How serious is the EU about reducing fragmentation?

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Introduction[1]

The EU has a long history of internal agreements to improve coordination and complementarity between its Member States and with the EU institutions on development cooperation. The *Code of Conduct on Complementarity and Division of Labour* agreed by Council in May 2007 is the latest example and the internal cornerstone of the EU's current efforts to reduce fragmentation. With the Code now in place for 6 years and the EU's next multi-annual budget cycle about to start in January 2014 this is a good moment to ask how serious the EU – that is the Commission and Member States – is about implementing the Code and reducing fragmentation.

The paper reviews evidence of the EU's record in adopting different approaches to coordination and complementarity in its efforts to improve aid effectiveness. The case for and value of reducing fragmentation, in terms of improving aid effectiveness has been made extensively in the Paris-Accra-Busan HLF aid effectiveness dialogue process and is not reiterated here.

Concepts and definitions

The introduction (call for papers) to this Conference suggests fragmentation as a term can apply as much to the proliferation of actors as to the proliferation of approaches. In this paper we focus on the number of actors not least because this is in line with the way the Busan final outcome document (HLF, 2011, para 25) uses the term *fragmentation* to refer to the 'diversity of development cooperation actors' and the 'proliferation of aid channels'. That said others take a broader view of the term. Bürcky (2011, p.9) for instance seeks to distinguish between aid fragmentation and donor proliferation with the former defined as 'the distribution of aid within a sector from a partner country perspective' and the latter being 'the spread of aid by a donor across sectors in a given partner country'.

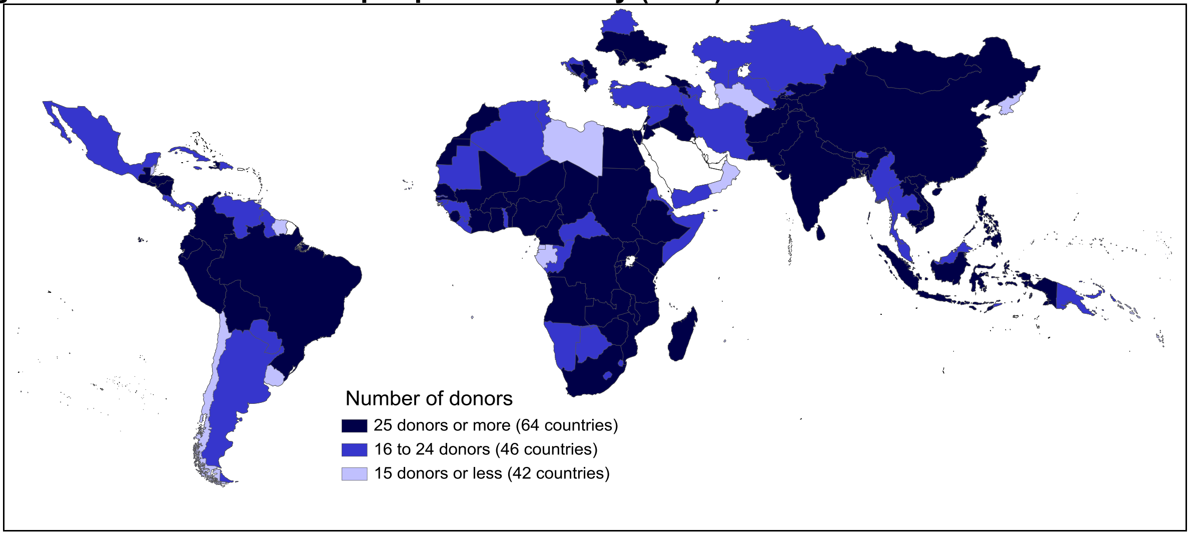
Mürle (2007) on the other hand in his study published in the lead up to the formulation of the Code of Conduct under the German EU Presidency is more specific: *'The main goal of a division of labour is to reduce the number of donors involved in the same kind of activities'.* The OECD in its *Report on the Division of Labour: Addressing Cross-Country Fragmentation of Aid,* Report for the Busan HLF (OECD, 2011, p.3) is equally succinct: *'many [developing countries] share a common problem:* ***too little aid from too many donors****'*

This OECD report is a key reference document on the topic. Using their statistical database the OECD has sought to quantify and analyse the phenomenon. Their work on measuring the fragmentation of aid is based on examining around 4,000 donor/partner aid relations[2] of over USD 250,000. This threshold is chosen so as to exclude the 'noise' generated by the myriad of small 'micro aid relations'. In practice, these micro aid relations represent 16% of all aid relations, but only 0.1% of Country Programmable Aid which gives some indication of the drag they present on transaction costs. From this analysis the OECD estimates that in 2009 the average donor was present in 71 partner countries and partner countries had to cope with an average of 21 donors, though there are major differences between regions (Figure 1 below) with many countries in Africa experiencing the highest incidences of fragmentation.

[1] The author wishes to thank his colleagues at ECDPM, including in particular Greta Galeazzi, Florain Krätke, Brecht Lein and Jan Vanheukelom, for their comments and suggestions during the drafting of this paper.

[2] The OECD defines an aid relation as 'the sum of all aid activities by a donor or a multilateral aid agency in a country' (OECD, 2011, p.3, footnote 4).

Figure 1: Number of donors per partner country (2009)



Source: OECD, 2011 (Figure 1, p.5)

The OECD methodology looks at the significance of aid relations in financial terms from both a donor and a partner country point of view, by defining a 'concentration ratio' for the former and a 'fragmentation ratio' for the latter. The inference from this analysis is that it is worth questioning the value of aid relations where these are not significant from either point of view.

Based on this analysis the OECD found that the global fragmentation ratio for 2009 was 40%, meaning that 2 out 5 aid relations were not significant, and on average bilateral donors are somewhat worse (45%) than multilateral donors (34%). Over time between 2004 and 2009 there is also a slight increase in fragmentation with Oceania as the only region of the world and UMICs as the only group of partner countries seeing improvements and reductions in fragmentation.

Looking more closely at the implications of this OECD analysis for the EU we note that in terms of concentration ratios Japan, United States, Germany and Austria are the most concentrated in their ODA with 80% or more of significant aid relations whereas several significant EU players[3] only show ratios of between 55 and 45% and some others do substantially worse than that. Although most EU Member States do not come out very well from this analysis, the OECD's data on concentration intentions does show that as a group DAC EU countries are planning to make more improvements (by phasing out of certain countries) than most donors.

On the other hand multilaterals seem to do better, with eight of them (including the EU Institutions at 83%) showing similar levels of concentration over 80%, though half of these are regional development banks whose mandates encourage concentration. Multi-laterals are affected by the way they are funded and the Report does stress (pp.13-14) that the DAC members put 81% of their funding for multilaterals into just five main clusters of which the EDF and EU budget gets nearly half (37%). As EU resources only come from EU DAC members this proportion is even higher for each of them. In other words, although most EU Member States may not (yet) do well on concentration in their bilateral programmes, through their financing of the EU they are supporting one of the multi-lateral agencies with the best performance in terms of concentration.

The EU's 2007 Code of Conduct on Division of Labour (DoL) takes a broader view of fragmentation and focuses on improving complementarity between EU donors at three levels: in country, cross-country and

[3] France, Netherlands, Belgium, Spain, Sweden and the UK.

cross-sector complementarity. It therefore provides the basis for reducing fragmentation of aid management through such approaches as joint programming, delegation or lead donor arrangements, but also for reducing the number of donors in a country by encouraging country prioritization and addressing the 'orphans' gap.

The Paris-Accra-Busan HLF documents use the word fragmentation as referring to the 'proliferation of aid channels' (Busan, 2011, p.7 #25) and 'too many duplicating initiatives especially at country or sector level' (AAA, 2008, p.3 #17).

In our consideration of aid fragmentation in this paper the key issue to resolve is thus taken to be the growing number of donors be it globally, at partner country level or in a specific sector.

Approaches to reducing fragmentation

In practice there are essentially three distinct methods to reduce fragmentation and address the growing number of donors:

a. *Pooling of resources through one donor mechanism*, while also making sure not to multiply the number of such mechanisms;
b. *Concentration:* donors reduce the number of partner countries or sectors in which they work;
c. *Coordination and complementarity of donor support* in any one partner country to make it easier for partner governments to manage the support as one package.

All three methods decrease the number of channels partner countries need to deal with and, providing overall levels of aid are not also being cut, should increase the scale and therefore, in the OECD's language, the significance of all the remaining aid relations. Most of the literature however concentrates on the latter two approaches and does not discuss the first. Yet, the OECD's analysis does show the value of using multi-lateral channels in the search for significant aid relations. Before considering how the EU makes use of each of these three approaches a few more comments on their individual scope are useful:

a. *Pooling* of resources by donors into multi-lateral vehicles of some form is the logic behind all multi-lateral agencies and specific issue or vertical funds. They allow finance from multiple donors to be administered by one agency. Obviously however, this approach needs to be used with circumspection as creating such instruments carries with it another danger of fragmentation if too many are created. Moreover, if bilateral donors continue to operate alongside the multilateral agencies or funds to which they have also contributed there is no gain in terms of numbers of active donors. That said, if the multilateral mechanism already exists and such contributions adequately scale up the volumes of ODA administered by the mechanism there may still be a gain in terms of the OECD's analysis of significant aid relations.

b. *Concentration* of individual donors' aid in a limited number of partner countries or sectors is, as we have seen, a major concern of the Paris, Accra or Busan HLFs though one detects a certain wariness about pushing donors to reduce the number of countries they work in. Rather the main emphasis seems to be on reducing fragmentation at the level of sectors. The Accra Agenda for Action does contain a commitment to *'start dialogue on an international division of labour across countries by 2009'* (AAA, 2008, p.3) and both the Accra and Busan documents contain references to the need to address the *'issue of countries that receive insufficient aid'*, one of the potential dangers of donors seeking to concentrate on fewer countries. Within the donor community however concentration in a few countries is more actively considered though it is appears to be largely discussed at a national level and rarely between donors or much with partner countries as the concerns with insufficient aid suggest. Though international dialogue on concentration is perhaps limited, it is never the less becoming a reality as the OECD notes *'bilateral donors are concentrating aid on fewer partnerships and many partners countries are now faced with donor exits.'* (2011, p.19)

c. *Coordination and complementarity* in country on the other hand receives far more attention in the Paris-Accra-Busan documents that all emphasise the importance of partner country-led coordination and the need for donors to collaborate more closely and focus on areas of comparative advantage. Country-led coordination is advocated as it leads to higher country ownership. At its purest this would take the form of general budget support or at least sector budget support, which is essentially pooling of resources under the control of partner countries. Yet as the OECD Report points out reductions in fragmentation can also be achieved through 'less advanced' methods by closer donor coordination involving measures such as joint programming, delegated cooperation and joint financing arrangements (2011, p.17).

Reducing fragmentation also has a negative side as, depending how it is done, it can reduce partner country choices and ultimately, in extreme cases sometimes experienced by 'aid orphans', can even lead to monopoly situations in which partner countries are faced with a very narrow choice of donors. This is a real concern as is evident from the Accra and Busan conclusions. Partner country attitudes to South-South cooperation also show the attraction of some level of choice and diversity in external assistance relationships. As the OECD points out (2011, p.19) there is no ideal level of concentration or fragmentation. In effect having more choice needs to be balanced against higher transaction costs and each country will need to make this cost-benefit analysis for itself.

The evidence from the EU

Much of the discussion on fragmentation of EU ODA has focussed on the slow pace at which the EU has moved on putting into practice the '3Cs' of the 1992 Maastricht Treaty and particularly the '2Cs' of *coordination* and *complementarity*[4]. It is only since the Monterrey Conference in 2002 and particularly the Paris Declaration of 2005 that most progress has been made. The EU's own 2007 Code of Conduct on Complementarity and Division of Labour is an important milestone in this respect and the most important policy initiative to date to seek to address fragmentation in the EU context. After its adoption it was followed-up with a Fast Track Initiative in some 30 countries to try and put the Code into practice (EU COM, 2011).

At the same time another aspect of EU trends in the past ten years is that EU enlargement has itself prompted the establishment of many new small donors as each new member state has been confronted with the *acquis communautaire* in development cooperation and obliged to create its own development administration and ODA budget[5]. This has resulted in a dozen donors with ODA levels of around Euro 150

[4] See for instance the studies on coordination on complementarity for the Triple Cs evaluation process in 2006-2008 (www.three-cs.net).

[5] Although new member states who do not have a development cooperation programme when they join the Union are not obliged to create one, their contributions to the EU Budget and they are expected to contribute to the EDF. In practice therefore they become donors though via the Commission. At the same time they are expected to join the relevant Council working groups related to development cooperation and participate in the decision making process at the EU level. This implies setting up a development administration in their Ministries of Foreign Affairs. To participate in the EU level discussions effectively several also feel the need to set up a small bilateral programme so as to acquire experience on which to base their input to EU discussions. Typically also they establish small NGO co-funding programmes to support national CSOs in their development efforts. This is seen as one way of increasing

mn or less, each one contributing below 0.5% of collective EU ODA (EU ODA data in Table 1). As Mürle (2007) suggested at the time of the discussions leading up to the Code of Conduct and just after the 'EU-12' new member states joined the EU in 2004 *'a division of labour approach is particularly important in this context'*.

How then does the EU use the three different approaches to reducing fragmentation identified above?

Pooling of EU ODA

It is important to recognise that from the very start of the European Community with the establishment of the first EDF in 1958, the member states have in effect adopted an ODA pooling approach by asking the European Commission to manage the funding on their behalf. EU Budget funds then also started to be used for development 10 years later with the creation of the first food aid instrument (Frisch, 2008). The Commission has therefore been managing ODA on behalf of the member states for over 50 years. In the last decade these funds (EDF, the EU Budget and EIB loans) have tripled in volume from around Euro 4 bn in 2000 to Euro 13,6 bn in 2012 (OECD Stats and EU COM 2013, Table 4.2.3b p.65), while 'collective EU ODA'[6] has doubled (cf. also Table 1). Thus the proportion of EU ODA that is going through this pooling is also increasing from around 19% in 2000 to 25% in 2012.

In that sense the EU Member States are already making a sizeable effort to reduce fragmentation in their collective ODA by channelling a quarter of it through the EU institutions. For the new member states of this past decade in particular a large proportion of their small amounts of ODA are administered in this way. Thus the fragmentation their emergence as new donors seems to encourage is in practice not that serious, though many of them also fund small projects often through NGOs.

Concentration

The OECD's analysis (2011) of EU Member States' forward planning intentions suggests that overall they are intending to concentrate their aid more on fewer partner countries. Some progress has apparently already been achieved in this direction but the overall picture that emerges is not that positive.

There is little recent systematic data and analysis on the number of partner countries of each EU Member States. However, the EU Donor Atlas (2012) does give some basic figures (Table 2 data for first three columns). Looking at the absolute numbers of sub-Saharan Africa partner countries that received ODA in 2000, 2005 and 2010, four trends are noticeable:

- The total number of partner countries for all EU member states went up by 20% over the 10 years (550 to 657). Only half of this increase is associated with new member states joining the EU during the period
- The 3 largest member state donors maintained the number of partner countries at the same level though the UK was slightly lower than the other two (France 47 – in effect 100% of the countries in the SSA region – Germany: 46 and UK: 42)
- Among the EU-15 half a dozen states increased their number of partner countries
- A few member states reduced the number of their partner countries (Austria, Netherlands, Spain and Sweden)

public awareness and support for development cooperation, an essential ingredient if the government is going to have public support for raising ODA levels.

[6] The European Commission uses the term Collective EU ODA to cover all the ODA from EU member states and ODA from EIB own resources (EU COM 2013, Table 4.2.3b).

The extra right-hand column in Table 2 gives figures for four Member States in 2011 drawn from government websites and other publications[7] (ECDPM 2012). These suggest that more recently some major Member States are indeed reducing the number of their partner countries more drastically though the data is not strictly comparable due to the definitions each country uses.

Table 2: Member State Partner Countries in sub-Saharan Africa

	Member State	**2000**	**2005**	**2010**	**2011**
1	Austria	33	34	29	
2	Belgium	36	40	40	
3	Bulgaria				
4	Croatia				
5	Cyprus		8	8	
6	Czech Republic	3	26	33	
7	Denmark	34	30	38	
8	Estonia		1	2	17
9	Finland	32	36	41	46
10	France	46	47	47	
11	Germany	47	46	46	
12	Greece	22	35	36	
13	Hungary		1	11	
14	Ireland	33	34	35	
15	Italy	42	38	41	
16	Latvia				
17	Lithuania		1	1	
18	Luxembourg	25	32	34	15
19	Malta				
20	Netherlands	41	43	32	
21	Poland	18	18	24	
22	Portugal	13	21	15	
23	Romania			10	
24	Slovak Republic		6	4	
25	Slovenia			14	
26	Spain	38	42	35	27
27	Sweden	43	41	39	
28	United Kingdom	44	38	42	
	Total Number of Partners	**550**	**618**	**657**	

Sources: EU Donor Atlas 2012 (for 2000-2005-2010); ECDPM 2012

Another source is Bürcky (2011) who looks at both cross-country and cross-sector concentration in his analysis of changes between 2005 and 2009. His overall conclusion is that donor cross-country fragmentation is increasing and the problem is significantly worse in the EU FTI countries which, as he points out, does mean these countries were well chosen. Comparing his all developing countries data for

[7] France: The 2013 OECD Peer Review lists France as focusing its aid down on '17 priority countries'. Faust & Zaija's (2012) study of German aid allocation indicate the number of partner countries has dropped from 68 in 2000 to 46 in 2011. The authors also suggest however that there is evidence of strong path dependency and there is in fact little evidence that such decisions have yet had any real financial consequences. The Dutch figure is taken from the Ministry of Foreign Affairs website (last checked on 1 Sept 2013). The UK figure is on the DFID web page dated 1 March 2011 announcing the outcomes of two aid reviews under the title 'Increasing the Effectiveness of UK Aid'.

cross country concentration over the shorter 5 year period he considers with the Table 2 data for sub-Saharan Africa over 10 years a somewhat different picture emerges. For the EU he identifies six member states (Austria, Belgium, France, Ireland, Netherlands and Portugal) as having decreased and eight (Denmark, Germany, Greece, Italy, Luxembourg, Spain, Sweden, UK) as having increased their number of partner countries between these two years.

On the other hand, in its Accountability Report (EU COM, 2012) for 2012 the European Commission says that in over the two years 2010 and 2011 there were 71 exits of Member States from 43 partner countries, though only 50 of these exits were actually completed in those years and the remainder will occur by 2016. If the total number of EU Member State presences in partner countries is around 650 in 2010 as suggested in Table 2, 50 exits in two years is roughly 8% and therefore not a large reduction.

The European Commission itself is far from concentrated in its provision of aid, with its delegations in 140 different countries and aid programmes in 120 including all African countries (Donor Atlas, 2012). However, this should be set to change with the Commission recent policy statement, the *Agenda of Change* (EU COM 2011b), committing it to the principle of 'differentiation', that is reducing aid to countries that have enough own resources.

Overall therefore it would seem some EU Member States have been reviewing their lists of partner countries particularly since the 2008 financial crisis (ECDPM, 2012,p.3) but the varying data and definitions problems from these different sources still gives an unclear picture suggesting that little real progress has been made to reduce the number of partner countries with which EU donors work. Moreover, even a more careful analysis of fragmentation that also factors in volumes of ODA and sectoral distribution as conducted by Bürcky (2011) suggests there is little improvement. However, both he and the Commission's 2012 Report do point to encouraging cases of donors who do seem to have reduced their fragmentation.

EU Coordination and Complementarity

It is difficult from existing literature to get a clear overall picture of trends in improved coordination and complementarity for EU donors, but various studies give insights of how this has taken different forms in specific country situations. We look briefly at evidence for budget support, division of labour, joint programming and discussions on comparative advantage, but miss out delegated cooperation for lack of readily available evidence.

Budget Support

Opinions on budget support among EU donors are very divided. The Commission is a major advocate and has developed the approach over some ten to fifteen years (ECA 2011), but quite a number of member states such as Germany remain cautious or very wary (Schiltz & Bichler, 2009). Even proponents of the modality regularly express doubts despite the positive assessments of impact that budget support often attracts (Tavakoli, 2012). Levels of budget support among EU member states are generally not high. Leiderer (2010) notes for instance how budget support only constitutes about 2.5% of German aid. For the Netherlands this proportion is slightly higher at 3.4% (IOB-NL MFA, 2012), for Sweden it was 5.3% in 2003 (Narea and Christensen, UTV, 2004) and for the UK, a relatively frequent user of the modality, it was 20% in 2010 (DFID, 2011). On the other hand for the Commission it is substantially higher with around 48% of EDF10 disbursed in this way and 25% in Asia and Latin American countries for the period 2006-2009 (ECA, 2011).

There are several countries where EU member states work with the Commission to provide partner country governments with budget support on a joint basis, though these arrangements are rarely seen as European in nature, but rather often also involve other major donors such as the World Bank or the African Development Bank. For instance the evaluation of the budget support in Zambia describes how a joint assistance strategy was agreed among donors in 2007, but already in 2005 a first budget support agreement was signed. This initially involved 5 donors but increased later to 9 of which the majority were EU donors (Commission + 5 Member States; in addition: Norway, WB and AfDB) (Kemp de, et al. 2011). In this case these donors continued to provide some assistance through other modalities as well however, though some reduced the number of sectors they were involved in.

Another recent evaluation of budget support is that conducted in Mali (Lawson et al., 2011). There some 10 donors provided support during the period covered (2002-2009). These included the European Commission and six EU Member States (Belgium, Denmark, France, Netherlands, Spain and Sweden).

What is certainly clear from these and other studies[8] is that budget support operations do encourage donors to work together and improve harmonisation and alignment as well as enhance dialogue and cooperation with partner countries. Typically the European Commission and several EU Member States are involved, but the exercises are not limited to them and generally also include other prominent DAC member countries and multilateral development banks. Typically however EU donors constitute an important part of the donor group involved in each case.

Division of labour

As the EU's Fast Track Initiative on Division of Labour (DoL) is monitored annually good data is available on progress. The third progress review (EU COM, 2011) suggests there has been encouraging progress in 19 out of the 30 of the partner countries in which the FTI has been followed and in a number of areas that are important for reducing fragmentation through better complementarity. As the review stresses DoL goes a step further than simple coordination because it seeks to change the situation and not just simply manage it better. The review notes in particular '*widespread use and institutionalisation of donor mappings'* and *'solid use of lead donor arrangements'* (p.2) both of which provide the tools to improve complementarity. The review also notes however that the approach is demanding and takes time to yield results. Reprogramming decisions as a result of DoL processes are underway in 50% of the countries though these tend to be taken at headquarters level and *'the coordination of exit strategies at country level remains a challenge'* (p.7). However, as we have seen, Bürcky's (2011) conclusions on in-country fragmentation are more pessimistic and suggest EU donors generally fragmented their aid more in the 2005-2009 period as they increased their levels of country programmable aid..

The review also looks at obstacles and enabling factors. In terms of obstacles the two most often cited by respondents to the questionnaire survey on which the review is based were not surprisingly perhaps (a) limited partner country ownership and (b) reluctance of donors to leave attractive sectors. On the other side of the coin the level of EU member state and Commission engagement in DoL seems to have a positive effect in encouraging other donors to join in. This is a strong argument in favour of the EU taking initiatives in reducing fragmentation providing it does so in an non-exclusive manner.

Joint programming

In January 2014 the new EU multi-annual budget period (2014-2020) starts and during 2013 the EU institutions have been programming the use of funds for this next budget cycle. For the first time this is marked by a large scale uptake of joint programming wherein the Commission and various Member States align their planning cycles, undertake the exercise together and as much as possible use single country

[8] See for instance the Joint Evaluation of General Budget Support 1994-2004 (Lister et al., 2006) that looked at budget support operations in six countries: Bourkina Faso, Malawi, Mozambique, Nicaragua, Rwanda, Uganda and Vietnam. The Commission and 9 EU Member States were involved supported this study: BE, FR, DE, DK, IRL, PT, SP, SW, UK.

strategy papers or ideally even the partner country's own national development plan. The approach was first discussed seriously in an EU context in 2004 and has already been trialled in Haiti (2010) and South Sudan (2011) (Galeazzi et al, 2013), but the outcome of this latest round is that joint programming is expected in some 40 countries over the next 4 years (EEAS, 28 May 2013) with the first wave having already started in Ethiopia, Ghana, Guatemala, Laos and Rwanda in 2012. The exercise is primarily an EU one but can also involve other donors in certain cases[9].

Joint programming as an approach to reducing fragmentation offers several advantages to participating donors. First it offers the possibility of reductions in transaction costs (no costs for preparing country strategy papers) but equally it means donors maintain the visibility of their bilateral programmes as their contributions do not get lost in a larger pool. For the partner country however it still means multiple donors to deal with.

Comparative advantage
One of the less discussed aspects of the Code of Conduct is that it suggested that EU donors would each conduct a self-assessment of their comparative advantages with the intention of focusing their work more in certain areas. While we can safely assume that such self-assessment does take place there is little evidence that the results are shared across the EU or any effort made to draw overall conclusions on how EU donors might as a group each concentrate their activities in particular areas and thereby reduce fragmentation. The FTI monitoring process also shows this is one of the least well used approaches (EU COM 2011).

On the other hand, there is some discussion about the comparative advantages of the European Commission itself. The *European Consensus on Development* from 2006 (OJ of the EU, 2006) for instance suggests eight roles where the Commission as a comparative advantage: (i) world-wide presence, (ii) promoting policy coherence for development, (iii) promoting best practice, (iv) facilitating coordination and harmonisation, (v) as a delivery agent where size and critical mass are important, (vi) promoting governance, human rights and rule of law, (vii) promoting civil society participation in development, and (viii) promoting public understanding of interdependence and international solidarity among European citizens. These criteria are based on the characteristics of the Commission and the other roles it plays.

A similar conclusion is reached by Severino (2013) in a recent paper where he argues that the role for the Commission should be determined by the following points: (i) global presence and scale: the EU has no other choice but to operate every where; (ii) because of its institutional nature it has to tackle global challenges such as the environment or climate change which demand a European response, (iii) equally it should work in areas and sectors where member states are least present, and conversely (iv) in areas where member states are very active it should play a role of bringing them together and coordination.

While member states may not have such distinctive characteristics as the Commission many of the medium and smaller member states are beginning to focus their attention on specific regions and sectors related to their history or areas of specialism that they have developed. Some have also started to leave certain sectors (eg. large scale infrastructure) because they feel other EU donors are better equipped to handle them. Specialisation around comparative advantage is thus not unknown among EU donors but it has not yet reached the level of an organised process which would be required to deliver real advances in reducing fragmentation.

[9] For example the EU joint programming exercise in Ethiopia also involves Norway (Galeazzi et al, 2013)

Summary of progress

The evidence thus shows, that in a rather ad-hoc way the EU as a group of donors is in practice making quite substantial efforts to reduce fragmentation in some areas but less in others.

- To begin with **pooling of aid**, 25% of collective EU ODA is administered through a central institution, the European Commission making it one of the largest donors in the world. This also allows it to have a global presence and be active in just about all developing countries. The proportion of EU aid administered by the Commission has also increased from 19% to 25% over the past dozen years.
- On the other hand in terms of **concentration** the evidence is mixed and suggests that there is still only limited overall progress on reducing the number of countries in which EU donors are present or in the rationalising the number of sectors each donor is involved in.
- As far as **coordination and complementarity** is concerned, this is well supported through the use of *budget support* where this occurs. But the use of this modality is far from systematic as it generally involves a limited number of EU member states and takes place in only a few partner countries, nor are budget support programmes purely EU based, but rather involve other donors as well and particularly development banks. On *division of labour*, follow-up action to the Code of Conduct through the Fast Track Initiative is more systematic, but progress is patchy and slow with best progress occurring in lead donor arrangements. But the evidence suggests that this showed little or no impact as in-country fragmentation of EU donor aid got worse during the period 2005-2008 while aid levels grew. *Joint programming* of EU donor ODA is relatively new, but could be on the verge of take off if recent official announcements are to be believed and could become prevalent in some 40 partner countries over the next 4 years.

Next steps for the EU

How then should the EU move forward to reduce fragmentation? A question to answer is whether the political will really exists to do so even though all EU Member States are nominally supportive of aid effectiveness principles and vocal advocates of the Paris-Accra-Busan HLF dialogue process.

The EU institutions are for their part keen to muster the evidence and make the case in favour of reducing fragmentation, not least because they see an opportunity to promote the value of their own work. This evidence suggests major savings could be made, a strong argument in this age of austerity and falling national budgets.

The European Parliament has, for instance, recently published a report in its 'Cost of Non-Europe' series of studies that recommends that the '*EU should fully exploit the legal provisions of the Lisbon Treaty on development and article 210 TFEU, to reinforce coordination between EU donors'* (EP EAVU, 2013, p.38). In more detail the report suggests that major savings (estimated at Euro 8.4 bn p.a.[10]) could be achieved with a 'fully integrated approach', but recognises that this is not compatible with the current 'shared competence' status of development cooperation in the Treaty. Instead they argue a balanced approach that exploits coordination possibilities in aid delivery and promotes better division of labour and joint programming is more realistic. Yet they also conclude that *'European aid actors should reflect upong the strengths and weaknesses of the current system of 'shared competence' and examine the scope for moving towards a more 'communautarised' EU policy on development' (pp.37).*

[10] The estimated savings figures used in the EAVU report are largely based on Bigsten et al. 2011.

The European Commission has sought to mobilise evidence of the savings to be made by commissioning two consultancy reports in the last few years (Carlsson et al, 2009; and Bigsten et al, 2011) on the benefits of a more joint EU approach to aid effectiveness.

Carlsson et al. review a number of studies on donor proliferation at the country level and conclude that there are significant opportunities to reduce fragmentation. They estimate the EU could potentially make savings of Euro 340 mn p.a. through three measures (2009, p.66-7): (a) avoiding duplication of country strategy processes (Euro 150 mn saved by having only one EU CSP per country), (b) reducing duplication of country offices (Euro 100 mn saved by having not more than 5 offices per country) and (c) avoiding duplication of missions and studies (Euro 90 mn saved by avoiding 1,200 uncoordinated studies).

Bigsten et al. also review the literature on coordination and identifies (2011, p.30) five benefits of aid coordination:

a. Permits donors to economize on transaction costs,
b. Relaxes the pressure on scarce resources (eg. staff costs),
c. Plays a positive role if it puts in place a specialized agency to collect information about governance characteristics of recipients and circulates it to donors,
d. More effective implementation of conditionalities,
e. Could improve aid effectiveness performances if it allows for delegation of aid allocation decisions to a specialised agency that is less subject to budget pressure than the donor members.

They also seek to estimate cost savings[11] and reach the conclusion that the EU could save substantially on transaction costs. Based on 2009 data they estimate these could be reduced by a total of Euro 744 mn p.a. by a combination of:

- A 37% reduction in the number of partner countries which EU member states supported (Euro 461 mn p.a.) (p.80), and by
- Changing aid modalities, moving from projects to programmes and using more budget support (Euro 283 Mn p.a) (p.82)

Increasing aid coordination is also considered as an option to reduce costs (pp.145-7). The limited evidence[12] they could identify suggests that there are wide variations in the efficiency of the EU donors and the Commission does appear to be among the most efficient. They therefore conclude that coordinating aid through the European Commission could well be an attractive option particularly for member states that are less efficient (p.147).

Another approach they examine is for the EU to seek to jointly optimise the cross country allocation of aid. Based on a study of the efficiency losses due to poor coordination they estimate the financial gain could be around Euro 7,779 mn which is by far the biggest potential saving that they identify. They recognise that there may be ‘strong political restrictions on what can be achieved’, however a more efficient cross-country allocation of ODA does not have to be done by shifting resources to the Commission (p.153) and could simply involve greater coordination at headquarters level. Particularly at a time of austerity such a sum is far from negligible as it represents around 15% of EU collective ODA or about 20% of the extra ODA the Commission deems the EU will need to find if it is to meet its 0.7% ODA/GNI ratio target by 2015 (EU COM 2013, p.64).

[11] Inevitably, the study has to make various assumptions in order to be able to construct their model including the major one that poverty reduction becomes the only goal of EU ODA.
[12] This analysis is largely based on a study by Birdsall and Kharas (2011). Their data suggested that only Ireland and Denmark were more efficient than the Commission, though the latter was followed closely by the UK, NL and FIN.

Bigsten's report concludes with a discussion on the optimal role the Commission in improving EU aid coordination. As the largest saving could be achieved with the better coordination of country allocations of aid they suggest that should either be done by channelling more ODA through the Commission or by establishing a joint Commission and Member States process for such decisions. Channelling more aid through the Commission has added advantages in terms of political clout and where coordination is required with EU level policies such as agriculture trade or global challenges such as climate change, global food security, migration of security (p.160)

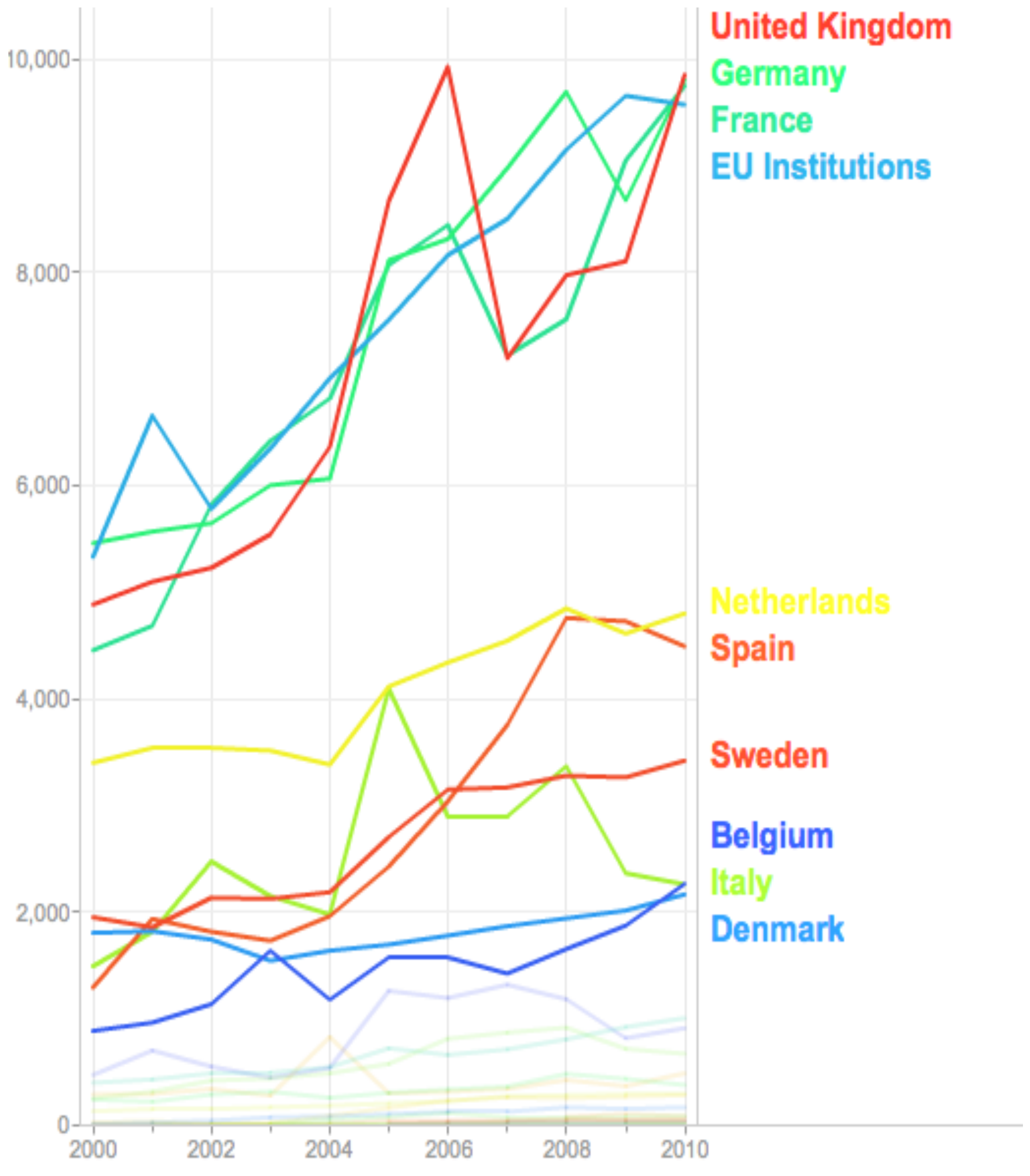
What these studies do bring out is that there are major potential savings to be made if the EU donors were to take a serious collective look at the way they coordinate. This should start from a realistic analysis of the roles the different EU Member States and the Commission each play in channelling ODA. Figure 2 shows graphically how this has evolved in terms of ODA volumes over a decade up to 2010.

Agreement on the EU's multiannual budget for 2014-2020 and EDF11 covering the same period is in the process of being finalised, but even once these are agreed there remains scope for increasing the ODA managed by the Commission (Kilnes et al. 2012). In the longer term channelling more aid through the Commission can in principle be done either by increasing the share of the EU Budget going to development cooperation or by increasing the contributions to the EDF. However, the latter is in practice more flexible as contributions to the EDF, though based on an initial separately negotiated distribution key, are voluntary and not subject to the vagaries of the far more complex negotiations of the EU Budget (Mackie et al. 2011). Member states can therefore offer to pay more into the EDF without upsetting the delicate balances of the EU Budget and there are precedents for this happening[13]. To retain this flexibility it would however be important to keep the EDF as a separate fund and not integrate it into the EU Budget as the Commission has long advocated. In the shorter term there is scope for pooling on specific programmes, supporting trust funds (eg. the EU-Africa Infrastructure Trust Fund) or matching funds for blending activities.

Pooling ODA and channelling it through the Commission therefore remains an option that can be used more extensively. A further step would be to look more carefully at the role different EU member states play in the providing the overall package of collective EU ODA. Figure 2 below shows graphically how ODA provision has evolved over the past decade since the start of the Millennium and the EU's concerted effort to reach the 0.7% ODA/GNI target.

[13] For instance in the negotiations on the level of EDF9 in 2000 the total of the offers made by Member States did not reach the target amount they had agreed would be desirable and the French who held the EU presidency at the time increased their input to close the gap.

Figure 2: EU ODA – EU Institutions and 9 largest Member State donors 2000-2010



Euro Millions

Source: EU Donor Atlas 2012

In particular Figure 2 suggests that since 2000 three very different groups of actors have emerged among the EU donors as many of them have made serious efforts to reach the 0.7% ODA/GNI target. In particular there are now four large players that rank among the biggest donors in the world: France, Germany, the UK and the Commission. These all now manage ODA volumes of around Euro 9-10 bn p.a.. A second group of six countries is clustered around the Euro 2-4 bn marks. Among these are three (Netherlands, Sweden and Denmark) that had already reached the 0.7% at the start of the period and which have therefore not increased their aid volumes substantially and one member state (Spain) that has made a substantial effort to increase. The remaining third group, all have ODA levels below Euro 1 bn. That is not to say that many have them have not made an effort to increase, but some started from a very low base in absolute terms and the group includes member states with the lowest GNIs. The EU effort to increase ODA levels since the Monterey Conference in 2002 has thus accentuated this differentiation into these three relatively distinct groups.

Over the past 2 years since 2010, the picture is of course starting to change again as some member states have difficulties in maintaining their ODA levels due to the financial crisis. Table 1 suggests that this is affecting several of the second (Spain, Italy, Netherlands) and third (Ireland, Portugal) groups. The question remains open as to how far this new trend will go and whether enough of the main features of the 2010 differentiation will remain in place for it to serve as a useful basis for forward thinking.

However, looking only at this pattern of ODA volumes it is possible to suggest that these groups of EU donors should behave in very different ways. In practice the following donor behaviour patterns are already starting to be visible in the actions of individual members of each of these groups.

- The first group of four large volume donors (COM, DE, FR and UK) could set themselves the goal of providing overall coverage and major volumes of ODA wherever required. Amongst them the Commission should, as already stipulated in the *European Consensus,* be the EU donor that is always present. The other three can then work jointly to ensure that at least one if not more are also present in any one partner country in support of the Commission depending on levels of ODA need. With the volumes of ODA these four deploy specializing in particular sectors is probably not called for; more important is that they should coordinate between themselves and ensure the provision of the volumes of ODA required.

- The next group of six middle level EU donors on the other hand need to continue their efforts already existing efforts to reduce the number of partner countries they work in and not spread themselves too widely over too many sectors. They provide valuable extra resources in addition to what the big four can deploy, but to be effective they need to be strategic in their choice of a limited number of activities.

- The third group of small and particularly the very smallest EU donors could consider the option of becoming 'niche' donors specializing closely on a very limited number of sectors and countries. In practice their other option should be to consider channeling an even larger proportion of their ODA through the Commission or through other pooling arrangements like trust funds.

Following such simple guidelines would result in a far more joined-up EU effort and, if some form of gentleman's agreement could be reached on this between member states, could provide a possible basis for a more strategic EU approach to further reduce fragmentation.

Conclusions

The available evidence suggests therefore that although the EU is in theory committed to reducing the fragmentation of its aid, the reality provides a very different picture. The formal follow-up process to the Code of Conduct on Division of Labour of 2007 suggests that while lead donor arrangements are being explored and donor-mapping exercises conducted there is, at least up unto 2009, no clear positive impact on fragmentation. A few EU donors do seem to be reducing the numbers of partner countries they work in but in-country fragmentation is getting worse.

On the other hand better progress seems to be being made in other areas not covered by the Code of Conduct. In particular there appears to be a slow by clear trend of the EU institutions managing an increasing proportion of collective EU aid over the 12 year period since the start of the new millennium. This coupled with coordinated efforts to use budget support where the Commission works jointly with groups of larger and medium scale EU donors as well as other DAC members or multilaterals are the most encouraging features of the landscape. But budget support, despite its promise as an effective means to reduce fragmentation, remains a modality that only a small minority of EU donors are willing to use and even then, for most of them, for only a very small proportion of their total ODA. A major political difficulty with both budget support and pooling aid through the Commission instruments is, of course, that neither approach provides individual EU member state donors with adequate visibility for their aid.

In this respect, it is interesting to note recent statements from the EU institutions that suggest that joint programming could take off in the next few years in some 40 countries. If this really does materialise to the extent suggested then it may well be that this provides a useful way of EU donors cooperating to reduce fragmentation while at the same time maintaining their visibility.

The way forward on fragmentation for the EU is therefore likely to lie in a combination of different approaches. First and foremost continuing a slow but steady increase of the proportion of collective EU ODA channelled through the EU institutions should be recognised as valuable and an important trend to encourage. The EDF provides a more flexible way to do this than the EU Budget and, if only for this reason, should ideally be maintained as a separate financial instrument beyond 2020 when the question of 'budgetisation' will next arise. Second, budget support involving groups of several EU donors led by the Commission should also be recognised as a key approach to reducing fragmentation and used wherever the conditions are appropriate. Third joint programming should indeed be supported as an attractive option for EU donors who want to maintain visibility for at least a proportion of their ODA. After that all EU donors though particularly those in the two groups handling medium and smaller volumes of ODA should seek to reduce the number of partner countries in which they work and particularly be far more selective about sectors. For a small donor specialising in a 'niche' activity or sector can well be an attractive option in terms of achieving impact as well as visibility and a reputation for excellence.

These various actions are all consistent with the Code of Conduct on Division of Labour although some of them do not feature as prominent parts of its formal follow-up process the FTI. Actions monitored under the FTI are practical steps along the way to improving fragmentation and where they are followed, such as with donor mapping and lead donor arrangements, they are certainly useful, but they do not replace the real political decisions and hard choices that donors have to make if reducing fragmentation is really going to work. EU efforts to improve division of labour also apparently do set an example that other donors seem to be willing to follow. This an additional secondary effect is another reason they should continue to be pursued. Moreover, as has been pointed out, as ODA becomes more concentrated in LDCs and fragile states, precisely those countries least well equipped to cope with a highly fragmented aid landscape, the importance of division of labour increases.

Ultimately however, it would seem that the real progress on reducing fragmentation will be made by EU donors taking tough decisions on the following six issues:

a. Increasing the proportion of ODA they channel through the EU institutions
b. Increasing the frequency of their use of budget support
c. Reducing the number of partner countries in which they work
d. Conducting a serious self-assessment of capabilities and expertise and on the basis of that focussing on a limited number of sectors.

e. Engaging with other EU donors in an on-going dialogue on the results of these self-assessments and the decisions they lead to in terms of rationalising their aid programmes
f. Seriously pursuing the new and promising avenue of joint programming that is currently gathering steam

These decisions will not all be the same for every EU donor. A lot will depend on the volume of ODA they each contribute and the outcome of their self-assessments. It is likely however that donors with similar volumes of ODA will have similar options and it may therefore be appropriate that groups of donors with large, medium and small ODA volumes take similar decisions. If so recognising these patterns in the EU level dialogue may well provide the basis for a more thought through and effective EU strategy on reducing fragmentation.

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Annex

Table 1: EU ODA by Member State, 2000-2012

Table 1: EU ODA Trends 2000-2012

Current Prices - Millions of Euros

Member State	2000		2001		2002		2003		2004		2005		2006		2007		2008		2009		2010		2011		2012	
1 Austria	477	2%	707	2%	552	2%	447	1%	545	2%	1,266	3%	1,194	2%	1,321	2%	1,188	2%	820	2%	912	2%	799	1%	865	2%
2 Belgium	889	3%	968	3%	1,137	4%	1,640	5%	1,178	3%	1,580	3%	1,575	4%	1,425	4%	1,654	3%	1,874	4%	2,268	4%	2,019	4%	1,792	3%
3 Bulgaria													1	0%	17	0%	13	0%	12	0%	31	0%	35	0%	30	0%
4 Croatia																							15	0%	15	0%
5 Cyprus									4	0%	4	0%	21	0%	18	0%	26	0%	33	0%	39	0%	28	0%	20	0%
6 Czech Republic	18	0%	30	0%	48	0%	80	0%	87	0%	109	0%	128	0%	131	0%	173	0%	154	0%	172	0%	180	0%	171	0%
7 Denmark	1,806	7%	1,825	6%	1,744	5%	1,547	5%	1,640	5%	1,697	4%	1,782	4%	1,872	4%	1,944	3%	2,018	4%	2,168	4%	2,108	4%	2,115	4%
8 Estonia	1	0%	1	0%	1	0%	1	0%	4	0%	5	0%	11	0%	12	0%	16	0%	13	0%	14	0%	18	0%	18	0%
9 Finland	402	1%	434	1%	490	2%	494	1%	547	2%	726	2%	665	2%	717	2%	808	1%	926	2%	1,006	2%	1,011	2%	1,027	2%
10 France	4,454	16%	4,688	16%	5,821	18%	6,420	19%	6,820	20%	8,067	18%	8,445	18%	7,220	18%	7,562	13%	9,049	18%	9,751	17%	9,348	17%	9,419	17%
11 Germany	5,458	20%	5,571	19%	5,650	18%	6,005	18%	6,064	17%	8,112	18%	8,313	18%	8,978	18%	9,693	16%	8,674	18%	9,804	17%	10,136	18%	10,198	18%
12 Greece	245	1%	225	1%	293	1%	321	1%	258	1%	309	1%	338	1%	366	1%	488	1%	436	1%	383	1%	305	1%	252	0%
13 Hungary							19	0%	56	0%	81	0%	119	0%	76	0%	74	0%	84	0%	86	0%	100	0%	93	0%
14 Ireland	254	1%	320	1%	422	1%	446	1%	489	1%	578	1%	814	1%	871	1%	921	2%	722	1%	676	1%	657	1%	629	1%
15 Italy	1,493	5%	1,817	6%	2,475	8%	2,153	7%	1,981	6%	4,096	9%	2,901	5%	2,901	5%	3,370	6%	2,368	5%	2,262	4%	3,111	6%	2,053	4%
16 Latvia					2	0%	1	0%	7	0%	8	0%	9	0%	12	0%	15	0%	15	0%	12	0%	14	0%	16	0%
17 Lithuania			2	0%	2	0%	2	0%	8	0%	12	0%	20	0%	35	0%	35	0%	26	0%	28	0%	38	0%	40	0%
18 Luxembourg	133	0%	155	1%	156	0%	172	1%	190	1%	206	0%	232	1%	274	1%	288	0%	298	1%	304	1%	294	1%	336	1%
19 Malta									8	0%	7	0%	7	0%	8	0%	11	0%	10	0%	10	0%	14	0%	14	0%
20 Netherlands	3,402	12%	3,542	12%	3,542	11%	3,516	11%	3,384	10%	4,115	9%	4,343	9%	4,547	9%	4,848	8%	4,615	9%	4,800	8%	4,563	8%	4,298	8%
21 Poland	31	0%	40	0%	15	0%	24	0%	95	0%	165	0%	236	1%	265	1%	258	0%	269	1%	285	0%	300	1%	341	1%
22 Portugal	294	1%	300	1%	342	1%	283	1%	830	2%	303	1%	316	1%	344	1%	430	1%	368	1%	490	1%	509	1%	441	1%
23 Romania										0%		0%	3	0%	84	0%	94	0%	110	0%	86	0%	118	0%	113	0%
24 Slovak Republic	6	0%	9	0%	7	0%	13	0%	23	0%	45	0%	44	0%	49	0%	64	0%	54	0%	56	0%	62	0%	61	0%
25 Slovenia									25	0%	28	0%	35	0%	40	0%	47	0%	51	0%	44	0%	45	0%	45	0%
26 Spain	1,296	5%	1,940	7%	1,817	6%	1,736	5%	1,962	6%	2,429	5%	3,038	10%	3,755	10%	4,761	8%	4,728	10%	4,492	8%	3,001	5%	1,516	3%
27 Sweden	1,952	7%	1,860	6%	2,134	7%	2,124	6%	2,191	6%	2,705	6%	3,151	7%	3,170	7%	3,281	6%	3,266	7%	3,423	6%	4,030	7%	4,078	7%
28 United Kingdom	4,884	18%	5,099	17%	5,230	16%	5,542	17%	6,362	18%	8,667	19%	9,926	17%	7,194	17%	7,973	13%	8,102	17%	9,855	17%	9,948	18%	10,627	19%
A Total MS ODA	**27,497**	100%	**29,531**	100%	**31,880**	100%	**32,985**	100%	**34,758**	100%	**45,320**	100%	**47,667**	100%	**45,702**	100%	**50,035**	85%	**49,095**	100%	**53,457**	91%	**52,806**	94%	**50,623**	92%
EU Institutions:																										
B - EU imputed to MS	5,330	19%	6,656	23%	5,781	18%	6,349	19%	7,006	20%	7,555	17%	8162	15%	8499	16%	9149	15%	9,654	20%	9,573	16%	9,054	16%	9,125	17%
C - EU own resources																					5,150	9%	3,453	6%	4,544	8%
B+C Total EU Institutions	**5,330**	**19%**	**6,656**	**23%**	**5,781**	**18%**	**6,349**	**19%**	**7,006**	**20%**	**7,555**	**17%**	**8,162**	**15%**	**8,499**	**16%**	**9,149**	**15%**	**9,654**	**20%**	**14,723**	**25%**	**12,507**	**22%**	**13,669**	**25%**
A+C Collective EU ODA	**27,497**	100%	**29,531**	100%	**31,880**	100%	**32,985**	100%	**34,758**	100%	**45,320**	100%	**55,829**	100%	**54,201**	100%	**59,184**	100%	**49,095**	100%	**58,607**	100%	**56,259**	100%	**55,167**	100%

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