LOWY INSTITUTE
PACIFIC AID MAP

2025 KEY FINDINGS REPORT

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The annual Pacific Aid Map — launched by the Lowy Institute in 2018 — is a comprehensive database tracking official development finance (ODF) flows in the Pacific Islands region. By promoting greater transparency of ODF flows, the Lowy Institute project seeks to increase coordination, improve accountability, and strengthen decision-making and policy debate on aid, development, and geopolitical competition in the region.

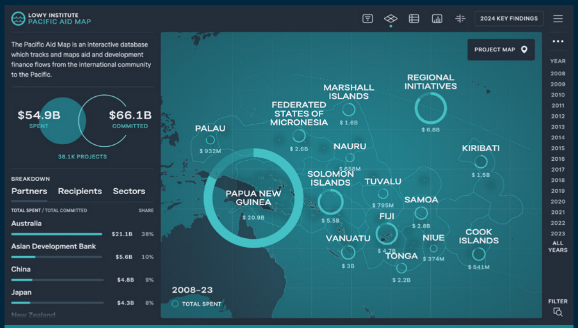
The eighth edition of the Pacific Aid Map encompasses the period from 2008 to 2023. It includes data on more than 38,000 projects and activities carried out by 76 development partners, totalling $55 billion in development finance. The research covers 14 states of the Pacific Islands region: Cook Islands, Fiji, Kiribati, Marshall Islands, Federated States of Micronesia, Nauru, Niue, Palau, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, and Vanuatu.

The Map synthesises millions of data points from official reporting mechanisms and databases. It combines this with information from thousands of publicly available documents including annual reports, financial statements, budget documents, news media reporting, and social media sources. The resulting database is the most comprehensive account ever created of both committed and disbursed development projects in the Pacific Islands region.

This 2025 Key Findings Report includes an analysis of the Pacific Islands' evolving development finance landscape and a series of profiles on trends in the 14 Pacific Island countries covered in the database.

Key findings in 2025

1. Pacific Islands aid falls to pre-pandemic levels amid steep lending contraction
2. Australia holds the line despite aid retreat by Western donors
3. Impact of USAID cuts overstated but compounds US reputational freefall
4. China's aid model grows more sophisticated with record grants and grassroots projects
5. Strategic infrastructure spending booms as health and education support slides



To see more and use the fully interactive features of the Pacific Aid Map, visit pacificaidmap.lowyinstitute.org

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Overview

Australia holds the line as global aid declines

The global development landscape faces a moment of profound upheaval as major donors, most notably the United States, sharply cut back on foreign aid. These reductions carry far-reaching consequences, not only for sustainable development in the world's poorest countries, but also in the contest for influence between China and Western nations. The Pacific Islands face an especially uncertain outlook as the world's most aid-dependent region, confronting both large development financing gaps and an aid landscape increasingly shaped by geopolitical competition.

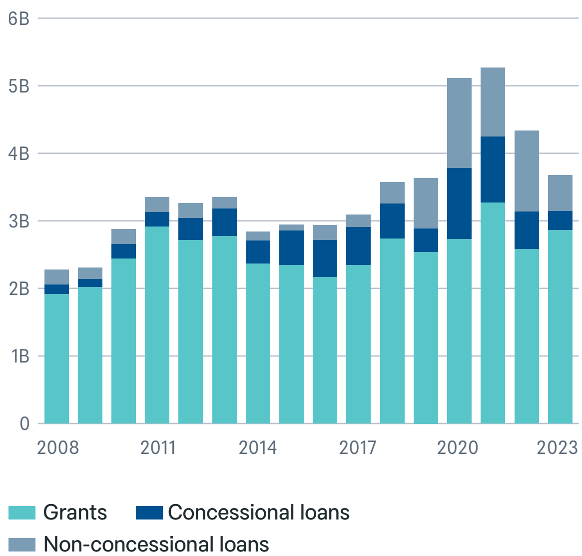
Against such a backdrop, this eighth edition of the Pacific Aid Map presents five key findings that are critical to understanding the future of development and competition in the region.

First, the total amount of development support provided to the Pacific Islands region has fallen back to pre-pandemic levels. Official development finance (ODF) to the Pacific Islands fell to $3.6 billion in 2023 — a 16% decline from 2022 and the second consecutive year of record contraction. Beneath this topline trend, grant support has remained stable while loans have dropped sharply as the emergency financing extended during the pandemic receded (Figure 1).

FIGURE 1

Official development finance to the Pacific, by type

Spent, constant 2023 US$

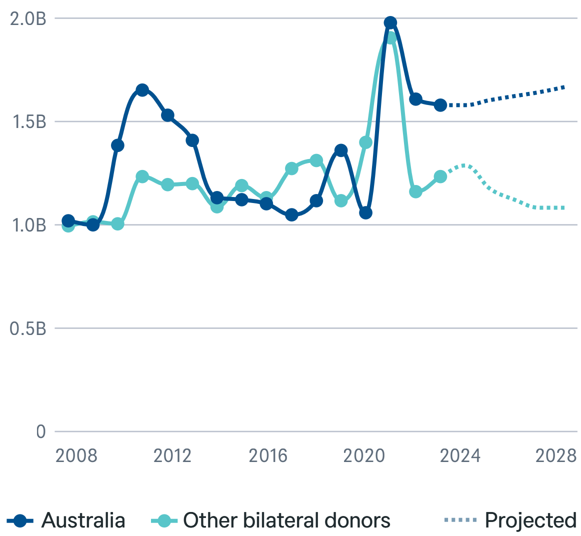


Second, Australia's dominance as the Pacific Islands' leading development partner looks likely to insulate the region from the bulk of recent aid cuts. The United States, the United Kingdom, New Zealand, and much of Europe are cutting foreign aid budgets. Australia, however, accounts for 43% of ODF to the region and has stabilised its post-pandemic support at a high baseline (Figure 2). Looking ahead, rising Australian infrastructure lending should provide an important offset to cuts by other partners, suggesting a broadly stable outlook for Pacific Islands development finance, in sharp contrast to the contractions expected elsewhere in the developing world.

FIGURE 2

Official development finance to the Pacific, Australia vs bilateral donors

Spent, constant 2023 US$



Third, the Pacific Islands are far less exposed to USAID cuts than commonly assumed. Most US support to the region is delivered through protected Compact of Free Association Agreements, leaving a comparatively small footprint outside of these arrangements. Nonetheless, there are some acute impacts, particularly on vaccination and media programs. The cuts are also reputationally damaging for the United States, reinforcing perceptions of inconsistency and amplifying China's diplomatic narratives about American unreliability.

Fourth, China's engagement has stabilised after a prolonged decline in lending. Beijing has recalibrated its regional aid strategy, prioritising record levels of grant financing, a high volume of grassroots projects, and strategic large-scale initiatives. The legacy of China's earlier loan-heavy approach remains visible as countries such as Samoa, Tonga, and Vanuatu face steep debt repayments for projects signed in the 2010s.

Finally, geopolitical competition has seen funding for infrastructure become the dominant theme across the region. While helpful, the region's infrastructure gap remains large. Meanwhile, funding for human development sectors has declined. Education support is now near a 15-year low, raising concerns about the long-term foundations for the region's development.

Taken together, these trends point to a Pacific Islands aid landscape that, while stable relative to other developing regions, faces a flat financing outlook dependent on a narrowing pool of partners. What was once described as a period of choice for Pacific Island governments appears to be giving way to an era of constrained options.

Note: The term 'Pacific' in this report refers to the Pacific Islands region.

Understanding development finance

Official Development Finance (ODF)
Public funds for the promotion of economic development and welfare of developing countries.

Official Development Assistance (ODA)

- Public or official source
- For the purpose of development
- Concessional

ODA consists of grants (donations that do not have to be paid back) and concessional loans (below market rate and on terms favourable enough to contain a substantial **grant equivalent**).

ODA is primarily provided to low-income countries with little capacity for repayments, or for projects that are unlikely to generate commercial returns.

Other Official Flows (OOF)

- Public or official source
- For the purpose of development
- Semi- or not concessional

OOF consists of financial instruments that do not meet ODA criteria. In the Pacific, it mostly includes loans that are provided on a semi- or non-concessional basis, meaning the finance is not on favourable enough terms to contain an adequate **grant equivalent**.

OOF is most commonly extended to middle-income countries with capacity for repayment.

Standards of concessionality are defined by the OECD's "grant equivalent".[1] The income level of a recipient country determines the grant equivalent threshold. For example, for a transaction to a low-income country to be considered ODA, the grant element must be 45%, while the threshold is 15% for a lower middle-income country, and 10% for an upper middle-income country.

Development partners explained
In terms of development finance, partners are commonly separated into two categories:

Traditional development partners

The Pacific's traditional partners are governments, organisations, or entities that have a long-standing history of providing assistance and support to the region. These partners typically include established development partner countries such as the United States and Australia, international organisations such as the United Nations, and multilateral development banks such as the Asian Development Bank and the World Bank.

Non-traditional development partners

This group includes emerging partners who are not members of the OECD's Development Assistance Committee, such as China, Taiwan, Saudi Arabia, Qatar, India, and Russia, as well as multilateral entities where non-traditional partners play a key role in their governance, such as the Asian Infrastructure Investment Bank and the Islamic Development Bank.

1. Pacific Islands aid falls to pre-pandemic levels amid steep lending contraction

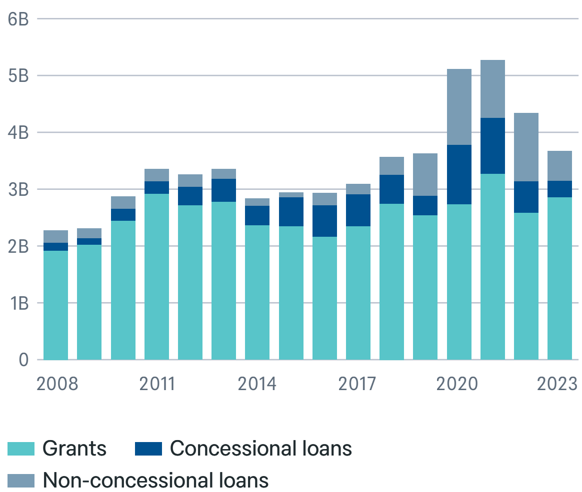
After two years of record contractions, Pacific official development finance volumes have returned to pre-pandemic levels. The decline has been driven by a sharp fall in lending to Papua New Guinea and Fiji, while grant support has remained stable across the rest of the region.

Total official development finance (ODF) to the Pacific Islands region fell to $3.6 billion in 2023 — a 16% drop from 2022 levels (Figure 3). This marks the second consecutive year of record contraction, as the last of the pandemic-era emergency financing exits the region. What was once an open question — to what extent the pandemic-era influx of support would be sustained — now appears largely answered. With the 2023 decline, ODF has effectively returned to 2018–19 financing levels.

FIGURE 3

Official development finance to the Pacific, by type

Spent, constant 2023 US$



The fall in aggregate ODF in 2023 was largely driven by major contractions in concessional and non-concessional lending. The total volume of loans disbursed to the region more than halved, falling from $1.8 billion to $813 million. Grant financing in 2023, however, remained slightly above its pre-pandemic level, with most Pacific countries seeing grant volumes on par with, or above, average levels from 2015–19. This stability has provided some cushioning amid worsening fiscal pressures, as many Pacific governments confront slower than anticipated growth and rising debt pressures.[2]

Fluctuations in aggregate development financing flows to the region have not played out uniformly across individual countries. Financing trends have diverged between the Pacific's largest economies, Papua New Guinea and Fiji, and the rest of the region (Figure 4). Both countries received substantial loan financing during the pandemic but have exited the crisis period at different settling points. In Papua New Guinea, grant financing totalled $650 million in 2023, falling short of its inflation-adjusted 2015–19 average of $720 million. Yet loan volumes remain high, supported by Australian budget assistance, Asian Development

Bank connectivity projects, and Chinese investment in the communications sector. Fiji, by contrast, received near-record levels of grant financing in 2023, while loan volumes fell well below historical averages.

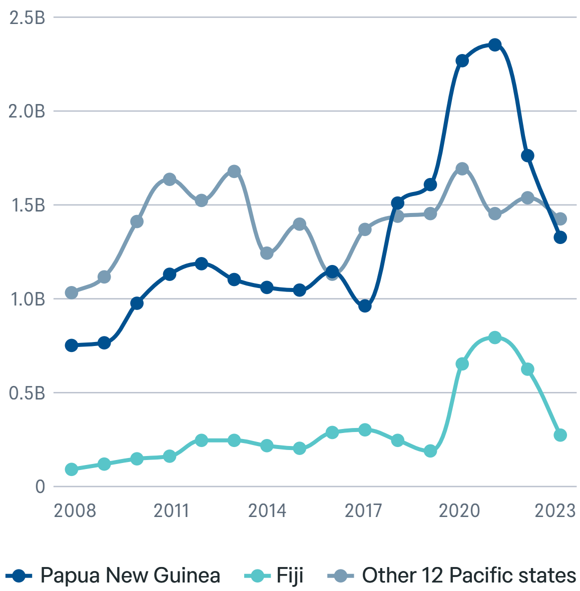
For the region's 11 economies that largely rely on grant financing, the picture has been stable. Total ODF to these countries has remained at around $1.4 billion over the past five years (Figure 4). However, this topline consistency masks considerable variation in the composition of flows and country-level support.

In 2023, less than 5% of ODF flows to these economies came in the form of loans — a decade low and less than half the 2015–19 average share of 11%. This trend reflects both the collapse of Chinese lending and a broader decline in appetite for loans amid rising debt risks. Importantly, grant financing, particularly for region-wide initiatives, has remained elevated, helping to offset the decline in lending.

FIGURE 4

Official development finance to the Pacific, by recipient

Spent, constant 2023 US$



At the country level, variability remains high. Samoa, Vanuatu, Palau, and Nauru all received less ODF in 2023 than their 2015–19 averages, while Kiribati and Tuvalu saw record annual inflows. In Kiribati, this increase was largely driven by Chinese infrastructure financing and equipment donations, whereas in Tuvalu it reflected increased Australian support in the lead-up to the Falepili Union announcement.

2. Australia holds the line despite aid retreat by Western donors

Sharp aid cuts by major Western donors have thrown the global development landscape into disarray. Australia's dominant role in the Pacific Islands is likely to insulate the region from the worst impacts, resulting in a flat but fragile development financing outlook.

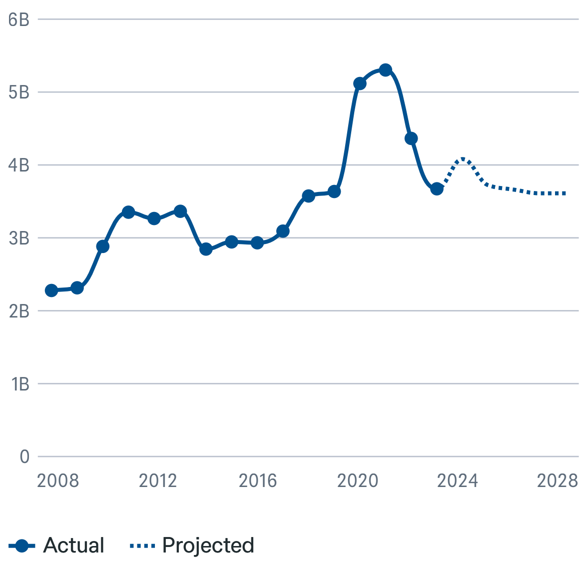
Since the end of the Pacific Aid Map 2023 data reporting period, the global aid landscape has seen considerable upheaval. The United States has announced an estimated $60 billion in cuts to its development program, including immediate freezes to project financing, signalling a sharp withdrawal from what had been the world's largest source of official development finance.[3] The United Kingdom has followed suit, redirecting around $7.6 billion in aid funding to defence and national security, resulting in an estimated 40% cut to its global aid program.

Cuts to European aid programs, totalling an estimated $17.2 billion, are scheduled for the remainder of the decade.[4] These reductions predate the agreement by NATO member states to increase defence and security spending to 5% of GDP by 2035, which could further weigh on future European aid spending. Closer to home and of particular significance to the Pacific is New Zealand's latest budget, which indicates a 35% reduction in its aid spend by 2027.[5]

FIGURE 5

Projected official development finance to the Pacific

Spent, constant 2023 US$



Looking ahead — using figures based on current budget documents, outlook statements, public announcements, and credible estimates by other researchers — this report projects some short-term volatility in ODF flows to the Pacific, followed by a period of flatlining (see endnotes for full list of assumptions).[6] The 11% rise in ODF to the region in 2024 is driven largely by increased disbursements by the Asian Development Bank (ADB), which is followed by a 9% contraction in 2025 as US, UK, and European cuts take effect. By 2028, ODF is projected to stabilise at around $3.6 billion annually, well below pandemic-era highs but moderately above the 2015–19 average of $3.2 billion (Figure 5). There is considerable uncertainty around this assessment, though, particularly depending on whether aid cuts are applied uniformly across countries and regions, and whether major Australian budget support loans to Papua New Guinea are sustained.

While the Pacific, like the rest of the globe, has likely passed "peak aid", its outlook is far more stable than that of other developing regions confronting significant financing shortfalls. That is because ODF to the Pacific is heavily dominated by players that are not cutting their assistance — notably Australia and, to a lesser extent, the multilateral development banks. Australia remains the Pacific's largest development partner by a wide margin. In 2023, Australia alone accounted for 43% of all ODF to the region. The Asian Development Bank and World Bank combined account for a further 12%. Australia and the two multilateral development banks therefore account for more than half of all ODF to the region.

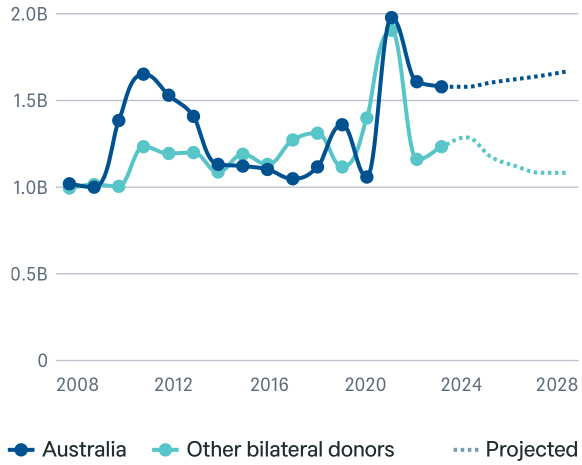
By contrast, the United States, the United Kingdom, and European donors play a relatively modest role in the Pacific, despite being among the largest global donors. In 2023, the United States contributed just 1% of all ODF to the region, excluding funding to the Compact states, which has largely been shielded from recent aid cuts (see next section). European donors collectively accounted for less than 5% of Pacific ODF, while the United Kingdom contributed only 0.3%. The most consequential aid-reducing donor for the region is New Zealand, which provided around 10% of all ODF in 2023. Overall, the combined aid from these cutting donors amounts to roughly 18% of Pacific ODF. If reductions occur in line with cuts to their global aid budgets, the Pacific will face an estimated $200 million annual shortfall in development support.

Australia's position as the region's leading donor is likely to provide an important counterweight to aid cuts by other donors. Total Australian ODF has stabilised at a relatively high baseline of nearly $1.6 billion in 2023 — well above its annual pre-pandemic average of $1.2 billion (Figure 6). In the coming years, Australia's aid spending is expected to remain flat in inflation-adjusted terms. However, rising infrastructure lending under the Australian Infrastructure Financing Facility for the Pacific, which has an AU$2 billion pipeline of projects, should see the total volume of Australian ODF to the region rise modestly.

FIGURE 6

Official development finance to the Pacific, Australia vs bilateral donors

Spent, constant 2023 US$



This stabilisation at a higher post-pandemic baseline, combined with cuts by other Western donors, has driven a stark shift in the Pacific's bilateral aid landscape. After tracking roughly in line with the aggregate spending of the region's other bilateral aid partners from 2008–21, the post-pandemic period has seen a clear divergence. As of 2023, Australia provides more than half of bilateral ODF to the region, a share that could rise to around 60% by 2028.

The net effect is a stable but increasingly concentrated aid landscape. While Australia and multilateral development banks remain key pillars of support, the region's development finance outlook will be heavily reliant on their continued engagement and successful project delivery. Any disruption to Australia's infrastructure pipeline or multilateral development bank commitments could trigger a sharper decline in ODF, underscoring the fragility of the current equilibrium and Pacific governments' growing dependence on a narrow set of development partners.

3. Impact of USAID cuts overstated but compounds US reputational freefall

USAID cuts are unlikely to materially affect Pacific Island aid levels, given most US support flows through protected Compacts of Free Association. However, even modest cuts amplify uncertainty and reputational risks, reinforcing perceptions of US inconsistency.

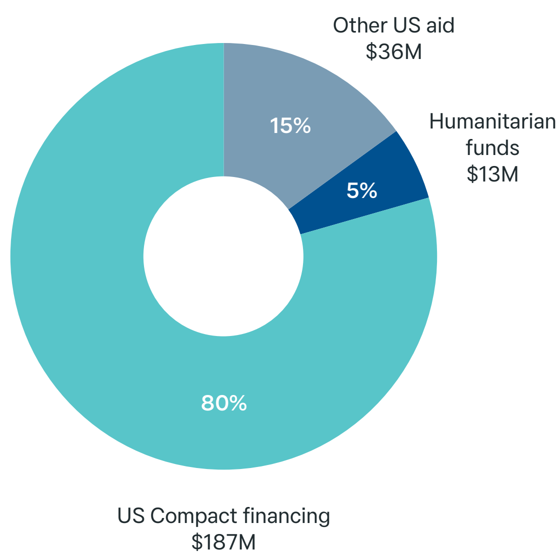
Despite widespread concern, the bulk of US development support to the Pacific is likely to be insulated from Trump administration funding cuts. Around 80% of US aid to the Pacific is directed towards the North Pacific states — Palau, Federated States of Micronesia, and Marshall Islands — through the Compacts of Free Association (Figure 7). Unlike the broader USAID program, these financing flows fall under the US Department of the Interior. This, along with the funding's link to defence and maritime access agreements, makes both the Compacts and their associated aid financing highly likely to be protected from the wider rollback in US aid spending.

If the Compact of Free Association states are excluded, the United States ranks as only the ninth-largest donor to the Pacific, contributing 1.4% of total aid to the region — just $42 million annually since 2008. Still, there is some important fallout from the cuts, with programs in Melanesian countries appearing most at risk.[7] There is specific concern around the effects of reduced US health sector support, particularly for current and planned vaccination and HIV programs in Papua New Guinea and Fiji. These cuts are poorly timed, as HIV cases are rising sharply in both countries and the issue has become a matter of significant public and political concern.[8] In June 2025, Papua New Guinea declared a national HIV crisis.[9] That said, the cuts may not fully materialise, with some US senators pressing for the US President's Emergency Plan for AIDS Relief (PEPFAR) program to be spared.[10]

The aid cuts have also served to further concentrate the Pacific media space, resulting in the closure of the Pacific-focused Radio Free Asia subsidiary BenarNews and leading to an estimated 80% payroll reduction for In-depth Solomons and Inside PNG.[11] Against a backdrop of declining media freedom in the region, these reductions are likely to have an outsized impact. The cuts coincide with a significant expansion in Chinese support to Pacific media outlets, particularly through the provision of equipment, facilities, and training.[12]

There are also second-order effects from US staffing cuts and potential reductions in support to multilateral agencies and non-governmental organisations. Although the United Nations accounts for just 1.5% of total aid to the Pacific, it plays an outsized role in vaccinations, food security, and humanitarian assistance. In 2022, the United States contributed more than $18 billion to the United Nations — around a quarter of its total budget. Significant reductions in US support to the United Nations would likely constrain the capacity of key agencies active in the Pacific, including the World Food Programme (50% US-funded), UNAIDS (41%), and UNHCR (36%). The World Health Organisation and GAVI have also seen major shortfalls in US support, both of which run health programs in the region.

FIGURE 7
US official development finance to the Pacific, annual average 2008–23
Spent, constant 2023 US$



Beyond the direct program impacts, the broader consequence of the USAID cuts lies in the reputational damage to the United States. After a decade of promises to Pacific governments and heightened rhetoric about the region's importance to US foreign policy interests, the rollback of development spending will reinforce perceptions of neglect and unreliability. This plays directly into China's diplomatic narrative in the Pacific, with Beijing promoting its own South–South cooperation as an alternative.

4. China's aid model grows more sophisticated with record grants and grassroots projects

After a prolonged decline in lending, China's development engagement in the Pacific Islands region has stabilised and recalibrated. Funding remains below 2010s levels, but the focus has shifted from debt-driven infrastructure to more targeted, grant-based and grassroots engagement.

In 2023, China provided $230 million in official development finance to the Pacific, a 9% decline from 2022 but broadly consistent with its post-2020 trend (Figure 8). The year-on-year contraction saw China fall behind New Zealand, Japan, and the United States in the 2023 annual spending rankings. However, China's narrower focus on a smaller set of Pacific countries means it remains the second-largest bilateral donor behind Australia in Kiribati, Federated States of Micronesia, Papua New Guinea, Solomon Islands, and Vanuatu.

China's post-pandemic transition to predominantly grant-financed development has accelerated, with preliminary data indicating a record $207 million in grant projects signed in 2024 (Figure 8) and a similar trajectory for the first half of 2025. In inflation-adjusted terms, China's grant commitments in 2023 were nearly double its $112 million pre-pandemic average. The $135 million China–Fiji Vanua Levu Bridges and Roads Project announced in 2024 stands as China's largest-ever grant-funded initiative in the Pacific. Record-sized grants were also announced for Tonga and Solomon Islands to finance national stadiums and sporting complexes, and in Vanuatu to fund the construction of a presidential palace and ministerial buildings.

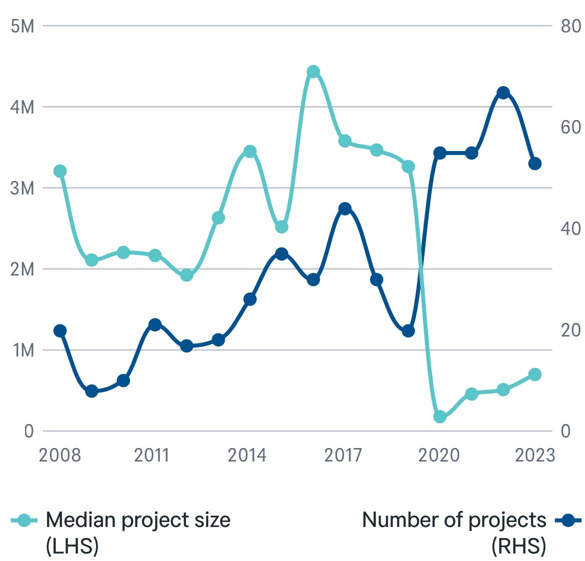
As China has transitioned more of its aid mix towards grants, its engagement has also become smaller in scale and more locally targeted, aligning with Xi Jinping's push for a "small and beautiful" project approach (Figure 9). Between 2008 and 2019, the median project spend was around $3 million. Since 2020, this figure has dropped to $470,000. This trend is driven by a notable increase in the volume of grassroots and aid-in-kind donations, with China engaging heavily with provincial and local political actors, schools, police forces, and hospitals across the Pacific. China has also maintained its funding to budget support and discretionary funds for select partners, notably the Solomon Islands Constituency Development Fund and Kiribati's Social Stability Fund. In 2024, China announced a $20 million budget support package to Solomon Islands, indicating continued use of this aid modality.

FIGURE 8

China's official development finance to the Pacific
Committed and spent, constant 2023 US$

FIGURE 9

China's project size and volume
Number of projects and median project spend, constant 2023 US$

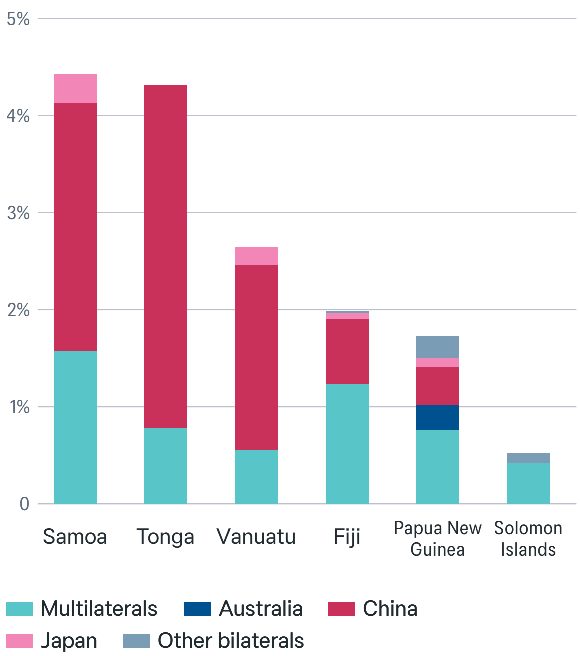


While the recovery in Chinese engagement since 2020 has been largely grant-driven, loan-financed projects have not disappeared entirely. Since 2022, these have included the $75 million Digital TV Transformation Project in Papua New Guinea (2022), the $66 million Huawei cell tower rollout in Solomon Islands (2022), and in Vanuatu, the $44 million West Ambae Tarseal Road Project (2024) alongside several phases of the Pentecost, Tanna, and Malekula road projects (2021–25). Together, these projects demonstrate that China's debt-financed infrastructure engagement remains active, albeit more selective.

FIGURE 10

External public debt service payments for Pacific countries

Payments due, 2022–25 average, % of GDP



At the same time, the legacy of China's earlier loan-heavy approach remains visible. The standard terms of Chinese loans, typically involving a 3–5 year grace period followed by 15–20 years of repayments, mean that many loans issued during the mid-2010s lending boom are now in acute repayment phases. Tonga is facing particularly burdensome debt repayments. China previously allowed Tonga to repeatedly defer debt repayments but without extending the maturity of its loans. This means Tonga must now repay an especially large amount within a short window. Samoa and Vanuatu also face notably large debt repayments to China (Figure 10).

5. Strategic infrastructure spending booms as health and education support slides

Infrastructure has emerged as the Pacific Islands' dominant development finance theme, driven by acute needs and intensifying geopolitical competition. Yet despite record flows, investment has only marginally narrowed the region's infrastructure gap and has come at the expense of human development sectors.

Infrastructure has become the fastest-growing area of development finance in the Pacific over the past decade, marking a clear shift in the sectoral focus of external funding to the region. In 2008, infrastructure accounted for just 15% of total official development finance. By 2019, that share had doubled to more than 30%. As of 2023, infrastructure made up more than a quarter of all newly committed financing. What can be broadly categorised as strategic infrastructure — key ports, airports, telecommunications and power generation infrastructure — has become a particular focus of new financing (Figure 11), while support for other infrastructure has been relatively stable.

Two key factors are driving this trend. The first is developmental need. The International Monetary Fund estimates that the Pacific faces an annual infrastructure

FIGURE 11

Strategic infrastructure official development finance

Spent, constant 2023 US$

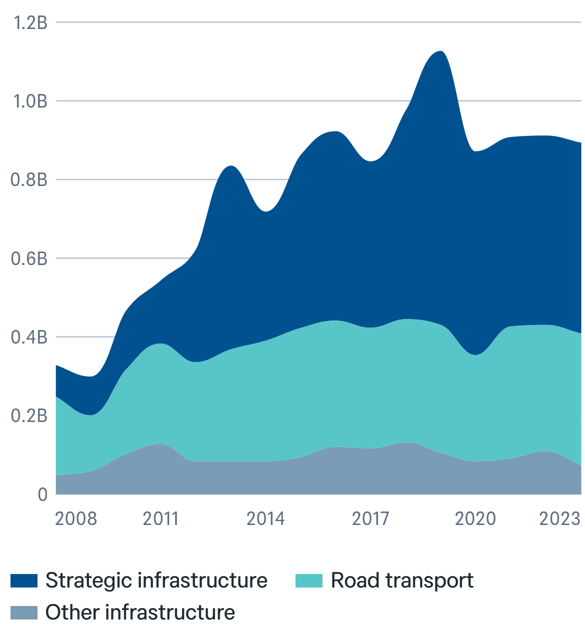


FIGURE 12

Sources of bilateral debt in the Pacific

Loan disbursements, constant 2023 US$

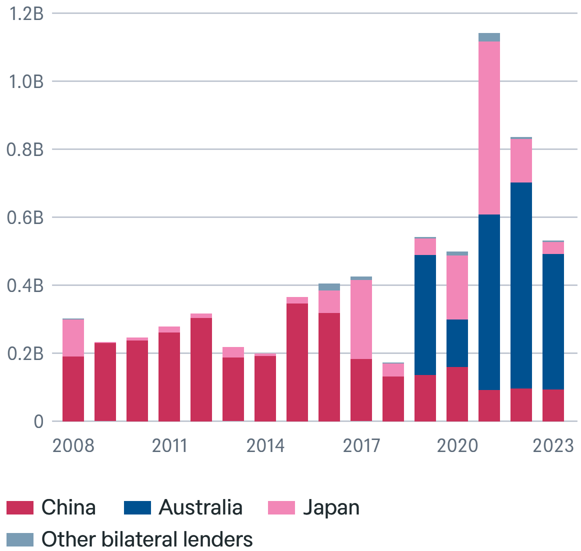
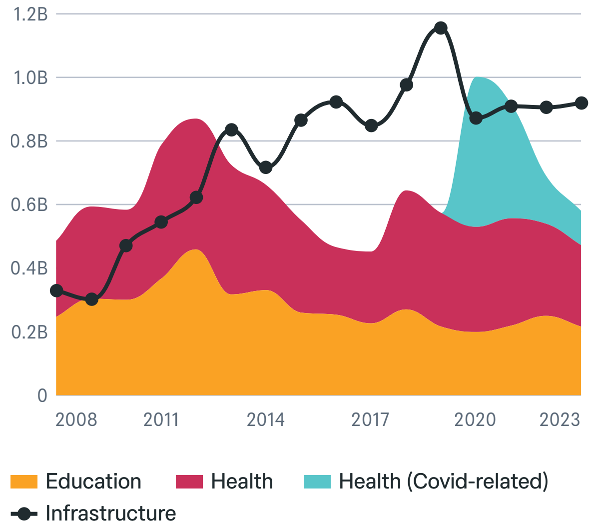


FIGURE 13

Infrastructure vs education and health official development finance

Spent, constant 2023 US$



financing gap of around $1.6 billion, particularly for climate-resilient and hard adaptation investments.[13] Rising awareness of the region's acute climate vulnerability has prompted a reallocation of aid towards adaptation and mitigation initiatives, as well as the entrance of dedicated climate players such as the Green Climate Fund. While challenges persist around access and absorptive capacity, these players have injected much-needed resources into the region's infrastructure landscape.

The second driver is geopolitics. In the mid-2010s, China was the leading provider of loan-financed infrastructure in the Pacific, accounting for more than one-third of total infrastructure funding and more than half when excluding Papua New Guinea. As geopolitical competition has intensified, other donors, particularly Australia, have reoriented their financing towards infrastructure to contest China's influence in the sector. The shift has been significant: between 2008 and 2018, Australia accounted for just 11% of total infrastructure finance commitments in the region. From 2019 to 2023, that share surged to 65%, driven largely by the Australian Infrastructure Financing Facility for the Pacific, which as of 2025 has more than AU$2 billion in signed projects. These dynamics, along with large budget support loans to Papua New Guinea, have seen Australia unseat China as the region's biggest source of new bilateral debt (Figure 12). This debt can play a helpful role in financing the region's development where it displaces reliance on more expensive market-rate financing and funds productive investments. However, it also presents some basis for concern given generally elevated debt risks in the Pacific.

Yet this rising investment has not closed the region's infrastructure gap. Despite the increase in headline figures, annual infrastructure financing flows remain below estimated needs. Moreover, the composition of this financing raises questions of potency. Approximately 40% of infrastructure-tagged ODF in the Pacific is directed towards technical assistance and policy support rather than hard infrastructure delivery.[14] While such spending is important for project preparation and implementation, it suggests the true infrastructure gap may be larger than topline figures imply.

Finally, trade-offs are emerging. The sharp rise in infrastructure spending has coincided with a decline in support for human development sectors, particularly education and health (Figure 13). The data indicates that the infrastructure surge is not fully additional, but has come at the expense of traditional development priorities. In 2023, ODF to education stood at just $216 million, only slightly above the 15-year low recorded in 2019. This relative deprioritisation raises concerns about the long-term foundations for sustainable development and inclusive growth in the region.

Cross-cutting priorities: climate, gender equality, and disability inclusion

Climate development finance

Pacific Island countries are among the most vulnerable globally to the escalating impacts of climate change. Governments across the region face high unmet needs for climate finance, particularly for adaptation. For instance, the International Monetary Fund estimates that Papua New Guinea needs to invest 2% of GDP in adaptation-related infrastructure, while other Pacific Island countries need to invest between 6.5% and 9% of GDP.[15] Given their small economies and deep development challenges, these countries rely heavily on external support to narrow their climate financing gaps.

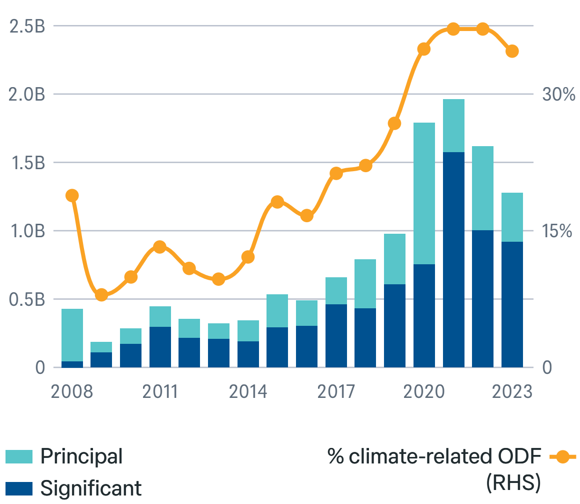
Trends

Climate-related official development finance (ODF) to the Pacific fell to $1.3 billion in 2023, down from $1.6 billion in 2022 and well below the 2021 peak of nearly $2 billion (Figure 14). This drop largely reflects the unwinding of pandemic-era emergency financing (2020–22) when large budget support loans to Papua New Guinea and Fiji were tagged with climate objectives.

FIGURE 14

Climate official development finance, by type

Spent, constant 2023 US$

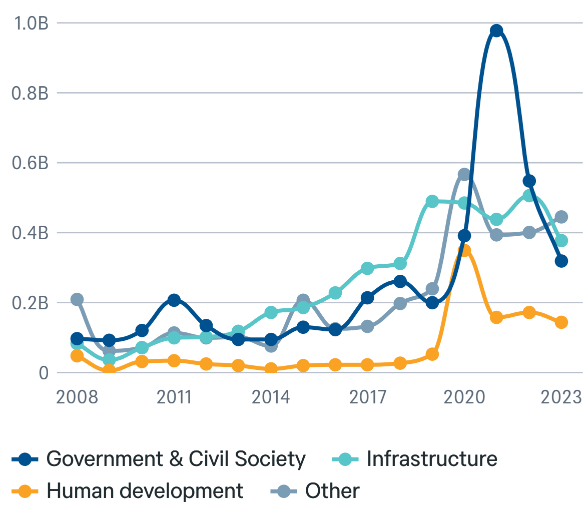


Stripping out these pandemic-related distortions, the longer-term trend is one of steady growth. Climate-related ODF has expanded significantly from a low base, increasing at an average annual rate of about 14%. Importantly, even after the end of large-scale Covid-19 support, the share of ODF allocated to climate finance remained largely consistent. In 2023, the share of climate-tagged ODF stayed above 35%, even as total ODF to the Pacific contracted by 16%.

FIGURE 15

Climate official development finance, by sector

Spent, constant 2023 US$



Breaking down climate-tagged ODF offers some insight into where climate-related financing is directed (Figure 15). The spike in government and civil society sector projects since 2020 reflects the influence of budget support. Strikingly, only 32% of climate-tagged projects fall within the infrastructure sector — and within that, a smaller portion still is directed at "hard" investments in adaptation and mitigation. While data limitations cloud the picture, a considerable share of this financing appears to be directed towards technical assistance, policy advice, and other "soft" adaptation measures.

Key partners

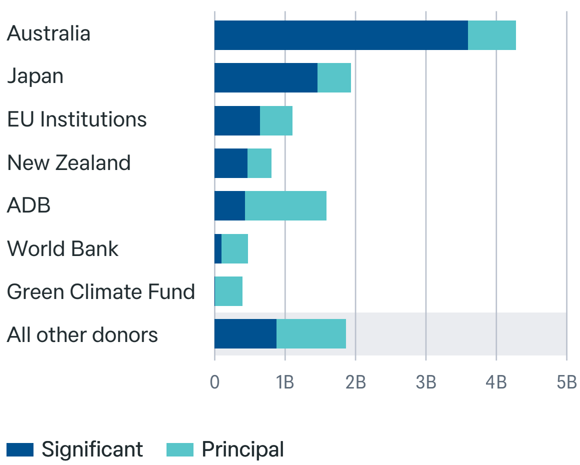
In line with its position as the Pacific's largest aid donor, Australia has also been the region's main source of climate-related development finance. Between 2008 and 2023, Australia disbursed $4.3 billion in climate-related ODF to the Pacific — around one-fifth of its total ODF flows to the region (Figure 16). The Asian Development Bank (ADB), meanwhile, has been the leading provider of financing where climate change is listed as a "principal" objective, disbursing $1.1 billion over the same period. This ADB spending accounts for roughly a quarter of all funds directed exclusively towards climate adaptation or mitigation outcomes. While China is the Pacific's second-largest bilateral donor, its climate financing footprint remains small — totalling $110 million since 2008. The vast majority of this support has been for climate mitigation initiatives, specifically wind energy projects, small-scale solar electrification projects, and grid upgrades.

Climate-focused multilateral agencies such as the Green Climate Fund, Climate Investment Funds, Adaptation Fund, Global Environment Facility, and the Global Green Growth Institute also play a key role in providing "principal" climate finance to Pacific Island countries, as their mandates ensure that almost all funding is directed towards climate objectives. While their overall contribution remains modest, accounting for just 14% of "principal" climate finance to the region between 2008 and 2023, this represents an outsized role given that collectively they provide less than 1% of total ODF to the Pacific.

FIGURE 16

Largest climate official development finance providers to the Pacific 2008–23

Spent, constant 2023 US$



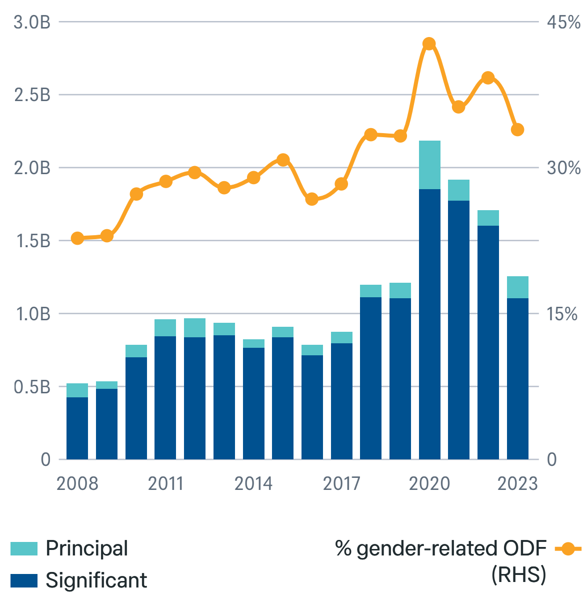
Gender equality finance

Women in the Pacific Islands face pronounced social and economic inequalities. Across the region, women's participation in the non-agricultural labour force is roughly half that of men.[16] Two-thirds of women and girls in the Pacific experience gender-based violence.[17] Pacific Island countries also have the lowest level of female political representation in the world, with only 7% of parliamentarians being women, well below the global average of 27%.[18] In response to these trends, international development support has sought to target gender equality outcomes to reduce inequality and promote inclusive development.[19] As of 2023, 29% of ODF projects in the region have a mainstreamed or "significant" focus on gender equality and a further 3% have a "principal" focus on the policy objective.

FIGURE 17

Gender equality official development finance, by type

Spent, constant 2023 US$



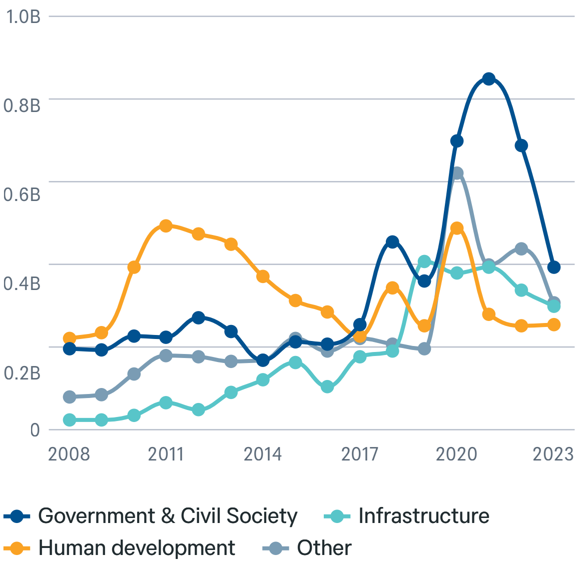
Trends

Gender-related financing in the Pacific grew steadily in the decade prior to the pandemic, rising at an average rate of 11% per year between 2008 and 2019. On average, "principal" gender-focused projects accounted for $110 million annually, while "significant" gender-focused projects reached $985 million. Over the past 16 years, around 3% of total ODF to the region has had a "principal" focus on gender equality, while an additional 29% of ODF had a "significant" gender focus.

In 2020, both categories of gender ODF saw significant uplift, as major donors such as Australia and Japan embedded gender equality objectives into large Covid-19 budget support programs. This surge temporarily lifted gender-related financing to unprecedented levels (Figure 17). These gains, however, were short-lived as by 2023, gender financing had largely returned to pre-pandemic levels as Covid-19 financial support packages ended and ODF flows returned to 2018–19 levels. The drop in gender financing was therefore predominantly driven by a 27% contraction in "significant" tagged financing, while "principal" financing increased by close to a third to around $150 million.

FIGURE 18

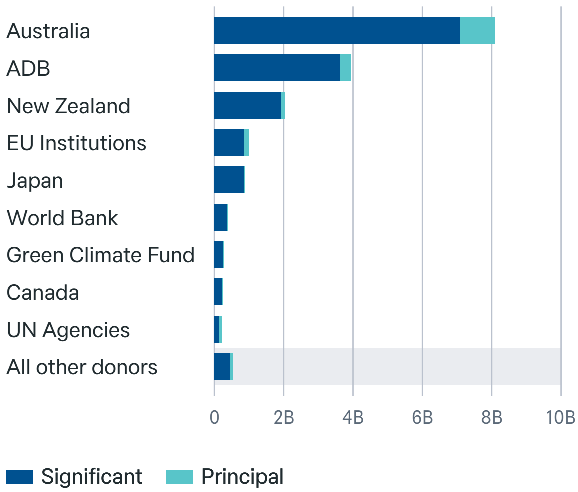
Gender equality official development finance, by sector
Spent, constant 2023 US$



Breaking down gender-tagged finance flows reveals several trends. First, the growth of governance and civil society projects reflects in part the integration of gender goals into budget support programs, largely accounting for the volatility of this ODF subset since 2020 (Figure 18). Second, infrastructure features prominently in the "significant" gender ODF category, as large projects — particularly those financed by Japan and the ADB — increasingly incorporate gender impact considerations. Finally, gender-tagged ODF to human development sectors has remained relatively stable, reflecting the long-standing integration of gender equality objectives into health and education initiatives, especially those supported by traditional partners such as Australia and New Zealand.

FIGURE 19

Largest gender equality official development finance providers to the Pacific 2008–23
Spent, constant 2023 US$



Key partners

In line with its role as the region's largest ODF provider, Australia also leads the provision of gender-focused ODF (Figure 19). More than 40% of gender-tagged financing that has been disbursed in the Pacific has come from Australia, with Australia's $110 million Pacific Women Lead program representing the largest "principal" gender investment in the region. In 2023, Australia provided 43% of total ODF to the region, but close to 60% of gender ODF.

The ADB and New Zealand follow Australia as the next-largest providers of gender ODF to the Pacific. The World Bank and EU institutions also play an out-sized role, together providing more than one-fifth of all gender-related financing to the region, despite contributing only 5% and 4% of total ODF respectively.

Disability inclusion finance

For the first time, the 2025 Pacific Aid Map includes a dedicated tag and filter to identify development projects that incorporate disability inclusion as an objective. This new feature is based on the OECD Development Assistance Committee (DAC) disability inclusion policy marker. It also includes estimates for other donors who either do not apply the marker or do not report to the OECD.

FIGURE 20

Disability inclusion official development finance, by type
Spent, constant 2023 US$

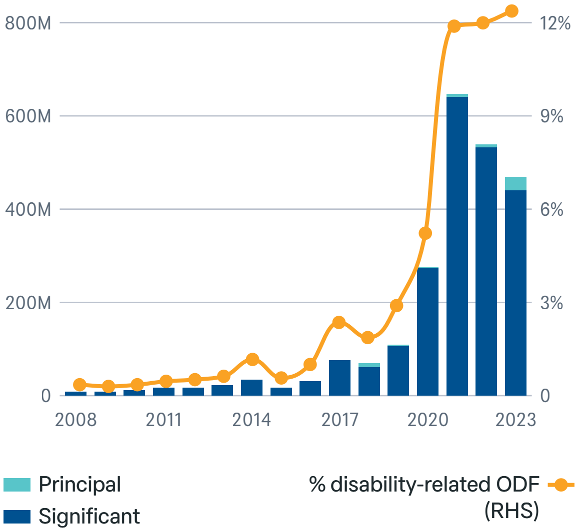
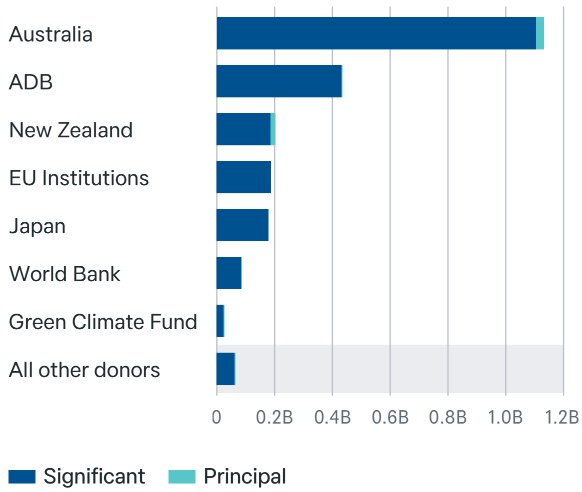


FIGURE 21

Largest disability inclusion official development finance providers to the Pacific 2008–23
Spent, constant 2023 US$



People with disabilities are among the most marginalised groups in Pacific Island countries, facing persistent stigma, discrimination, and economic exclusion. They experience lower rates of school attendance and labour force participation and are more likely to report negative encounters with health systems.[20] Women with disabilities face particularly severe barriers, including higher rates of physical and sexual violence, forced treatments, and earlier childbearing compared with both women without disabilities and men with disabilities.

Trends

The Pacific Disability Forum estimates that 1.7 million people across the region live with a disability.[21] This number is rising, driven by demographic ageing and the growing prevalence of non-communicable diseases. In response, disability-specific government programs have emerged as a feature of the region's development landscape. Since 2015, six countries — Fiji, Kiribati, Palau, Samoa, Tonga, and Tuvalu — have introduced non-contributory disability benefit schemes, providing regular, predictable payments to eligible individuals.[22] Yet major gaps remain. Countries such as Papua New Guinea, Solomon Islands, and Vanuatu still lack substantive government support for people with disabilities.

In this context, some development partners have increased efforts to finance disability inclusion and mainstream this into their development activities. While averaging just 0.4% of total ODF before the pandemic (2015–19), disability-related financing rose to 13% of all development finance disbursed in the Pacific in 2023. As seen with climate- and gender-tagged projects, the pandemic period drove a substantial increase in "significant" marked disability financing, with mainstreamed efforts built into budget support programming. Unlike support for other cross-cutting issues, this support has been more durable (Figure 20). Nonetheless, the volume of "principal" disability financing remains very low, averaging less than $4.5 million per year from 2018 to 2022. However, annual financing for these projects jumped from $5.6 million in 2022 to $27 million in 2023 — a more than fourfold increase.

Key partners

Donors have increasingly integrated disability inclusion into broader development initiatives. Australia is the largest provider of disability-related aid in the region, having spent $1.1 billion between 2008 and 2023 (Figure 21). Japan ranks second, having provided $432 million, followed by New Zealand, with $202 million. The vast majority of this financing — close to 98% — has been marked as "significant", with only $50 million marked as "principal" since 2008. These trends suggest that while there has been some increased focus on disability financing, it remains a more limited policy goal compared to climate- and gender-related development funding.

Country profiles

COOK ISLANDS

Key trends and development challenges

Cook Islands is a self-governing territory in free association with New Zealand, located in the Pacific sub-region of Polynesia. In 2023, the GDP of Cook Islands was $366 million, making it one of the smallest economies in the Pacific. The country has a population of 14,300, resulting in a GDP per capita of $25,651 — the highest in the Pacific. While its economy is small, Cook Islands has an extensive ocean territory and rich marine resources.

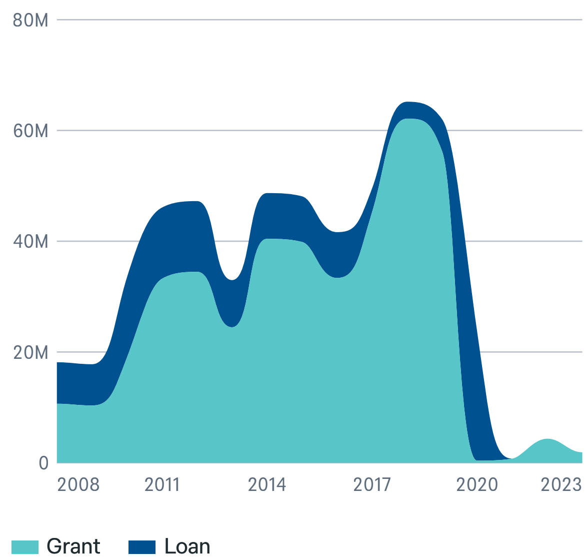
In 2020, Cook Islands graduated from the Organisation for Economic Co-operation and Development's list of official aid recipients and was reclassified as a high-income country. In 2023, it was the lowest per capita aid recipient in the region, yet Cook Islands still faces significant growth challenges and remains highly exposed to climatic shocks.

Cook Islands' economy relies heavily on tourism, with the leisure economy accounting for around 85% of GDP. The Covid-19 pandemic significantly disrupted the country's economy, as border closures and slow global tourism rebound hampered growth. Encouragingly, 2023 visitor arrival estimates were close to parity with pre-pandemic levels.

Between 2008 and 2023, annual official development finance (ODF) disbursements to Cook Islands — including grants, loans, and other forms of assistance — averaged $34 million. During this period, loans made up 23% of total ODF flows to the country, the fourth-highest share in the Pacific. As a result of its graduation from aid, grant financing to Cook Islands in 2021–22 was 98% lower than the pre-pandemic average. Consequently, the role of aid to the Cook Islands economy is the lowest across all the countries covered in the Pacific Aid Map. ODF makes up just 0.5% of the country's GDP, a sharp fall from a peak of 16% in 2015.

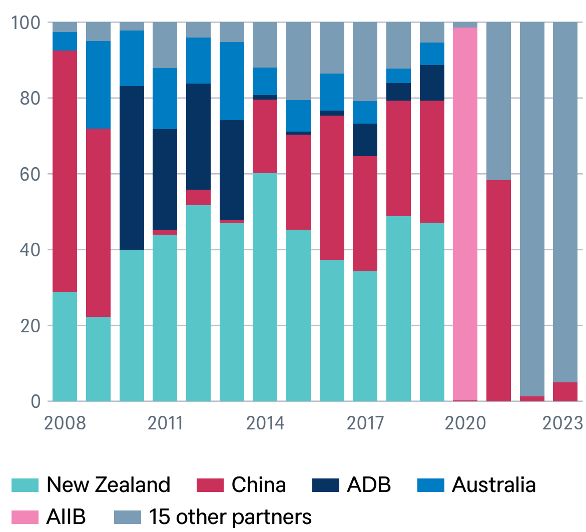
COOK ISLANDS

Official development finance, by transaction type
Constant 2023 US$



COOK ISLANDS

Official development finance, by partner
% of total ODF spent, constant 2023 US$

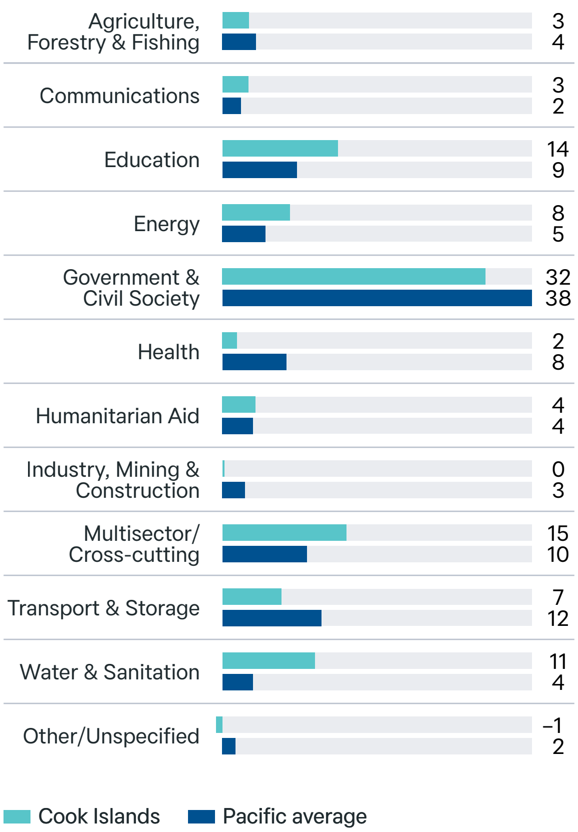


$541M	$611M	677	89%
SPENT	COMMITTED	PROJECTS	STATUS

COOK ISLANDS

Official development finance, by sector

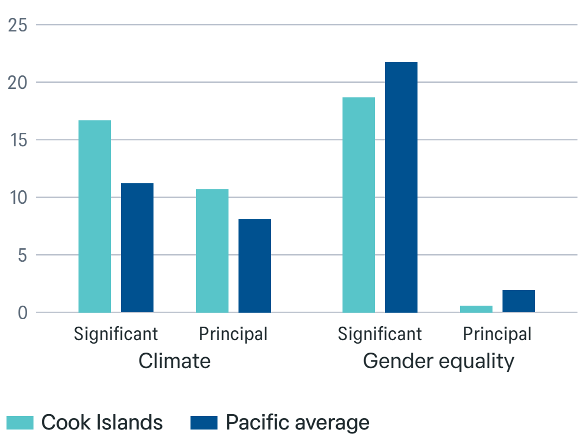
% of total ODF spent, constant 2023 US$



COOK ISLANDS

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



Development partners and sector trends

Between 2008 and 2023, the vast majority (85%) of ODF support to Cook Islands has come from four development partners, led by New Zealand (42%), China (22%), the Asian Development Bank (12%), and Australia (9%). Donor concentration in Cook Islands is among the highest in the Pacific.

New Zealand's aid to Cook Islands has historically focused on education and governance. Conversely, China's support has focused on infrastructure. The last major financing package received by Cook Islands was a $20 million loan from the Asian Infrastructure Investment Bank, through its Covid-19 Crisis Recovery Facility. Despite the addition of this loan, the Asian Development Bank continues to rank Cook Islands' risk of debt distress as low.

ODF to Cook Islands largely conforms with regional trends. The largest sector for incoming ODF is government and civil society, which accounts for 32%, below the regional average of 38%. Donors have also focused funds on education (14%), water and sanitation (11%), and energy (8%), all of which see allocations above the regional average.

Since 2008, Cook Islands has received $50 million in development finance primarily targeting climate goals, and $82 million with climate as a significant objective. Unlike regional trends, climate finance rose sharply in the early 2010s but has shown little growth over the past decade. As a share of total ODF received by Cook Islands, "principal" climate projects have made up 11% of total spending, above the Pacific regional average. Similarly, spending on "significant" climate projects in Cook Islands made up 17% of incoming funds, well above the regional average of 11%.

Between 2008 and 2023, Cook Islands received $3 million in development financing with a "principal" focus on gender equality, and $101 million in development financing with a "significant" focus on gender equality. "Principal" gender equality financing constituted less than 1% of ODF received by the country, below the regional average of 2%. Similarly, "significant" marked gender equality financing made up 19% of incoming ODF, slightly below the regional average.

FEDERATED STATES OF MICRONESIA

Key trends and development challenges

Federated States of Micronesia (FSM) is an atoll state located in the Pacific sub-region of Micronesia. With a GDP of $442 million, FSM is the seventh-largest economy in the Pacific Islands, accounting for 1% of regional GDP. FSM has a population of 113,000, resulting in a GDP per capita of $3,919 — the fourth-lowest in the Pacific. While FSM is categorised as a micro-state, its exclusive economic zone (EEZ) spans 2.9 million square kilometres, the 14th-largest globally, comparable in size to the EEZ of Mexico.

FSM has the fourth-largest official development assistance (ODA) to gross domestic product (GDP) ratio in the Pacific Islands region, with aid accounting for 34% of GDP. In a global context, FSM remains among the most aid-reliant countries in the world, with its aid as a share of GDP ranking fifth among 125 developing countries. FSM's government development agenda is focused on improvements to the country's human capital and infrastructure. At 0.615, FSM's Human Development Index score ranks 149th out of 193 ranked countries.

Between 2008 and 2023, annual official development finance (ODF) disbursements to FSM — including grants, loans, and other forms of assistance — averaged $162 million. Less than 3% of the development finance received by FSM in this period came in the form of loans.

Development partners and sector trends

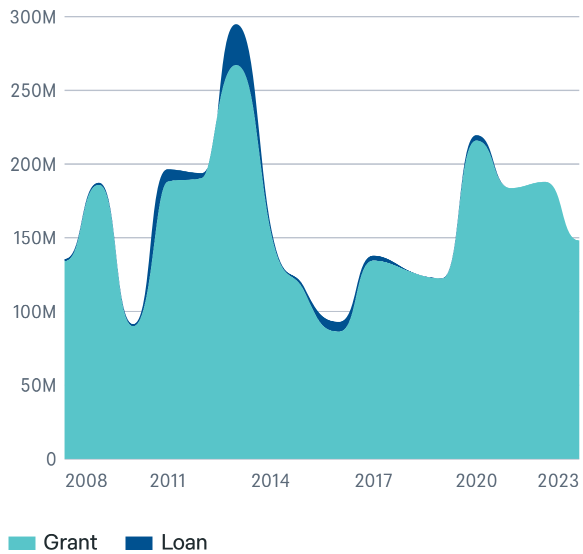
FSM has seen a high degree of variation in its annual ODF receipts over the past 16 years. ODF to the country peaked at $285 million in 2013 and declined steeply afterwards. This trend is in part a product of the country's Compact of Free Association (COFA) agreement with the United States, which infrequently releases multi-year budget support packages in large, lumpy financial transfers.

The vast majority (82%) of ODF support to FSM in 2023 came from three development partners — the United States (68%), the World Bank (7%), and China (7%). The country sees one of the highest levels of donor concentration in the region, largely due to its COFA agreement.

FEDERATED STATES OF MICRONESIA

Official development finance, by transaction type

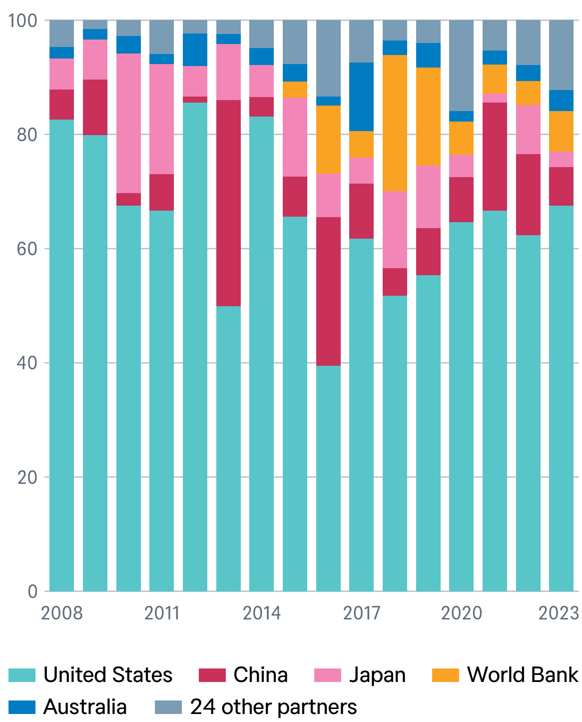
Constant 2023 US$



FEDERATED STATES OF MICRONESIA

Official development finance, by partner

% of total ODF spent, constant 2023 US$

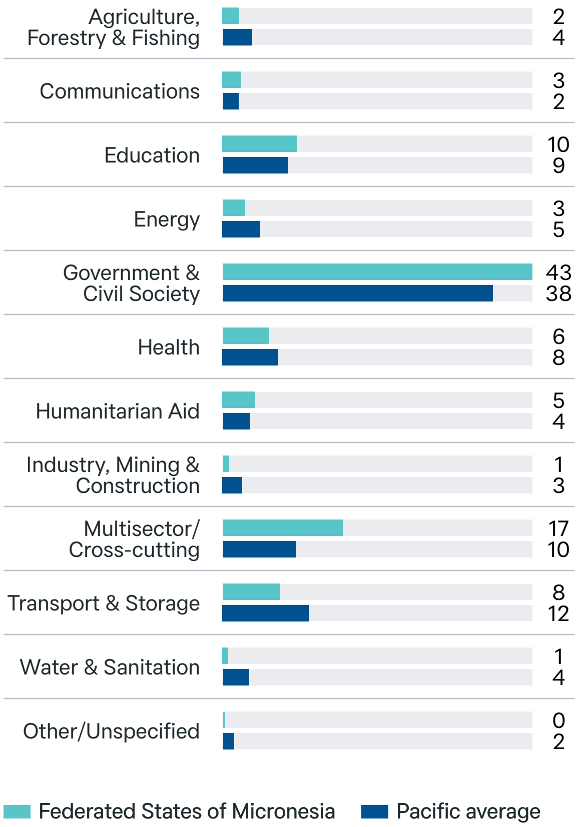


$2.6B	$3.7B	1,347	70%
SPENT	COMMITTED	PROJECTS	STATUS

FEDERATED STATES OF MICRONESIA

Official development finance, by sector

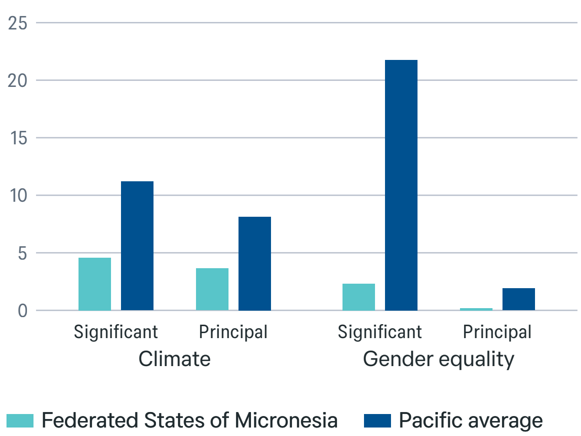
% of total ODF spent, constant 2023 US$



FEDERATED STATES OF MICRONESIA

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



ODF disbursements to FSM are largely in line with regional trends in terms of sector distribution. Projects focused on education are moderately above regional averages, while government and civil society spending is well above the regional average. Conversely, spending on the transport and water sectors is below regional averages. These differences are primarily a product of how the United States reports and directs its Compact support to the country.

Since 2008, FSM has received $119 million in development financing with a “principal” focus on either climate adaptation or mitigation. Over this same period, the country has seen $94 million in development financing with a “significant” focus on climate outcomes. Like other countries in COFA arrangements with the United States, FSM has seen a marked rise in spending on climate initiatives since 2020, albeit from a low base. As a share of total ODF received by FSM, “principal” climate projects made up 4% of total spending, significantly below the Pacific regional average of 8%. Similarly, spending on “significant” climate projects in FSM made up 5% of incoming funds, markedly under the regional average of 11%.

Between 2008 and 2023, FSM received $5 million in development financing with a “principal” focus on gender equality, and $60 million in development financing with a “significant” focus on gender equality. “Principal” gender equality financing constituted less than 1% of ODF received by the country, below the regional average of 2%. Conversely, “significant” marked gender financing made up 2% of incoming ODF, markedly below the regional average of 22% and the lowest share of any Pacific country. The largest project directly targeting gender equality in FSM was the multi-year Pacific Women Shaping Pacific Development program, funded by Australia.

FIJI

Key trends and development challenges

Fiji is a small island developing state located in the Pacific sub-region of Melanesia. With a GDP of $5.44 billion, Fiji is the second-largest economy in the Pacific Islands and accounts for 12.8% of regional GDP. Fiji has a population of 924,000, resulting in a GDP per capita of $5,888 — the sixth-highest in the Pacific. The country's exclusive economic zone (EEZ) spans more than 1.29 million square kilometres, the 26th-largest globally, and is comparable in size to the EEZ of Argentina.

Fiji historically had one of the lowest official development assistance (ODA) to gross national income ratios in the Pacific Islands region, with aid accounting for only 2.5% of national income between 2008 and 2020. However, in the wake of the pandemic, this share spiked to 15%. The jump was a product of both increased development support to the country during the pandemic and a contraction in Fijian incomes. In a global context, Fiji is only moderately aid reliant, ranking 48th among 125 developing countries. At 0.731, Fiji's Human Development Index score ranks 111th out of 193 ranked countries.

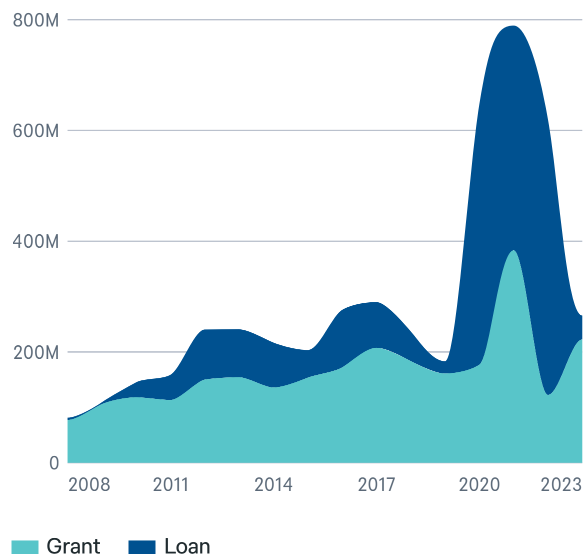
Between 2008 and 2023, annual official development finance (ODF) disbursements to Fiji — including grants, loans, and other forms of assistance — averaged $294 million. As a share of Fiji's total received development support, loan-financed projects have increased significantly. In 2008, loans accounted for just 5% of total incoming ODF, while in 2021 and 2022 they made up 51% and 79% respectively, before falling to 16% in 2023. Despite the increase in lending, the International Monetary Fund continues to rank Fiji's risk of debt distress as moderate, in part a result of the high concessionality of the loans received by the country.

Development partners and sector trends

In 2023, three-quarters of the ODF support to Fiji came from its largest five development partners, led by Australia (40%), New Zealand (11%), the Asian Development Bank (11%), UN Agencies (8%), and China (6%). Fiji has one of the lowest levels of donor concentration in the Pacific, with its ODF coming from a variety of bilateral and multilateral sources.

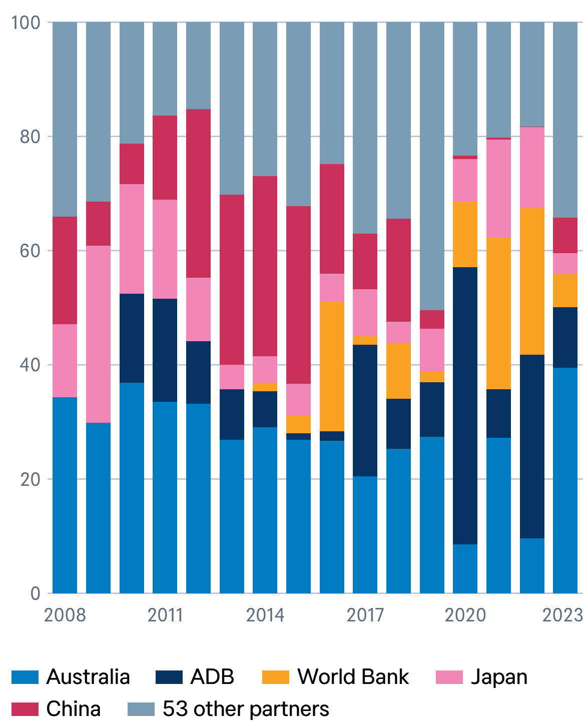
FIJI

Official development finance, by transaction type
Constant 2023 US$



FIJI

Official development finance, by partner
% of total ODF spent, constant 2023 US$

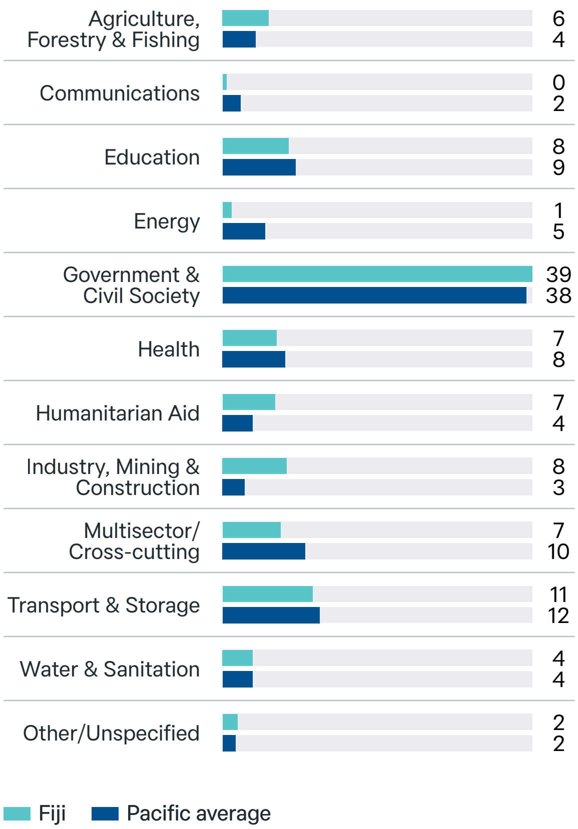


$4.7B	$5.3B	4,505	88%
SPENT	COMMITTED	PROJECTS	STATUS

FIJI

Official development finance, by sector

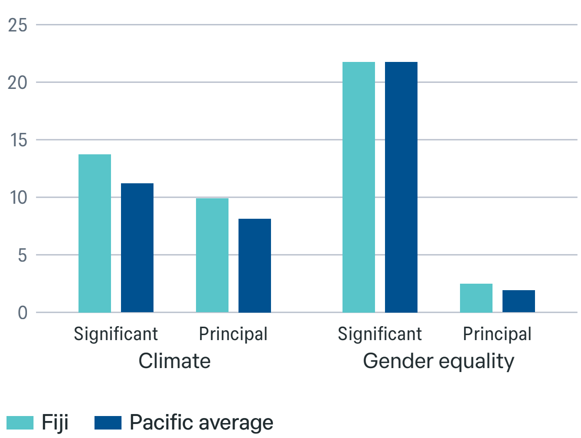
% of total ODF spent, constant 2023 US$



FIJI

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



The ODF project that saw the highest spending in Fiji in 2023 was the $30 million Australian-funded Fiscal Budget Support Program. The project was part of a broader set of budget support measures funded by Australia focused on the governance, health, and education sectors. Fiji also saw high volumes of spending by the Asian Development Bank as part of its Transport Infrastructure Investment Sector Project. China's renovation of the Suva Multi-Purpose Sports Stadium cost an estimated $10 million.

ODF in Fiji was largely in line with regional trends in terms of sector distribution. Fiji's only sectoral outliers relate to its below average share of spending on the energy sector and higher spending on industry, mining, and construction.

Since 2008, Fiji has received $466 million in development financing with a "principal" focus on either climate adaptation or mitigation. Over this same period, the country has seen $647 million in development financing with a "significant" focus on climate outcomes. Since the early 2010s, Fiji has seen steady growth in climate-targeting projects, a trend mirrored across most of the Pacific. As a share of total ODF received by Fiji, "principal" climate projects made up 10% of total spending, slightly above the regional average of 8%. Spending on "significant" climate projects in Fiji made up 14% of incoming funds, above the regional average. To date, the largest climate ODF investment in Fiji has been the Fiji Urban Water Supply and Wastewater Management Project financed by the Green Climate Fund, worth close to $20 million.

Between 2008 and 2023, Fiji received $117 million in development financing with a "principal" focus on gender equality, and $1 billion with a "significant" focus on gender equality. "Principal" gender equality financing constituted 2% of ODF received by the country, equal to the regional average of 2%. Over the same period, "significant" marked gender financing made up 22% of incoming ODF, matching the regional average of 22%. The largest project directly targeting gender equality in Fiji was the multi-year, $44 million Pacific Women Shaping Pacific Development program, funded by Australia.

KIRIBATI

Key trends and development challenges

Kiribati is an atoll state located in the Pacific sub-region of Micronesia. With a GDP of $289 million, Kiribati is one of the smaller economies in the Pacific, accounting for 0.7% of regional GDP. Kiribati has a population of 133,000, resulting in a GDP per capita of $2,200 — the third-lowest in the Pacific. Despite its small economy, the country's exclusive economic zone (EEZ) covers 3.44 million square kilometres, the 12th-largest globally.

Kiribati has the sixth-largest official development assistance (ODA) to gross domestic product (GDP) ratio in the Pacific Islands region, with aid accounting for 45% of GDP. In a global context, Kiribati remains among the most aid-reliant countries in the world, with its aid as a share of GDP ranking eighth among 125 developing countries.

Kiribati's population is highly dispersed over the country's 32 remote atolls. Common to many Pacific Island states, the country's distant and dispersed population significantly increases the per capita cost of service delivery. The Kiribati government is highly dependent on fisheries income, with tuna licensing and access fees accounting for around 70% of fiscal revenue between 2018 and 2023. At 0.644, Kiribati's Human Development Index score ranks 140th out of 193 ranked countries.

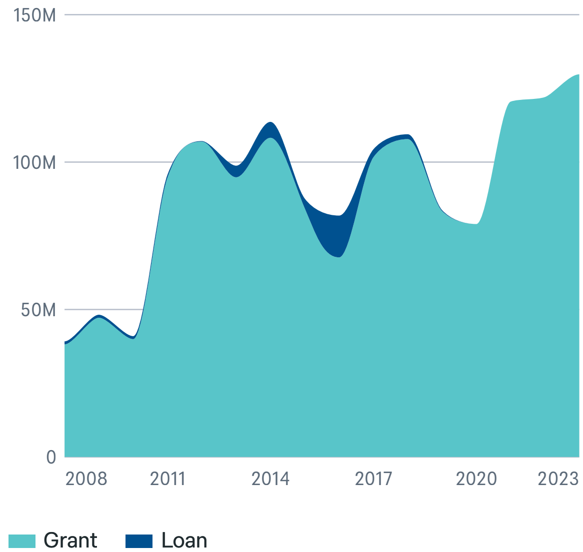
Between 2008 and 2023, annual official development finance (ODF) disbursements to Kiribati — including grants, loans, and other forms of assistance — averaged $91 million. In 2023, the Pacific Islands state received $129 million in development assistance — more than three times the level of disbursements seen in 2008. Only 2.2% of the development finance received by Kiribati between 2008 and 2023 came in the form of loans.

Development partners and sector trends

The vast majority (83%) of ODF support to Kiribati in 2023 came from five development partners, led by Australia (22%), China (21%), Japan (17%), the World Bank (14%), and New Zealand (9%). Since switching recognition from Taiwan to China in 2019, Chinese ODF has played a significant role in financing development

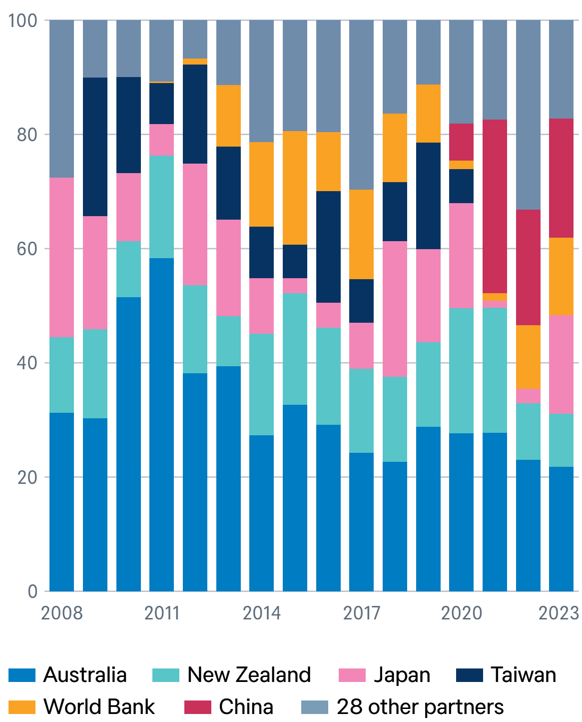
KIRIBATI

Official development finance, by transaction type
Constant 2023 US$



KIRIBATI

Official development finance, by partner
% of total ODF spent, constant 2023 US$

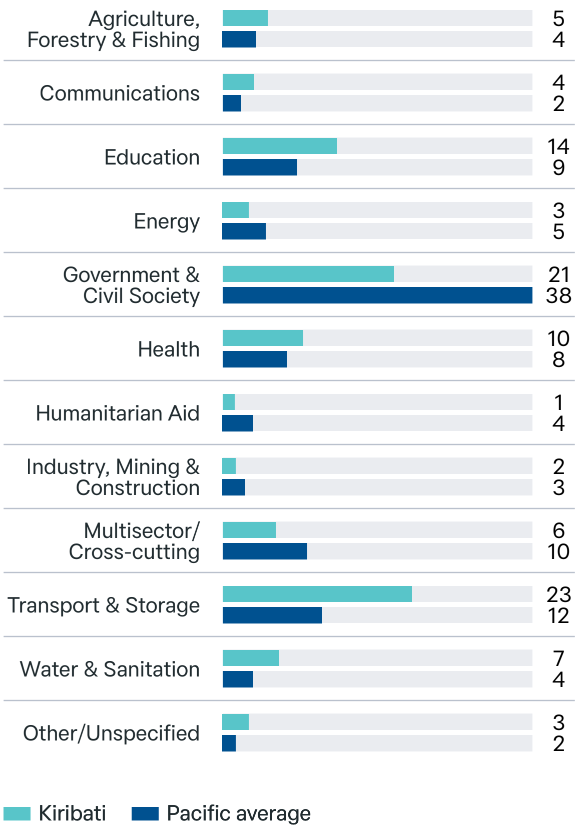


$1.5B	$2.1B	2,473	70%
SPENT	COMMITTED	PROJECTS	STATUS

KIRIBATI

Official development finance, by sector

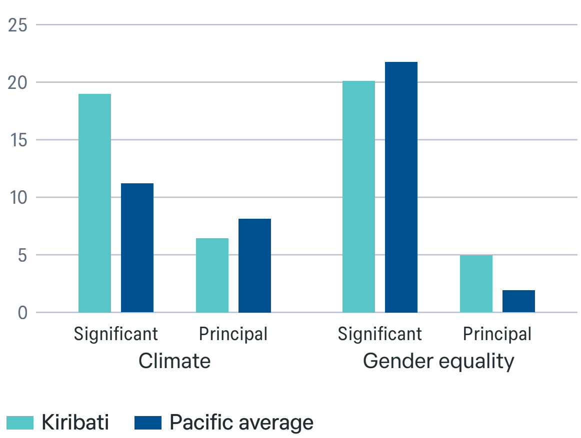
% of total ODF spent, constant 2023 US$



KIRIBATI

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



in Kiribati. China has become the country's second-largest aid partner, financing commercial aircraft for the national carrier, agricultural projects, and budget support programs.

The largest active investment in Kiribati in 2023 was Japan's contribution to the East Micronesia Cable project, a multi-donor project that aims to improve internet connectivity through a new submarine cable, worth $17 million. Kiribati also received substantial infrastructure support from China, particularly for roads projects. Australian support flowed primarily to the health and education sectors. Viewed in full, ODF disbursements to Kiribati are distinct from regional trends in terms of sector distribution. Projects focused on transport made up 23% of incoming flows, well above the regional average of 13%. Infrastructure has been a major and increasing focus of ODF flows to Kiribati, with the sector seeing considerable external support over the past decade. While the pandemic briefly interrupted this trend in 2020, infrastructure spending bounced back in 2022–23.

Over the past 16 years, Kiribati has received $94 million in development financing with a "principal" focus on either climate adaptation or mitigation. In the same period, the country has seen $277 million in development financing with a "significant" focus on climate outcomes. Since the late 2010s, Kiribati has seen steady growth in climate-targeting projects, a trend mirrored across most of the Pacific. As a share of total ODF received by Kiribati, "principal" climate projects made up 6% of total spending, slightly below the Pacific regional average of 8%. Conversely, spending on "significant" climate projects in Kiribati made up 19% of incoming funds, above the regional average of 11%. To date, the largest ODF climate investment in Kiribati has been the Kiribati Adaptation Project, financed by the Australian government and the World Bank.

Between 2008 and 2023, Kiribati received $72 million in development financing with a "principal" focus on gender equality, and $293 million in development financing with a "significant" focus on gender equality. "Principal" gender equality financing constituted 5% of ODF received by the country, above the regional average of 2%. Conversely, "significant" marked gender financing made up 20% of incoming ODF, slightly below the regional average.

MARSHALL ISLANDS

Key trends and development challenges

Marshall Islands is an atoll state located in the Pacific sub-region of Micronesia. With a GDP of $261 million in 2023, Marshall Islands is one of the smaller economies in the Pacific Islands, accounting for 0.6% of regional GDP. Marshall Islands has a population of 39,000, resulting in a GDP per capita of $6,509, ranking fifth among Pacific Island states. While Marshall Islands is classified as a microstate, the country's exclusive economic zone (EEZ) spans 1.99 million square kilometres, the 19th-largest globally and comparable in size to the EEZ of Portugal.

Marshall Islands has the third-largest official development assistance (ODA) to gross domestic product (GDP) ratio in the Pacific Islands region, with aid accounting for 53% of GDP. In a global context, Marshall Islands remains among the most aid-reliant countries in the world, with its aid as a share of GDP ranking third among 125 developing countries. The Marshallese government's development agenda is focused on improvements to the country's human capital and infrastructure. At 0.733, Marshall Islands' Human Development Index score ranks 108th out of 193 ranked countries.

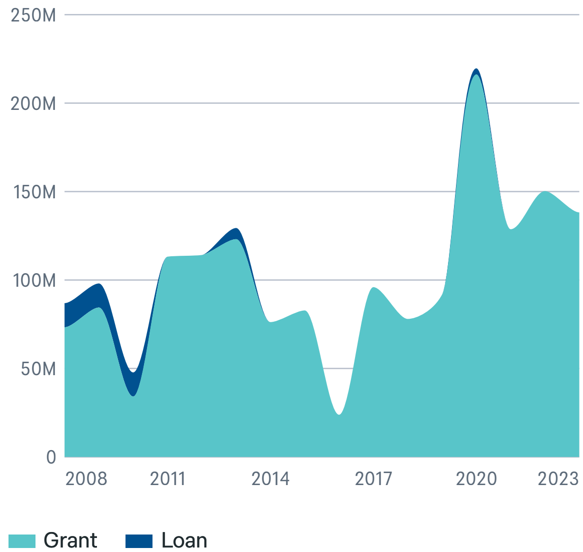
Between 2008 and 2023, annual official development finance (ODF) disbursements to Marshall Islands — including grants, loans, and other forms of assistance — averaged $103 million. Less than 2% of the development finance received by Marshall Islands over the past 16 years came in the form of loans, among the lowest in the Pacific.

Development partners and sector trends

Marshall Islands has seen high variation in its annual ODF receipts since 2008. This volatility is largely a product of the lumpy disbursement of budget support packages from the United States, as part of the country's Compact of Free Association agreement (COFA). The vast majority (74%) of ODF support to the country in 2023 came from two development partners — the United States (60%) and the World Bank (14%). Marshall Islands sees one of the highest levels of donor concentration in the region.

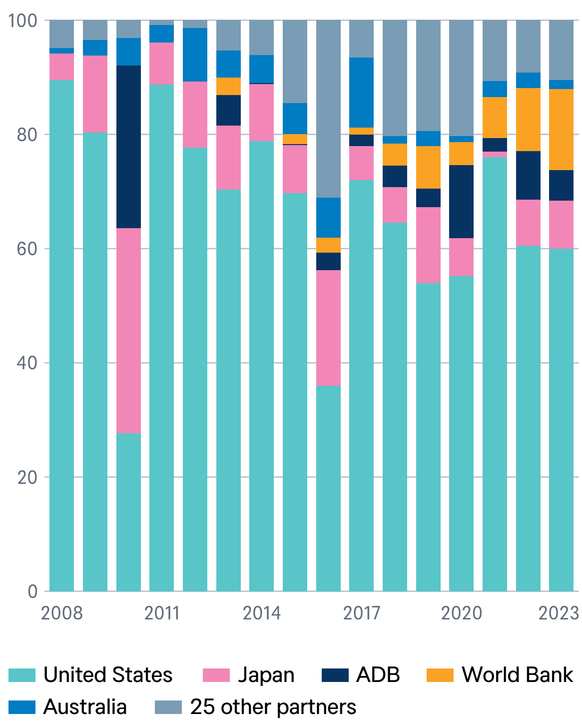
MARSHALL ISLANDS

Official development finance, by transaction type
Constant 2023 US$



MARSHALL ISLANDS

Official development finance, by partner
% of total ODF spent, constant 2023 US$

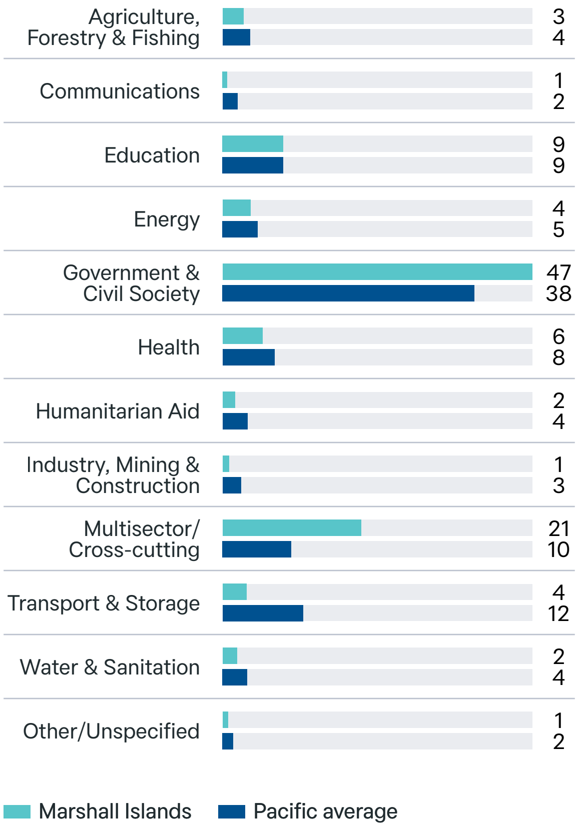


$1.6B	$2.3B	1,346	71%
SPENT	COMMITTED	PROJECTS	STATUS

MARSHALL ISLANDS

Official development finance, by sector

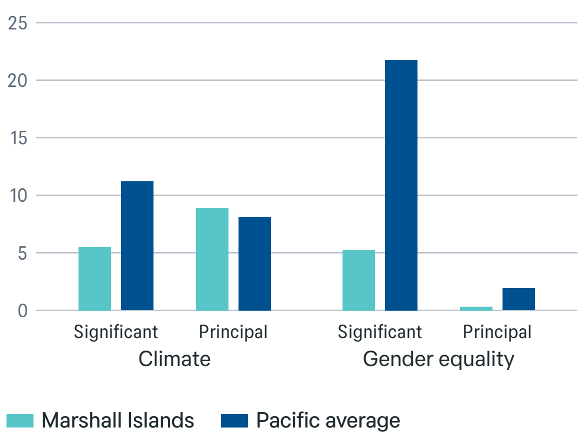
% of total ODF spent, constant 2023 US$



MARSHALL ISLANDS

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



Projects financed through the COFA dominate ODF project lists in Marshall Islands, with funding flowing to all sectors, with a particular focus on education, health, and infrastructure. In addition to US-financed projects, the World Bank's Pacific Islands Regional Oceanscape Program represents a major new commitment of $18 million in support of sustainable management of Pacific fisheries.

ODF disbursements to Marshall Islands are somewhat distinct from regional trends in terms of sector distribution. ODF flows focused on government and civil society made up 47% of incoming support, which is higher than the regional average of 38%. Conversely, spending on transport, energy, and water and sanitation were below the regional averages. Marshall Islands is an outlier in the Pacific in that human development spending over 2008–23 consistently eclipsed spending on infrastructure. These differences are primarily a product of how the United States reports and directs its Compact support.

Since 2008, Marshall Islands has received $147 million in development financing with a "principal" focus on either climate adaptation or mitigation. Over this same period, the country has seen $90 million in development financing with a "significant" focus on climate outcomes. Since 2018, Marshall Islands has seen substantial growth in climate-targeting projects. As a share of total ODF received by Marshall Islands, "principal" climate projects made up 9% of total spending, slightly above the Pacific regional average. Conversely, spending on "significant" climate projects in Marshall Islands made up 5% of incoming funds, significantly below the regional average of 11%.

Between 2008 and 2023, Marshall Islands received $5 million in development financing with a "principal" focus on gender equality, and $86 million in development financing with a "significant" focus on gender equality. "Principal" gender equality financing constituted less than 1% of ODF received by the country, below the regional average of 2%. Similarly, "significant" marked gender financing made up 5% of incoming ODF, around a quarter of the regional average of 22%. The largest project directly targeting gender equality in Marshall Islands was the multi-year Pacific Women Shaping Pacific Development program, funded by Australia.

NAURU

Key trends and development challenges

Nauru is a small island developing state located in the Pacific sub-region of Micronesia. With a GDP of $198 million, Nauru is the third-smallest economy in the Pacific Islands, accounting for less than 0.5% of regional GDP. Nauru has a population of 12,000, resulting in a GDP per capita of $16,790, ranking third in the Pacific.

Nauru has the ninth-highest official development assistance (ODA) to gross domestic product (GDP) ratio in the Pacific Islands region, with aid accounting for 19% of GDP. In a global context, Nauru is among the most aid-reliant countries in the world, with its aid as a share of GDP ranking 14th among 125 developing countries. The Nauruan government's development agenda is focused on debt reduction and supporting the transport sector. At 0.703, Nauru's Human Development Index score ranks 124th out of 193 ranked countries.

Between 2008 and 2023, annual official development finance (ODF) disbursements to Nauru — including grants, loans, and other forms of assistance — averaged $41 million. Less than 3% of the development finance received by Nauru during this period came in the form of loans. Almost all of the loan financing received by Nauru came in 2020 in the form of a support loan from Taiwan for new aircraft for the country's national airline. However, due to Nauru's switch of diplomatic recognition to China, the status of this loan is unclear. Despite the addition of this debt, the International Monetary Fund continues to rank the country's risk of debt levels as sustainable.

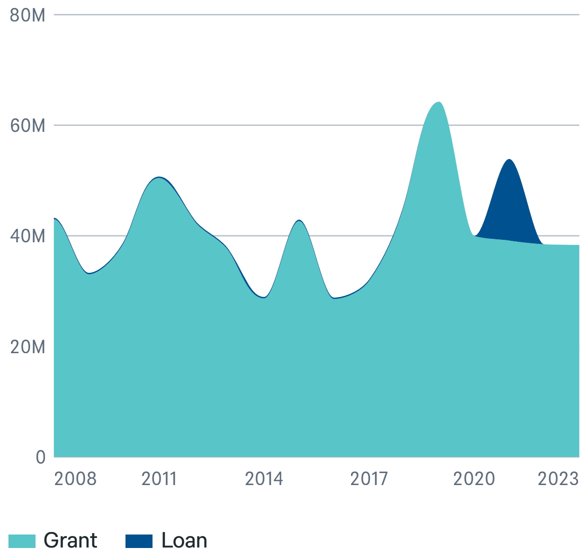
Development partners and sector trends

More than 90% of ODF support to Nauru in 2023 came from three development partners — Australia (57%), Japan (29%), and New Zealand (5%).

ODF in Nauru was largely distinct from regional trends in terms of sector distribution. The country sees little spending on the communications sector but a high allocation of financing towards energy projects, when compared with the rest of the region. With the

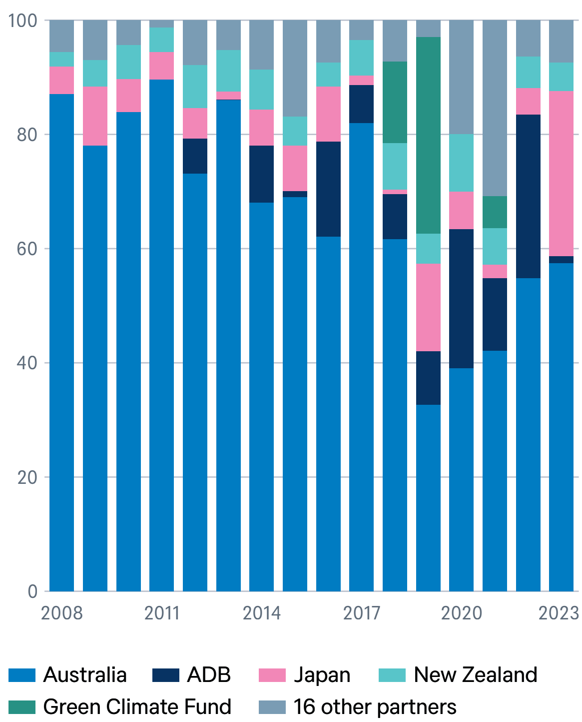
NAURU

Official development finance, by transaction type
Constant 2023 US$



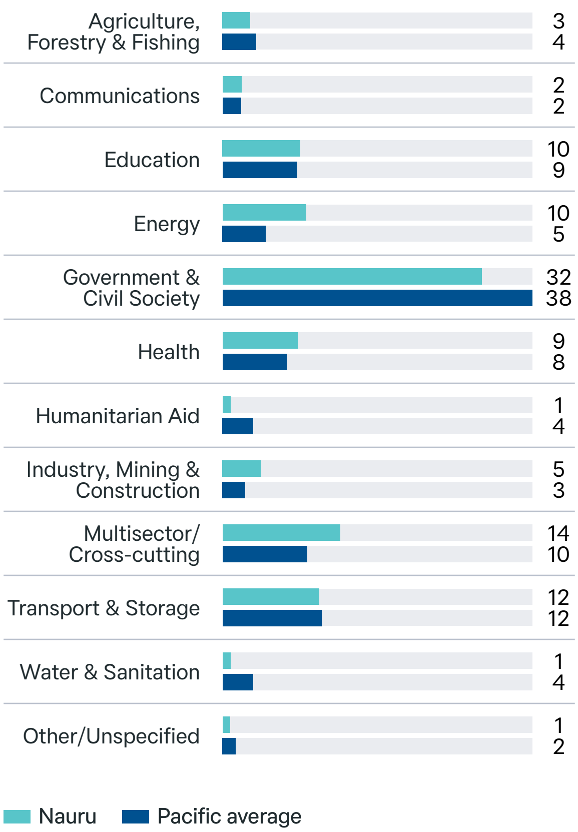
NAURU

Official development finance, by partner
% of total ODF spent, constant 2023 US$

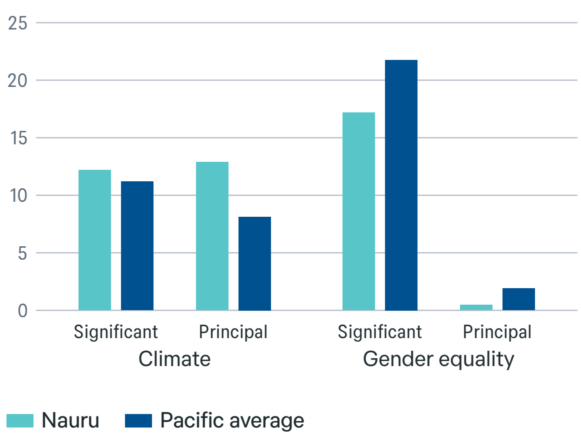


$658M	$837M	939	79%
SPENT	COMMITTED	PROJECTS	STATUS

NAURU
Official development finance, by sector
% of total ODF spent, constant 2023 US$



NAURU
Official development finance, by policy goal
% of total ODF spent, constant 2023 US$



exception of the transport sector loan provided by Taiwan mentioned previously, spending on human development has largely outpaced infrastructure spending.

Since 2008, Nauru has received $85 million in development financing with a "principal" focus on either climate adaptation or mitigation. Over this same period, the country has seen $80 million in development financing with a "significant" focus on climate outcomes. Since the mid-2010s, Nauru has seen a gradual rise in climate-targeting projects. As a share of total ODF received by Nauru, "principal" climate projects made up 13% of total spending, above the Pacific regional average of 8%. Conversely, spending on "significant" climate projects in Nauru made up 11% of incoming funds, slightly below the regional average of 12%.

Between 2008 and 2023, Nauru received $3 million in development financing with a "principal" focus on gender equality, and $113 million in development financing with a "significant" focus on gender equality. "Principal" gender equality financing constituted less than 1% of ODF received by the country, below the regional average of 2%. "Significant" marked gender financing made up 17% of incoming ODF, below the regional average of 22%. The largest project directly targeting gender equality in Nauru was the multi-year Pacific Women Shaping Pacific Development program, funded by Australia.

NIUE

Key trends and development challenges

Niue is a self-governing territory in free association with New Zealand, located in the Pacific sub-region of Polynesia. With a GDP of $26 million, Niue is the smallest economy in the Pacific Islands and one of the smallest in the world. Niue has a population of around 1,800 people, resulting in a GDP per capita of $13,884 — the fourth-highest in the Pacific and just below the Organisation for Economic Co-operation and Development's high-income classification.

While it is classified as a small island developing state, Niue has high levels of human development and zero poverty as defined by the lower bound of the international poverty line. Niue's national development plan is focused on improving governance and rehabilitating the country's private sector.

Between 2008 and 2023, annual official development finance (ODF) disbursements to Niue — including grants and other forms of assistance — averaged $23 million. Niue is the only Pacific Islands country to have received no loan financing over the past 15 years.

Development partners and sector trends

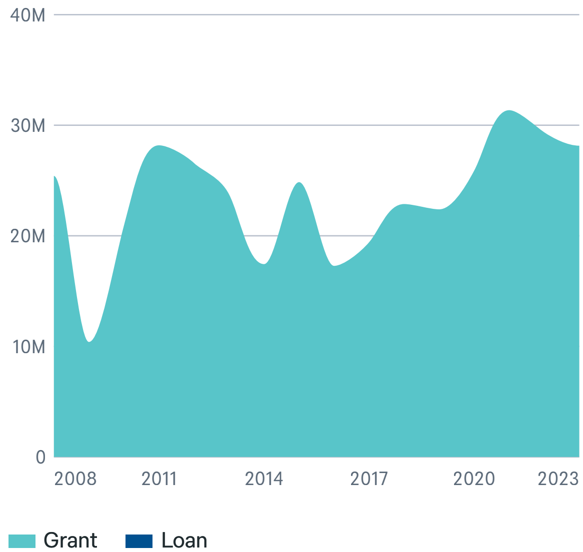
The vast majority (97%) of ODF support to Niue in 2023 came from just two development partners — New Zealand (91%) and Australia (6%). Donor concentration in Niue is the highest in the Pacific, with New Zealand's level of support representing one of the highest donor–recipient concentrations in the region.

In 2023, the largest active project in Niue was the upgrade to Hanan International Airport, supported by $10.4 million from New Zealand. The country also continued to receive budget support from New Zealand of more than $7 million, as well as additional emergency and supplementary budget support of $6 million. ODF in Niue was heavily weighted towards the government and civil society sectors, with those accounting for 74% of incoming assistance. Human development spending in Niue has always been relatively low, in part due to the country's pre-existing, strong education and health services. Since 2016, the country has seen a growing emphasis on climate-resilient infrastructure.

NIUE

Official development finance, by transaction type

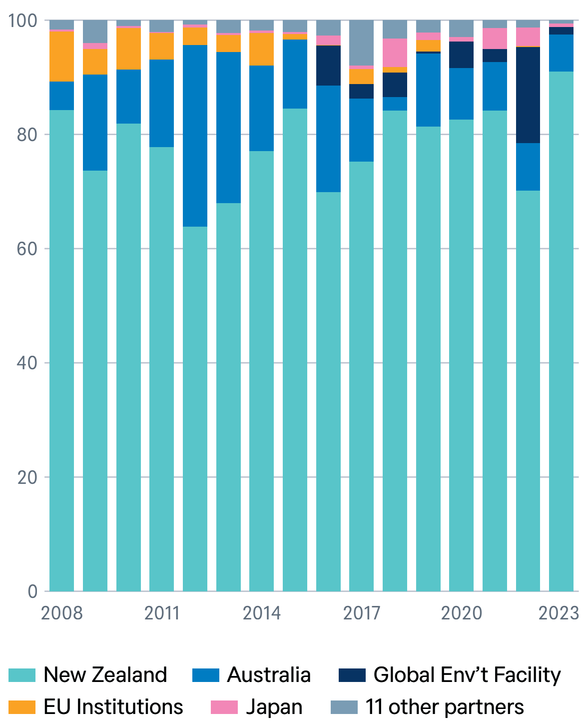
Constant 2023 US$



NIUE

Official development finance, by partner

% of total ODF spent, constant 2023 US$

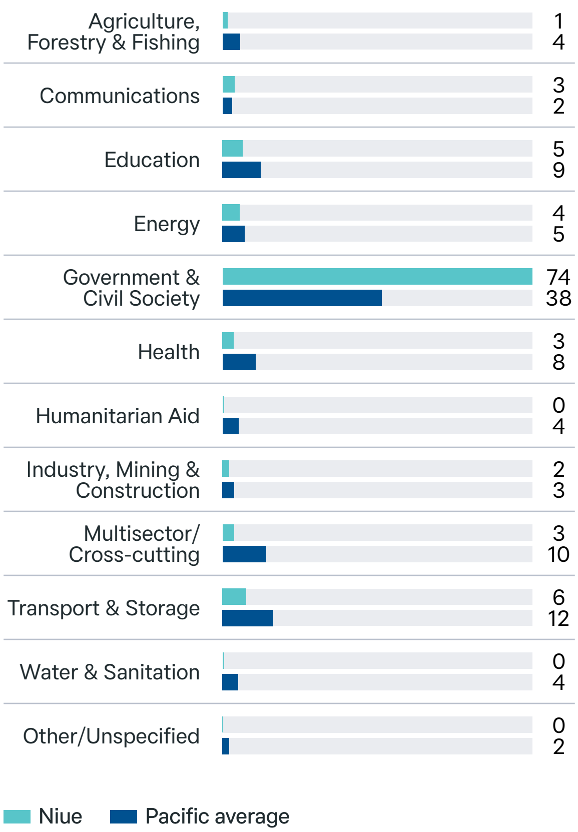


$374M	$409M	699	91%
SPENT	COMMITTED	PROJECTS	STATUS

NIUE

Official development finance, by sector

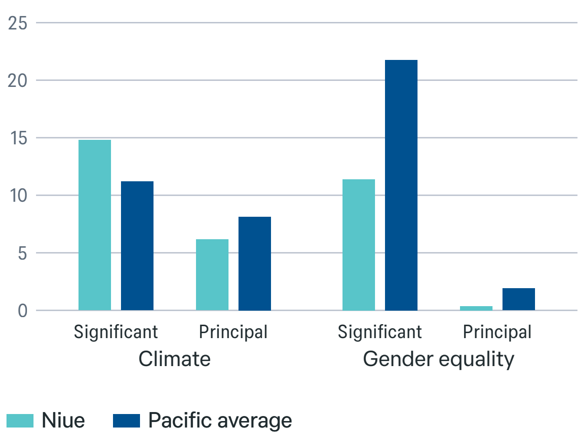
% of total ODF spent, constant 2023 US$



NIUE

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



Since 2008, Niue has received $23 million in development financing with a "principal" focus on either climate adaptation or mitigation. Over this same period, the country has seen $55 million in development financing with a "significant" focus on climate outcomes. Niue is distinct in the Pacific in that it has seen a decline in climate-targeting projects since the mid-2010s. However, this is likely a product of the size of Niue's economy and the impact of a handful of large projects distorting the trend. As a share of total ODF received by Niue, "principal" climate projects made up 6% of total spending, below the Pacific regional average of 8%. Conversely, spending on "significant" climate projects in Niue made up 15% of incoming funds, above the regional average of 11%.

Between 2008 and 2023, Niue received $1.3 million in development financing with a "principal" focus on gender equality, and $43 million in development financing with a "significant" focus on gender equality. "Principal" gender equality financing constituted less than 1% of ODF received by the country, below the regional average of 2%. "Significant" marked gender financing made up 11% of incoming ODF, significantly below the regional average of 22%. The largest project directly targeting gender equality in Niue was the multi-year $330,000 Gender Equality and Women's Empowerment program, funded by Australia.

PALAU

Key trends and development challenges

The Republic of Palau is an independent Micronesian country, comprised of 340 islands, eight of which are inhabited. With a GDP of $282 million, Palau is the fourth-smallest economy in the Pacific Islands and one of the smallest sovereign nations in the world. Palau has a population of 17,800, resulting in a GDP per capita of $15,859, ranking third in the Pacific.

Palau has the fifth-highest official development assistance (ODA) to gross domestic product (GDP) ratio in the Pacific Islands region, with aid accounting for 12% of GDP. In a global context, Palau remains among the more aid-reliant countries in the world, with its aid as a share of GDP ranking 22nd among 125 developing countries. The Palau government's development agenda highlights the importance of sustainable management of its marine resources. At 0.786, Palau's Human Development Index score ranks 84th out of 193 countries.

Between 2008 and 2023, annual official development finance (ODF) disbursements to Palau — including grants, loans, and other forms of assistance — averaged $55 million. The share of loans in Palau's total incoming development assistance has increased dramatically over the past decade. Between 2008 and 2013, loans made up around 7% of incoming funds. From 2014 onwards, loans have accounted for around a third of Palau's total incoming development assistance. The International Monetary Fund ranks Palau's risk of debt distress as low.

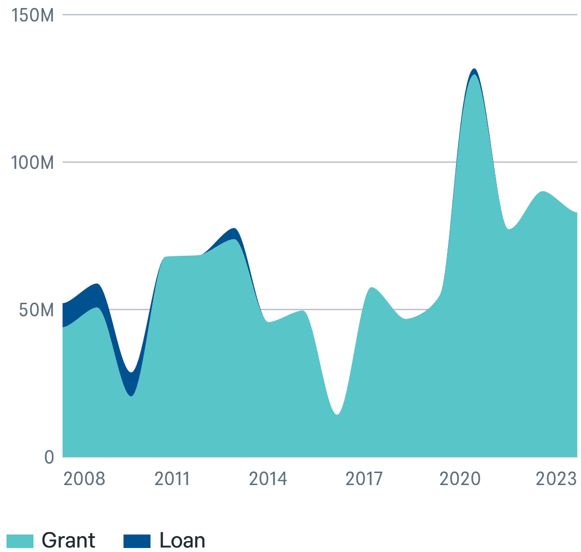
Development partners and sector trends

The vast majority (88%) of ODF support to Palau in 2023 came from four development partners, led by Taiwan (28%), Japan (24%), the United States (19%), and Australia (17%).

Beyond Compact of Free Association-supported projects funded by the United States, both Japan and Australia financed key initiatives in Palau in 2023. Australia contributed $4 million to support the construction of a solar facility in Ngatpang, while Japan provided $5.4 million in budget support ODF disbursements, largely consistent with regional trends in terms of sector distribution. The government and

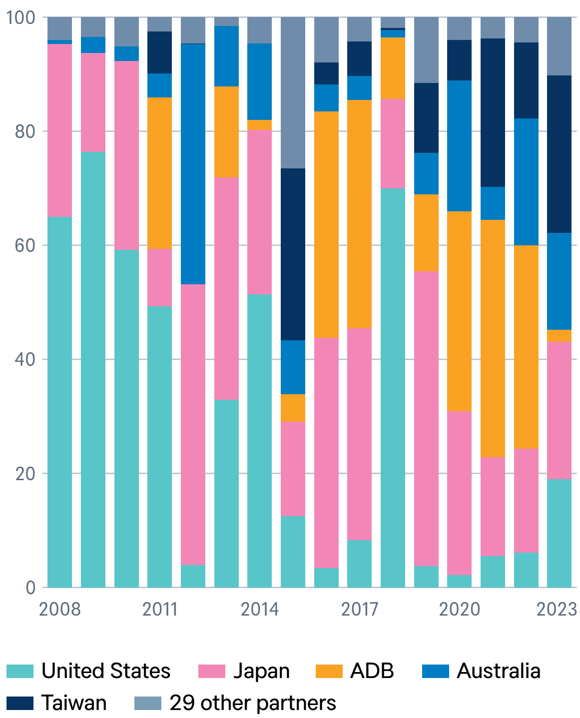
PALAU

Official development finance, by transaction type
Constant 2023 US$



PALAU

Official development finance, by partner
% of total ODF spent, constant 2023 US$

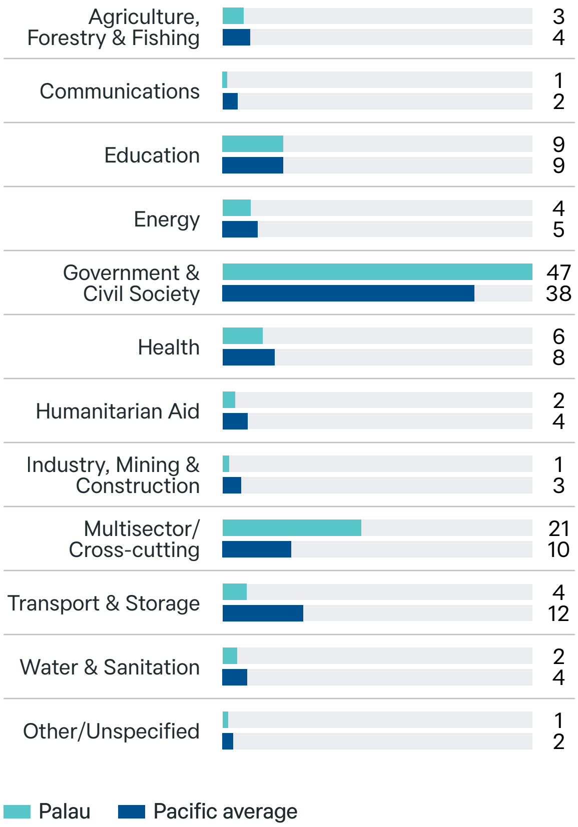


$932M	$1.1B	1,074	81%
SPENT	COMMITTED	PROJECTS	STATUS

PALAU

Official development finance, by sector

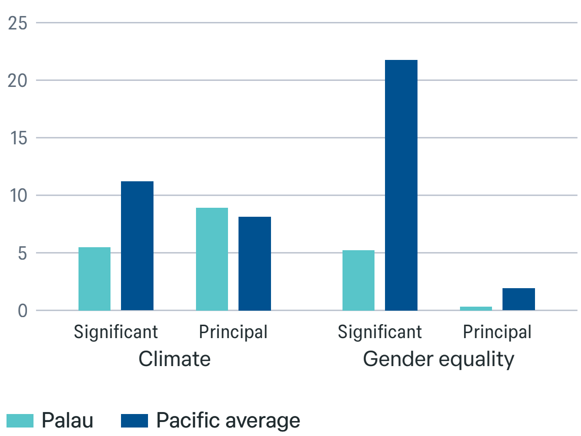
% of total ODF spent, constant 2023 US$



PALAU

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



civil society sector featured prominently, accounting for more than a third (39%) of incoming financing. Palau also sees higher-than-average spending in the water, sanitation, and energy sectors.

Since 2008, Palau has received $127 million in development financing with a “principal” focus on either climate adaptation or mitigation. Over this same period, the country has seen $166 million in development financing with a “significant” focus on climate outcomes. Over the past half-decade, Palau has seen a gradual rise in climate-targeting projects. As a share of total ODF received by Palau, “principal” climate projects made up 14% of total spending, above the regional average of 8%. Spending on “significant” climate projects in Palau made up 18% of incoming funds, above the regional average of 11%.

Between 2008 and 2023, Palau received $1.5 million in development financing with a “principal” focus on gender equality, and $124 million in development financing with a “significant” focus on gender equality. “Principal” gender equality financing constituted less than 1% of ODF received by the country, below the regional average of 2%. “Significant” marked gender financing made up 13% of incoming ODF, under the regional average of 22%. The largest project directly targeting gender equality in Palau was the multi-year Pacific Women Shaping Pacific Development program, funded by Australia.

PAPUA NEW GUINEA

Key trends and development challenges

Papua New Guinea (PNG) is a developing state located in the Pacific sub-region of Melanesia. With a GDP of $31 billion, PNG is the largest economy in the Pacific Islands and accounts for 73% of regional GDP. Papua New Guinea has a population of 10.4 million, resulting in a GDP per capita of $2,966, the third-lowest in the Pacific. Its exclusive economic zone (EEZ) spans 2.4 million square kilometres, the 19th-largest globally, comparable in size to the EEZ of Norway.

PNG has the lowest official development assistance (ODA) to gross domestic product (GDP) ratio in the Pacific Islands region, with aid accounting for 4% of GDP. In a global context, PNG has only moderate levels of ODA reliance, with its aid as a share of GDP ranking 65th among 125 developing countries. The PNG government's development agenda highlights agricultural reform, expansion of road networks, and improvements to the healthcare sector as its key priorities. At 0.576, PNG's Human Development Index score ranked 160th out of 193 countries, and is the lowest in the Pacific.

Between 2008 and 2023, annual official development finance (ODF) disbursements to PNG — including grants, loans, and other forms of assistance — averaged $1.3 billion. PNG has seen a dramatic increase in total ODF received since 2019, with total funds more than doubling since 2017. This uptick in ODF was driven in large part by annual budget support loans from the Australian government, as well as Asian Development Bank pandemic recovery loans.

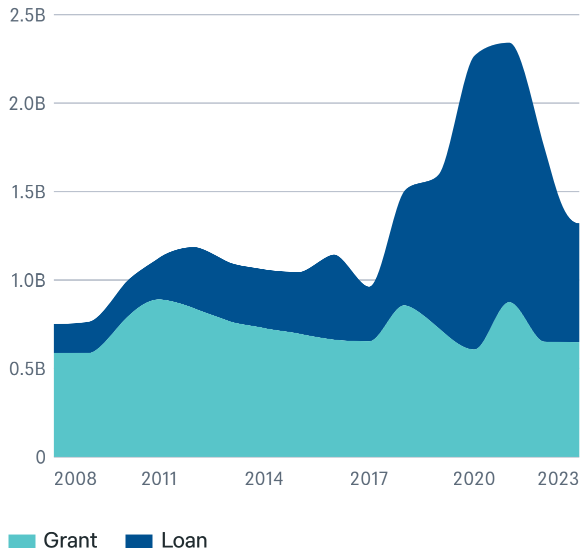
Almost half (44%) of the development finance received by PNG between 2008 and 2023 came in the form of loans. As a share of total received development support, loan-financed projects have increased significantly. Between 2008 and 2015, loans accounted for around a third of total ODF. Since 2016, this has increased to more than half.

Development partners and sector trends

Three-quarters (74%) of the ODF support to PNG in 2023 came from its largest three development partners, led by Australia (62%), the Asian Development

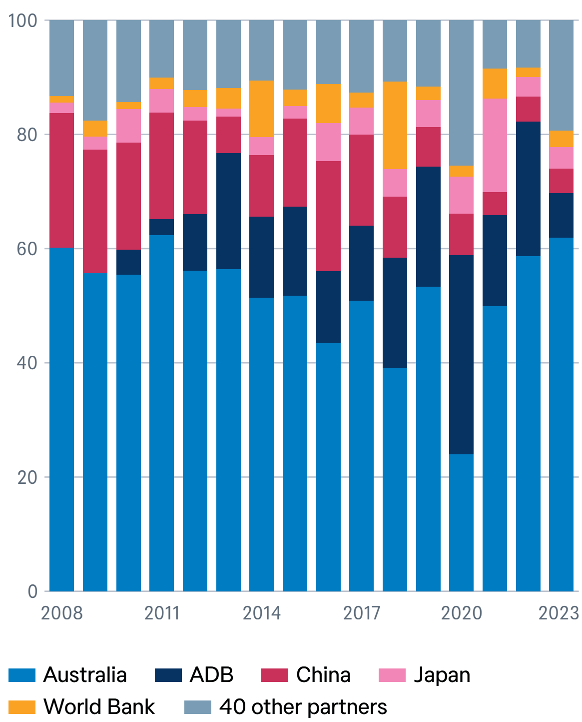
PAPUA NEW GUINEA

Official development finance, by transaction type
Constant 2023 US$



PAPUA NEW GUINEA

Official development finance, by partner
% of total ODF spent, constant 2023 US$

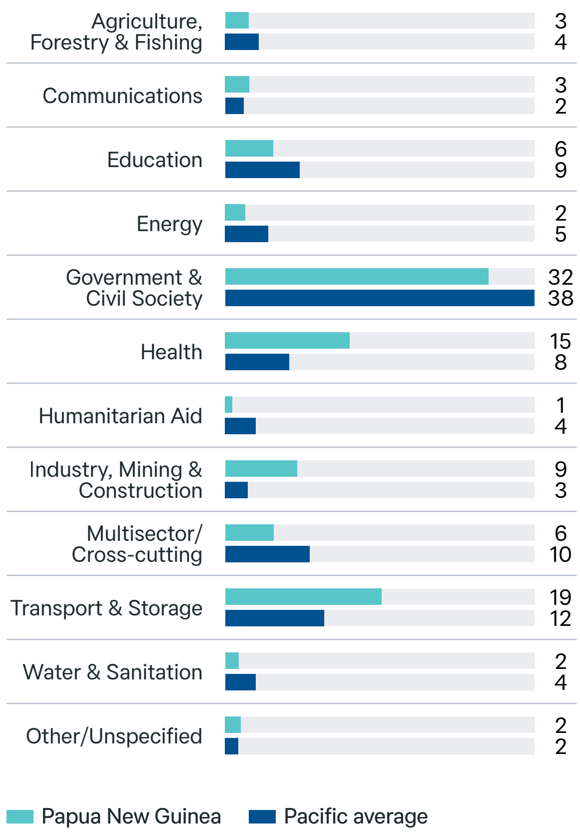


$20.9B	$25.4B	5,746	82%
SPENT	COMMITTED	PROJECTS	STATUS

PAPUA NEW GUINEA

Official development finance, by sector

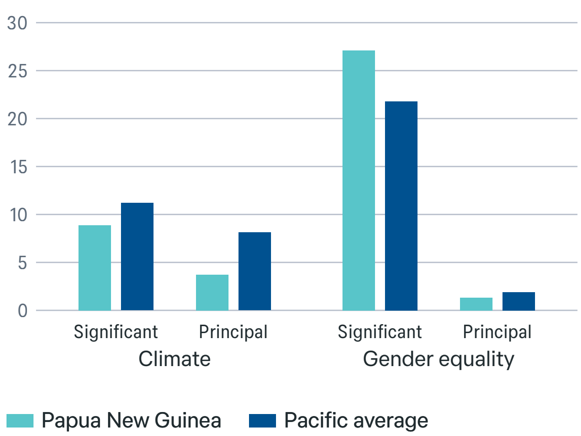
% of total ODF spent, constant 2023 US$



PAPUA NEW GUINEA

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



Bank (8%), and China (4%). Australia's largest ODF disbursements to PNG have all been budget support measures. The portion of PNG's total ODF provided by multilateral agencies changed dramatically in the wake of the pandemic. Prior to 2020, multilaterals made up a quarter of support received by the country. From 2020 onwards, the share has jumped to more than a third, with the uptick driven largely by increased support from the Asian Development Bank.

ODF in PNG was broadly consistent with regional trends in terms of sector distribution. PNG's only major sectoral outliers are in the health, transport and industry, and mining and construction sectors. Spending on projects focused on infrastructure overtook education and health in 2013, a trend maintained through to 2023.

Since 2008, PNG has received $778 million in development financing with a "principal" focus on either climate adaptation or mitigation. Over this same period, the country has seen $1.9 billion in development financing with a "significant" focus on climate outcomes. Over the past decade, PNG has seen a substantial rise in spending on climate-targeting projects. As a share of total ODF received by PNG, "principal" climate projects made up just 4% of total spending, well below the regional average of 8%. Conversely, spending on "significant" climate projects in PNG made up 9% of incoming funds, only slightly below the regional average of 11%. The difference in country and economy size between PNG and the rest of the Pacific accounts for these differences.

Between 2008 and 2023, PNG received $275 million in development financing with a "principal" focus on gender equality, and $5.7 billion in development financing with a "significant" focus on gender equality. "Principal" gender equality financing constituted 1% of ODF received by the country, in line with the regional average. Conversely, "significant" marked gender financing made up 27% of incoming ODF, well above the regional average of 22%. This high share is largely a product of gender equity goals being included in major budget support programs, somewhat distorting the picture. The largest project directly targeting gender equality in PNG was the multi-year $42 million Gender Equality and Gender-Based Violence initiative, funded by Australia.

SAMOA

Key trends and development challenges

Samoa is a small island developing state located in the Pacific sub-region of Polynesia. With a GDP of $1.1 billion, Samoa is the fourth-largest economy in the Pacific Islands and accounts for 2.7% of regional GDP. Samoa has a population of 216,700, resulting in a GDP per capita of $5,242, ranking eighth in the Pacific.

Samoa has the eighth-largest official development assistance (ODA) to gross domestic product (GDP) ratio in the Pacific Islands region, with aid accounting for 12% of GDP. In a global context, Samoa remains among the most aid-reliant countries in the world, with its aid as a share of GDP ranking 17th among 125 developing countries. The Samoan government's development agenda highlights the need for capacity-building, economic diversification, and investment in climate-resilient infrastructure. At 0.708, Samoa's Human Development Index score ranks 122nd out of 193 ranked countries.

Between 2008 and 2023, annual official development finance (ODF) disbursements to Samoa — including grants, loans, and other forms of assistance — averaged $175 million. As a share of Samoa's total received development support, loans have declined significantly over the past decade. In 2010, loans made up 47% of total financing to the country. Since 2020, this share has declined to 8%. The International Monetary Fund ranks Samoa's risk of debt distress as high.

Development partners and sector trends

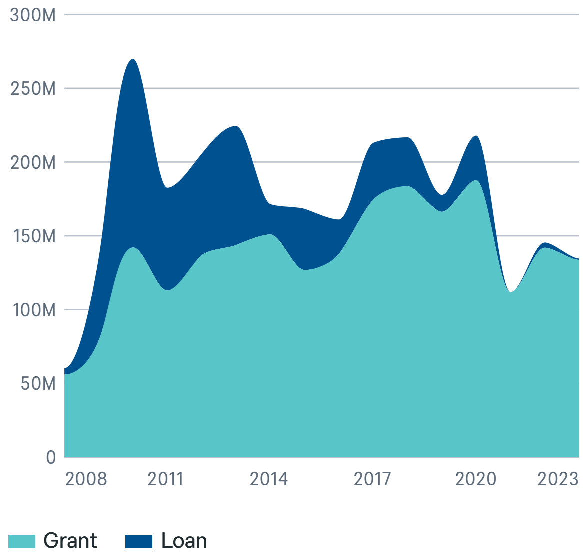
The vast majority (84%) of ODF support to Samoa in 2023 came from four development partners, led by Australia (33%), New Zealand (30%), the World Bank (17%), and Japan (4%).

ODF in Samoa was largely consistent with regional trends in terms of sector distribution. However, disbursements in the education, water and sanitation, and humanitarian aid sectors were notably higher than the regional average. The governance sector also featured prominently, making up close to a third of incoming ODF, but still below the regional average of 38%. From 2014, Samoa has seen a greater emphasis

SAMOA

Official development finance, by transaction type

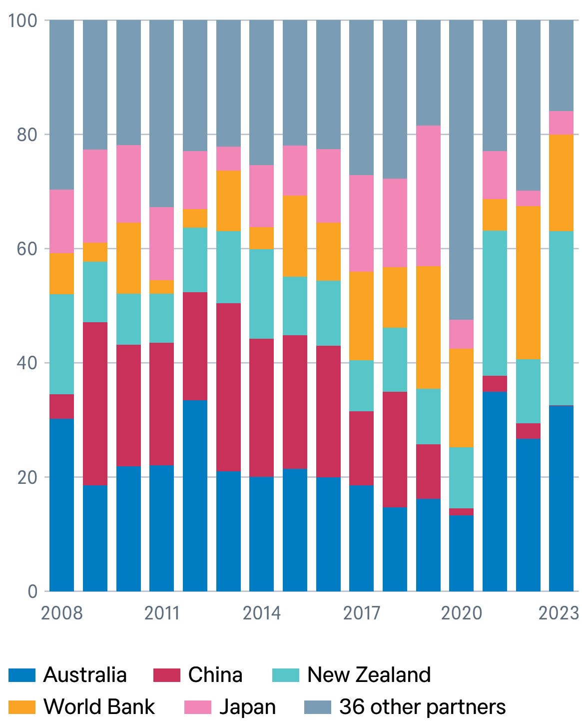
Constant 2023 US$



SAMOA

Official development finance, by partner

% of total ODF spent, constant 2023 US$

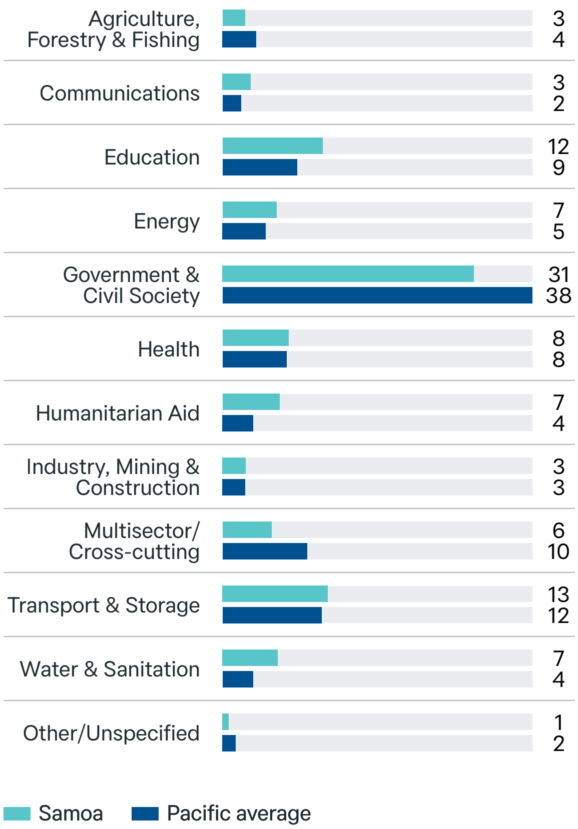


$2.8B	$2.9B	2,638	97%
SPENT	COMMITTED	PROJECTS	STATUS

SAMOA

Official development finance, by sector

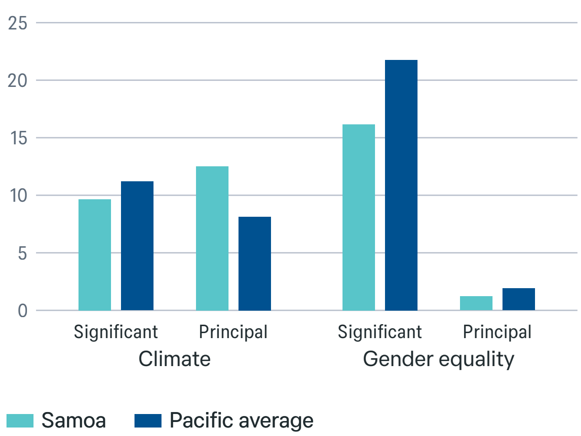
% of total ODF spent, constant 2023 US$



SAMOA

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



on infrastructure spending. However, the pandemic shifted priorities back towards human development, particularly within the healthcare sector.

Since 2008, Samoa has received $350 million in development financing with a “principal” focus on either climate adaptation or mitigation. Over this same period, the country has seen $270 million in development financing with a “significant” focus on climate outcomes. In contrast to other Pacific countries, Samoa has seen minimal changes in spending on climate-targeting projects. As a share of total ODF received by Samoa, “principal” climate projects made up 13% of total spending, above the regional average of 8%. Spending on “significant” climate projects in Samoa made up 10% of incoming funds, close to the regional average.

Between 2008 and 2023, Samoa received $34 million in development financing with a “principal” focus on gender equality, and $452 million in development financing with a “significant” focus on gender equality. “Principal” gender equality financing constituted 1% of ODF received by the country, slightly below the regional average of 2%. Conversely, “significant” marked gender financing made up 16% of incoming ODF, below the regional average of 22%. The largest project directly targeting gender equality in Samoa was the multi-year $2 million Women in Leadership program, funded by Australia and the United Nations Development Programme.

SOLOMON ISLANDS

Key trends and development challenges

Solomon Islands is an archipelagic state situated in the Pacific sub-region of Melanesia. With a GDP of $1.6 billion, Solomon Islands is the third-largest economy in the Pacific Islands and accounts for almost 4% of regional GDP. The country has a population of around 800,000, resulting in a GDP per capita of $2,005, ranking last in the Pacific. Its exclusive economic zone (EEZ) spans 1.5 million square kilometres, the 22nd-largest globally, comparable in size to the EEZ of the Philippines.

Solomon Islands has the seventh-highest official development assistance (ODA) to gross domestic product (GDP) ratio in the Pacific Islands region, with aid accounting for 20% of GDP. In a global context, Solomon Islands remains among the most aid-reliant countries in the world, with its aid as a share of GDP ranking 13th among 125 developing countries. The Solomon Islands government's development agenda focuses on infrastructure investment and economic diversification. At 0.584, Solomon Islands' Human Development Index score ranks 156th out of 193 countries.

Between 2008 and 2023, annual official development finance (ODF) disbursements to Solomon Islands — including grants, loans, and other forms of assistance — averaged $341 million. Around 6% of the development finance received by Solomon Islands during this period came in the form of loans. Loan assistance peaked at 22% of total ODF in 2019 but declined in successive years to less than 10% in 2021. In 2022, the Solomon Islands' government signed a $66 million loan with China to build 161 mobile communication towers. The International Monetary Fund ranks Solomon Islands' risk of debt distress as moderate.

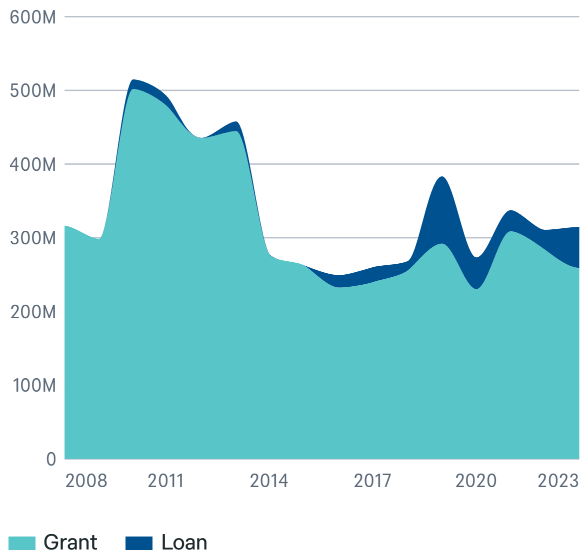
Development partners and sector trends

The vast majority (85%) of ODF support to Solomon Islands in 2023 came from five development partners, led by Australia (34%), China (19%), the World Bank (18%), New Zealand (7%), and Japan (7%). Since switching recognition from Taiwan to China in 2019, Chinese financing has played a growing role in the ODF mix of Solomon Islands. Since 2021, China

SOLOMON ISLANDS

Official development finance, by transaction type

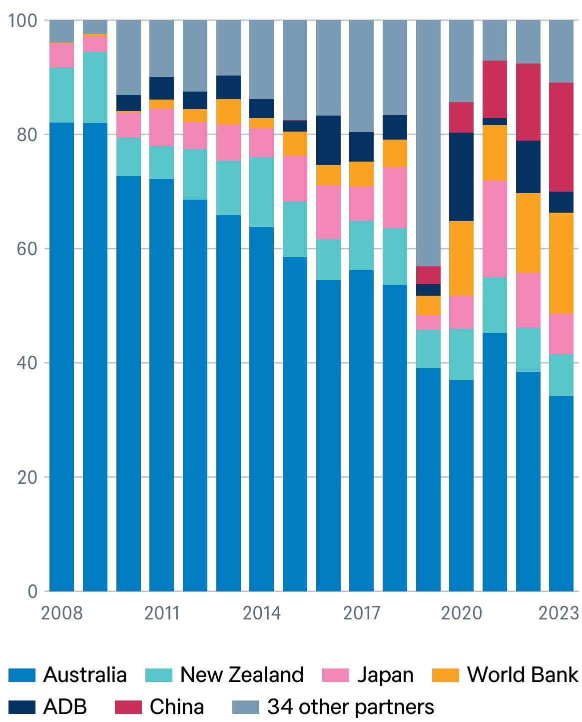
Constant 2023 US$



SOLOMON ISLANDS

Official development finance, by partner

% of total ODF spent, constant 2023 US$

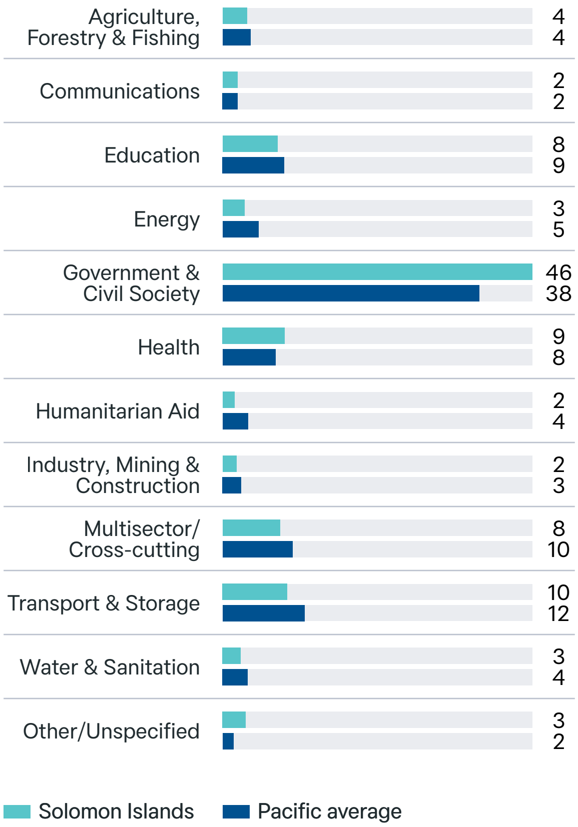


$5.5B	$6.3B	3,805	86%
SPENT	COMMITTED	PROJECTS	STATUS

SOLOMON ISLANDS

Official development finance, by sector

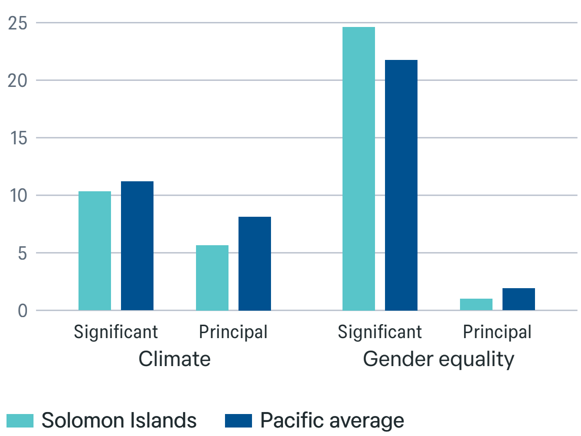
% of total ODF spent, constant 2023 US$



SOLOMON ISLANDS

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



has been the country's second-largest aid partner, providing finance for stadiums and facilities for the 2023 Pacific Games in Honiara, upgrading university facilities, and enhancing policing support.

ODF disbursements in Solomon Islands were largely consistent with regional trends in terms of sector distribution. The government and civil society sector featured prominently, accounting for close to half (46%) of incoming financing. This is driven in part by flows of ODF to discretionary government and parliamentarian funds, such as the country's Constituency Development Funds. Human development spending has remained higher than infrastructure spending in Solomon Islands since 2008, with the exception of a spike in 2019 as a result of spending on the Tina River Hydropower Development Project. Solomon Islands was one of a small number of Pacific states that did not see a significant spike in human development spending during the pandemic.

Since 2008, Solomon Islands has received $308 million in development financing with a "principal" focus on either climate adaptation or mitigation. Over this same period, the country has seen $563 million in development financing with a "significant" focus on climate outcomes. Since 2015, Solomon Islands has seen a substantial rise in spending on climate-targeting projects. As a share of total ODF received by Solomon Islands, "principal" climate projects made up just 6% of total spending, below the regional average of 8%. Spending on "significant" climate projects in Solomon Islands made up 10% of incoming funds, slightly below the regional average of 11%.

Between 2008 and 2023, Solomon Islands received $54 million in development financing with a "principal" focus on gender equality, and $1.3 billion in development financing with a "significant" focus on gender equality. "Principal" gender equality financing constituted 1% of ODF received by the country, in line with the regional average. Conversely, "significant" marked gender financing made up 25% of incoming ODF, above the regional average of 22%. The largest project directly targeting gender equality in the country was the multi-year $23 million Addressing Gender Equality project, funded by Australia and the United Nations Development Programme.

TONGA

Key trends and development challenges

Tonga is a small island developing state located in the Pacific sub-region of Polynesia. With a GDP of $508 million, Tonga is the sixth-largest economy in the Pacific Islands and accounts for 1.2% of regional GDP. Tonga has a population of 105,000, resulting in a GDP per capita of $4,900, ranking eighth in the Pacific.

Tonga has the second-highest official development assistance (ODA) to gross domestic product (GDP) ratio in the Pacific Islands region, with aid accounting for 35% of GDP. In a global context, Tonga remains one of the most aid-reliant countries in the world, with its aid as a share of GDP ranking second among 125 developing countries.

The Tongan government's development agenda is focused on the continued recovery from the Covid-19 pandemic and the Hunga Tonga–Hunga Ha'apai volcanic eruption and subsequent tsunami event. Health sector reform and disaster resilience are also key priorities. At 0.769, Tonga's Human Development Index score ranks 92nd out of 193 ranked countries.

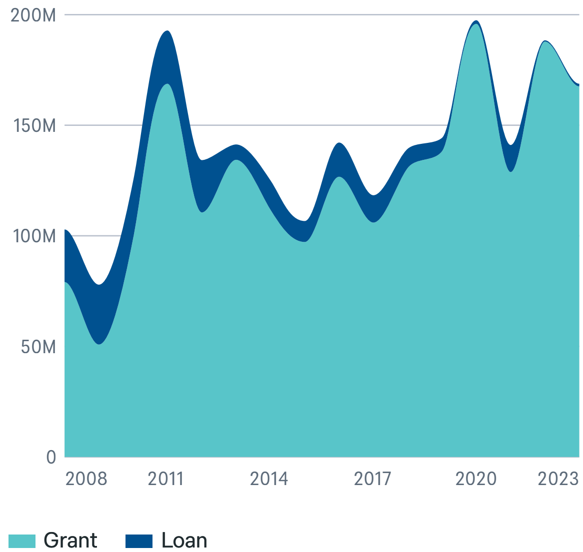
Between 2008 and 2023, annual official development finance (ODF) disbursements to Tonga — including grants, loans, and other forms of assistance — averaged $140 million. Just over 10% of the development finance received by Tonga since 2008 has come in the form of loans. As a share of Tonga's total received development support, loans have declined significantly over the past decade. Between 2008 and 2011, loans made up 23% of total financing to the country. Between 2019 and 2023, the loan share dropped to less than 3%. The bulk of this lending came from China to fund a rebuild of the Nuku'alofa business district and a tied national roads project, with debt repayments for this project currently weighing heavily on the government budget. The International Monetary Fund ranks Tonga's risk of debt distress as high, in large part a product of the 2029 repayment deadline on Chinese debts.

Development partners and sector trends

More than 80% of ODF support to Tonga in 2023 came from four development partners, led by Australia (46%), New Zealand (16%), China (12%), and the World Bank (9%).

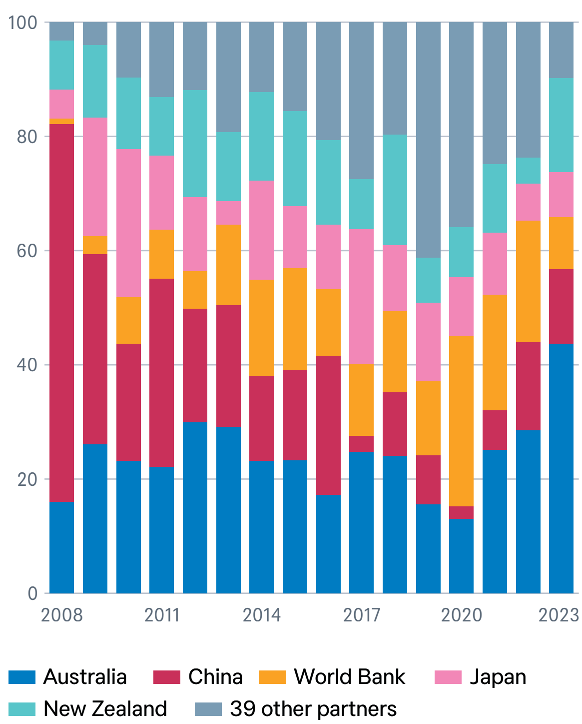
TONGA

Official development finance, by transaction type
Constant 2023 US$



TONGA

Official development finance, by partner
% of total ODF spent, constant 2023 US$

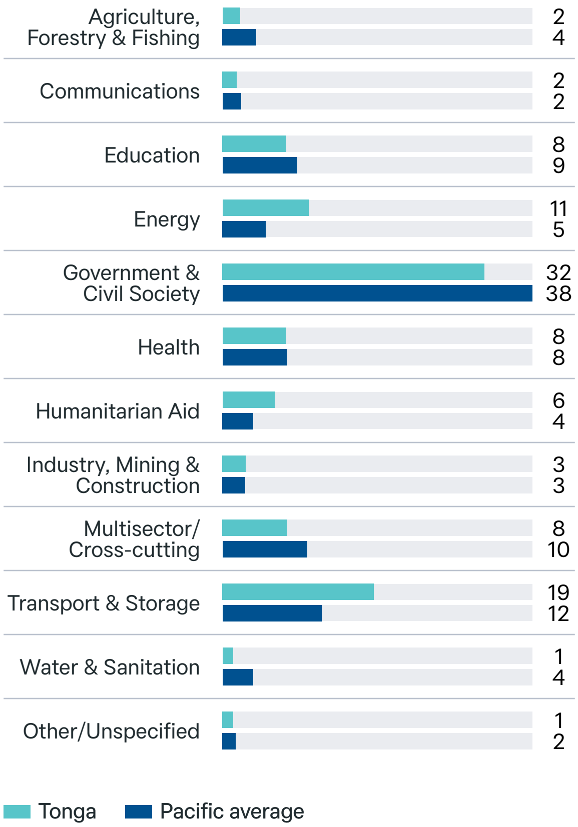


$2.2B	$2.5B	2,444	88%
SPENT	COMMITTED	PROJECTS	STATUS

TONGA

Official development finance, by sector

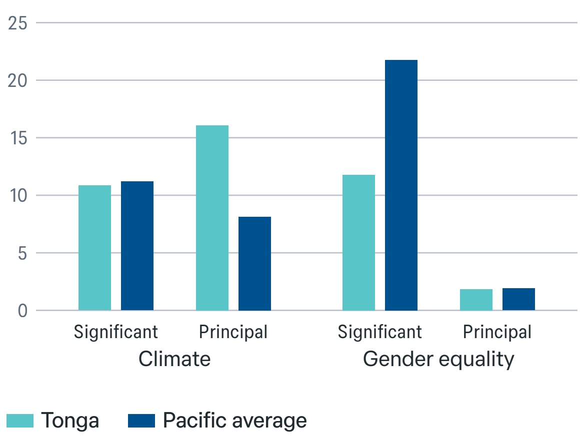
% of total ODF spent, constant 2023 US$



TONGA

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



ODF in Tonga was largely consistent with regional trends in terms of sector distribution. The country sees moderately high levels of spending on transport and energy, and a smaller focus on health. Distinct from regional trends, infrastructure has remained a dominant focus of incoming ODF disbursements in Tonga over the past decade.

Since 2008, Tonga has received $361 million in development financing with a “principal” focus on either climate adaptation or mitigation. Over this same period, the country has seen $244 million in development financing with a “significant” focus on climate outcomes. Since 2018, Tonga has seen a substantial rise in spending on climate-targeting projects. As a share of total ODF received by Tonga, “principal” climate projects made up 16% of total spending, well above the regional average of 8%. Conversely, spending on “significant” climate projects in Tonga made up 11% of incoming funds, in line with the regional average of 11%.

Between 2008 and 2023, Tonga received $41 million in development financing with a “principal” focus on gender equality, and $264 million in development financing with a “significant” focus on gender equality. “Principal” gender equality financing constituted 2% of ODF received by the country, in line with the regional average of 2%. Conversely, “significant” marked gender financing made up 12% of incoming ODF, well below the regional average of 22%. The largest project directly targeting gender equality in Tonga was the $7 million Pacific Women Shaping Pacific Development project, funded by Australia.

TUVALU

Key trends and development challenges

Tuvalu is one of the world's smallest independent nations, comprising nine low-lying coral atolls. With a GDP of $60 million, Tuvalu is the second-smallest economy in the Pacific Islands and accounts for 0.1% of regional GDP. Tuvalu has a population of 9,900, resulting in a GDP per capita of $5,800, ranking seventh in the Pacific. Despite its small size, Tuvalu's exclusive economic zone (EEZ) covers 749,800 square kilometres, the 38th-largest globally, comparable to the EEZ of China.

Tuvalu has the highest official development assistance (ODA) to gross domestic product (GDP) ratio in the Pacific Islands region, with aid accounting for 146% of national economic output. In a global context, Tuvalu is the most aid-reliant country in the world, with its aid as a share of GDP ranking first among 125 developing countries.

The Tuvalu government's development agenda highlights five strategic areas: sustainable development, economic development, social development and inclusion, islands and culture, and infrastructure development. At 0.689, Tuvalu's Human Development Index score ranks 129th out of 193 ranked countries.

Development partners and sector trends

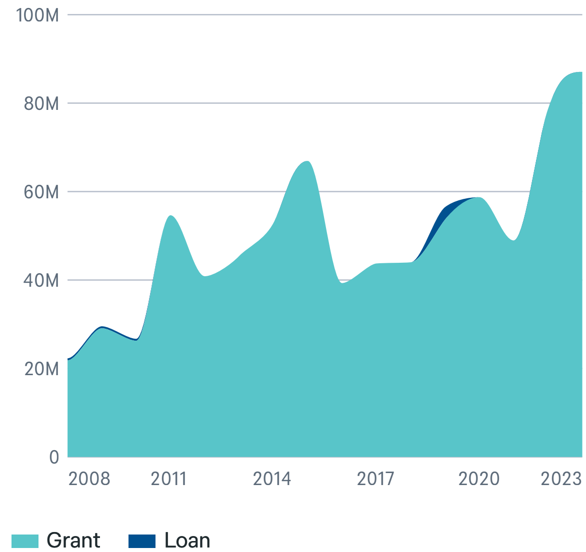
Between 2008 and 2023, annual official development finance (ODF) disbursements to Tuvalu — including grants, loans, and other forms of assistance — averaged $50 million. Since 2011, Tuvalu has seen exclusively grant-based development financing. Tuvalu is the second-highest per capita aid recipient in the Pacific, in part a product of its small population size.

The vast majority (83%) of ODF support to Tuvalu in 2023 came from five development partners, led by Australia (26%), the Green Climate Fund (23%), the World Bank (13%), New Zealand (11%), and Taiwan (10%).

ODF disbursements in Tuvalu were largely consistent with regional trends in terms of sector distribution. The government and civil society sector featured prominently, accounting for close to 40% of incoming

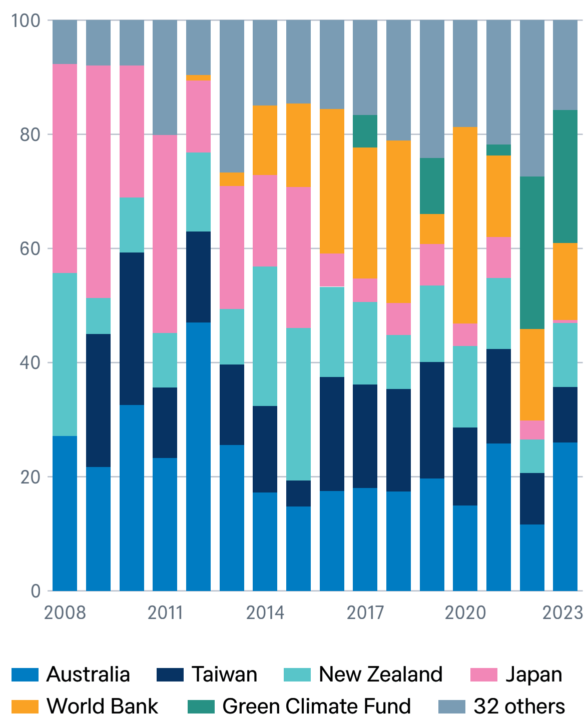
TUVALU

Official development finance, by transaction type
Constant 2023 US$



TUVALU

Official development finance, by partner
% of total ODF spent, constant 2023 US$

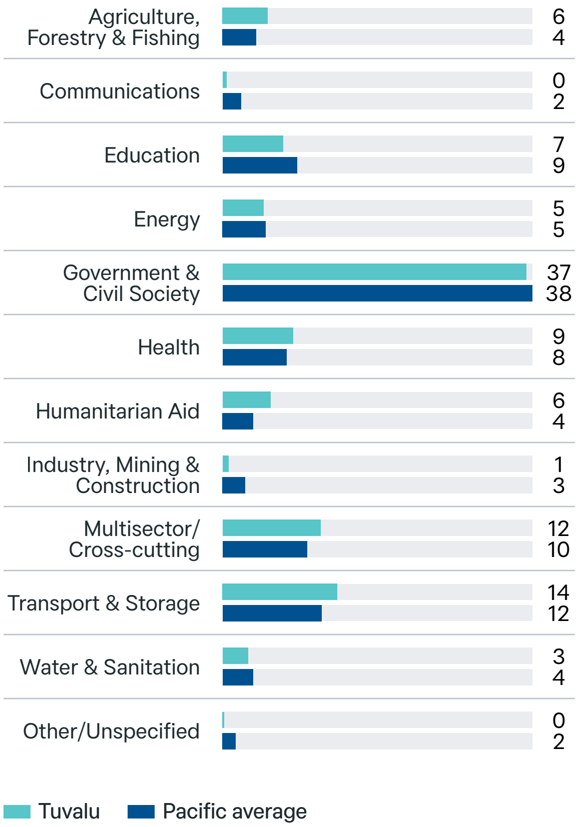


$795M	$1.1B	1,318	74%
SPENT	COMMITTED	PROJECTS	STATUS

TUVALU

Official development finance, by sector

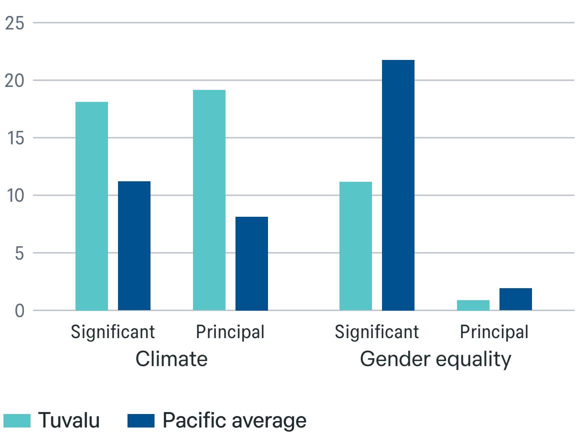
% of total ODF spent, constant 2023 US$



TUVALU

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



financing. Tuvalu also sees slightly higher-than-average spending in transportation, energy, and humanitarian aid. From 2014 onwards, Tuvalu has seen a greater emphasis on infrastructure spending, particularly climate adaptation projects.

Since 2008, Tuvalu has received $152 million in development financing with a “principal” focus on either climate adaptation or mitigation. Over this same period, the country has seen $144 million in development financing with a “significant” focus on climate outcomes. From 2018, Tuvalu saw a substantial rise in spending on climate-targeting projects in recognition of its extreme vulnerability to climate change. As a share of total ODF received by Tuvalu, “principal” climate projects made up 19% of total spending, well above the regional average of 8%. Similarly, spending on “significant” climate projects in Tuvalu made up 18% of incoming funds, above the regional average of 11%.

Between 2008 and 2023, Tuvalu received $7 million in development financing with a “principal” focus on gender equality, and $89 million in development financing with a “significant” focus on gender equality. “Principal” gender equality financing constituted 1% of ODF received by the country, slightly below the regional average of 2%. Similarly, “significant” marked gender financing made up 11% of incoming ODF, well below the regional average of 22%. The largest project directly targeting gender equality in Tuvalu was the $1 million Pacific Women Shaping Pacific Development project, funded by Australia.

VANUATU

Key trends and development challenges

Vanuatu is an independent republic located in the Pacific sub-region of Melanesia. With a GDP of $1.03 billion, Vanuatu is the fifth-largest economy in the Pacific Islands and accounts for 2.4% of regional GDP. Vanuatu has a population of 320,000, resulting in a GDP per capita of $3,300, ranking 11th in the Pacific. Its exclusive economic zone (EEZ) spans 663,200 square kilometres, the 39th-largest globally, comparable in size to the EEZ of Malaysia.

Vanuatu has the tenth-highest official development assistance (ODA) to gross domestic product (GDP) ratio in the Pacific Islands region, with aid accounting for 21% of GDP. In a global context, Vanuatu remains among the most aid-reliant countries in the world, with its aid as a share of GDP ranking 20th among 125 developing countries.

The Vanuatu government's development agenda highlights the need for a balance between the social, environmental, and economic pillars of sustainable development. At 0.621, Vanuatu's Human Development Index score ranks 146th out of 193 ranked countries.

Between 2008 and 2023, annual official development finance (ODF) disbursements to Vanuatu — including grants, loans, and other forms of assistance — averaged $190 million. Around a fifth (19%) of the development finance received by Vanuatu during this period came in the form of loans, predominantly provided by China for roads projects. Principal among these has been the multi-stage Tanna and Malekula Roads rehabilitation program, which has seen total debt-financed spending of more than $155 million. The International Monetary Fund ranks Vanuatu's risk of debt distress as high.

Development partners and sector trends

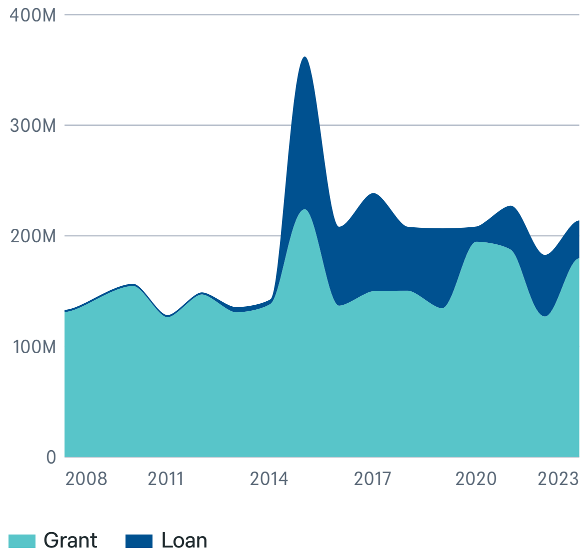
The vast majority (84%) of ODF support to Vanuatu in 2023 came from five development partners, led by Australia (36%), China (18%), the World Bank (11%), Japan (10%), and New Zealand (9%).

ODF disbursements in Vanuatu were largely consistent with regional trends in terms of sector distribution.

VANUATU

Official development finance, by transaction type

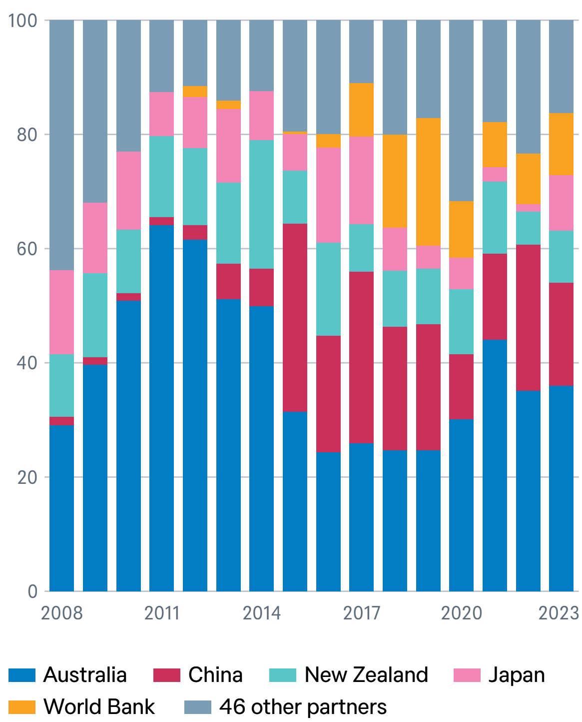
Constant 2023 US$



VANUATU

Official development finance, by partner

% of total ODF spent, constant 2023 US$

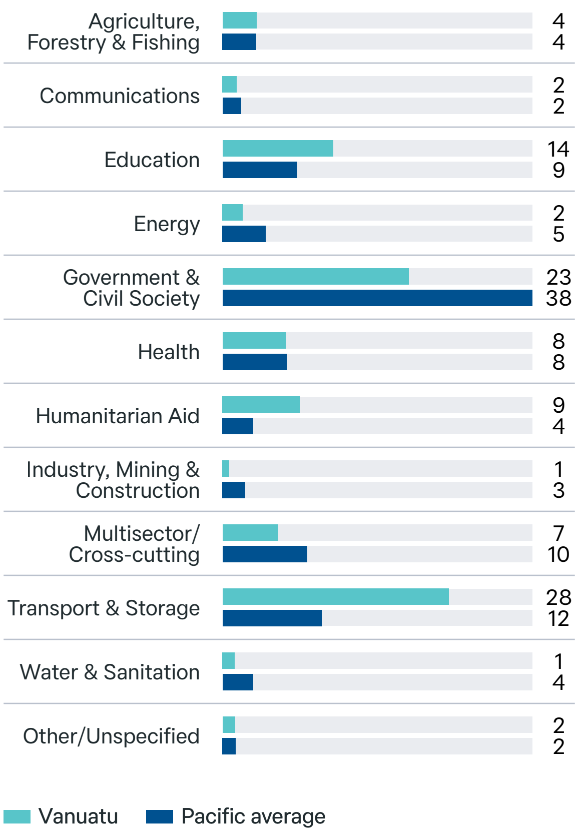


$3B	$3.6B	3,365	84%
SPENT	COMMITTED	PROJECTS	STATUS

VANUATU

Official development finance, by sector

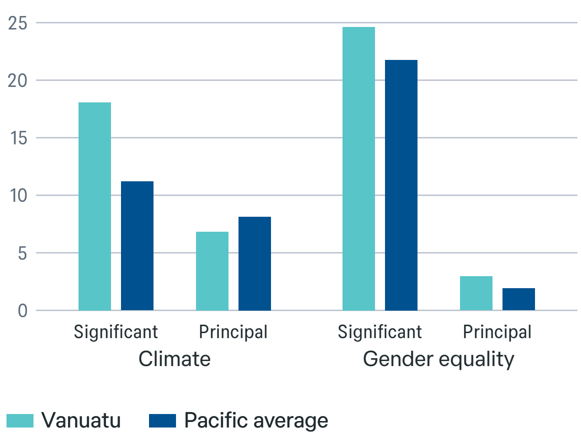
% of total ODF spent, constant 2023 US$



VANUATU

Official development finance, by policy goal

% of total ODF spent, constant 2023 US$



The transport sector featured prominently, accounting for more than a quarter of incoming financing. Vanuatu also sees higher-than-average spending in the education and humanitarian aid sectors, the latter a product of the country's intense exposure to climatic disaster events.

From 2014 onwards, Vanuatu has seen a greater emphasis on infrastructure spending. Vanuatu was one of a small number of Pacific states that did not see a significant spike in human development spending during the pandemic.

Since 2008, Vanuatu has received $209 million in development financing with a "principal" focus on either climate adaptation or mitigation. Over this same period, the country has seen $551 million in development financing with a "significant" focus on climate outcomes. Since the mid-2010s, Vanuatu has seen a substantial rise in spending on climate-targeting projects. As a share of total ODF received by Vanuatu, "principal" climate projects made up 7% of total spending, slightly below the regional average of 8%. Conversely, spending on "significant" climate projects in Vanuatu made up 18% of incoming funds, well above the regional average of 11%.

Between 2008 and 2023, Vanuatu received $89 million in development financing with a "principal" focus on gender equality, and $750 million in development financing with a "significant" focus on gender equality. "Principal" gender equality financing constituted 3% of ODF received by the country, slightly above the regional average of 2%. Similarly, "significant" marked gender financing made up 25% of incoming ODF, above the regional average of 22%. The largest project targeting gender equality outcomes in Vanuatu was the $21 million Vanuatu–Australia Policing and Justice Program project, funded by Australia.

REGIONAL INITIATIVES

$6.8B	$7.8B	5,683	86%
SPENT	COMMITTED	PROJECTS	STATUS

The "Regional initiatives" recipient category captures both funding allocated to regional organisations and projects implemented across multiple countries. Between 2008 and 2023, annual official development finance (ODF) disbursements to regional projects — including grants, loans, and other forms of assistance — averaged $422 million. Funds earmarked as regionally focused constituted the second-largest recipient in the Pacific Aid Map, accounting for 17% of incoming ODF flows in 2023, the highest level on record.

Australia is the largest provider of development funds to regional initiatives, accounting for 42% of funding inflows in 2023. The next-largest providers are New Zealand (23%), Japan (9%), and Canada (5%).

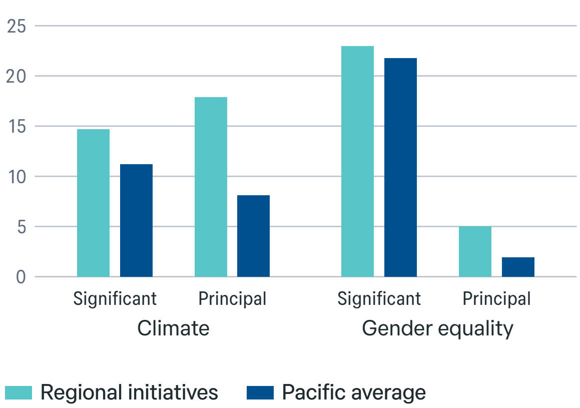
The Council of Regional Organisations in the Pacific (CROP) brings together several regional intergovernmental agencies. Collectively, CROP agencies capture around a fifth of regionally earmarked ODF inflows. The Pacific Community (SPC) is the principal scientific and technical organisation in the Pacific region and the major CROP recipient in the Pacific.

ODF disbursements to regional initiatives are distinct from regional trends. For instance, agriculture, forestry, fishing, and water management see a greater focus when compared with Pacific averages as they are initiatives typically tackled with a multi-country approach. Regional projects are also predominantly focused on human development over infrastructure.

REGIONAL INITIATIVES

Official development finance, by policy goal

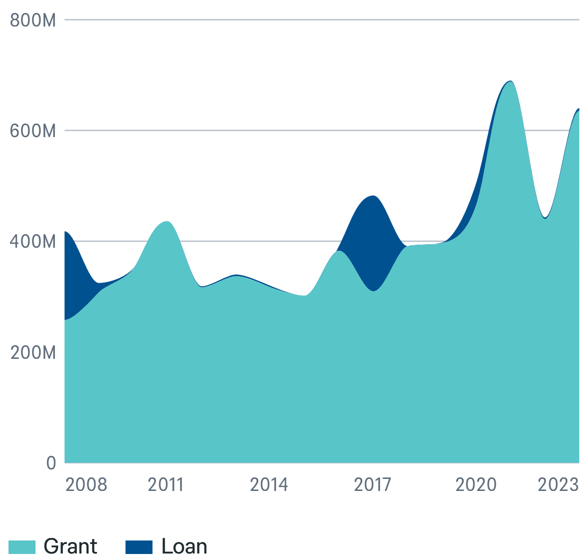
% of total ODF spent, constant 2023 US$



REGIONAL INITIATIVES

Official development finance, by transaction type

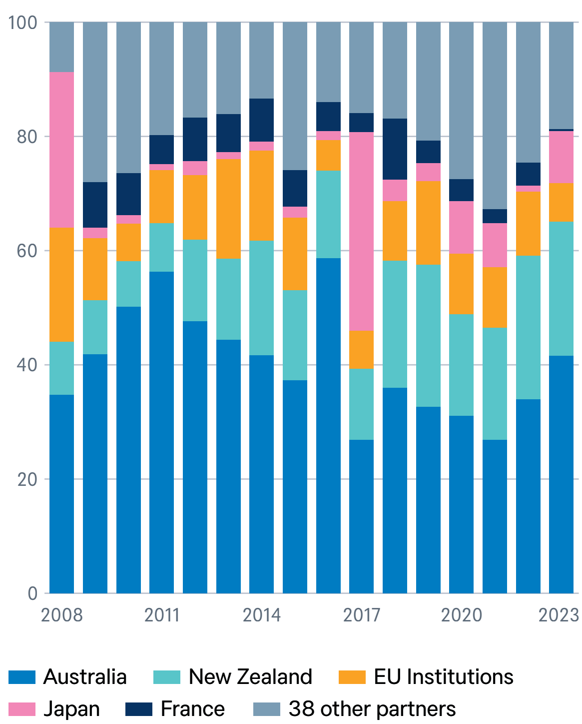
Constant 2023 US$



REGIONAL INITIATIVES

Official development finance, by partner

% of total ODF spent, constant 2023 US$



Methodology

The Pacific Aid Map consists of data on more than 38,000 projects and activities across all Pacific Island nations from 76 development partners, with complete data from 2008 to 2023. This raw data is freely available on the Pacific Aid Map interactive platform, allowing users to drill down and manipulate the data in a variety of ways.

Key concepts

Official development finance (ODF) refers to public funds provided by governments and international organisations to promote economic and social development in low- and middle-income countries. It is the combination of official development assistance (ODA) and other official flows (OOF).

Official development assistance (ODA) is defined as financial flows that are provided by official agencies and are administered with the promotion of the economic development and welfare of developing countries as the main objective and are concessional in character.

Other official flows (OOF) consist of financial flows that do not meet the conditions for ODA either because they are not primarily aimed at development or because they do not meet Organisation for Economic Co-operation and Development (OECD) concessionality standards.

Donors

A donor is an entity, such as a government or organisation, that provides foreign assistance to support economic and social development in other countries. The Pacific Aid Map focuses on 97 official agencies or partners, both bilateral and multilateral.

Recipients

The recipient countries in alphabetical order are: Cook Islands, Federated States of Micronesia, Fiji, Kiribati, Marshall Islands, Nauru, Niue, Palau, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, and Vanuatu. Additionally, there is a Regional initiatives recipient category that captures all regional and multi-country projects.

Committed vs spent

There is an important distinction between what development partners have committed in the region and what they have actually spent. Large commitments, typically in infrastructure, can often take a long time to disburse, meaning commitments can often overstate a donor's overall footprint. Spent funds are a better indication of annual flows into the region.

Sectors

Sectors have been drawn from the OECD sector categories and condensed for formatting purposes. The sectors are: Agriculture, Forestry & Fishing, Communications, Education, Energy, Government & Civil Society, Health, Humanitarian Aid, Industry, Mining & Construction, Multisector/Cross-cutting, Transport & Storage, Water & Sanitation, and other/unspecified.

Sources

There are two major existing databases for tracking aid and development finance: the OECD's Development Assistance Committee (OECD DAC) and the International Aid Transparency Initiative (IATI). Unfortunately, neither dataset has comprehensive reporting on non-traditional partners such as India, China, and Taiwan, nor do they cover each Pacific Island country. Steps have been taken by the Pacific Aid Map team to both fill the gaps in existing reporting mechanisms and validate what has been reported through official channels. The team collected, cleaned, and analysed data from open sources such as government budget documents, press releases, news media and social media, and websites of resident embassies. These sources are available via hyperlinks in the Pacific Aid Map database.

This approach, while detailed, will never be entirely comprehensive and some projects will likely be missing, especially from non-traditional partners. However, we are confident that this approach has produced the most complete picture of non-traditional development partner activities to date.

Climate, disability inclusion, and gender equality development finance

The OECD policy marker system provides an indication of the degree of investment a policy goal receives within an ODF project. A modified version of the OECD's marker system for climate, disability inclusion, and gender equality has been applied to all projects in the Pacific Aid Map dataset, sorting projects into three categories: "principal", where climate change mitigation or adaptation/inclusiveness of persons with disabilities/gender equality is explicitly stated as fundamental to the project; "significant", where climate change mitigation or adaptation/inclusiveness of persons with disabilities/gender equality is explicitly stated but not fundamental; and "not climate related", where climate change mitigation or adaptation/inclusiveness of persons with disabilities/gender equality is not targeted in any way.

The Pacific Aid Map team has taken at face value the climate, disability, or gender equality relevance marking given to projects by those development partners who self-report using the OECD system. For those partners who do not report, each project has been allocated a rating based on relevant criteria such as project and partner information, Sustainable Development Goal indicators, and OECD sub-sectors.

Data caveats

The research covers the period from 2008 to 2023. Data for non-traditional development partners is likely to be incomplete. Additionally, the OECD relies on partner self-reporting of OOF, and partners report into it to varying degrees. It likely understates the actual volume of OOF being transferred to the region.

Review process

The clean dataset was provided to both recipient and main partner governments and organisations for confirmation. The full methodology and a representative subset of the data was sent to an independent, external organisation for robust peer review and to validate, test, and recreate the results.

Currency

All currency is quoted in constant 2023 US dollars.

Notes

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