped to offer, and the kinds of investments that are possible and impactful for the general population. In Mozambique, for example, while investment is focused on large-scale infrastructure or extractives projects, some development partners are working to find ways to link small-scale local producers and intermediaries as suppliers to those or other industries. Grant-based activities can do things that investments cannot – for example support improvements in the enabling environment, livelihoods or even humanitarian plus interventions – but the two types of intervention are often disconnected from one another.

The nature and development of the state, basic systems, and the nature and development of the economy are inextricably linked. Some studies have found, for example, that the relationship between private investment and conflict incidence may depend not only on the nature of investment but also on the governance environment and rule of law, level of investment in local human capital and the number of politically unrepresented ethnic groups (Sonno, 2024<sup>[51]</sup>). This finding challenges the idea of private sector development as simply an alternative activity and

underscores the need for co-ordination across types of interventions (for example, policy reform and financial investments).

Conflict sensitivity and analysis of the political economy are vital even when there is no current conflict. While ambition for private sector investment is high, there is also a significant literature on the risks posed by inflows of investment. Disputes over land use and distribution of benefits are commonly cited explanations when things go wrong. In addition, running a successful company in a context with high fragility, where being politically connected is often essential, requires different skills and approaches than developing a well-governed company elsewhere.

Even while the overall goal is to increase the private sector contribution to resilience, regrettably, sometimes the right decision will be to not engage. There may be incentives that push against such as decision even when it is the right one – for instance, staff incentives around deal volume or a partner country's focus on boosting jobs even if this means unwise investments.

## **SUPPORTING RESILIENT AND PEACEFUL SOCIETIES THROUGH ECONOMIC PARTNERSHIPS**

In addition to the broader goals of building resilience, there can be specific roles for economic interventions and investments in building peaceful societies, whether in outright conflict situations or in terms of localised tensions and grievances. In post-conflict reconstruction, public and private sectors are critical partners since even before a conflict is over, it is necessary to start rebuilding the economy.

A breakdown in political channels or even eruption of violence does not necessarily mean a breakdown in economic channels and linkages, either with the international community or sometimes even between belligerents. The linkages or partnerships involved in delivering economic support, whether in the public or private sectors or through third parties, can help preserve connections to the international community that might otherwise erode, providing an entry point for potential future progress.

DAC members rely heavily on the mandates, expertise and/or financial firepower of IFIs, the UN system and NGOs, especially in politically constrained contexts. Economic agencies such as the IMF and MDBs continue to work on tailoring their offer for contexts with higher levels of

fragility – work that will be a key test of the MDB evolution and the upcoming Bretton Woods at 80 initiative. For many multilateral and bilateral partners, remaining engaged through conflict and crisis is one of their key development strategies and policy goals. There is great diversity in mandates across organisations and depending on the type of fragility and the specific context concerned. Different mandates or permission space for engagement – in particular, whether local authorities are recognised as legitimate or direct financial arrangements are possible – also can depend on the view of the international community as expressed through board decisions. These differences can have significant implications on the opportunity set available in high and extreme fragility contexts, which may be impacted by the degree of strained political relations; the reason for the crisis, conflict or instability; the emergence of significant policy concerns (notably corruption, terrorist financing or macro-level crisis); and political or policy developments in the donor capital or organisation's headquarters.

The toolkit for using economic interventions and linkages is more extensive than is often supposed and does not rely entirely on IFIs, even in severely politically or economically constrained environments. DAC members do deploy their own toolkits, though there is often less clarity and transparency regarding either their interventions or the triggers to engage before different kinds of shocks, staying engaged during the shock, or re-engaging after. Economic provisions in peace agreements, financial incentives and formal or informal revenue sharing agreements, and policy conditionalities linked to inclusion and addressing horizontal inequalities have all been used as partial mechanisms to address the contributing economic factors, which are context specific.

Conflict sensitivity and contextual tailoring are needed well before and well after the hottest part of a conflict or other rupture is over. There are potential tensions between staying engaged in support of core economic systems, and exercising the incentive effect of large-scale financing, for example. Maintaining dialogue can be perceived as legitimising, and economic institutions, sectors, and aid spending itself can be highly contested.

In terms of the private sector, there are areas where a focus on understanding and supporting peacefulness and resilience can help improve outcomes for both the companies and the society. Especially in land-intensive sectors, the main risks deterring investment are often related to peace, meaning peacebuilders and investors share a common interest in reducing risks to projects and

increasing the benefits from the projects to the surrounding communities. It is important to have right-sized expectations: the private sector cannot replace the other critical investments and interventions outlined elsewhere in this chapter. Investments in contexts facing high to extreme fragility are already challenging, and in some cases past mistakes could undermine trust.

Nevertheless, there are promising initiatives underway to increase the peace-positive impact of private sector development, by increasing positive social impact and reducing risk. Examples include:

- There are proposals to establish overall standards and develop the market for peace-positive investments or peace finance, for example as outlined by the Finance for Peace Initiative (2023<sup>[85]</sup>).
- The Investing for Peace initiative outlined a proposed investment vehicle that focuses on peace first, considering conflict dynamics and the interaction between peace and private sector development in a given context. This would mean that business partnerships and investments are sought second and based on the assessment of community needs and the potential for the private sector to increase resilience (German Federal Foreign Office, 2020<sup>[86]</sup>).
- Commercial risk assessment methodologies can link specific transactions to peacebuilding mechanisms such as community dialogues and mediation. Benefit-sharing mechanisms also could be introduced into a transaction once a (likely) profitable investment has been found to help reduce and better price risk and increase both profitability and social benefit.<sup>16</sup>
- The piloting of new types of sustainable investment, for example the Security-Indexed Investment Bonds (SIIB) proposed by the African Development Bank as part of its partnership with the peacebuilding community (Box 3.8).

### **Box 3.8. The African Development Bank continues to evolve its business model to support peace and security as a regional and global public good**

Increasing insecurity and conflict across the globe, including in Africa, underlines the importance of treating peace and stability as regional and global public goods.

The Sahel crisis has expanded since it started in 2011, stalling development gains, diverting scarce domestic resources towards preserving security, and now threatening to spill over to coastal West Africa. It is just one example of why the international community, including Development Finance Institutions (DFIs), need to mobilise their expertise and resources to contribute to preventing the conflict from spreading further.

The African Development Bank was the first Multilateral Development Bank (MDB) to recognise that the challenge of fragility is not limited to a set of what were once termed fragile states, but applies to all countries and it has adapted its business model accordingly over the past ten years. The Bank understands fragility as political, economic, social and environmental pressure points to which countries, societies and markets are exposed. It thus focuses its support on strengthening sources of resilience so that these contexts are better able to cope with shocks and prevent the outbreak of conflict.

Fragility and resilience were considered as cross-cutting issues in the African Development Bank's first Ten-Year Strategy for 2013-22. This ensured that the preparation of its regional and country strategies and investments in all African countries would be guided by an assessment of the internal and external drivers of fragility and sources of resilience. For this purpose, the Bank has effectively mainstreamed this agenda in its business model, drawing on its deep contextual knowledge as a regional development bank and leveraging the trust it has among African stakeholders to engage in policy dialogue, promote solutions to prevent conflict and find solutions to protracted crises.

In the years since, the Bank has continued to refine its strategies and approaches for this purpose, learning lessons from both the international community and, thanks to independent evaluations, from its own engagement.<sup>17</sup> The Bank has developed quantitative and qualitative analytical tools to assess the pressure points, including a Country Resilience and Fragility Assessment tool, and thereby ensures that its investments are geared towards building resilience and preventing conflict.

The recently approved Ten-Year Strategy for 2024-33 consolidates this approach and leverages the Bank's "High 5" priorities for implementation: "Light Up and Power Africa", "Feed Africa, Industrialise Africa", "Integrate Africa", and "Improve the Quality of Life for the People of Africa". In addition to maintaining fragility and resilience as a cross-cutting dimension that is mainstreamed across its investments, the Bank now considers regional peace, stability and resilience as a public good to which it aims to make an explicit contribution.

Accordingly, the African Development Bank is moving beyond the mitigation of negative externalities of its activities, which underpins the do no harm agenda, and towards an agenda that intentionally aims to generate positive and measurable externalities on peace. For this purpose, it is partnering with the peacebuilding community in support of the UN New Agenda for Peace, which calls on IFIs to be agents for peace, and is exploring the potential of peace-positive investment approaches and how to mainstream peace-enhancing mechanisms into its activities to enhance its peace impact.

Drawing on its experience of carrying out fragility and resilience assessments for the past ten years, many of them conducted jointly with other partners, the African Development Bank also puts great emphasis on the links between analysis, investment and impact. As a complement to its guidance on how to operate in environments exposed to fragility, the Bank is identifying a pipeline of public and private investments that have the greatest peace impact and is leveraging its suite of financial instruments to pioneer this shift.

Recognising that countries exposed to fragility and conflict require more resources, the Bank created in 2004 the predecessor of the Transition Support Facility (TSF), which has since mobilised over USD 7.1 billion – predominantly via the replenishments of the African Development Fund – to finance more than 400 operations in low-income countries facing conflict, fragility and adverse climate impacts.

The TSF allows the Bank to finance investments that focus on the key areas of its Strategy for Addressing Fragility and Building Resilience in Africa: building effective institutions, promoting inclusion with a focus on communities, and catalysing the private sector in recognition that peace and prosperity go hand in hand.

The operating modalities of the TSF continue to evolve with the aim of enhancing its effectiveness in preventing conflict, responding more flexibly to crises, and achieving synergies with humanitarian and peacebuilding partners through the nexus approach. The Private Sector Credit Enhancement Facility was created in 2015 to allow the Bank to make more private investments in these markets, which are characterised by higher risks. In 2023, a Climate Action Window was introduced to enhance the capacity of vulnerable low-income countries to attract climate finance from existing sources and channel additional resources for climate adaptation into investments at the climate-peace nexus.

Encouraged by the successes of these financial innovations, the African Development Bank is currently spearheading the development of an innovative instrument and approach that directly responds to the growing insecurity on the continent: the Security-Indexed Investment Bonds (SIIB) initiative.

In co-ordination with the African Union, regional economic communities and African countries, and building on its lessons from engaging in these environments, the Bank is developing the SIIB to leverage ODA to raise additional resources at scale, including from capital markets, and to deploy them through holistic investment strategies that involve the public sector, private sector and civil society.

The African Development Bank is therefore pursuing an ecosystem approach to contribute to achieving the regional and global public goods of peace and security in Africa. Its emphasis is on developing strategic long-term partnerships across the HDP nexus and leverage the private sector.

Note: The 2008 strategy focused on enhanced engagement in contexts experiencing fragility in line with the 2007 OECD Principles for Good Engagement in Fragile States. The 2014 and 2022 strategies focused on addressing the complementary theme of resilience.

Source: African Development Bank Group (2024<sup>[87]</sup>), *The Ten-Year Strategy 2024-2033*, <https://www.afdb.org/en/documents/ten-year-strategy-african-development-bank-group-2024-2033>.

## ANALYTICAL PROGRESSION: SUBNATIONAL FRAGILITY

The wider application of a subnational lens on fragility would address a knowledge and analytical gap in ODA allocation. Evidence suggests that development actors may not always target pockets of fragility within countries or areas of subnational conflict (Custer et al., 2017<sup>[88]</sup>). This may be due to the reluctance of partner governments to engage on such issues when they threaten elite political interests and/or due to the importance of country ownership in jointly deciding resource allocation. Nevertheless, donor interest in this agenda has increased, particularly among the MDBs; the Inter-American Development Bank, for one, is developing a strategy that incorporates a subnational lens. The emerging focus on subnational fragility also ties in with other agendas of growing interest to the donor community such as localisation and locally led development and remaining engaged in politically constrained environments where subnational entities can sometimes serve as entry points.

Subnational fragility manifests through diverse phenomena:

- **Pockets of fragility at subnational level, particularly in middle-income contexts, can persist even in relatively stable and functional states that are experiencing GDP growth.** For instance, certain areas of the Philippines have GDP per capita and institutional weakness that are similar to those of low-income contexts with high fragility (Barron, 2022, pp. 48-51<sup>[89]</sup>).
- **Cross-border dynamics may not always be captured nationally.** These may include phenomena such as forced displacement, conflict intensity, and environment-related factors (e.g. natural disasters, water stress and shared ecosystems beyond national boundaries). For instance, porous border regions such as Liptako-Gourma between Burkina Faso, Niger and Mali experience particularly high conflict intensity.
- **The effects of subnational fragility may persist for long periods of time.** Subnational laggards that often suffer from processes of historical, political and economic marginalisation are at risk of being left behind. For instance, recent evidence shows that areas under rebel control in El Salvador from 1985-1992 now experience worse economic outcomes than adjacent state-controlled areas (Bandiera et al., 2023<sup>[90]</sup>).

- **Islands of stability can exist in subnational areas of contexts exposed to extreme fragility, where the central state has limited territorial control and low state capacity.** Some of these regions, such as Kurdistan in Iraq, have historically had higher levels of stability than surrounding regions in the same context. One reason can be that “bounded rulers” governing these regions have a long time horizon because of their limited possibilities for upward mobility (i.e. due to their ethnicity and/or religion), which leads them to establish an informal social contract with the population for “protection ... in return for information and support to the government” (Harsch and Troy, 2024<sup>[91]</sup>).

The OECD fragility framework is designed to provide a macro-level understanding of fragility trends but has limited capacity to demonstrate the fragility that exists at subnational levels. Expanding its analysis to the subnational level offers deeper insights into macro trends by unveiling granular details that are often masked by the “tyranny of averages” prevalent in cross-country comparisons (Custer et al., 2017<sup>[88]</sup>). A broader spectrum of analysis that can be adapted to different levels of decision making in donor and partner institutions is important and could also help provide a more balanced analytical picture, especially in conflict-affected contexts where local analysis is often driven by security needs and therefore often off limits to development and humanitarian actors who could benefit from enhanced local insights. Indeed, high and extreme fragility contexts experience important spatial inequalities in relation to conflict, poverty rates, access to basic services, income, gender, minorities and environment-related factors. For instance, within-country income and wealth inequality has increased in many contexts though it has decreased between countries (Qureshi, 2023<sup>[92]</sup>). Using alternative data sources and inference will also fill the existing data gaps in several contexts; data on Kosovo, for instance, are not currently included in the OECD multidimensional framework. In 2025, the OECD will continue to collaborate with the European Space Agency (ESA) and European Investment Bank (EIB) to explore how to measure fragility at subnational levels in Ethiopia and Myanmar. Following this pilot project, the long-term ambition is to provide a comprehensive and integrated analytical framework. Adopting fragility analysis that seamlessly combines earth observation (EO) and non-EO data will enhance the understanding of drivers of risk and resilience in subnational level contexts. This will ensure the delivery of timely, actionable insights that also enable more effective and informed decision making and operations.

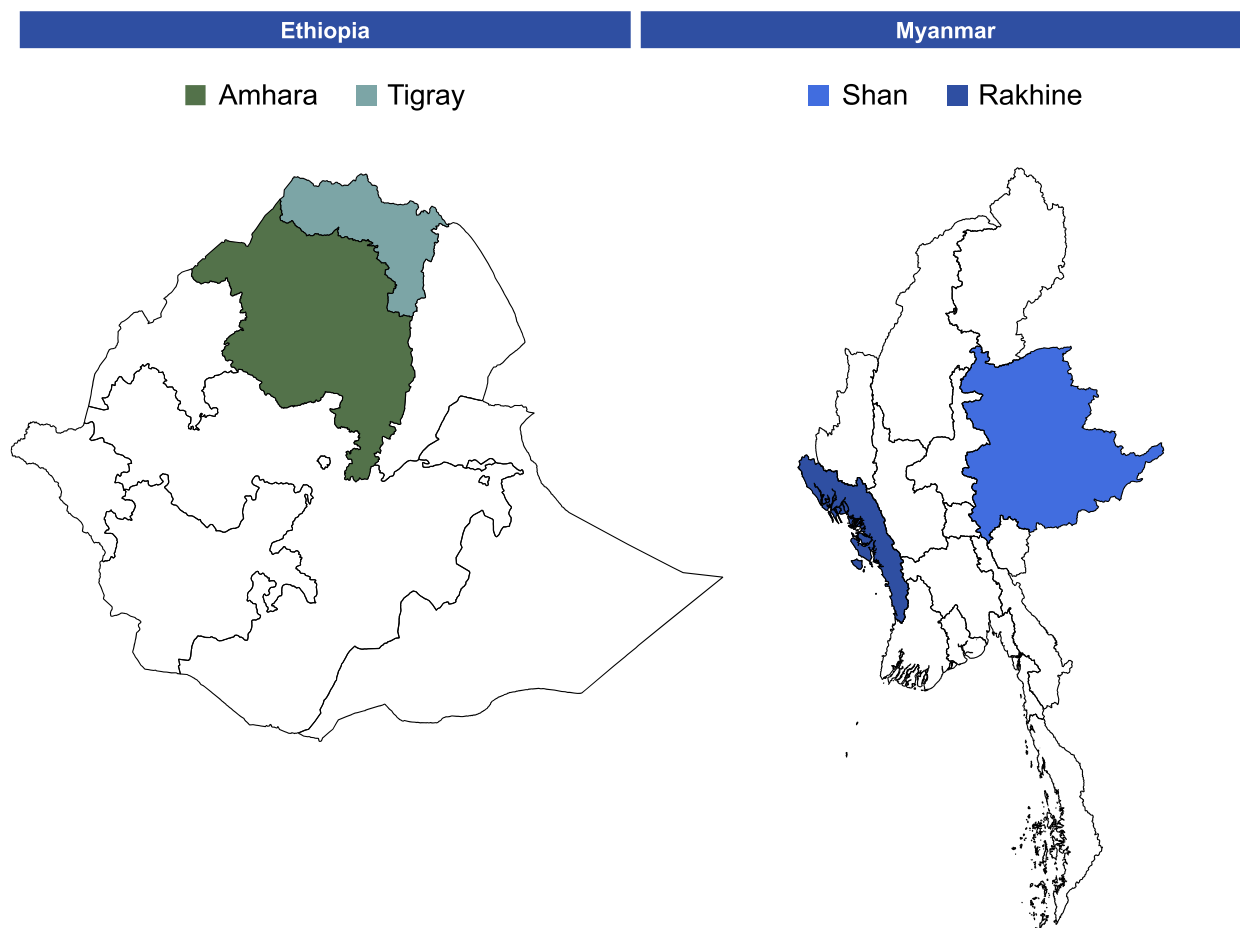


### PILOTING THE MEASUREMENT OF SUBNATIONAL FRAGILITY: ETHIOPIA AND MYANMAR

The OECD pilot tested measuring fragility at a subnational level in two regions of Ethiopia (Amhara and Tigray) and two regions of Myanmar (Shan and Rakhine) using EO and non-EO data (Figure 3.9) in partnership with the European Space Agency (ESA) and the European Investment Bank

(EIB). This analysis builds on an initial data fusion pilot project conducted as part of the ESA's Global Development Assistance (2025<sup>[93]</sup>) fragility, conflict and security initiative, whose objective was to identify fragility across all its dimensions combining EO and non-EO data in co-operation with the Asian Development Bank (European Space Agency, 2023<sup>[94]</sup>).

**Figure 3.9. Project regions in Ethiopia and Myanmar**



#### *Methodology and timeline*

This pilot focused on the subnational economic, environmental, security and societal dimensions of fragility from 2018 to April 2024, with data collection and analysis conducted at the end of 2024. Data sources include EO data from ESA satellites<sup>18</sup> complemented by non-EO data.<sup>19</sup> Integrating physical-related parameters derived from EO imagery with layers of non-EO information, the fragility analysis provides localised evidence of risks and resilience, including identifying their potential drivers. The

methodology addresses the challenges of combining complex and multifaceted information to better understand the context as well as interconnections between historical and present drivers of fragility. In this pilot, the combination of data was used as a proxy for identifying the fragility of subnational regions, for instance nightlights intensity and industrial air pollution (economic fragility); land use changes, vegetation health and rainfall data (environmental fragility) and displacement and conflict data (security fragility).

The project's choice of geographies was motivated by several factors:

- **Variability in the severity of fragility.** Ethiopia's fragility peaked in 2020-21 during the Tigray war, according to the OECD multidimensional fragility framework, though political and security fragility remain at high levels. Myanmar's fragility increased rapidly across all dimensions from 2021 onwards, coinciding with the February 2021 military coup, particularly in the political, security and societal dimensions. In both countries, looking at subnational fragility enables a more nuanced analysis of aggregate national fragility.
- **Centre-periphery tensions and subnational violence.** Several subnational conflicts co-exist in Ethiopia and are mostly, though not exclusively, related to nationalism, local competition for power and intra-ethnic disputes (ACLED, 2024<sup>[95]</sup>). In Ethiopia, one of the most salient was the 2020-22 Tigray war between the Ethiopian federal government and the Tigray People's Liberation Front, estimated to have caused hundreds of thousands of fatalities (International Crisis Group, 2023<sup>[96]</sup>) including deaths from starvation and disease. Also in Ethiopia, violence has engulfed the Amhara region over the past two years involving Fano militias and the federal government. Myanmar has been marked by subnational violence in the uplands since its independence in 1948 (Horsey, 2024<sup>[97]</sup>), which has accelerated and spread to the Bamar-populated heartlands following the 2021 military coup (Mon, 2024<sup>[98]</sup>).
- **Data availability and security volatility.** The Amhara and Tigray regions were chosen for the pilot as they are the most conflict-affected regions in Ethiopia, with conflict increasing in the former and decreasing in the latter. Rakhine and Shan were chosen to illustrate the diversity of subnational risks and coping capacities as they rank among the most volatile regions in Myanmar over a range of different indicators.

### *Findings from the pilot test*

#### **Economic dimension**

Earth observation, with its timely insights and granular detail, allows for an enhanced understanding of the linkages between security and economic fragility. For instance, methane emissions sharply increased following the 2021 coup in Myanmar and from 2020 to 2022 in

Ethiopia, albeit to a lesser extent; the effects in Rakhine and Tigray were more pronounced than national averages. This suggests there was a shift back to natural resource-based livelihoods, such as agricultural activities, in these areas. Similarly, reduced aerosol emissions in Myanmar suggest a decrease in the use of vehicles and transportation, which can be used as proxies for economic activity (i.e. infrastructure and means of transportation).

Timeseries from 2017-23 on nightlights intensity show that nightlights intensity is lower in Rakhine and Shan than in other regions of Myanmar and lower in Tigray and Amhara than other regions in Ethiopia. This suggests a lower level of economic development in the four regions analysed, which may be due to pre-existing differences and/or the effects of conflict. These regions also show a reduction in nightlights intensity coinciding with the COVID19-pandemic that is significantly greater than the mean value of other regions in the same contexts. After the pandemic, the four regions experienced a recovery of nightlights intensity that is greater than average despite being conflict affected. Interestingly, Shan State shows a particularly high level of radiance in 2022-23, that exceeds average trends in Myanmar for 2023. This seemingly positive insight on Shan is mitigated by high volatility in nightlights intensity, with rapid changes that suggest limited steady and predictable growth.

#### **Environmental dimension**

Coping capacities in terms of environmental fragility show that Shan has more water reservoirs per inhabitant than Rakhine, but the volatility of water reservoirs is six times higher in Shan. This is a likely consequence of Shan's greater exposure to volatility in rainfall levels and thus drought risk, which is compensated for by using water reserves. The drought that hit Shan in 2020 reduced water reserves by over 50%, for instance, and climate change could intensify its significant exposure to drought risks.

#### **Security and societal dimensions**

Conflict intensity and levels of displacement at the subnational level are highly correlated in most cases. After the coup (2021-23), conflict casualties in Shan increased fivefold and the number of internally displaced persons (IDPs) increased sevenfold over levels prior to the coup (2018-20). These phenomena are correlated with a decrease in urban growth, which slowed to 2.99% over 2021-23 compared with 4.94% growth over 2018-20. This suggests a significant slowdown in urbanisation as the population growth rate remained roughly the same. The

magnitude and spread of displacement in Myanmar and Ethiopia is striking. Ethiopia has significantly more IDPs (e.g. 1.1 million in Oromia); Rakhine stands out in Myanmar for the large-scale population outflows of the Rohingya to Bangladesh starting in 2016 (almost 1 million refugees), while conflict between the Arakan Army (an ethnic armed organisation) and Myanmar military has internally displaced approximately 570 000 people in Rakhine as of January 2025.

### *Implications for donor programming*

EO allows for detailed vulnerability mapping and monitoring risks (with AI predictive analysis). When EO is integrated with other socioeconomic data, fragility can be analysed at a granular level and by time (past and present), location and indicator, providing insights and identifying trends and patterns. This methodology can inexpensively and rapidly inform targeted interventions, complement other analyses in complex environments, and improve transparency. It is a powerful approach for understanding and addressing environmental, social and infrastructural challenges in contexts exposed to high to extreme fragility along the project lifecycle. The methodology may also be particularly useful in contexts that are experiencing rapid changes and are politically constrained, have weak central governments, lack reliable data sources such as regular censuses and surveys, and are inaccessible or remote.<sup>20</sup> Other situations where analysis using EO can enhance providers' understanding of context-specific fragility include the following:

- **Engagement in politically constrained environments.** Development co-operation is always challenging without political dialogue with national authorities, as demonstrated in Afghanistan and Myanmar. Channelling aid deliveries through alternative mechanisms requires engaging at the local level, potentially through non-state actors (e.g. ethnic armed organisations in Myanmar). EO is a viable proxy when it is impossible for donors to have eyes on the ground. The ESA satellite remote sensing observations provide information on various environmental parameters including rainfall, temperature, vegetation health, soil moisture conditions, and crop development to monitor food production, for example. EO also can enable providers to observe population movements, conflicts and the impact of natural hazards without directly engaging with authorities.

- **Switching modalities of aid delivery.** Donors often allocate a large share of humanitarian aid to contexts experiencing high to extreme fragility and conflict. For instance, in 2020, humanitarian aid accounted for 14% and 8% of allocations to Ethiopia and Myanmar, respectively, but rose to 29% and 22%, respectively, in 2023. At the same time, donors tend to reduce overall ODA volumes and suspend budget support in conflict-affected settings, as seen with the EU's suspension of budget support to Ethiopia due to the Tigray conflict (Gerth-Niculescu, 2020<sub>[99]</sub>). Fragility analysis with EO enables monitoring and evaluation, both before and after implementation, of the impact of humanitarian programmes and projects such as food distribution, health or education support and small infrastructure projects.
- **Rapidly changing contexts.** Subnational conflicts create fluid and rapidly changing situations, reinforcing the need for granular and timely insights. This has implications for the delivery of aid, access to these areas and the choice of partner. In Rakhine State, the Arakan Army had captured most of the State's territory except for a few towns by the end of 2024. This offensive has been accompanied by trade blockades imposed by the ruling Myanmar junta, a 37% decline in cultivated areas between 2018 and 2023 (as gleaned from EO data), skyrocketing prices for essential goods, and a significant increase in the number of IDPs (from 196 400 in October 2023 to 570 000 in October 2024) – all of which could lead to Rakhine facing acute famine (UNDP, 2024<sub>[100]</sub>). EO versatility enables timely geo-intelligence, which facilitates effective integration of conflict implications into development partner programming and allows for targeted interventions.

### *Next steps*

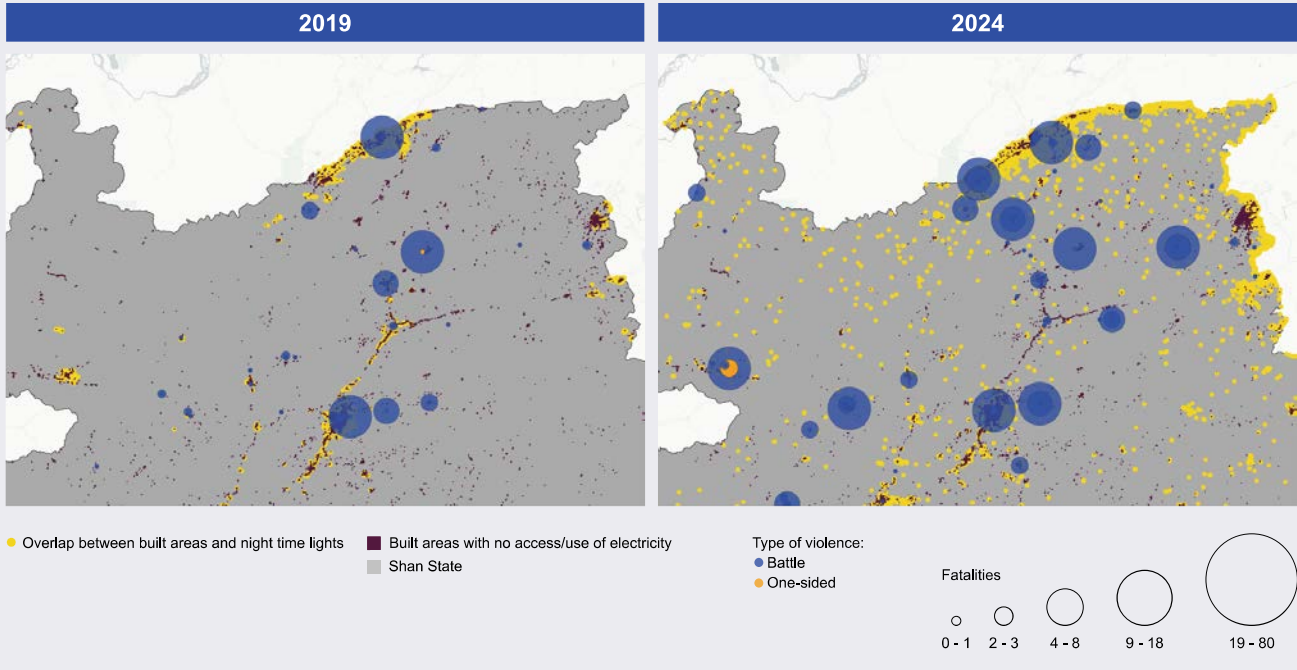
The ESA, EIB and OECD pilot project will continue until the end of March 2025. It will focus on incorporating additional data sources (e.g. urbanisation), assessing subnational fragility more holistically by leveraging machine learning and AI-based models, and identifying lessons learned and recommendations. The results of this preliminary project will support a forthcoming publication on subnational fragility.<sup>21</sup>

### Infographic 3.4. Subnational fragility in Shan State (Myanmar), 2019-2024

#### Nightlights' extent in northern Shan State increased while being more dispersed away from urban areas

Nightlights' extent in northern Shan, a proxy for economic growth and for population density, have become increasingly dispersed in the countryside and concentrated next to the Chinese border.

Ruralisation could have happened as a coping mechanism to conflict and could be due to the internal displacement engendered by conflict (in northern Shan State, there are 37 500 internally displaced persons (IDPs), and over 100 000 IDPs have returned). Shan State's urbanisation rate decreased from 4.9% (2018-20) to 3% (2021-23) following the military coup, despite roughly unchanged population growth rates.

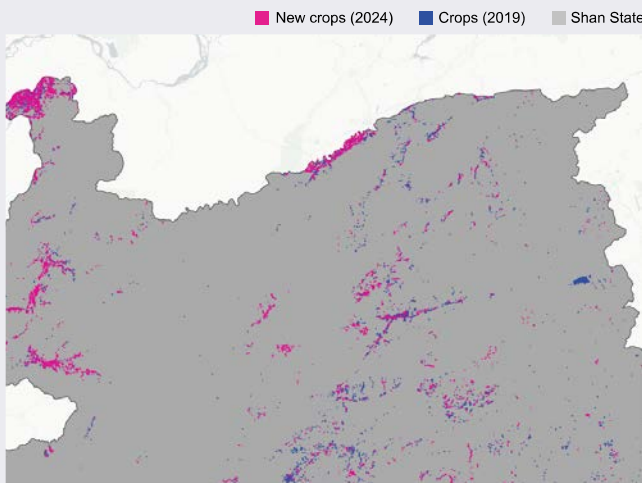


#### Increased opium cultivation in Shan State (coping capacity) is likely to be highly correlated to dispersion in nightlights' extent

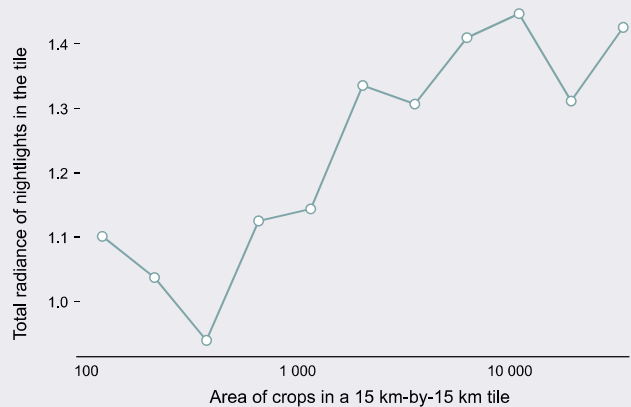
From 2019 to 2024, new crops increased by 4.9% in Shan State. However, crop areas declined after the 2021 coup, reaching a minimum in 2022 (-11.3% vs. 2021) and then sharply increased in 2023 (+14.1% vs. 2022). Crop location is highly correlated with the dispersion of nightlights, as presented above.

Shan State accounts for 88% of Myanmar's poppy cultivation areas in 2023. Despite a 4% decrease in areas under cultivation from 2023 to 2024, areas under cultivation have almost doubled since the 2021 coup.

#### New vs. old crops in Shan State (2019 vs. 2024)



#### More dispersed nightlights are correlated to more crops in the corresponding area



Notes: Land use was extracted from Sentinel-2 (satellite) while nightlights were extracted from Suomi NPP (satellite). UCDP data was taken from 2018 and 2019 for the first panel (2019) and from 2023 to September 2024 for the second (2024).

Sources: Earth Engine Data Catalogue (2025<sub>[101]</sub>); NASA (2025<sub>[102]</sub>); Davies, Engström and Öberg (2024<sub>[10]</sub>); Sundberg and Melander (2013<sub>[11]</sub>).



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## NOTES

<sup>1</sup> The discrepancy between FDI and ODA in 2023 is due to the fact that there were large outflows of FDI for one recipient (Iraq).

<sup>2</sup> Country allocable aid here only includes contexts on the OECD multidimensional fragility framework: contexts exposed to high and extreme fragility (61) and medium to low ODA eligible contexts (63).

<sup>3</sup> See the annex for an explanation of the difference between core and secondary peacebuilding.

<sup>4</sup> The year 2015 was taken as a reference point for this calculation as it is the first reporting year for many non-DAC countries in the Creditor Reporting System. Only Monaco and Qatar started reporting after 2015.

<sup>5</sup> Syria data include large ODA flows that the Republic of Türkiye reported to the OECD in 2023 and that mainly consist of support to Syrian refugees in Türkiye.

<sup>6</sup> A full description of UN, other multilaterals and international financial institutions is available in the annex.

<sup>7</sup> See the annex for definitions of gross ODA and net ODA.

<sup>8</sup> Climate-related development finance refers to concessional and developmental as well as not concessional or not primarily developmental flows.

<sup>9</sup> The UN introduced the concept as a holistic approach based on preventing the outbreak, escalation, continuation and recurrence of conflict.

<sup>10</sup> This statistic refers specifically to the legal survey of the OECD Social Institutions and Gender Index to determine whether these contexts have a law or laws that specifically address violence against women.

<sup>11</sup> The eight areas are security (put staff safety first), understand the changing context, define principles of engagement, reinforce co-ordination, review programme orientation, review the relationship with the government and other partners, review funding modalities, and invest in staff capacity. For more information, see <https://www.sdc-pge.ch/en/news-staying-engaged-authoritarian-contexts>.

<sup>12</sup> For information on the WTO programme, see [https://www.wto.org/english/thewto\\_e/acc\\_e/tradeforpeace\\_e.htm](https://www.wto.org/english/thewto_e/acc_e/tradeforpeace_e.htm)

<sup>13</sup> The OECD has published guidance for blended finance, available at <https://doi.org/10.1787/ded656b4-en>. The Global Partnership for Effective Development Co-operation's Kampala Principals also provide guidance for effective private sector engagement, available at <https://www.effectivecooperation.org/landing-page/action-area-21-private-sector-engagement-pse>.

<sup>14</sup> This analysis used surveys conducted since 2013, using the most recent survey available for each context.

<sup>15</sup> The Humanitarian and Resilience Investing Initiative, or HRI Initiative, brings together partners from public and private sectors and NGOs to catalyse private investment and build the resilience of the most vulnerable communities and economies. The HRI Initiative aims to cultivate investments, build and mature markets, and increase transparency around the financial performance and impact of deals. The Africa Resilience Investment Accelerator initiative, or ARIA, was launched in 2021 by British International Investment and FMO as a collaborative platform to identify potential investments and improve investment readiness through collective support for country reforms. Currently, ARIA operates in Benin, DRC, Ethiopia, Liberia and Sierra Leone.

<sup>16</sup> See for instance the Peace Invest methodology at <https://peaceinvest.net/our-methodology/>.



<sup>17</sup> In 2012 and 2020, the Independent Evaluation Department of the African Development Bank published its findings of the implementation of the Bank's 2008 and 2014 strategies that had been guiding the Bank's engagement in contexts exposed to fragility. In 2022, the evaluation department published the findings of its review of the Transition Support Facility. These independent evaluations are crucial to not only ensure accountability but also to promote learning in this complex area. In 2025 the African Development Bank will prepare the mid-term review of its 2022-26 Strategy for Addressing Fragility and Building Resilience in Africa.

<sup>18</sup> EO data was extracted from satellites including Sentinel 2, Open Meteo, Modis, Sentinel 5p and Suomi NPP.

<sup>19</sup> These include data from the UNHCR, the Armed Conflict Location & Event Data project or ACLED, and the Uppsala Conflict Data Program as well as census data for population figures.

<sup>20</sup> Background notes to Infographic 3.4. First, several ethnic armed organisations have been conducting a military offensive (Operation 1027) in Shan State since October 2023 and took control of most of the state by mid-2024, including border crossings with China and the State capital of Lashio. See <https://www.irrawaddy.com/news/war-against-the-junta/how-operation-1027-transformed-war-against-myanmar-junta.html>. Second, Myanmar's instability following the 2021 coup explains the increase in organised crime and criminal markets (<https://globalinitiative.net/analysis/ocindex-2023/>). This includes significantly increased drug production (opium and methamphetamines), extraction of critical rare earth minerals and illegal mining (the latter especially in Kachin State), and the establishment of scam centres in border regions. Third, Shan State's criminal-oriented political economy, organised around the production of opium and methamphetamines, and ethnic conflicts there preceded the 2021 military coup. See <https://www.crisisgroup.org/asia/south-east-asia/myanmar/299-fire-and-ice-conflict-and-drugs-myanmars-shan-state>.

<sup>21</sup> In parallel, the ESA is funding an 18-month project partnering with the Asian Development Bank, the EIB and OECD. This project leverages AI technologies to analyse EO, open-source intelligence, social open-source intelligence and contextual data and will derive and assess tailored fragility indicators across geographical and thematic dimensions. Under this project, the OECD will focus on fragility dimensions at the subnational level to enhance the existing OECD multidimensional fragility framework and the States of Fragility series. This effort will lead to the development of an import-export mechanism and an online dashboard for detailed analysis.



# 4 PERSPECTIVES ON FRAGILITY

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*In keeping with the agency and drive for resilience identified in Chapter 1, this chapter presents perspectives from communities exposed to high and extreme fragility themselves on how they, governments and stakeholders are finding pathways through and out of fragility.*



# In Brief

## Where perspectives on fragility align

- **Fragility is dynamic, evolving across historical, political, economic and social dimensions** (the spectrum of fragility). Resilience is the target. Achieving resilience requires consistency and reforms, as well as commitment from both local and external actors.
- **Reforms that work are locally led, country-owned and empowered by tailored and adaptable finance are delivering positive outcomes.**
- **With careful management of peace and integrated thinking on development, progress is possible,** including in contexts with high levels of security fragility.
- **Development co-operation actors must adapt to appreciate the shifting and evolving needs of youth in increasingly digital societies, especially for young women and girls.**
- **Fragmented international interventions that fail to address the systemic issues perpetuate fragility but initiatives to address climate and environmental fragility point to potential for building resilience at scale.**
- **Conflicts and violence distort economies, drive competing incentives, and create new economic centres.** Innovative responses in several contexts are findings ways to build resilience under pressure.
- **Private sector development does not happen in isolation.** With tailored reforms come increased economic opportunities, better understanding of and adaptation to risk, and a clearer case for investment.
- **Local fragility unaddressed can quickly become a regional and international challenge through violence, forced displacement, poverty and gender inequality,** as different sources of risk and resilience combine to impact stability and development.
- **Reforms (such as building fiscal space) require time to produce results.** Consistency, commitment and patience are critical features for international co-operation actors to support resilience building.
- **Pragmatic approaches are necessary but values are an essential part of the offer by the OECD Development Assistance Committee (DAC), especially for women and girls, and should not be compromised.**

## RESILIENCE AS AN END: A SPECTRUM APPROACH TO FRAGILITY AND COUNTRY OWNERSHIP

Secretary General Helder da Costa and Deputy Secretary General Habib Ur Rehman Mayar (g7+)

The increasing prevalence of polycrises – a confluence of global challenges – disproportionately impacts conflict-affected countries already grappling with significant vulnerabilities. These states, often exposed to extreme fragility, bear the brunt of cascading crises including extreme poverty, hunger and displacement. Ad hoc, fragmented and reactionary interventions in these contexts have done little to foster the resilience needed to withstand and recover from such shocks. The g7+ (Group of Seven Plus), an intergovernmental group of conflict-affected nations, has long championed resilience and stability as the ultimate goals of humanitarian, peacebuilding and development interventions.

Its vision calls for a paradigm shift, one that perceives fragility not as a fixed condition but as a dynamic spectrum. The fragility spectrum provides a nuanced lens, acknowledging the interconnected and evolving challenges that countries face. At its core, this understanding of fragility empowers the principle of country ownership, emphasising that sustainable solutions must originate from within the affected nations themselves.

### *THE FRAGILITY SPECTRUM: MOVING BEYOND LABELS*

Traditionally, fragility has been viewed through a binary lens that categorises nations as either “fragile” or “stable”. Such rigidity oversimplifies the complex and shifting nature of fragility, which varies over time and across sectors. The fragility spectrum, conceptualised by the g7+ (2013<sup>[1]</sup>), offers a more flexible and realistic framework that aligns with the innovations introduced by the OECD in this report. Countries experience varying degrees of fragility shaped by historical, political, economic and social factors. Some nations contend with protracted conflicts and institutional collapse, while others face localised governance or economic challenges. The spectrum approach can tailor interventions to address specific vulnerabilities without undermining national ownership.

By viewing fragility as a continuum, this approach also enables the realisation of the humanitarian-development-peace (HDP) nexus, which is expected to bridge the often siloed domains of immediate humanitarian response, long-term development and peacebuilding. The spectrum approach provides a framework to integrate these efforts,

enabling context-specific, multi-sectoral strategies that concentrate on the root causes of fragility while building systems for resilience and self-reliance. This perspective shifts the focus from externally imposed solutions to empowering countries to address their unique challenges. By recognising fragility as a dynamic continuum, interventions can evolve alongside shifting realities, fostering resilience from within.

### *RESILIENCE AS THE ULTIMATE GOAL*

In this framework, resilience is the ultimate goal – a state where nations can withstand, recover from and transform in the face of crises. Resilient states are not immune to shocks; rather, they possess the institutional strength, societal cohesion and economic adaptability to respond effectively. For instance, a natural disaster such as a flood has vastly different impacts in Afghanistan’s Baghlan Province than in Spain’s Valencia Province. While both regions may suffer loss of life, the longevity and severity of the socio-economic consequences are profoundly different. These disparities underscore the importance of building resilience tailored to specific contexts.

Drawing from the experiences of g7+ countries that have transitioned from conflict to stability, the Group collectively aspires to global policy reforms aligned with the following pillars of stability and development as reflected in the peacebuilding and statebuilding goals of the New Deal for Engagement in Fragile States (INCAF, 2012<sup>[2]</sup>):

- **Social cohesion and reconciliation.** States with high fragility often inherit deep societal divides resulting from wars. These unresolved grievances frequently fuel further conflicts, including proxy wars. Promoting reconciliation, fostering dialogue and addressing historical injustices are essential for building durable peace and social capital, which are prerequisites for sustainable development.
- **Inclusive and effective state institutions.** Citizens’ trust in state institutions is fundamental to resilience. Decades of conflict erode this trust, which can only be restored through capable and inclusive governance. Strengthening legitimate institutions that deliver essential services ensures citizen participation in statebuilding processes and fosters stability.



- **Economic self-sufficiency.** Economic fragility exacerbates vulnerability, and reliance on external aid often subjects fragile states to undue geopolitical influence. Resilience pathways must prioritise poverty reduction, sustainable livelihoods and economic diversification to break cycles of dependency. Investments in foundational economic infrastructure are critical to achieving self-sufficiency.
- **Climate and environmental adaptation.** Many conflict-affected countries are highly vulnerable to the impacts of climate change. Climate-induced shocks exacerbate existing fragility, creating vicious cycles of vulnerability. Despite this, these countries receive disproportionately low levels of climate finance compared to contexts with medium to low fragility (Gulati et al., 2024<sup>[3]</sup>). Recognising this gap, the g7+ has issued a joint call for increased climate financing and the mainstreaming of equitable processes. Integrating climate resilience into national strategies is essential to enable fragile states to withstand environmental shocks (Dickie and Jessop, 2024<sup>[4]</sup>).

### *COUNTRY OWNERSHIP: THE CORNERSTONE OF RESILIENCE*

Central to the spectrum approach is the principle of country ownership, the cornerstone of resilience building. Resilience cannot be externally imposed; it requires the full engagement and leadership of national stakeholders, including citizens. Country ownership empowers nations to

develop homegrown solutions that align with their unique contexts and priorities, ensuring legitimacy and sustainability.

The g7+ emphasises the importance of international partnerships that respect and reinforce country ownership. External actors should play a supportive role, providing resources, technical expertise and solidarity while allowing countries to lead their own development processes. This inclusive approach strengthens the HDP nexus, as it ensures that humanitarian, development and peacebuilding efforts are coherent and aligned with national priorities.

### *CONCLUSION: A NEW PARADIGM FOR RESILIENCE*

The spectrum approach to fragility reframes resilience as both a process and an end goal. By recognising fragility as a dynamic continuum and prioritising country ownership, this framework enables tailored, context-specific responses that empower nations to overcome vulnerabilities. Moreover, the spectrum approach operationalises the HDP nexus, fostering collaboration across sectors and creating cohesive strategies that address both immediate needs and long-term aspirations.

As this and other contributions presented in this chapter show, resilience is not just an aspiration. For some states with high fragility, it is already a transformative reality, one that fosters hope, opportunity and sustainable development for future generations. Through this vision, conflict-affected countries in particular can redefine their trajectories, becoming resilient nations capable of enduring and thriving amid global uncertainties.

## COMMUNITIES RISING: ALIGNING DEVELOPMENT AND PEACE APPROACHES THROUGH EQUITY-TRANSFORMATIVE ACTIONS TO ADDRESS FRAGILITY IN COLOMBIA

H.E. Francia Márquez (Vice President of Colombia)

This contribution embraces a project for change. Inequalities in Colombia have led to poverty, weak industrial capacity, territorial gaps, population gaps and long-term armed conflicts. Understanding and approaching fragility as a consequence of inequalities inherited from colonisation and its reproduction is the main reason Colombia created the Ministry of Equality and Equity.

Wealth concentration works on different scales, and so do inequalities. According to the Gini index, Colombia is the most unequal country in the region and the third-most unequal in the world. Its Gini index in 2023 was 0.54 (Colombia National Administrative Department of Statistics, 2024<sup>[5]</sup>). While Colombia is also a middle-income country, 26% of the population faces food insecurity. In addition, 50% of the national budget for the last decade was invested in the Andes region but only 17% in the Pacific region and just 4% in Amazonia (National Planning Department, 2024<sup>[6]</sup>). At the societal level, while the income gap between men and women has narrowed to 6%, the gap between men categorised as white and women categorised as Afro-descendant is 58%, which means gender and racial-ethnicity gaps are not being addressed with the same effectiveness.

To contribute to total peace in Colombia from a structural perspective, the Ministry of Equality and Equity was created with a people-centred operating model for community-based interventions through transformative strategies. This model implies implementing transformative actions in local and community contexts based on the conditions of the territory so that these local interventions can be added to the required structural transformations of the national order. Thus, as these structural transformations are achieved, the lives of the people and communities most affected by inequality, inequity and their consequences (such as poverty and armed conflict) are already changing. The following are some of the transformative actions underway in different areas that represent short-term material changes of local scope.

### FOOD SECURITY

The Zero Hunger Programme prioritises ten sub-regions and 79 of the 1 110 municipalities where the food security situation is critical. As an illustration of what critical means,

food insecurity is as high as 95% in informal settlements in Cartagena, Cúcuta, and nearby municipalities in Bolivar and Norte de Santander where implementation of the programme started in 2024; the national rate, by comparison to the baseline, is 26%.

In these communities, the ministry has concentrated its actions on temporary deliveries of food, with transforming actions aimed at strengthening local food production systems, for instance buying from local producers for the delivery of food and delivering productive goods to farmers that allow them to increase and sustain production of traditional food. Another transformative intervention action is aimed at strengthening local food supply systems by building sub-regional food supply centres and networking producers, transport, and/or local carriers and distributors.

These actions will not impact most of the population directly. But they will improve the availability of food in these territories, reducing prices and facilitating the market for producers.

### ACCESS TO WATER AND SANITATION

Similarly, actions have been taken to address gaps in water and sanitation access. It would take 13 billion Colombian pesos to close water gaps in the country. Concrete actions such as reducing bureaucratic barriers to guarantee the construction of water supply and basic sanitation systems in marginalised and excluded territories are concentrated in infrastructure projects in villages, population centres and small municipalities, especially on the Pacific and Caribbean coasts. Currently, 38 projects are in different phases of implementation, ranging from studies and designs to construction contracting.

The government also designed a special procedure to promote equitable access under which it takes 60 days, not the traditional two years or more, to assess water and sanitation projects before investing public resources. We have also implemented non-conventional community solutions in territories where communities are geographically distant, such as in the Amazon and Orinoco regions.

### *TRANSFORMATIVE, INCLUSIVE SOLUTIONS FOR YOUTH*

In addition to Youth in Peace, the government's national flagship programme for vulnerable youth, the ministry is working on a local strategy in the north of the Pacific region of Cauca. The Young Guardians of Nature Programme recognises that youth in marginalised and excluded territories are expelled from their communities if they want to access higher education or have a life project based on innovation. This programme is being implemented in 13 municipalities of Cauca and aims to capitalise on the relationship between 1) young people and the territory, 2) the strong social fabric in these communities, and 3) a commitment to productive innovation that contributes to the protection of the environment.

Specifically, the programme strengthens the participation of 2 000 young people in circular economy processes, showing the transforming power of societal and popular bonds. For example, while surveys find that 5.6% of people in Colombia trust people they do not know, 16.0% of young people participating in the programme say they trust people they do not know. Trust as a cultural factor has proven to be fundamental to the success of associative initiatives. It is not only useful for enhancing the programme's transforming effect. It also contributes to dismantling racist, classist and regionalist prejudices about the potential of ethnic, peasant and popular communities and especially about the youth of these territories.

### *REDUCING GENDER INEQUALITY*

The ministry has programmes to address gender-based violence and strengthen women's political and civic

participation nationwide. Nevertheless, given the overlap of racial and gender gaps, actions to promote economic autonomy for women are prioritised in the Pacific and Caribbean coastal areas. For instance, the Afro-descendant Viche women of the Colombian Pacific are a cultural and productive reference point in the country. In 2021, the beverage viche was recognised through Law 2158 as an ancestral, traditional beverage and part of the collective heritage of Afro-descendant black communities. The Ministry of Cultures and Knowledge administers the law, and we in the Ministry of Equality and Equity will strengthen 300 ancestral and traditional productive units of Viche women in Cauca. This project is part of a broader government initiative to strengthen the Vichero landscape of the Pacific and improve distribution channels. For the ministry, supporting this activity is part of recognising forms of production other than by men and making progress in guaranteeing the economic autonomy of women in this territory.

These very local and concrete actions may not seem interesting from a macroeconomic or national perspective, but it is precisely these communities that broader actions have failed to impact. From the collective action theory, changing the lives of people and communities for whom the state has been only a military presence or has not existed at all is the basis for structural change. It is also the opportunity to build total peace based on the living conditions of the civilian population.

## COMPLICATED DEVELOPMENT: EVOLVING RISKS AND RESILIENCE IN BANGLADESH

Naomi Hossain (School of Oriental and African Studies)

The 2024 uprising that unseated the powerful Awami League regime in Bangladesh shone a spotlight on the pathways to fragility. It highlighted the ways in which extreme political fragility, the result of the Awami League's increasingly authoritarian rule over the course of 15 years, led to a deepening of fragility in the economic, security and ultimately societal dimensions, the killing of over a thousand protestors, and then a total breakdown of law and order. Sheikh Hasina's regime fell in August 2024. The next month, excess flooding led to further widespread harm, loss of homes and livelihoods, and billions of dollars of damage. With the Bangladeshi state still in disarray only weeks after the fall of the regime, the disaster response mechanisms were weak, and the limited redress available for those affected showed how quickly political fragility can undermine capacities to cope with ecological fragility. This downward spiral happened in a country that had, until then, been deemed a development success story for its relatively inclusive human development progress and for its effective responses to the effects of the climate crisis. The downfall of the regime demonstrates the necessity of protecting key civic and political rights as a bulwark against just such a descent into fragility, showing how political fragility intersects with other forms of fragility to endanger hard-won economic and social development progress.

The national uprising swept the country over six weeks in July and August of 2024. In addition to the more than 1 000 people killed, tens of thousands were seriously injured in the student-led popular movement (Depto, 2024<sup>[7]</sup>). When the army chief declined to shoot any more protestors, Hasina fled the country on 5 August. Within days, a non-party interim government was in place, tasked with instituting governance and electoral reforms and returning the country to multi-party democracy.

The Awami League regime had been in power since 2009, when it won a landslide victory in a free and fair election that was held under a non-party caretaker regime. Subsequent elections under the Awami League government were less free and fair; the main opposition boycotted two of the polls, and the ruling party rigged most of them, including the most recent in January 2024 (Riaz, 2023<sup>[8]</sup>). Over the years, the government shrunk the space for peaceful debate, dissent and policy advocacy, imprisoning and criminalising the opposition and silencing civil society and the media with threats, enforced

disappearances and overt violence (Freedom House, 2023<sup>[9]</sup>). The descent into political fragility was particularly marked in the two years leading up to the uprising, with sharp downturns in the indicators for democracy and corruption. In this setting of suppressed speech and no freedom of association, the regime had forced itself into a position in which it was unable to manage conflict and fragility through any means other than force and the threat of force, and it was willing to use force because the spoils of the previous years of crony capitalist rule meant there was far too much at stake to relinquish power.

The student movement initially demanded reforms to the civil service job quota system. It was met with disproportionate violence by party thugs, the Bangladesh Chhatra (student) League, which operated with full impunity and government protection. Other students joined the protests, and when the army and police were ordered to shoot protestors, thousands of other people joined. Horrific videos of the killings of unarmed protestors shocked and galvanised people across the nation; preliminary data analysis suggests that protests took place in 25% of all sub-districts across the country, with apparently hundreds of thousands gathering in the biggest cities. The escalation from a specific to a general complaint also highlights the ways political fragilities prevent the peaceful resolution of societal disputes. In this case, the callous brutality of the killings made it clear to the broader public that the regime would stop at nothing to shut down the movement.

Student movements had been big and violently repressed in the recent past. But they had never escalated into a national movement until now. This time, the movement escalated in size and reach because of broader discontent among the general public arising from the cost-of-living crisis (Hassan et al., 2023<sup>[10]</sup>), ongoing since Russia's invasion of Ukraine in 2022. General inflation was running at 10%, with food and energy inflation far higher at times. Although international events were the main causes of rising commodity prices, they were interpreted within the context of domestic politics. Many people believed that commodity speculation by powerful big business interests with political protection pushed up prices and that the government should have acted to protect the population's basic needs.

The descent into fragility and conflict stems directly from the failure of Bangladesh's democracy. Political violence is routine; electoral losers lose everything, sometimes going into exile or facing jail or worse. This means that all incumbents have much at stake in staying in power. This was even more the case for Sheikh Hasina's Awami League regime between 2009 and 2024 because that political settlement was held together through crony capitalism and grand corruption (Al Jazeera, 2024<sup>[11]</sup>) that included big business, the army and police, and the civil service and co-opted members of civil society as well as political leaders and foot soldiers. In the Bangladesh case, corruption and conflict are closely and causally related. The corrosive effects of undemocratic rule spread gradually to other domains: in contrast to the steady and relatively inclusive development of the 1990s and the 2000s. The latter part of the Awami League regime saw a slowing of progress or decline in some health, education and other social indicators, and the economy failed to generate decent jobs. The contrast between high growth and claims of development success and the actual living standards, in particular the dwindling prospects for the youth of the country, paved the way for the vast movement that unseated the powerful regime.

New revelations of massive corruption and a banking crisis indicate the ways an apparently successful development

agenda was actually underpinned by looting on a grand scale. Bangladesh now has an unelected interim government that has limited capacity, little support in the civil service, local governments and some security forces that were aligned with the old regime, and a restive and anxious population seeking resolution and a return to democracy. Meanwhile, political unrest continues, disrupting everyday life and the country's flagship export industry. The current interim government is attempting to restore law and order; introduce essential political and institutional reforms, in particular to cover governance functions such as the electoral system and anti-corruption; and organise free and fair elections. It would be a daunting task for any unelected group of civil society leaders and technocrats. It is even more so because of the crippling inflation that continues to afflict a population that, despite the country's high rates of growth and lauded development models, remains close to the poverty line and vulnerable to falling below it. The intersecting social, economic, political, security and ecological fragilities destabilising Bangladesh in late 2024, some emanating from regional powers and global conflicts, mean that the country merits strong international support and close attention over the next few years. Bangladesh stands an excellent chance of recovering its democracy and its inclusive development successes, but it needs aid, leadership and accountability for this to become a possibility.



## GENDER AND FRAGILITY: IT IS TIME TO GET SERIOUS ABOUT ONLINE SPACES AND DIGITAL TECHNOLOGIES

Deqa Yasin (Human Rights advocate and Social Justice activist, Somalia)

The OECD recognises that men and women experience fragility differently. Among other factors, the combination of gender inequalities and wider crises often means that women face even higher risks of sexual and gender-based violence (GBV) in contexts exposed to fragility. For example, we know that sexual, emotional and physical violence peak following the onset of natural disasters (Kaul and Valero, 2023, p. 25<sup>[12]</sup>) and that such violence is an established feature of armed conflict (UN, 2024, p. 4<sup>[13]</sup>). This is painfully evident in my country, Somalia: Rampant sexual and gender-based violence ruins lives, fuels the wider conflict, and undermines the potential of women and girls to fully contribute to our country's recovery. Somalia shows severe fragility in five of the six indicators applied by the OECD fragility framework to monitor risks to and sources of resilience for women and girls. When I was appointed Minister of Women and Human Rights Development in 2017, fighting back became one of my key priorities. On 31 May 2018, the cabinet of Ministers unanimously passed the Sexual Offences Bill (SOB) 2018, which was developed under my leadership and would have provided Somalia's first dedicated and urgently needed legal protections from sexual and gender-based violence. The bill was fatally compromised by a major blind spot regarding both fragility and women, peace and security debates – that is, the very real transnational effects of online spaces and digital technologies in contexts with high fragility.

On 15 September 2020, while the SOB was before the parliament, the leadership of the parliament made false statements about the initiative being against Islam and singled me out by referring to the SOB as "Deqa's bill" rather than as a collective project approved by 22 ministers under the leadership of our prime minister. These statements set off an avalanche of online violence and disinformation, often coming from the diaspora. The same day, a member of the diaspora in the Netherlands posted a video on Facebook calling on the terrorist group Al Shabaab to assassinate me in response to my leadership on the bill. Shared hundreds of times, this post fuelled a wave of online and ultimately offline threats against me, my family and other advocates. Due to the wide presence and influence of this group, which assassinates women's rights advocates on a regular basis (Saferworld, 2023, p. 2<sup>[14]</sup>), these threats could be carried out easily, at any time.

To send a signal that such online violence is a crime and to highlight its offline consequences for women living in communities compromised by fragility, I decided to take the author of the viral Facebook video to court in the Netherlands. I ultimately won my case, but the proceedings dragged on for three years and the defendant was sentenced to no more than a few hours of community service – a sentence with no relation to the damage that was done to me and to all Somali women. I also followed YouTube procedure by filing a detailed complaint against another Somali Youtuber who had posted another threat to my life on 15 September 2020. This individual produced a video on the SOB 2018 labelling me an infidel, including by posting an image of me next to an icon of a Christian cross – a death sentence in Somalia. In response to my complaint, I received an automated response from YouTube informing me that it was "unable to determine whether the content in question is defamatory" and, therefore, unable to remove it, but that it "encourage[s me] to try to resolve any issues directly with the creator of the content in question".

These are not isolated incidents. Following remarks construed to be in support of the SOB, the 1<sup>st</sup> Deputy Speaker of Parliament Sadia Yasin Samatar faced similar online attacks, particularly by elements within the Somali diaspora. Women in the diaspora are also targets: Hanna Paranta, an anti-GBV advocate based in the United Kingdom, has faced assassination attempts combined with online attacks co-ordinated through "groomed" diaspora women (Mahmood, 2021<sup>[15]</sup>). While systematic documentation of online GBV in Somalia is extremely limited, respondents in a small initial survey of university students in Puntland reported that politically active women are generally the main targets (Bareedo Platform, 2020<sup>[16]</sup>). In extreme fragility contexts like Somalia, such online violence has particularly severe consequences, especially where it combines with offline security threats. Armed groups that are highly active on social media (Cox et al., 2018<sup>[17]</sup>; Grobbelaar, 2022<sup>[18]</sup>) and responsible for offline violence against women's advocates also co-ordinate or carry out online threats, increasing the risk of escalation into offline attacks. Women in high and extreme fragility contexts also face a distinct lack of accountability for (online) violence due to weak state institutions and rule of law as well as digital architectures that are blind to context-

specific, gender-based threats in local languages (Carlson and Rousselle, 2020<sup>[19]</sup>; Iyer, Nyamwire and Nabulega, 2024<sup>[20]</sup>). With large displaced populations participating actively in political debates of their home countries through social media, these threats are often transnational, further complicating responses and accountability.

### *WHAT DOES A LACK OF ACCOUNTABILITY ON SOCIAL MEDIA AND ONLINE SPACES MEAN FOR GLOBAL WORK ON FRAGILITY*

These developments have important implications and call for three sets of responses. First, get serious about digital technologies and online spaces. Particularly in high and extreme fragility contexts, what happens online has very real consequences. Social media also has great potential to empower women's movements in all levels of society, but this positive potential won't just unfold automatically. We need to work actively to make online spaces safe for women, especially those exposed to the highest levels of fragility. Second, it's time for Western countries to clean up their own backyard. The causes and consequences of

fragility never respected national boundaries. With the rise of social media and digital technologies, the idea that fragility is just "out there", confined to other developing countries, certainly needs urgent updating. In my case, gaps in hate speech legislation in the Netherlands and the procedures of United States-based companies undermined life-saving legal protections for women in Somalia and could have facilitated attacks on advocates in the process. If causes are transnational, responses must be, too. Feminist domestic policies, not just feminist foreign policies, are needed, meaning in this instance the better monitoring of transnational online threats to women, with appropriate common legal standards to enforce protection. Third, get real about supporting and empowering local leadership. Gender equality change often involves dramatic shifts in power. Avoiding backlash requires realism and humility about the risks and timelines involved. Importantly, it requires building on locally driven initiatives and allowing local women's organisations to guide international actors: They are the experts on local online and offline lives, how to navigate these volatile environments, and the risks of doing harm.

## ENGAGEMENT WITH THE TALIBAN: PUNCTURING PRAGMATISM WITH PRINCIPLES TO ACHIEVE PEACE

Mariam Safi (DROPS, Afghanistan)

What does principled engagement with the Taliban look like? The lack of integration between development and peacebuilding in Afghanistan during the international intervention from 2001 to the Taliban takeover in August 2021 has been a significant factor in the securitisation of development and, ultimately, the unsustainability of the democratisation process in the country. Now, with the Taliban as the de facto authority, it has become even harder to envision development and peace working in tandem to meet the needs of the Afghan population, particularly women and girls. This difficulty arises from multiple factors: the Taliban's oppressive governance, their disregard for Afghanistan's international legal obligations, and their egregious violations of human and women's rights. Meanwhile, the international community's response – pursuing what is termed a pragmatic approach to engagement – has only encouraged the Taliban to continue their approach. Lacking the political will or capacity to use its leverage to compel meaningful change, the international community has failed to shift the Taliban's course of action. This has led many Afghans to question whether the international community's role in Afghanistan has been constructive, as it appears to reinforce the Taliban's authoritarian rule rather than engaging with them to foster a transformation into a representative, transparent and legitimate government that reflects the aspirations of its people.

Since 2021, the Taliban have issued 122 edicts (United States Institute of Peace, 2024<sup>[21]</sup>), most of which target the fundamental rights and freedoms of women and girls and effectively relegate them to house arrest (Feminist Majority Foundation, 2023<sup>[22]</sup>). This amounts to the most oppressive situation for women and girls globally today. These decrees were codified on 31 July 2024 in the official gazette of the Islamic Emirate of Afghanistan under the Law on the Propagation of Virtue and Prevention of Vice (Shekhawat, 2024<sup>[23]</sup>). In Afghanistan today, not only are women prohibited from attending school beyond grade six, from working and from leaving their homes without a male relative; they are also required to veil their entire bodies, including their faces, when in public or near men who are not close relatives (Safi and Khan, 2024<sup>[24]</sup>). Disturbingly, the law equates a woman's voice with her "private parts" (*aurat* in Arabic), declaring that women's voices cannot be heard

loudly in public and banning them from singing or reciting hymns (Safi and Khan, 2024<sup>[24]</sup>).

A survey conducted by the Afghan Organization for Policy Research and Development Studies in January 2024 underscores the dire situation and how Afghan women are viewing their own individual situations. Across 24 provinces, 67% of the 3 640 female respondents described the Taliban's restrictions as systemic oppression and domination of women and girls (Bishnaw, 2024<sup>[25]</sup>). Furthermore, 61% believed these restrictions were intended to create a society where women and girls are subordinate to men, and 60% advocated for the UN to formally label the Taliban's policies as "gender apartheid" (Sobat, 2024<sup>[26]</sup>). In December 2024, DROPS conducted a survey of 7 223 respondents across 32 provinces to assess the impact of the new PVPV Law on women and their communities. The survey revealed that 55.59% of respondents observed a negative behavioral change among their community members since the introduction of the law (Bishnaw, 2024). Moreover, the Taliban are enforcing the law through men in households, with 33.81% of respondents reporting that the de facto authorities were implementing the law by instructing male community members through local mosques (Bishnaw, 2024). This approach only further reinforces male authority over women, significantly altering gender roles, and stripping women of any autonomy it may have still had left within the home.

Since 2021, Afghan women's civil society organisations have increasingly called for the codification of gender apartheid as a crime against humanity. This legal framework would impose stronger obligations on states, enabling them to fulfil international commitments on gender equality while holding violators accountable. It would also demand greater responsibility from the international community, whose policy of so-called pragmatic engagement has done little more than enable the Taliban's erosion of human rights and governance. This should be indisputable, especially now that the International Criminal Court, on 25 January, announced arrest warrants for the Taliban Supreme Leader Haibatullah Akhundzada and Chief Justice Abdul Hakim Haqqani for committing crimes against humanity, specifically persecution on gender grounds (Abdelaziz and Kent, 2025<sup>[27]</sup>).

The international community's focus has largely shifted away from Afghanistan, driven by global crises and fatigue after a two-decade-long intervention. However, without peace, anchored in inclusive governance, equality, and human rights protection, Afghanistan cannot reduce its dependence on humanitarian aid or embark on the path to sustainable development.

Afghan women have persistently called for principled engagement with the Taliban. They define this approach as one grounded in adherence to the UN Charter and respect for women's rights (including political participation, freedom of speech and mobility). Engagement without these safeguards offers no long-term benefits; it merely allows the Taliban to perpetuate its gender apartheid. The integration of development and peacebuilding, utilising both vertical and horizontal approaches, is essential for bringing Afghanistan back onto the path of stability. By excluding the Afghan people from decision-making further undermining local ownership, and adopting an elite centric and top-down approach, the Taliban are replicating the same mistakes that the international community made

during the Republic. Despite this, UNAMA, the UN Assistance Mission to Afghanistan, has consistently argued for pragmatic engagement with the Taliban, contending that pushing for women's rights could provoke harsher restrictions and that principled engagement might alienate the Taliban from negotiations.

For Afghan women, a pragmatic approach devoid of principles will neither restore their rights nor foster legitimacy within the country. Any structured political process, such as the UN-convened Doha talks, must include benchmarks rooted in human rights, such as repealing decrees that violate the rights of women and girls and ending abuses against defenders of women's rights. Therefore, investing in robust risk assessments for Afghan women is a pressing necessity. The international community must recognise these benchmarks as non-negotiable, reflecting the views of local stakeholders. The voices of Afghan women and civil society actors are not obstacles to peace; rather, they are essential to achieving a legitimate political consensus that balances the needs of peace and development, even in authoritarian regimes.

## THE COSTS OF CRISIS AND MANIFESTATIONS OF FRAGILITY: THE PERSPECTIVE OF ONE OF THE MILLIONS DISPLACED FROM VENEZUELA

Ana María Diez<sup>1</sup> (President, Coalición por Venezuela)

Once a resource-rich nation, Venezuela has experienced unprecedented socio-economic and political decline in recent decades. This collapse has generated a complex humanitarian crisis of epic proportions, the largest in the Americas in the last 50 years, characterised by rampant hyperinflation, food and medicine shortages, the forcible displacement of almost 8 million people, and a significant erosion of democratic institutions. These issues have local and international implications where different sources of risk and resilience combine to impact on stability and development. This article details how the dimensions of fragility are manifesting themselves in Venezuelan society and being experienced by Venezuelans during the current crises.

### *POLITICAL FRAGILITY*

Political fragility in Venezuela manifests itself in the erosion of the rule of law, the concentration of power in the hands of a few, and the lack of checks and balances. It has been a determining factor in the collapse of democratic institutions and in the deterioration of the quality of life of Venezuela's citizens. The manipulation of public powers that lack independence, the alteration of the constitutional order and the restriction of fundamental freedoms have undermined confidence in the political system and generated deep repression in Venezuelan society. The resulting political situation has made national dialogue difficult and prevented finding consensual solutions to the country's problems.

The militarisation of power has been another key element in Venezuela's political fragility. The growing influence of the armed forces, politicised in violation of the constitution, in the country's political and economic life has weakened civilian institutions and increased authoritarianism. Dependence on the state apparatus and political clientelism have been used as tools to maintain social control and guarantee the loyalty of the armed forces since Chavez's era. This situation has generated a deep distrust in institutions and limited the possibility of a democratic transition.

The consequences of political fragility in Venezuela have been devastating. The humanitarian crisis, massive population displacement and regional destabilisation are just some of the most obvious manifestations of this

problem. In 2024, the Venezuelan regime broke relations with its close allies in the region including Brazil, Chile, Colombia and Mexico and with other countries such as Argentina, Canada, Costa Rica, the Dominican Republic, Panama, Paraguay, Peru, Spain and the United States and has threatened to break relations with still others. In addition, it has besieged diplomatic offices in the country, among them the embassy of Argentina, denying them access to water, food and electricity and preventing free transit for asylum seekers they are sheltering, in violation of the Vienna Convention on diplomatic offices; they even use snipers in nearby houses as a pressure measure (Singer, 2024<sup>[28]</sup>). The Venezuelan government's loss of international legitimacy has isolated the country and made international co-operation difficult. To overcome this crisis, a process of democratic transition is necessary to reestablish the rule of law, promote national reconciliation and guarantee respect for human rights.

### *Authoritarianism and repression*

The consolidation of a dictatorship regime has led to political persecution, the arbitrary detention of opponents and the restriction of civil liberties, by its strict definition it is qualified as such (Bobbio, 1998<sup>[29]</sup>). On 28 July 2024, presidential elections were held, and even though candidate Edmundo Gonzalez Urrutia won with 67% of the votes (BBC, 2024<sup>[30]</sup>), the Maduro regime refused to make the voting records public and Maduro declared himself the winner, generating repression of dissidents and citizens who demanded that the results be respected. The ballots collected by thousands of citizens show the clear victory of González Urrutia and are currently in the custody of the president of Panama after having been verified by a dozen leaders in the region. To date, almost 2 400 political prisoners are being held in Venezuela (Gaviña, 2023<sup>[31]</sup>). Among them are children and people with disabilities or serious health conditions who are without access to medical care. In El Helicoide, the largest torture centre in the country, some detainees have died under mysterious circumstances, some showing clear signs of torture (Gaviña, 2023<sup>[31]</sup>).



### *Weakening of institutions*

The judicial system, the legislative branch and electoral bodies have been co-opted by the government, which has undermined the separation of powers and transparency. The branches of the judiciary, headed by the Public Prosecutor's Office, have been the executing arm of commando operations to persecute, imprison and create cases of political origin against opponents, citizens, human rights defenders and humanitarian workers on the premise they committed treason or terrorism, without proper access to justice. The National Electoral Council, another of the public powers, endorsed Maduro's re-election claim without asking for proof and, in parallel, created the so-called justices of the peace to extend its control over future electoral results to community levels for each sector and street in the country. The legislative branch has implemented numerous laws to prevent the functioning of non-profit organisations, control humanitarian actions and threaten anyone who publicly voices support for economic or diplomatic sanctions against the government, with a punishment of up to 30 years in prison.

### **SOCIAL FRAGILITY**

The social crisis in Venezuela is characterised by deep inequality, a high rate of poverty and a humanitarian crisis of unprecedented proportions. The main indicators of this fragility are as follows:

**Food insecurity.** Millions of Venezuelans suffer from hunger and malnutrition, which has generated an unprecedented health crisis. The UN Special Rapporteur on the Right to Food recently reported that 82% of Venezuelans live in poverty and 53% in extreme poverty (UN, 2024<sup>[32]</sup>). Children and older people suffer the greatest impact, evident in signs of stunting and worsening diseases such as diabetes and cancer (Sociedad Anticancerosa de Venezuela, 2024<sup>[33]</sup>).

**Health crisis.** The health system has collapsed, leading to an increase in preventable diseases and a decrease in life expectancy. Amid a serious humanitarian crisis, 88% of the population depends on a public health system that has lost 80% of its capacity. The few transplant units along with specialised cancer care, dialysis and other services do not operate consistently and are inaccessible to most citizens. The Inter-American Commission on Human Rights (IACHR) of the Organization of American States has received 100 requests for "precautionary measures", and some of

their beneficiaries have died while waiting for action (CEPAZ, 2024<sup>[34]</sup>). These precautionary measures are a protection mechanism of the IACHR through which it requests a state to protect one or more people who are in a serious and urgent situation of suffering irreparable harm.

**Mass displacement.** The crisis has forced millions of Venezuelans to leave the country in search of better living conditions, generating one of the largest migration crises in the region. The Interagency Platform Response for Venezuelans estimates that 7.8 million Venezuelans have left the country, according to official data (Inter-Agency Coordination Platform for Refugees and Migrants from Venezuela, 2024<sup>[35]</sup>). Coalition for Venezuela estimates that at least 8.1 million have left, which would make this the largest refugee crisis in the world without armed conflict. In response to the strong repression in the country following the presidential elections, there was a fivefold increase in border crossings into Brazil, and it is estimated that by mid-2025 the total number of displaced persons will have increased to at least 10.4 million, according to the Delphos Institute (CEPyG UCAB, 2024<sup>[36]</sup>).

### **SECURITY FRAGILITY**

Security fragility in Venezuela manifests itself in increasing crime, violence and citizen insecurity. The main factors that contribute to this situation are as follows:

**Disarticulation of the security forces and irregular armed groups.** The police and the armed forces have been used for political purposes, which has weakened their capacity to guarantee citizen security, and the proliferation of irregular armed groups has generated a climate of violence and undermined the rule of law. Both developments have been documented in reports of crimes against humanity by the Office of the UN High Commissioner for Human Rights (CEPyG UCAB, 2024<sup>[36]</sup>).

**Drug and arms trafficking.** There has been a significant increase in drug and arms trafficking that has financed illegal armed groups and destabilised the region. Drug trafficking is the leading illicit activity, with Venezuela going from a country of cocaine transit to a country of cocaine production, according to investigations by Insight Crime (2024<sup>[37]</sup>). In the most impoverished areas of the country, the presence of human trafficking and smuggling networks has grown since these networks in France and Spain were dismantled in recent operations.

## ENVIRONMENTAL FRAGILITY

The irrational exploitation of natural resources, deforestation and pollution have aggravated the environmental crisis in Venezuela. The loss of biodiversity has led to the destruction of ecosystems, mainly the loss of endemic species, and has jeopardised long-term sustainability. Venezuela lost its last glacier as well as more than 7 million hectares of natural cover, and illegal mining has put at risk the biodiversity of Canaima, its most fragile national park that is home to the oldest mountains in the world. The Orinoco Mining Arc project, covering an area of almost 112 000 square kilometres, exploits minerals – mainly gold, which has caused poisoning and mercury contamination in rivers and Indigenous communities in the

south of the country. The damage caused by the extraction is irreversible.

In coastal areas, the presence of the unomia coral (*Unomia stolonifera*), an invasive species, has devastated at least 700 hectares of seabed, and while national authorities detected it in 2011, no efforts have been made to combat it, leading to the loss of endemic species. The archipelagos of Los Roques and La Tortuga are some of the most fragile ecosystems but, despite being national parks, parts of their land have been devastated for the construction of airstrips or mansions awarded to high-ranking generals in Venezuela (Guerrero, 2024<sup>[38]</sup>). According to the Red Book of Venezuelan Fauna, there are at least 288 threatened species in one of the most megadiverse countries in the world (Libro rojo de especies amenazadas, 2020<sup>[39]</sup>).

## UNDERMINING RESILIENCE TO EMPOWER A COUP: HOW NIGERIEN COUP LEADERS SUPPRESSED CIVIL SOCIETY TO STRENGTHEN MILITARY CONTROL

The July 2023 coup d'état in Niger, orchestrated by soldiers of the presidential guard, followed coups d'état in Mali (2020) and Burkina Faso (2020 and 2022), creating significant risks for Nigerien civil society.<sup>1</sup>

Before the coup in Niger, although there were certain regulatory constraints and state control had increased, amendments had been introduced to revise legislation, which fostered a modest climate of dialogue. The presidential administration, emphasising dialogue with civil society and political actors, sought to improve interactions through frequent meetings to promote collaboration rather than conflict. Despite these efforts to engage in dialogue, some demonstrations and civil society initiatives were banned, and attempts by civil society to organise rallies often ended with arrests. In addition, a revision of the laws governing non-governmental organisations and associations was underway before the coup, with the aim of increasing state control over them.

The coup led to the immediate suspension of the constitution, restricting the fundamental legal frameworks of civil society and reinstating strict legal provisions, including on cybersecurity. For example, the cybercrime law, which had been relaxed, was restored to its original version, with the effect of limiting freedom of expression. Military authorities quickly banned public demonstrations, leading to arrests of those who tried to organise them. The post-coup climate is described as an environment of fear and intimidation with severely limited space for free expression. The reintroduction of restrictive laws strengthened military control over freedom of association and expression.

Civil society organisations continue to operate where possible despite the restrictions in place. However, demonstrations remain prohibited, and there are strict controls over humanitarian actions, including a requirement to obtain authorisation to travel. The decentralised administrative structure that allowed local municipalities a certain degree of autonomy has been reorganised. Mayors and local council leaders were replaced by delegated administrators, most of them

military personnel, which consolidated military control over various administrative levels. Soldiers were also appointed to positions of responsibility in different sectors, thus changing the functioning of the administration. These changes have led to more rigid interaction between citizens and the state, with the military presence reshaping Niger's civic life and governance.

From the point of view of donors and international partners, the rupture has been significant. After the coup, many donors suspended their activities, distanced themselves from local civil society, and were sometimes surprised to discover that some local organisations did not necessarily share their democratic values. Donors, particularly Western countries, have appeared hesitant, seeking to balance their strategic interests in the region with the need to preserve relations with the junta. Some donors were caught in their own traps; they did not see the coup d'état coming and had encouraged the country to adopt a purely security approach to development. These donors were mainly occupied with their own interests, which were not necessarily aligned with those of local civil society, and as a result, a climate of distrust and distance has grown up between a part of civil society and donors.

The coup also created a diplomatic dilemma, as donors have attempted to maintain their influence without compromising their values or encouraging the junta's authoritarian tendencies. Anti-imperialist and sovereigntist narratives emerged that characterised relations with Western powers as subordination. Overall, the same Western actors are present as well as the Russians, who continue to be involved mainly in the security sector rather than in direct support for civil society. China, for its part, mainly stresses economic co-operation. The emphasis of these partnerships remains state-centric, contrasting with the priorities of Western donors, which traditionally include support for civil society and development projects.

## THE EVOLVING POLITICAL ECONOMY OF SUDAN AMID CONFLICT

Yasir Zaidan (University of Washington)

The ongoing conflict in Sudan has profoundly reshaped the country's political and economic landscape. Countrywide, more than 15 000 people have been killed, more than 10 million have been displaced and an estimated 15.8 million are in need of humanitarian aid (International Rescue Committee, 2024<sup>[40]</sup>). Sudan is classified by the OECD as experiencing extreme fragility, and the OECD multidimensional fragility framework identifies severe fragility across all six dimensions. This fragility is especially visible in Khartoum, Sudan's traditional economic and manufacturing hub, which has been devastated by the Rapid Support Forces (RSF) since the war began in April 2023. This destruction has led to a forced exodus of capital and skilled labour to the northern and eastern states, where economic transformations are taking root, including growth in the service sector. Despite Sudan's deepening instability and the catastrophic impact of armed conflict, these changes reveal an evolving economic structure that may hold the potential for new regional development.

Amid the scale and horror of destruction, it is easy to miss the shifting political economy dynamics. The relocation of capital and expertise to less-affected regions has generated new economic opportunities, presenting both hope and significant obstacles. This article examines the potential for a nascent middle class to drive transformation in the face of severe challenges. The chaos has depleted the savings and assets of Sudan's previous middle class, for example, and the continued conflict poses a threat to any budding recovery. While these shifts could lay the groundwork for political and economic reorganisation, and potentially peace, their sustainability depends on a balanced response encompassing security, economic and social interventions supported by effective policy.

### *SHIFTING ECONOMIC CENTRES AND THE POTENTIAL FOR A NEW MIDDLE CLASS*

The movement of displaced professionals and entrepreneurs seeking safer environments outside of Khartoum has created new regional hubs in the northern and eastern regions and stimulated growth in a variety of sectors. Airports in Port Sudan, Dongola and Kassala have opened to support this increased movement and shipping demand. New services, retail businesses and small industries are emerging in these areas, potentially giving

rise to a middle class that can drive future economic and social changes.

This emerging middle class could indicate a critical socio-economic shift, but its future remains precarious. The destruction of Khartoum led to significant losses for the established middle class, as savings were depleted and assets were looted or destroyed. However, businesses relocating to Port Sudan and the northern states are beginning to reopen their branches in these areas. During my recent visit to Sudan in November 2024, I observed that banks have resumed operations in safer areas, and online banking, primarily through the widely used Bankak application from the Bank of Khartoum, remains resilient. Telecom services have also moved their headquarters to Port Sudan and are now fully functional in safe areas of northern and eastern states. The unprecedented demand for housing has created opportunities for real estate and construction, benefiting regions with high inflows of displaced people who cannot leave Sudan. While the government plans to replace currency notes (due to the RSF's destruction of the central bank and printing facilities), these measures alone are insufficient to sustain economic recovery. Without adequate support and protection, the development of this new economic base risks stalling before it can contribute to Sudan's recovery.

### *COMPREHENSIVE INTERVENTIONS FOR LONG-TERM STABILITY AND GROWTH*

Achieving Sudan's recovery requires a multidimensional approach incorporating security, economic and social strategies. Post-conflict recovery in other countries such as Lebanon, Liberia and Rwanda highlights, in different ways, the need to integrate these strategies for lasting stability. The political economy of war recovery suggests that any durable peace must address security while fostering economic empowerment and social cohesion.

#### *Security interventions*

Security is fundamental to Sudan's stability. Without a secure environment, economic and social interventions cannot succeed. In the first instance, efforts must focus on securing safe areas currently hosting displaced people and stabilising active conflict zones to provide immediate relief and set the stage for broader recovery. Secure zones for

displaced populations could involve creating safety corridors and bolstering security forces to protect civilians. Stabilising war zones requires a blend of military and peacebuilding strategies to ensure humanitarian aid and safety for local populations. Stability can also be achieved through both localised and broader security efforts, even in active conflict zones (Mukhopadhyay, 2014<sup>[41]</sup>). An example is the Al Salam Hospital in Soba, south of Khartoum, which continues providing lifesaving services and receives medical aid from Port Sudan despite being in an RSF-controlled areas. Security and safety are foundational for economic and social development, as instability derails intervention efforts (Collier, 2007<sup>[42]</sup>). By securing key areas, Sudan can prevent conflict spillovers, reduce displacement, and build a foundation for resilient social and economic structures.

### *Economic interventions*

From a political economy standpoint, post-conflict economic policies should support broad-based growth rather than enrich elites. Emphasising equitable economic strategies that empower local actors and build domestic capacity is one (often overlooked) option (Berdal, 2009<sup>[43]</sup>). In Sudan, this may involve investing in decentralised infrastructure projects that support emerging regional hubs in the northern and eastern regions. Infrastructure projects such as railways, airports and highways are essential for these zones to connect growing agricultural and small business activities. Support for small and medium-sized enterprises could stimulate job creation and economic resilience, reinforcing the safety and prosperity of these areas. International financial assistance, as seen in Rwanda's recovery, has been shown to bolster resilience when strategically managed. For Sudan, a mix of grants, low-interest loans, and technical assistance could aid infrastructure rebuilding, agricultural support and economic diversification, provided funds are managed transparently and directed towards projects benefiting the broader population.

### *Social interventions*

Long-term stability also demands that the social ramifications of prolonged conflict be addressed, including how economic and political institutions shape social stability (North, Wallis and Weingast, 2009<sup>[44]</sup>). Policies fostering social cohesion are vital for Sudan, especially given the fragmentation from conflict. Education and

healthcare programmes targeting regional disparities also are crucial to ensure that displaced people have equal access to services. Health programmes not only enhance the quality of life but also reduce the social grievances that fuel conflict. Community-driven development initiatives empower local communities and mitigate intergroup tensions, as shown in South Sudan and Uganda.

### *Political and institutional reforms*

Comprehensive recovery also requires institutional support for governance reforms. What Paris (2024, p. 2168<sup>[45]</sup>) calls institutionalisation before liberalisation – that is, ensuring a functioning state for a phase of post-conflict transition that can ultimately lead to a political system capable of managing conflicts peacefully – appears adaptable to Sudan, which will have to address the root causes of conflict and the realities of new socio-economic dynamics. Sudan's government could strengthen institutions that promote transparency, accountability and a fair political process, thus addressing longstanding grievances. A decentralised approach could empower regional governments, bridging disparities across Sudan's regions. Policies promoting citizen participation and inclusive governance are essential for building state trust and credibility.

### **LOOKING AHEAD: THE NEED FOR A CO-ORDINATED APPROACH**

The experiences of other post-conflict countries show Sudan's need for a co-ordinated approach. Recognising the conflict economy that has emerged, security interventions must enable economic activity to resume, and inclusive economic policies can help prevent inequalities that fuel conflict. Addressing social needs and ensuring equitable access to services will build cohesion, in turn supporting a sustainable political settlement. Sudan's future stability and political agreements depend on such interventions, as stability, economic development and social justice are inseparable.

The conflict in Sudan has posed unprecedented challenges but also led to significant transformation. Despite asset losses and ongoing conflict threat, the evolving political economy presents an opportunity to rebuild Sudan as a resilient, inclusive society capable of supporting future growth and peace. A strategy balancing security, economic and social interventions to support new economic hubs could provide a path toward stability.



## THE CHALLENGE OF TURNING THE CORNER FROM FRAGILITY TO RESILIENCE: A PERSPECTIVE ON FRAGILITY IN TIMOR-LESTE

Joao M. Saldanha<sup>1</sup> (Joao Saldanha University)

Timor-Leste is one of a sizeable group of contexts that have consistently experienced medium to high fragility due to the combined effects of unstable economic growth, emigration, and lack of political and social cohesion (vulnerabilities in governance and communal tensions). Among the main sources of fragility has been its overdependence on the now-dwindling Petroleum Fund to finance the state budget. Climate change could be another source of fragility because Timor-Leste is prone to natural disasters. In addition, the flow of young people to other countries may result in a brain drain that would be counter-productive to Timor-Leste's development in the future.

### KEY METRICS OF FRAGILITY IN TIMOR-LESTE

#### *Debt*

The state budget has experienced exponential growth since 2008, with a particularly sharp rise in public transfers. Timor-Leste has relied on its sovereign wealth fund to finance the state budget while also maintaining low public and external debt. It has no domestic sovereign debt. But with domestic revenues declining, the government has turned to external debt to finance infrastructure and social programmes. The government recently stopped (i.e. postponed) three debt schemes from the World Bank. Between 2021 and 2022, external debt rose by 3.98% from USD 278.6 million, or 14.0% of GDP to USD 289.7 million, or 15.2% of GDP. As Timor-Leste's debt-to-GDP ratio is relatively low – it is three times higher in some other contexts and dropped to 14.0% in 2023 – the country is not fragile from a debt perspective. However, its heavy reliance on the Petroleum Fund is a concern. Government revenues have been flat at about 15% of GDP for more than two decades, and most of these revenues are derived from projects related to the state budget. The Petroleum Fund, which had USD 18 million in 2024, will run out in less than a decade unless new production from other fields in Timor-Leste are discovered and exploited, increasing Timor-Leste's exposure to fragility.

#### *Conflict and violence*

Overall, Timor-Leste is generally stable, having maintained low levels of conflict and violence since the politico-military crisis of 2006. In this sense, it is not fragile when assessed

against the metric of conflict and violence. The last relatively significant event occurred during the 2006 politico-military crisis, which led to more than 200 000 refugees, tested the nascent democratic institutions of independent Timor-Leste and caused the economy to contract.

#### *Women's rights and power imbalance*

Women in Timor-Leste do not have much power in decision making. One example relates to the delivery of babies. This is often decided by in-laws rather than by the women who carry the babies. Women are economically dependent on men, which places women in a weak position in discussions with men. Women also tend to have less education than men, which also contributes to the power imbalance. Likewise, there is a salary gap between women and men even when they hold similar positions. Finally, under current social norms, employers prefer to hire men because they believe women will take time off (up to three months or in some cases longer) after childbirth. There are efforts underway to correct the gender imbalance.

#### *Governance*

Timor-Leste's institutional set-up consists of four branches: the presidency, the national parliament, the government and the courts. This democratic arrangement has already survived five tests, namely large demonstrations by the Catholic churches in 2005, the politico-military crisis in 2006, the political deadlock of 2017 and 2018, and the COVID-19 pandemic. These crises did not set back the democratic system. The presidential and parliamentary elections in 2022 and 2023, respectively, have stabilised the situation up to the present. Thus, governance is improving, although questions remain around the delivery of basic services, which could be a source of fragility.

#### *Political economy*

The state dominates the country's political economy and through the Petroleum Fund can dictate almost all activities in Timor-Leste. Markets and the private sector function, but the prices of construction materials and of consumer goods and services are mostly determined by the state budget. Market demand derived from the consumption of goods and services by the nearly 1.4 million people in Timor-Leste

plays a relatively minor role in both price setting and the overall economic behaviour of the country. Government expenditures are based on appropriations by the parliament and signed into law by the president. Government agencies draw up the draft budget, which is submitted to the parliament for approval.

One concern is that there is significant leakage of funds because the state spends a sizeable amount to import both intermediate and final goods and services. This results in a low multiplier effect of roughly 0.1, meaning that every USD 1.00 spent by the government creates only USD 0.10 in the economy, while in high-income countries the multiplier is closer to 4.0. Thus, if the Petroleum Fund goes dry and there are no other sources of revenue for the government, it could set off a political and economic crisis and become a source of fragility.

### *Corruption*

Timor-Leste's score on Transparency International's Corruption Perceptions Index has improved by 7 points over the last 5 years and by 10 points over the last 11 years. Nevertheless, corruption persists in different areas of the government through price mark-ups. The risk areas are customs, procurement, public works and rice distribution. A high level of corruption can retard economic development. On average, Timor-Leste's economic growth in the last two decades was only about 1.8%, generally too low to make a dent in poverty. Corruption also contributes to this mediocre progress. Therefore, corruption can also be a source of fragility in Timor-Leste in the future if the Petroleum Fund dries up without being replaced by other funds.

### *Poverty and inequality*

Poverty levels have been stubbornly high at above 40% in the last two decades with no indication of a downward trend. No new poverty survey was conducted in 2024, and therefore it is not possible to gauge whether poverty levels have declined or remained high.

In terms of linking poverty to economic growth, a 1.0% increase in income can reduce poverty by 1.1% on average. This depends on the poverty line used, the level of inequality in a country and geographical location – that is, whether the country is in East Asia and the Pacific, Africa, Latin America, or Eastern Europe. Timor-Leste's government has launched several policy initiatives to reduce poverty, especially through cash transfers and in-kind support programmes. But their success is still limited, and they have not reduced poverty significantly.

### *Climate and environmental fragility*

Timor-Leste is prone to natural disasters and the impacts of climate change. On 4 April 2021, for instance, Tropical Cyclone Seroja caused major damage, with torrential rains washing away roads, houses, and other properties in cities and towns across Timor-Leste. Among the consequences were a contraction of the economy, the destruction of rice fields and a distortion of the supply chain in many cities. As climate change and the environment are the major sources of fragility in Timor-Leste, special attention must be paid to these now and in the future.

### *Migration and forced displacement*

Regarding the lifetime migration ratio within Timor-Leste, the populations of all municipalities except Dili are declining. The biggest of these decreases is in Viqueque, which has lost more than 20% of its population; the population of Dili, on the other hand, has grown by 36.9%. Overall, Timor-Leste's net internal lifetime migration is zero, i.e. no loss or gain of population. However, disaggregating population shifts by municipalities shows stark differences across the country. Dili, the capital, receives internal migration from all other cities and towns in Timor-Leste. External migration is mostly characterised by the outflow of youth to other countries, a trend that began with the 2006 crisis and continues today. At the beginning, young people tended to go to Ireland and the United Kingdom through Portugal in search of jobs and opportunities. More recently, people have migrated to Australia and Korea because these two countries also opened up to unskilled workers from Timor-Leste. The outflow is expected to continue, as jobs and opportunities are limited in Timor-Leste. This trend may become a source of fragility for Timor-Leste, as it leads to brain drain.

### *Perspectives on donor competition*

Development co-operation providers have played a critical role in the reconstruction and development of Timor-Leste since the destruction in 1999. Major donor expenditures were recorded between 1999 and 2005, in the early years during the rebuilding of Timor-Leste and then through the transition period under UN administration before oil and gas revenues from exploitation in the Timor Sea started flowing into the newly established Petroleum Fund. Minor differences aside, donors and the government have had good relations over the last 25 years. Therefore, donor engagement is not a source of fragility in Timor-Leste, especially as the volume of support has stabilised at about USD 200 million each year since 2008.

### *GEOPOLITICAL AND REGIONAL POLITICS*

While Timor-Leste faces a delicate situation in terms of its relationship with the outside world, it has maintained good relations with its big neighbours Australia and Indonesia and with the major world powers of China, the European Union and the United States. Australia and Timor-Leste achieved a permanent sea boundary settlement and are in negotiations for the development of the Greater Sunrise gas field, which would provide significant revenues for Timor-Leste in the future. There are residual issues between Timor-Leste and Indonesia, and while they are not significant, they may need to be addressed. Relations with Indonesia have been cordial since reconciliation, and Indonesia has been the main proponent for Timor-Leste to be a member of the Association of Southeastern Asian Nations (ASEAN). Timor-Leste's imminent membership in ASEAN will also provide a cushion in its relations with the major world powers and with its immediate neighbours.

Nevertheless, Timor-Leste will still need to continuously improve its relations with major powers to address geopolitical concerns, as such concerns could become a source of tensions when major powers, especially China and the United States, enter into conflict. Hopefully, Timor-Leste can play a role in diffusing those tensions by promoting good relations with both countries and with Australia and Indonesia, its immediate neighbours.

### *VALUE IMPLICATIONS OF FRAGILITY*

Timor-Leste's fragility profile has not changed over the past few years. For it to decisively turn the corner to more sustainable development and peace, addressing the drivers and sources of fragility identified in this article will be essential. From public finances and preparedness to education and peacebuilding, Timor-Leste will require appropriate and sustained support to build resilience and secure its future.

## ADDRESSING SOMALIA'S MULTIDIMENSIONAL FRAGILITY THROUGH MACROECONOMIC POLICY AND ACTIONS

H.E. Bihi Iman Egeh (Minister of Finance for the Federal Republic of Somalia)

Somalia has experienced one of the most difficult and prolonged conflicts in modern history, one which we are only starting to fully recover from today. We first entered into civil war in 1991, and the first internationally recognised government was formed in September 2012, when the current president, H.E. Dr. Hassan Sheikh Mohamud, was elected to his first term. Yet, only 13 years later, Somalia is a story of reform, resilience and hope.

After nearly a decade of implementing stringent fiscal and socio-economic reforms as well as delivering on over 90 key benchmarks from the International Monetary Fund (IMF) and many more, including from the World Bank and the European Union, Somalia achieved debt relief through the Highly Indebted Poor Countries Initiative (HIPC) in December 2023 on its first attempt. The most significant dividend from the HIPC Completion Point was debt relief amounting to USD 4.5 billion of Somalia's unsustainable bilateral and multilateral debts at the end of 2023. This brought Somalia's debt obligations from 64% to less than 6% of gross domestic product (GDP), or approximately USD 557 million.

The historic debt relief journey has normalised relations for the first time in over 30 years with international financial institutions including the World Bank, the IMF and the African Development Bank. It also helped Somalia build an important track record of reform execution that has made available more grants-based financial resources from such institutions and donors to utilise for the key priorities of reducing extreme poverty, creating jobs, enhancing social protection and growing the economy.

The Somali government's successful economic reforms have resulted in increased domestic revenues, which rose from just 1.2% in 2013 to 2.7% in 2023. This reform trend is continuing, with a clear focus on tax policy and administration modernisation, including increasing the use of innovative digitalisation and public-private dialogue to enhance transparency, accountability and public trust. Moreover, Somalia's financial country systems are improving at a steady pace with the World Bank, the European Union and other major donors having channelled over USD 2 billion through these thus far. This represents a substantial scale-up from the first USD 50 000 deposited in Somalia's Treasury Single Account over a decade ago.

Expenditure on basic social services has also increased from roughly USD 8 per person in 2013 to USD 48 in 2023, and

the Somali federal government employed 6 000 new teachers for the first time in the last two budget cycles. Moreover, we are making strong progress in further strengthening public financial management, deepening financing, and improving data for decision making and policy action as well as enhancing the private investment environment. These achievements are historic and clearly demonstrate that, despite all the other external challenges and existing multidimensional fragilities identified in the OECD fragility framework, transformative objectives can be achieved in Somalia with national unity, determination and effective international support.

### *SOMALIA'S FRAGILITY AND VULNERABILITY: NAVIGATING POST-HIPC CHALLENGES*

Even with all the successes we have achieved so far, Somalia continues to experience extreme levels of fragility. In fact, our experience is that debt relief does not automatically translate into more fiscal space to invest in resilience building. The post-HIPC environment poses great challenges for countries like ours because our growing domestic revenues are still insufficient to cover the costs of running government, providing basic public services at scale and tackling poverty, which over half of our population is experiencing. The revenue mobilisation challenges are various, and among the most important are a small tax base, high informality across the economy, heavy dependence on customs despite a larger percentage of revenues now coming from inland sources and non-tax revenue, and a weak social contract owing to the more than two decades of civil strife. The reality is that our tax-to-GDP ratio is currently about 3%, among the lowest in the world. We are working tirelessly to increase this ratio each year through our national Medium-term Revenue Roadmap by expanding the tax base through a simpler and more progressive tax system, enforcing compliance, and supporting businesses to shift away from informal employment. But we also know reforms take time to produce results. Consistency, commitment and patience are a must for us and for our international partners.

Somalia continues to grapple with multiple external shocks such as the devastating impact of climate change, regional conflicts and the Red Sea crisis while also fighting international terrorism with limited domestic and external resources and steadily progressing in the political and statebuilding processes. In between recurrent droughts

and floods, the Somali government has been actively fighting the international Al Qaeda-linked terrorist group Al Shabaab. There have been major gains in liberating multiple cities, towns and villages once under the terrorists' control, and the government has taken swift actions to stabilise these regions with security, law and order, and the provision of basic public services. The government is also working with its international partners to further strengthen the capacity of its national army to finalise the remaining process of taking full security control of the country. While fighting the remaining pockets of terrorism in Somalia is costly, the terrorist group's heavy defeats are spurring hope and economic activity that will build resilience across many newly liberated communities and across the country.

### ***BUILDING RESILIENCE***

Somalia's preparedness for shocks and the impacts of multidimensional fragility is improving, with more national institutions now established, organised, and collaborating in terms of data collection, sharing and dissemination. These activities are also guided by the new National Transformation Plan that our government is working on with a whole-of-country, society and systems approach.

However, our data collection institutions are still at a nascent stage and are actively supported by bilateral and multilateral partners, including international financial institutions, individual bilateral donors and even the private sector. This collective approach is not only improving our access and ability to use data to inform key decisions. It is also enhancing national readiness and actions after major incidents such as floods and droughts.

Escaping Somalia's existing multidimensional fragility requires predictable, long-term external financing as we move forward with our government's efforts to embed and deepen our economic reform successes with a new three-year IMF successor programme and to grow the economy. We have urged bilateral and multilateral partners addressing fragility to be optimistic and ambitious and to truly focus dedicated resources on supporting the most fragile states with tailored, affordable and accessible financing for their unique resilience-building needs, including for social protection, education, health, job creation, infrastructure and energy.

A timely opportunity for partners is to use the World Bank's International Development Association (IDA)21 replenishment to scale up grant financing for fragile countries with limited fiscal space and low debt-carrying capacity such as Somalia. All development partners, dedicated climate funds and international financial institutions must then follow up by scaling grant-based

climate financing for adaptation in the most vulnerable countries through the New Collective Quantified Goal on Climate Finance, which will hopefully replace the USD 100 billion annual pledge under the Paris Agreement that is expiring in 2025.

It is not feasible for governments in our uniquely challenging situation to continually make the painful policy trade-offs between financing urgent life-saving basic public services to build resilience and responding to the impacts of deep structural external shocks like climate change from meagre domestic resources.

The Somalia government has placed private sector-led development at the heart of our post-debt relief priorities. Somalia, with the longest coastline in Africa and one of the longest in the world, has enormous potential as the gateway of trade between Africa, the Middle East, the Far East and Australasia. We can also become a major player in agriculture, livestock, the blue economy and energy in Africa and globally. Somalia also has substantial untapped human potential. In addition to its strategic location, it has a dynamic young population and a diaspora of more than 2 million across the globe. With these assets and its agricultural and livestock capabilities, Somalia can also become a food-secure nation as well as a regional logistics hub to facilitate global trade. Hence, our government is working tirelessly to create a more conducive investment environment through legislation and enhanced public-private dialogue.

To advance Somalia's trade ambitions, the government has joined the East Africa Community and is actively working towards World Trade Organization membership. These two foreign and economic policy endeavours will ensure Somalia's connectivity and centrality to regional trade, economic diplomacy and stability and create national, regional and global opportunities for job creation and growth. Furthermore, these efforts will enhance Somalia's participation in the Horn of Africa Initiative. Supported by the World Bank, the African Development Bank and the European Union, this initiative aims to foster regional connectivity and resilience through investments in infrastructure and human capacity development.

In conclusion, for a fragile, recovering post-conflict state, Somalia and its people are incredibly resilient and determined to build a better future for themselves that is characterised by inclusive politics, security, trade and economic growth. However, the existing global financial architecture must also be redesigned in a way that supports and rewards this hope and resilience as well as the long-term efforts to build a sustainable, prudent economic base for growth and opportunities at greater scale in fragile states today.



## LEVERAGING THE PRIVATE SECTOR TO BUILD RESILIENCE: THE EXAMPLE OF THE DEMOCRATIC REPUBLIC OF THE CONGO

Based on OECD interviews with Paul Ouma and Jules Ndambu, CrossBoundary Advisory

### *LESSONS FOR DEVELOPING PRIVATE SECTORS AS A SOURCE OF RESILIENCE*

The private sector can play a role in creating economic opportunities for populations living in conflict-affected areas. It is important for donors to increasingly complement humanitarian emergency programmes with economic development programmes that can help address the root cause of the conflict. Companies that work in these kinds of settings require financial and technical support. It is difficult for them to access these types of support on the investment side as there is always a high perception of risk – and sometimes that perception is overstated. For example, businesses in eastern Democratic Republic of the Congo (DRC) have been quite resilient, and there are cases of companies active in that area for decades. However, they have had limited access to capital, technical support and international best practices.

Impact investors have a role to play. In Bukavu, South Kivu, we have worked with a company called Pharmakina SA,<sup>4</sup> which is the major quinine producer in Central Africa. Through support provided by an investment facilitation mandate, an impact investor committed capital and took a majority stake in the firm, effectively revitalising the company financially and operationally and developing an expansion plan. This is a good example of an investment that will create new jobs and have significant positive effects on the value chain of suppliers to the company.

### *BUSINESS CHALLENGES AND OPPORTUNITIES IN FRAGILE AND UNDERSERVED MARKETS*

In fragile and underserved markets, risks and opportunities are two sides of the same coin, and the private sector can bring real, substantive benefits. Investment in sources of sustainable development in the DRC is essential. To unlock growth, six entry points for investment stand out.

First, investing in strategically important infrastructure is both a need and an opportunity in a country with a sizeable extractives sector. The DRC, which is the world's tenth-biggest country and has a landmass more than four times the size of metropolitan France (My Life Elsewhere, 2025<sup>[46]</sup>), has seen decades of low public investment in both

the maintenance of existing infrastructure and the development of new infrastructure. Existing infrastructure is under ever-increasing pressure due to significant demographic growth. This lack of critical infrastructure in the DRC limits economic, societal and human progress, which are key points of resilience. Roads, airports, bridges, digital infrastructure and sporting facilities are massively underdeveloped.

Second, there are enduring challenges in the energy sector, though these also create opportunities, especially in renewable energy. As of 2022, little more than 20% of the population in the DRC had access to electricity (World Bank, 2024<sup>[47]</sup>). The electricity sector was liberalised in 2014, but the rural electrification promotion agency ANSER (Agence Nationale d'Électrification et des Services Énergétiques en milieux rural et périurbain) and the electricity sector regulator ARE (Autorité de Régulation de l'Électricité) were put in place only in 2021. Significant opportunities exist to use this progress to catalyse growth and human development, but further investments in electricity generation are needed to help address the large energy deficits felt by industry and currently provided by generators run on fossil fuels. According to data from mining companies, the mining sector alone is running an energy deficit of more than 1.2 gigawatts (GW), projected to reach 5 GW by 2030.

Third, there is significant untapped potential in the agricultural sector, for commercial use and food security. Food security in the DRC is critically low. The country currently imports over USD 3 billion worth of [food](#) annually (Tschilombo, 2024<sup>[48]</sup>). The dominant form of agriculture is subsistence agriculture, with a low degree of mechanisation. Investment in both consumption-oriented food crops and export-oriented perennial cash crops, like coffee or cocoa, could provide vital stimuli for the agriculture sector through positive spillovers to other agri-sectors. The recent revival of the coffee and cocoa sectors in the DRC points to the sector's potential.

Fourth, deepening the financial services sector, both banking and non-banking can support a more dynamic private sector ecosystem. Domestic credit to the private sector is 7% of GDP, one of the lowest rates in sub-Saharan

Africa, representing both a challenge to businesses and a highly attractive investment opportunity. Homegrown financial institutions especially, such as commercial banks, have the potential to generate financial returns from a low basis. Investing in the financial services sector to deepen the banking system and develop a greater range of financial services and intermediaries beyond traditional banks can help enable a more dynamic private sector ecosystem.

Fifth, the DRC has the potential to be a leader in the green transition. The country is the world's largest cobalt producer, home to 74% of the world's mine production and 55% of world reserves as of 2023. It is also home to 41% of the world's tantalum production and a significant producer of copper and tin. There is an opportunity to build value chains and move into higher-value activities, thus growing processing capacities. Achieving this requires the aforementioned investments in electricity and infrastructure.

Finally, a better business environment is needed for the DRC to attract investment in sustainable development at scale. The general business environment is not conducive to the functioning or growth of the private sector and presents a cross-cutting issue. For instance, a streamlined tax framework and a land policy (i.e. access or use rights) are needed. In the DRC, more than 90% of all cases going to court relate to disputes over land, and the associated delays disrupt business activity. A poorly functioning business environment can reinforce an uneven playing field, as it opens the possibility of prioritising or easing specific sectors or deals based on prospective returns rather than clear regulations.

### **PRIVATE SECTOR DEVELOPMENT AND CONFLICT SENSITIVITY**

When looking at private sector development, immediate impacts such as job creation, tax revenue and profits matter. However, it is also essential to look at interactions between a potential investment and conflict dynamics, often related to actual or perceived situations of exclusion or marginalisation. This can occur around projects in the mining sector but can also happen, for example, in the agricultural sector. While land-intensive activities are often key potential sources of growth, they must be handled carefully, as disagreements over land ownership or use can also breed disputes. When local communities think that they are not benefiting from such activities and that the dividend is going elsewhere, this might pose a risk of conflict.

The relationship between investment and conflict is complex, and the dynamics are difficult to analyse. Having no investment is not always the better option, as the lack of investment and opportunity can exacerbate or create conflict – and this counterfactual needs to be considered. For instance, when a company goes bankrupt for lack of investment, it creates unemployment and could generate conditions that inflame conflict over contested economic resources or other income opportunities.

We at CrossBoundary Advisory have seen both sides of this complexity. With more than ten years of experience working in underserved markets, CrossBoundary Advisory provides contextual, tailored capital solutions, innovative project structuring, and expert advice to ambitious entrepreneurs, investors, corporations, governments and foundations. More than 80% of our team is based in the markets we serve. Our mission is to unlock capital for sustainable growth and strong returns in underserved markets, including fragile and post-conflict settings. We believe that blended finance can be a catalyst for systemic change in markets that are typically overlooked.

There are notable success stories – such as commercial farms that generate mutual benefits for both the company and the local community. However, there have also been instances where investments have led to significant challenges, damaging the company's reputation and ultimately forcing investors to withdraw.

It is important to be careful about one-size-fits-all approaches. For instance, a large mining company might have the resources to collaborate with the local community and provide public goods and services to it. But small and mid-sized companies, even in the agriculture and mining sectors, might find it difficult to do the same. Trying to do everything by the same playbook that a larger company can follow could be overwhelming for a smaller company. In such cases, it is important to illustrate the benefits on the commercial side but also on the societal side of things. And as companies build their capacities, this hopefully gets ingrained in terms of how they function and operate as businesses and also has a demonstration effect for other companies, not only in a context like the DRC but also elsewhere.

Conflict sensitivity is equally crucial in non-commercial investments. In the DRC, for example, the influx of refugees from neighbouring countries has led to increased humanitarian assistance directed primarily towards these displaced populations. While such aid is essential, it can inadvertently create tensions with host communities that may feel overlooked, especially when they face similar

socio-economic challenges. The *Global Report 2022* of the UNHCR (2022<sub>[49]</sub>), the UN Refugee Agency, on the DRC highlights that in Angola, Burundi, the Republic of the Congo, Rwanda, Uganda, the United Republic of Tanzania and Zambia, 84 600 refugees from the DRC with specific needs received material non-cash support, and 1.1 million refugees and host community members accessed basic health services. This underscores the importance of inclusive investment strategies that address the needs of both refugees and host communities to prevent social tensions.

In contrast, the DRC's Eastern Recovery Project (STEP)<sup>5</sup>, financed by the World Bank, demonstrates how inclusive programming can mitigate such challenges. This initiative emphasises the leadership of local and traditional authorities in fostering sustained refugee integration and inclusion. By involving host communities in decision-making processes and ensuring that development investments benefit all residents, the project helps reduce potential conflicts and promotes social cohesion. This approach illustrates the effectiveness of integrated development strategies in regions affected by displacement.

To ensure a conflict-sensitive do-no-harm approach, it is essential to prioritise transparency, accountability and the fair distribution of resources. These elements can help mitigate conflict and support peace-positive investments. It is important as well to integrate the local community and ensure a cohesive collaboration between its members and the company. Moreover, reinvesting the tax revenue from private companies wisely is paramount. Building local infrastructure and diversifying the economy can contribute to a peaceful setting as communities can see tangible benefits from private sector operations such as preserving and transmitting wealth to future generations.

### *GREEN TRANSITION AND GEOPOLITICAL SHIFTS ARE CREATING NEW CHALLENGES AND OPPORTUNITIES IN FRAGILE AND UNDERSERVED MARKETS*

One key trend that we see is the increasing demand for critical minerals for the renewable energy transition. This represents a great opportunity for the DRC given its large reserves of cobalt and other minerals.

If revenues from the exploitation of these reserves are invested well, they can help build local infrastructure, diversify the economy and preserve this mineral wealth for future generations. Consider the potential of the Congo Basin rainforest, the world's second-largest tropical

rainforest after the Amazon rainforest. It is the world's largest carbon sink and can play a key role in the fight against global warming. According to a Center for Global Development study, the forest removes 1.1 gigatonnes (gross) of carbon every year from the atmosphere, a service that is valued at USD 55 billion per year (Mitchell and Pleeck, 2022<sub>[50]</sub>). That is five times the DRC's annual government budget. Projects around community forest conservation and reforestation of degraded land offer opportunities for carbon finance, leading to additional revenues for the DRC.

Another key trend is the evolving global economic and political landscape, which presents countries like the DRC with a valuable opportunity to diversify their trading partners. Not being reliant on one trading partner is a win-win situation. However, to fully capitalise on this opportunity, it is essential to establish a robust regulatory framework that ensures strict adherence to environmental, social and governance standards. Such a framework is critical to guaranteeing that investments and development efforts deliver equitable benefits, particularly for local communities, fostering sustainable and inclusive growth.

### *THE ROLE OF DEVELOPMENT ACTORS*

Donors, development finance institutions (DFIs) and other development actors have an important role to play in developing the private sector and fostering investment in underserved markets. First, it is important that they both support the governments of the countries they work with, including the DRC, by providing technical assistance to implement key reforms and create an enabling business environment for private sector companies to operate in. Second, DFIs can provide blended capital to make transactions feasible through risk-sharing and first-loss facilities. A pertinent example is the Africa Resilience Investment Accelerator (ARIA), anchored by British International Investment and FMO, the Dutch DFI. Investing in fragile markets requires intentionality due to their higher risk perception and smaller ticket sizes relative to other markets. Without such intentionality, the focus will primarily be on larger investment tickets in more market-friendly environments where it is easier to make deals. ARIA's mission, therefore, is to connect DFIs with investment opportunities in companies operating in fragile markets, especially those without a physical presence in these markets. ARIA provides DFIs' investment teams with supplementary local knowledge, as the programme has investment professionals embedded in the target markets and supports them on deal origination and due diligence.

The DRC is a country full of opportunities and offers the potential for outsized impact and attractive returns for investors. If we asked for just one thing, it would be to see more risk appetite among investors and a smaller gap between the real risks and how investors perceive the risks. We observe a lot of hesitancy in terms of project size and sector as well as of actual and perceived risks. But in these fragile and underserved markets, a small investment size – be it USD 1 million or USD 20 million – can move the

needle. Our work through DRC Invest Activity, a programme of the United States Agency for International Development, has facilitated more than USD 70 million of investment in the past two years. This demonstrates that even in challenging circumstances, including underserved agricultural value chains, it is possible to invest, have a decent return and make an impact. We at CrossBoundary will continue to build on this solid foundation – and we invite others to do the same.

## RESPONDING TO DEFORESTATION AND ARMED CONFLICT IN SUB-SAHARAN AFRICA

Amin Awad (President of the Foundation Council, DCAF - Geneva Centre for Security Sector Governance)

Sub-Saharan African communities are facing a multidimensional crisis hinged at the intersection of climate and security. Deforestation, armed conflict, and a chronic lack of capacity within local and national forestry services, combined with the aggravating effects of climate change, continue to drive forced displacement at unprecedented levels. Host communities in sub-Saharan Africa rely heavily on forest resources like brushwood and charcoal for firewood and basic energy needs. The United Nations (UN) Environment Programme (UNEP) estimates that, by 2050, 65% of the region will still depend on woodfuel for cooking (UN, 2019<sup>[51]</sup>). Already, mass deforestation combined with rapid urbanisation (OECD, 2022<sup>[52]</sup>) has led to a significant loss of biodiversity, as evidenced by the near-complete destruction of East and West African forests (Aleman, Jarzyna and Staver, 2018<sup>[53]</sup>).

Deforestation is only the tip of the iceberg: Low access to finance and weak governance systems have degraded national forestry services' ability to cope with day-to-day work, let alone provide much-needed monitoring and oversight of large tracts of forest and savannah. This has contributed to the collapse of a fledgling agroforestry industry, inciting fierce competition between herders and farmers over meagre resources, including water and green pastures, and pushing people from their land.

Armed conflict is both a symptom and a cause of the diminishing forests. Forests provide a dual function for armed groups, serving as a staging ground for launching attacks and as a source of exploitable resources. Organised crime and the proliferation of violence have further eroded a strained social fabric, cultivated contempt and grievances between local communities, and uprooted families from their homes. This multidimensional crisis underscores the urgent need for host communities, displaced populations and returnees to collaborate in ways that promote environmental stewardship while fostering social and economic resilience.

### *DESPITE THE COMPLEXITY OF THE CRISIS, SOLUTIONS DO EXIST*

A new sub-Saharan reforestation alliance is one such solution. Financed by multilateral donors, financial institutions, and environmental and developmental actors and with galvanising support from climate lobbies and

advocacy groups, this alliance can become a model for regional forestry governance. With the right programming, finance and political support, a new sub-Saharan reforestation alliance can kick-start a development cycle by facilitating the return of millions of displaced persons to reclaimed forests, reviving local services and providing gainful employment in re-planting forests, restoring biodiversity and protecting wildlife sanctuaries. When it comes to policy co-ordination and convening power, the World Economic Forum (2025<sup>[54]</sup>) stands out as a prime example of how a successful alliance, in the form of public-private co-operation, can bring multiple regional actors beneath one banner for sustainable change.

Large-scale, paid voluntary service programmes in the environmental and agricultural sectors can also be part of the solution. Paid voluntary work would kick-start forest regeneration and build local capacity in organic and biodynamic farming, agroforestry and other proven nature-based solutions. By creating jobs within the local agroforestry sector, such a programme could better facilitate the return of the displaced persons by providing meaningful and gainful employment while simultaneously building hosting communities' social and economic resilience.

The knock-on effects are manifold: By decongesting over-populated urban areas, kick-starting vibrant rural-urban connectivity, and re-forging meaningful connections between communities and the land, a co-ordinated reforestation programme can also help build solidarity and prevent the proliferation of armed groups, thereby empowering natural resource governance institutions. The Facility for Refugees, Migrants, Forced Displacement and Rural Stability (FARMS), an initiative of the International Fund for Agricultural Development (2023<sup>[55]</sup>), provides a practical example of how offering employment in sustainable land use and reforestation creates long-term job opportunities that benefit both displaced populations and local communities, thus promoting social and economic integration while contributing to environmental recovery.

Community and women-led reforestation initiatives can directly support those fragile and displaced communities most affected by deforestation and energy insecurity. Women play a central role as traditional managers of wood



and energy supplies. For example, in West Africa, 80% of Benin's population relies on firewood and charcoal for cooking, and women are primarily responsible for collecting and managing these resources (Global Forest Coalition, 2019<sup>[56]</sup>). The direct involvement of women will ensure equitable natural resource governance and support effective monitoring and income generation. Women's active participation *en masse* in grassroots reforestation projects will also mutually reinforce their collective voice and their physical safety and protection.

Building capacity and skills within environmental services at the village, regional and national levels is essential to ensure effective natural resource governance. Without the know-how and the tools to plan and mobilise, effective governance and monitoring mechanisms will struggle to take off. National forest departments and environmental services must build operational capacity and resilience from within to sustain operations and prevent illegal logging while remaining sensitive to local demand and fragility. Once national frameworks are established and complemented by operational strategies that include field presence, then fully equipped forest rangers and technical staff can be deployed for reforestation and effective monitoring and protection. This will facilitate the conditions for economic growth and trust in domestic institutions.

Nurturing community resilience and reducing competition over increasingly scarce forest resources are essential and deserve a 360-degree stakeholder approach. Including community leaders of aggrieved groups, women and displaced communities in reconciliation and peace processes can generate much-needed legitimacy among local authorities, fostering a strong social contract. The

Global EverGreening Alliance (2024<sup>[57]</sup>), the Great Green Wall of Africa (UN, 2024<sup>[58]</sup>), the Bonn Challenge (Restore our Future, 2020<sup>[59]</sup>) and the Trillion Trees (2024<sup>[60]</sup>) initiative are widely supported by DAC members and partners and offer insights into how reforestation can be achieved at scale.

Building on grassroots climate initiatives and associated consortia for reforestation will also support agroforestry initiatives, a vital tool in achieving greater food and energy security. This can encourage the rehabilitation and restoration of grassland, savannah and wildlife sanctuaries via controlled grazing, restore ecosystems, enhance habitat connectivity, and improve living conditions for fragile communities.

Reforestation at this scale invites development finance actors, climate lobbies and policy makers to lean into sustainable approaches, cohesion and resilience at the local, institutional and government levels. By leveraging Indigenous knowledge systems and women's leadership at the grassroots level, development and finance actors can achieve more effective forestry governance, monitoring and stewardship of the land.

The time to address deforestation and forced displacement is now. By empowering local host communities, especially women, and strengthening forestry governance, reforestation efforts can regenerate ecosystems, reduce conflict and restore livelihoods while nurturing vital resources. Investing in these solutions will help displaced populations return to revitalised land while fostering peace and long-term stability.

## SOLOMON ISLANDS' LOCAL CLIMATE ADAPTIVE LIVING FACILITY: MAKING USE OF THE PROVINCIAL CAPACITY DEVELOPMENT FUND MODEL TO INVIGORATE CLIMATE RESILIENCE

Wayne Ghemu,<sup>6</sup> Momodou Swawaneh<sup>7</sup> and Derek Futaiasi<sup>8</sup> (Ministry of Provincial Government and Institutional Strengthening, Solomon Islands)

Solomon Islands is a stunning archipelagic nation neighbouring Papua New Guinea and nestled in the heart of the Western Pacific region. This remarkable country in the Pacific consists of a diverse array of islands, each with its own unique landscapes, cultures and ecosystems. Like many Pacific Island countries, it faces a multitude of challenges stemming from its geographical position, socio-economic conditions and political landscape (Dinnen, 2008<sub>[61]</sub>; Mcdonald, Miller and Smets, 2024<sub>[62]</sub>). According to the OECD fragility framework, the Solomon Islands experiences high fragility, with notable risks in the human and societal dimensions and severe fragility across the environmental dimension (OECD, 2025<sub>[63]</sub>). Additionally, 80% of the land is customary, and 68% of the population resides less than one kilometre from the coast, meaning most of the population is vulnerable to sea level rise, king tides and storm surges (World Bank Group, 2021<sub>[64]</sub>).

### *CLIMATE CHANGE NOW CONSTITUTES A CRISIS*

The Solomon Islands bears the brunt of climate change's most severe and devastating impacts, which threaten not just the environment but also the livelihoods and cultural heritage of the islanders (Solomon Islands Government, 2023<sub>[65]</sub>). As one of the nations most vulnerable to climate impacts globally, Solomon Islands grapples with rising sea levels, increased frequency of severe weather events, and ecological shifts that jeopardise its biodiversity and socio-cultural environment (World Bank Group, 2021<sub>[64]</sub>). Recognising these profound threats, state and non-state actors and other relevant stakeholders in the Solomon Islands, in collaboration with international actors, are undertaking crucial efforts to craft and implement robust strategies focused on enhancing climate resilience. By embracing innovative approaches and building on local knowledge, the nation aims to safeguard its future and protect the well-being of its people amid the looming challenges posed by climate change.

Underpinning most of these stakeholders' activities is the goal to develop their respective frameworks to implement

multiple climate programmes, each with distinct modalities, including to facilitate the transfer of financial resources from donors to subnational levels. One such notable initiative is the Local Climate Adaptive Living Facility (LoCAL), launched in the capital, Honiara, on 1 November 2024.

### *LOCAL COMPLEMENTS EXISTING SYSTEMS TO STRENGTHEN PROVINCIAL GOVERNMENT AND INSTITUTIONAL CAPACITY*

LoCAL was initiated by the government and the UN Capital Development Fund (UNCDF) with initial funding support from the government of New Zealand and the European Union of approximately USD 15 million (Solomon Islands Government, 2024<sub>[66]</sub>). The UNCDF designed and manages the LoCAL in co-operation with local institutions. As a mechanism to integrate climate change response into local authorities' planning and budgeting systems, the facility combines performance-based climate resilience grants with technical and capacity-building support to create a scalable system for delivering climate finance through local governments and also to increase the flow of climate finance reaching local communities.

Importantly, LoCAL is embedded in the Solomon Islands' Provincial Capital Development Fund (PCDF), which underscores the close relationship between the new facility and the Provincial Government Strengthening Project (PGSP). This approach complements the PCDF's existing performance-based grant system within the PGSP framework, as LoCAL's grant financing for locally led climate resilience projects is entirely performance-based. Though it can finance 100% of adaptation projects, the facility serves mainly to top up approved projects with finance for their adaptation components. During the launch of LoCAL, the Minister of Provincial Government and Institutional Strengthening predicted that LoCAL would spur more local adaptation interventions and investments by helping provincial governments access climate funding for resilience-building projects.

*The Local Climate Living Facility, [...] is aimed at unlocking financing that empowers local communities and the provincial governments to take the lead in climate adaptation in the most critical areas. The initiative [...] will not only upscale the existing Provincial Capacity Development Fund (PCDF) but also assist our nine provincial governments in accessing essential climate funding for resilience-building projects. The project will ensure there is increased awareness and capacity of provincial governments to respond to climate change adaptation. Climate change adaptation shall be integrated into provincial governments' plans, and there will be an increased number of local adaptation interventions and investments. (Solomon Islands Government, 2024<sub>[66]</sub>)*

The government instituted a performance-based grant system in 2008 with the aim of building provincial capacity to effectively deliver services to the people of Solomon Islands. The system is built on three mutually reinforcing pillars. First, discretionary development grants are designed and transferred to the provinces for investment in eligible social and economic infrastructure. Second, a performance assessment system is used to ensure that provinces have the basic fiduciary safeguards in place and are therefore eligible to receive the grants; an incentives process rewards provinces that perform well on key elements of the investment management process, governance and public financial management. And third, institutional strengthening and capacity development support are provided to address provincial capacity gaps, especially those identified during the performance assessment process.

Since the system was established, the nine provinces of Solomon Islands have delivered over 1 683 solid projects. Central to the success of these efforts is a focus on key sources of resilience and a deliberate effort to co-ordinate delivery with other donor-funded programmes. For example, working with the World Bank-funded Integrated Economic Development and Community Resilience project, launched in 2022, provincial governments have started to adopt and comply with the national environment and social framework, which aims to encourage risk-informed planning at the subnational level (Solomon Islands Government, 2024<sub>[66]</sub>). LoCAL builds on these initiatives to ensure that local economic and social infrastructure projects are designed to adapt to and withstand the impacts of climate change (Solomon Islands Government, 2024<sub>[66]</sub>).

Despite limited capacity and other constraints, all provinces have submitted financial statements to the Office of the Auditor General by the annual due date for the past ten years. This 100% submission rate is a remarkable achievement for the performance-based grant approach especially when measured against the situation from 1993 to 2008, when only two financial statements were submitted by the nine provinces for audit. This institutional resilience building is powering operational service delivery. Since the inception of this approach, provincial institutions have enhanced their efficiency not only through stronger financial statements and better-quality audit reports but also in terms of 1) better ownership, commitment and institutionalisation of the PCDF modality; 2) greater trust in the PCDF modality on the part of development partners, as reflected in their transfer of development grants to provincial governments;<sup>9</sup> 3) enhanced oversight of the PCDF by the Provincial Fiscal Grant Coordination Committee and Joint Oversight Committee; and, most importantly, 4) their delivery of the 1 683 economic and social infrastructure projects over the last 16 years under the mandate of provincial governments.

These achievements also reflect the collaboration and networking of different stakeholders at the international, national and local levels. Such networking between the various stakeholders is decisively important because it has developed at a particularly critical period for the Solomon Islands government, which is facing ongoing challenges in addressing its fiscal situation. Moreover, the success of the PGSP has significant implications for the reform and enhancement of the 1997 Provincial Government Act in that it could build legislative support for strengthening other mechanisms to leverage funding for the provincial governments as a complement to the efforts of the national government. However, the process is still vulnerable to risks that may impact on the long-term sustainability of the performance-based grant system. Various factors – among them, the global COVID-19 pandemic, the 2021 Honiara riots, the South Pacific Games and the general elections in 2024 – have prompted reservations on the part of stakeholders, with significant adverse effects on the national budget. Consequently, there is an urgent need for strategic financial interventions for programmes related to climate change. In addition, the lack of consistency of government contributions often raises concerns about long-term sustainability. Since 2022, donor funding seems to have replaced the mainstream government contribution, which undermines any prospects of sustainability.

### *BLENDING HIGH-LEVEL SUPPORT WITH LOCAL INITIATIVE*

The collaboration underpinning LoCAL and the PCDF highlights the importance of a community-centric approach that establishes multiple interconnected nodes to effectively tackle urgent issues and challenges. By leveraging platforms that are specifically tailored to the needs and context of a community, we at the Ministry of Provincial Government and Institutional Strengthening can more effectively confront pressing challenges in a locally sensitive way, ensuring that solutions are both relevant and sustainable. It is against this background that the Ministry, through its programmes, is engaging to ensure the capacity building of the Ward Development Committee, a tier of local governance that exists close to the villages and communities in rural areas. The policy blueprint is designed not only to institutionalise community participation in local development management decision making but also to keep the communities engaged through the fiscal grants being provided by provinces for micro-project implementation in the communities.

The positive impacts of the LoCAL initiative co-ordinated with the World Bank integrated Economic and Community

Resilience programme are likely to be significant and multifaceted. In addition to enhancing institutional capability and unlocking local access to critical climate funding for resilience-building projects, the facility also fosters the potential for more partnerships aimed at addressing climate change challenges that affect rural populations throughout Solomon Islands.

### *CONCLUSION*

The climate crisis in Solomon Islands is severe and, as with any modality, there remain governance challenges to be addressed. But the PCDF-LoCAL initiatives represent a significant positive step towards delivering effective adaptation policies that respond to impacts across all dimensions of fragility. The Solomon Islands government and our ministry recognise that progress must be sustained through learning from policy delivery. Hence, a review of the PCDF core systems and procedures will be initiated shortly to drive future reforms. They will aim to consolidate achievements to date and rejuvenate stakeholders' commitments to the Solomon Islands' established and widely appreciated approach, one that is seen to allocate capital grants fairly and with regard to both established needs and verified performance.

## COASTAL EROSION AND BEACH LOSS IN THE COMOROS

Carola Klöck and Ibrahim Mohamed (Science Po & University of the Comoros)

The Comoros<sup>10</sup> is an archipelago in the Channel of Mozambique. A small island developing state, the Comoros is classified by the OECD as experiencing high fragility, with severe fragility in the political and economic dimensions that compounds the existential risks associated with the environmental dimension (OECD, 2025<sub>[63]</sub>). The Comoros belongs to all three country groups (Small Island Developing States, Least Developed Countries, African countries), considered particularly vulnerable to the negative effects of climate change such as sea level rise, coastal erosion and beach loss. Coastal erosion is already clearly visible and is having dire consequences. About half of the country's sandy beaches have been lost (Mamaty and Bandar Ali, 2018<sub>[67]</sub>), and more are at risk of disappearing (Vousdoukos et al., 2020<sub>[68]</sub>). The coastal erosion leads to saltwater intrusion, threatening freshwater supply (Mohamed, 2012<sub>[69]</sub>). The population of the Comoros is heavily concentrated along the exposed coastline and very conscious of these impacts. In surveys, residents highlight, among others, both the regular flooding of houses and roads and their worries that these could completely disappear in as little as five to ten years.<sup>11</sup> Relocation is indeed an issue and may be inevitable. Nearly 20 years ago, in 2006, the government was already estimating that up to 10% of the population might have to relocate by 2050 (Union des Comores, 2006<sub>[70]</sub>).

Coastal erosion and beach loss have multiple causes, although climate change and especially sea level rise make these worse. One factor is the so-called coastal squeeze: building houses and infrastructure close to the coastline, that is, in areas at risk. Another key contributing factor is sand mining, which has been illegal since 1994 but remains widely practised. Driven by poverty and lack of resources, people often turn towards the use of beach sand for building, as good-quality, alternative materials, notably crushed volcanic rock, are too expensive.

Paradoxically, the local population and, even more so, local bureaucrats and decision makers are conscious of the negative effects of sand mining. Nevertheless, the local population in particular considers seawalls to be an important response to coastal erosion and beach loss and asks for more seawalls to be built. Seawalls, however, do not address the issue of sand mining. In addition, they are often badly built and not maintained and thus fall apart shortly after construction – a problem that is also widespread in other island countries such as those of the Pacific (Nunn, Klöck and Duvat, 2021<sub>[71]</sub>).

### *ALTERNATIVES TO BUILDING AND REBUILDING SEAWALLS, AND WHY THEY ARE NOT USED*

Many local people would support efforts to uphold existing laws that prohibit sand mining. Yet, as a respondent aptly explained, “The mayor is unable to put in place a mechanism to ensure compliance.” Law enforcement is difficult in a context like the Comoros which is exposed to fragility and where the national government has limited reach at the local level, where institutions are generally weak and have limited capacity, and where political will is lacking.

Non-state action in the Comoros seems more promising, consistent with the findings of the OECD fragility framework, which shows societal resilience to be associated with high levels of trust and civil society participation. The Comoros has a vibrant civil society at the local level and (informal) village groups and associations that are also actively engaged in environmental management. Communities have shown they are capable of deciding to protect their resources, including their beaches. Ratter, Petzold and Sinane (2016<sub>[72]</sub>) reported on two villages on the island of Anjouan/Ndzuani that collectively decided to stop sand mining and were able to enforce that decision in their villages. Similar examples of successful local resource management can be found in fisheries (Freed et al., 2016<sub>[73]</sub>; Hauzer, Dearden and Murray, 2013<sub>[74]</sub>). Local associations and village councils can fill gaps left by the national state, and the state should in turn discuss and consult with local actors.

For villagers to take informed decisions and implement them, they need information and resources. Capacities in the Comoros, whether financial, human or institutional, are generally weak and particularly so at the local level. Many of our respondents, for example, point to a lack of resources to implement adaptation measures. They may primarily have financial resources in mind, but we also have limited knowledge. Respondents tend to know little about different adaptation measures beyond seawalls or their respective costs and benefits. As we mentioned, our respondents recognise the negative effects of sand mining and at the same time strongly favour seawalls as a solution. In this context, information and exchange would be extremely helpful, in particular the sharing of experiences and learning about the successes and failures of other communities. Such exchange is made difficult by a degraded transport infrastructure that makes travelling between communities inconvenient, expensive and unsafe,



especially travelling between the three islands of the archipelago. As a result, most people know little about how communities in other parts of the country, let alone in other islands in the Indian Ocean or beyond, respond to coastal erosion and beach loss. Thus, the successful community beach management in Anjouan/Ndzuani and examples elsewhere remain largely unknown, although they offer valuable lessons for other communities.

Exchange requires resources, which typically come from outside, certainly in the environmental realm. In 2023, Comoros received USD 127 million in official development assistance for development objectives (OECD, 2025<sup>[75]</sup>), but donor funding has its own well-documented problems. For example, it is difficult to access and often channelled to the central state rather than to the local level, even when local stakeholders may be better able to govern and implement decisions. Locals thus regret that “millions of francs”, as respondents put it, have arrived in the country without much visible effect on the ground. In this context, it may help to simplify access to funding and to channel more funding to non-state actors, including the local university (which would help build local capacities), community actors

and the private sector. The private sector could help find and implement solutions such as crushed volcanic rock – subsidised through donor funding – to make sand mining less attractive. In addition, the private sector could offer job opportunities in a context in which employment and success are often conditioned on personal networks rather than merit.

Resources are clearly important, including to improve the overall situation in which environmental protection in the Comoros operates. Resources, for example, are needed to improve the country’s infrastructure and transportation as well as education and capacities more generally. Yet it is important to point out that many things can also be done with limited to no resources. The community beach management in Anjouan/Ndzuani did not require any specific funding but simply relied on existing collective decision making and enforcement. Similarly, not building in highly exposed areas is an easy measure to reduce vulnerability, although some funding may be required for concerned families to acquire land elsewhere. Nevertheless, at the local level, even small sums of money can go a long way.

## BUILDING PATHWAYS TO RESILIENCE IN IRAQ

Neam Alqaseer (Ministry of Environment, Iraq)

Though Iraq continues to be classified as experiencing extreme fragility in the OECD fragility framework, it is showing notable signs of improvement. As a country emerging from an era of conflict, it is now turning its attention to addressing critical points of resilience, especially those associated with the impact of climate and environmental fragility.

Iraq is exposed to severe levels of fragility in the economic, societal and environmental dimensions. This is reflected in national statistics that show a complex demographic picture: The population is growing at a rate of 2.3% and is projected to reach nearly 80 million people by 2050. With 50-60% of the population under the age of 30, real concerns exist around extreme inequality and high unemployment rates. There is a risk that a youth dividend could turn into a liability, contributing to severe social and economic challenges without investment in both essential services and new employment opportunities to ensure a sustainable future for the expanding population. The central issue cutting across all of these factors is Iraq's ability to manage three intersecting challenges: its unfolding climate crisis, access to energy and urbanisation.

Climate change has made the lack of water resources an existential threat. The inefficient use of scarce water resources compounds the problems of reduced transboundary flows and increased pollution, with 87.8% being used for irrigation, which further exacerbates the water crisis. The Tigris and Euphrates rivers are critical for water and agriculture, and they are declining due to upstream infrastructure and climate change. Globally, Iraq accounts for about 0.68% of global greenhouse gas (GHG) emissions.

Iraq also faces significant challenges in energy access. Approximately 50% of the population lacks sufficient access to energy, and consequently, diesel generators have become an essential yet inadequate solution for approximately 60% of urban residents. These generators are costly, environmentally high emitting and ultimately unsustainable. Energy pressures intersect with the economic dimension of fragility as Iraq struggles with limited economic diversification due to its overdependence on oil revenues, limited non-oil sector development, weak private sector participation, infrastructure deficiencies, and economic instability and security concerns. Iraq's oil

revenues are also vulnerable to fluctuations in global oil prices.

Unplanned urbanisation is characterised by minimal public transport infrastructure, widespread use of diesel generators, heavy reliance on air conditioning, limited green spaces, and inadequate sewerage and water supply systems. Iraq's rapid urbanisation has also contributed to the extreme risk of pollution, including waste, plastic, dust and chemical pollution. Over 70% of the population now lives in urban areas. In light of Iraq's 2.6% annual urban growth rate, focusing on these urban challenges is an urgent necessity.

Overall, addressing sources of fragility is essential to ensure the well-being of the population, promote sustainable development, and safeguard the natural heritage and cultural diversity of the area. It requires a comprehensive approach that takes into account climate change, economic development and social equity.

### *CLIMATE-INDUCED DISPLACEMENT AND BUILDING CLIMATE SECURITY*

Climate security refers to the impact of the climate crisis on peace and security. All climate scenarios show that Iraq is going to face severe climate change impacts, especially in the likely event that the collective effort to limit the global temperature rise to 1.5°C fails. Climate change can trigger competition for natural resources, make livelihoods less secure and cause mass displacement, thus increasing the risk of social tensions and instability. It constitutes a significant threat to national security. Iraq is one of the countries in the world worst affected by climate change. Approximately 92% of Iraqi land is threatened by desertification and high temperatures, which are increasing at a rate seven times faster than the global average.

Climate-induced displacement has already been increasing in the central and southern regions of Iraq with each passing year. As of June 2024, according to Displacement Tracking Matrix (DTM), approximately 147 000 individuals remained displaced due to drought, land degradation, and other climate and environmental factors. They represent a large, growing and unplanned influx of people into host communities, which are often urban areas. The influx creates tensions over access to limited services and resources; growing competition over access to limited

natural resources, especially water, is sparking tribal conflicts. In Iraq, climate change, including its impact on human mobility, is closely linked to fragility and conflict. Therefore, climate action needs to build strong synergies with peacebuilding and conflict recovery efforts while ensuring human security for the Iraqi people through development efforts.

### ***MOVING FROM POLICY TO IMPLEMENTATION: BUILDING RESILIENCE TO MULTIDIMENSIONAL FRAGILITY***

#### *Mitigation action and the energy sector*

Recognising that environmental and economic dimensions of fragility intersect, Iraq has developed a series of strategies and initiatives to mitigate high-priority risks in the energy sector. These include the Zero Routine Flaring Initiative by 2030, supported by the World Bank, which aims to improve the reporting of gas flaring and includes a commitment by Iraq to reach zero routine flaring by 2028. Under this programme, Iraq decreased flare volume by 0.2 billion cubic metres between 2022 and 2023. Iraq has also stepped up its commitments on issues such as methane reduction. It was the first member of the Organization of the Petroleum Exporting Countries to endorse the Global Methane Pledge, thereby contributing to a collective effort to reduce global methane emissions by at least 30% by 2030 from 2020 levels.

Working with the private sector is an essential aspect of this process, including on commitments to develop best practices to respond to notifications of the Methane Alert and Response System (MARS). In this regard, the Iraqi ministries of oil and environment have initiated a number of projects on methane reduction that are implemented with oil companies in Iraq. These efforts have benefited from Iraq's collaboration in methane tracking, detection and reduction with the UNEP-convened Climate and Clean Air Coalition, the UNEP International Methane Emissions Observatory, the Clean Air Task Force, and the International Energy Agency. Efforts also are ongoing to foster co-ordination between the Bahrain Petroleum Company and the Supreme Council for Environment of Bahrain, focusing on a persistent source of methane emissions in the country. Iraq is also finalising its National Appropriate Mitigation Action, which consists of all mitigation processes in Iraq in every related sector over the coming years.

#### *Renewable energy*

In response to the need for efficient transition processes, the Iraqi government is working on a renewable energy regulation law, a draft of which is currently under review in the parliament's Electricity and Energy Committee. The proposal would update existing laws to support the renewable energy sector and stimulate investment in a way that contributes to achieving sustainable development and enhances national energy security. The Ministry of Electricity is leading the effort to increase renewable and clean energies in the country's energy mix by developing solar energy projects in different Iraqi regions, with the aim of achieving a total of 12 gigawatts a year from solar energy by 2030. The World Bank, the International Energy Agency, the Regional Center for Renewable Energy and Energy Efficiency, and the UNDP are providing invaluable technical and commercial support to Iraqi regions in the implementation of utility-scale solar power generation and solar installations on the rooftops of residential buildings.

### ***USING DEVELOPMENT TO PREPARE FOR FUTURE SHOCKS AND CRISES***

In the Iraq Vision 2030 strategy document, the government highlights the benefits of integrating environmental objectives into development plans and policies to improve the quality of life of its citizens, ensure the sustainability of production and consumption patterns, and reduce the impacts of environmental pollution and climate change. A national adaptation plan (NAP) is also being developed to work in tandem with the 2030 strategy as a part of Iraq's commitments towards the UN Framework Convention on Climate Change and Paris Agreement, which aim to reduce vulnerability to the impacts of climate change by building adaptive capacity and resilience. The NAP will include a Climate Vulnerability Index that considers baseline and future Representative Concentration Pathways (RCP) of the Intergovernmental Panel on Climate Change (IPCC) (RCP 2.6, 4.5, 7.0 and 8.5 scenarios). The NAP will consist of climate change risks and adaptation options for Iraq focused on key environmental and socio-economic sectors. Options to be presented include the following areas:

- **Agriculture** – introduction of drought- and salt-resistant crop and fodder varieties, education and training for farmers on better agricultural practices, and provision of financial resources to upgrade their equipment
- **Public health** – early warning systems for hazardous weather, education on the health risks of climate-related phenomena, and better access to

clean water and stable energy supply in times of extreme heat

- **Livelihoods** – support for farmers through re-training and diversification of incomes, provision of loans and grants to stimulate new private enterprises, and development of new industries including clean energy
- **Water resources** – more efficient agricultural irrigation practices, upgrading of urban water supplies, reduction of water pollution from agriculture and industries, incentivising of water saving with metering and appropriate tariffs, co-ordinated management of water resources across governorates, and collaboration with neighbouring countries for a more joined-up approach
- **Land resources** – scaling-up of restoration of degraded land and prevention of further desertification with technological and nature-based solutions, restoration of the marshlands with sufficient water flows, and development of stronger regulatory frameworks on land use, urban planning and protected areas including the prime minister's initiative to plant 5 million trees and palm trees in Iraq to combat desertification
- **Human mobility** – financial support to internally displaced persons to return to home regions, training for jobs in the new communities, and support to get safe housing and access to clean water, health facilities and education
- **Energy** – update of health and safety regulations in running energy facilities, improvement of efficiencies in the use of water, regulation of water and air pollution from energy facilities, and assurance of stable access to electricity for all people.

### *FINANCING DEVELOPMENT AND RESILIENCE*

With the Iraq Development Fund, the government aims to attract investment to Iraq in order to develop non-oil economic resources; launch sustainable economic and social development; and find solutions to economic, social and environmental crises by expanding modern technology and attracting capital and financial resources from the private sector. The government has succeeded in obtaining investments worth up to USD 100 billion. The Central Bank of Iraq has supported this effort through a series of initiatives aimed at promoting economic growth, providing support for financing small and medium-sized enterprises, and stabilising the general level of prices. It has also driven the Renewable Energy Support Initiative to finance the

purchase of electric power generation units from renewable sources, allocating 1 trillion Iraqi dinars (USD 750 million).

To address human capital needs, the Riyada Initiative for Development and Employment, launched by the prime minister, aims to develop the skills and talents of young people and job seekers by training them and preparing them for the economic market. The initiative provides an opportunity for young people to learn how to set up their own projects; the state provides financial support for these projects in addition to certificates of participation for trainees.

Once again, financing climate initiatives is at the forefront of the government's efforts. The Climate Investment Plan is preparing an investment document to tackle climate change impacts and drive economic diversification, with the support of the United States Agency for International Development and the UNDP. The National Green Growth Strategy 2024 commits to building a brighter, greener and more prosperous Iraq and benefits from international support to implement projects, national documents and programmes to combat climate change. The National Investment Commission targets opportunities for private sector companies to invest in a range of sectors; a technology needs assessment analyses climate change mitigation and adaptation in Iraq's most vulnerable sectors and the association action, barriers and the enabling framework, the market, and climate impacts and associated benefits.

Implementation is underway on several projects, including 1) a project to build the resilience of the agricultural sector to climate change (BRAC) in the four poorest governorates in Iraq (Dhi Qar, Maysan, Diwaniyah and Muthanna) funded by Adaptation Fund in conjunction with a larger project called Encouraging Smallholder Farming, which is financed by a USD 16 million loan from the International Fund for Agricultural Development, and 2) a project to enhance the resilience of the population of Hor al-Hawizeh and increase their resilience to climate change in Maysan Governorate/Hor al-Hawizeh, which is funded by the Swedish International Development Cooperation Agency and implemented through UNDP. Other projects are under development with the Green Climate Fund allocation of USD 38.5 million, the governorates of Muthanna, Najaf and Karbala; and the Food and Agriculture Organization. Separately, projects are being implemented with the allocation USD 10 million in Basra and Dhi Qar with the Green Climate Fund and in Qadisiyah with the World Food Programme.

## *MIGRATION AND DISPLACEMENT*

The recently launched 2024-30 National Strategy for the Protection and Improvement of the Environment in Iraq is the main strategy followed by the Ministry of Environment to deal with environmental issues, including climate-related displacement, within the national frameworks of development policy. Working with the International Organization for Migration and others, the government aims to address the intersection of climate change, peace, security and human mobility in Iraq by focusing on the intersections that matter for delivering climate action plans and policies, including the next generation of nationally determined contributions and the migration chapter of the NAP. These actions are closely aligned with the National Security Advisory's work on integrating climate security as

part of the new national security strategy (based on the understanding that climate security is national security).

## *CONCLUSION*

Iraq is on the front line of climate change. The impacts of climate change will exacerbate water scarcity and affect livelihoods while simultaneously transforming the economy as the country seeks to diversify away from fossil fuels in a gradual and just fashion. After years of conflict, Iraq has demonstrated a strong commitment to the international efforts to reduce climate change globally and nationally. By taking action to reduce GHG emissions and increase resilience, it has logged some early results. The journey from years of war and conflict and from an oil-dependent economy to a more sustainable, peaceful and green future will be long, but it has definitely begun.



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## NOTES

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<sup>1</sup> The contribution was made on condition of anonymity.

<sup>1</sup> Joao Saldanha University, December 2024.

<sup>4</sup> For more information on Pharmakina, see <https://www.pharmakina.com/>.

<sup>5</sup> See <https://projects.worldbank.org/en/projects-operations/project-detail/P145196>.

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<sup>9</sup> These development grants include the World Bank Integrated Economic Development and Community Resilience project's performance-based grants; the UNCDF performance-based climate resilience grants; and the European Union-funded PGSD project that uses the PCDF modality to deliver sector grants to provinces.

<sup>10</sup> This contribution is based on the 2023 research paper by Klöck available at <https://www.afd.fr/fr/ressources/ladaptation-cotiere-aux-comores-le-role-des-perceptions-et-le-risque-de-mal-adaptation>.

<sup>11</sup> All references to perspectives of the local population are from the authors' surveys, which were conducted in several villages across the Comoros. For more information, see <https://www.afd.fr/fr/ressources/ladaptation-cotiere-aux-comores-le-role-des-perceptions-et-le-risque-de-mal-adaptation> and <https://doi.org/10.4000/11pd7>.



# Annex A. Methodological notes

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This annex provides an overview of the methodological notes for the data and evidence used in this report. Further information on the methodology for the States of Fragility report series is available on the States of Fragility data and visualisation platform: <http://www3.compareyourcountry.org/states-of-fragility/about/0/>. This webpage also contains a link to the underlying data and statistical code (produced in R and R Studio) to produce the fragility framework. The term “high and extreme fragility” refers to the 61 contexts identified on the snail infographic of the 2025 edition of the OECD’s multidimensional fragility framework. The term medium to low fragility refers to the other 116 contexts with the grouping medium to low fragility (ODA eligible) referring to the countries and territories on the DAC List of ODA Recipients on aid in 2024, available at [development-finance-codelists.oecd.org/CodesList.aspx](https://development-finance-codelists.oecd.org/CodesList.aspx)

## The methodology for the OECD’s multidimensional fragility framework

The OECD characterises fragility as the combination of exposure to risk and insufficient coping capacities of the state, system and/or communities to manage, absorb or mitigate those risks. The OECD’s multidimensional fragility framework, introduced in the 2016 edition of States of Fragility, measures fragility on a spectrum of intensity across six dimensions: economic, environmental, human, political, security and societal. It relies on a mixed methods approach that examines contexts within each dimension and then aggregates this information to obtain an overall picture of fragility. The methodology is based on a two-stage principal components analysis (PCA), with a hierarchical clustering procedure to group contexts according to similar characteristics in each dimension. The foundation is based on 56 indicators derived from independent third-party data sources, all of which are recorded and explained in greater detail on the States of Fragility platform. Each of the six dimensions contains eight to ten indicators that are aggregated into principal components in the first stage PCA; the first two principal components in each dimension are used for the second stage PCA. The first principal component that results from this second stage PCA represents the overall fragility score for each context. Based on this score, a context is classified as either exposed to high fragility, if its score is lower than -1.18, or exposed to extreme fragility, if the score is lower than -2.7. Thresholds for high and extreme fragility were chosen based on natural breaks in the data. This analysis assesses fragility across 177 contexts for which sufficient data were available, as denoted by data being available by context for at least 70% of indicators.

Population statistics were sourced from UN DESA (2024<sup>[1]</sup>), using both the “Estimates” and “Medium Variant” (e.g. from 2024 onward). Regional and income group classifications were based on the (World Bank, 2024<sup>[2]</sup>), Country and Lending Groups with classifications available for all contexts exposed to high and extreme fragility apart from Venezuela. The step-by-step process for the PCA and hierarchical clustering procedure is available on the States of Fragility platform as well as the methodological notes and caveats regarding the data collected for the analysis. Additional information is available upon request.

## Financial statistics

Aid statistics cited in this report are available until 2023. They are deflated to USD constant (2022) when used in timeseries and represented in USD million disbursements or USD billion disbursements. When figures from 2023 are quoted alone, these are usually cited in USD current prices. They are sourced from the OECD aid statistics database specifically the DAC2A (2025<sup>[3]</sup>) and Creditor Reporting System (OECD, 2025<sup>[4]</sup>). The sources of other financial statistics are cited in the text, using the most recent values – usually 2023.

### *Humanitarian-development-peace (HDP) nexus*

All other CRS purpose codes not listed below under humanitarian or peace fall under development.

**Table A A.1. Humanitarian**

Purpose Name	Purpose Code
Material relief assistance and services	72010
Emergency food assistance	72040
Relief co-ordination and support services	72050
Immediate post-emergency reconstruction and rehabilitation	73010
Multi-hazard response preparedness	74020

**Table A A.2. Peace and types of peace**

Purpose Name	Purpose Code	Type of Peace
Public sector policy and administrative management	15110	Secondary Peace
Public financial management	15111	Secondary Peace
Decentralisation and support to subnational government	15112	Secondary Peace
Anti-corruption organisations and institutions	15113	Secondary Peace
Legal and judicial development	15130	Secondary Peace
Democratic participation and civil society	15150	Secondary Peace
Legislatures and political parties	15152	Secondary Peace
Media and free flow of information	15153	Secondary Peace
Human rights	15160	Secondary Peace
Women's rights organisations and movements, and government institutions	15170	Secondary Peace
Ending violence against women and girls	15180	Secondary Peace
Facilitation of orderly, safe, regular and responsible migration and mobility	15190	Secondary Peace
Security system management and reform	15210	Core Peace
Civilian peacebuilding, conflict prevention and resolution	15220	Core Peace
Participation in international peacekeeping operations	15230	Core Peace
Reintegration and SALW control	15240	Core Peace
Removal of land mines and explosive remnants of war	15250	Core Peace
Child soldiers (prevention and demobilization)	15261	Core Peace

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# States of Fragility 2025

States of Fragility 2025 considers a world of shifting power dynamics, where the most severe impacts of crisis, conflict and instability converge in the 61 contexts identified with high and extreme fragility. Multidimensional fragility lies at the core of the geopolitical shifts that are disrupting decades long global power equilibria, creating challenges and opportunities that require deep reflection and rapid adaptation across humanitarian, development and peace communities.

The report analyses the state of fragility in 2025, how it shapes global structural trends, current responses to it, and how it is perceived and tackled by the people most exposed to its impact: the 2 billion people in contexts with high and extreme fragility that account for 25% of the world's population but 72% of the world's extreme poor. Maintaining a focus on the furthest behind is more critical than ever for development partners, as a global good and a geostrategic necessity.



PRINT ISBN 978-92-64-97732-7  
PDF ISBN 978-92-64-96657-4



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