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Groups of countries in special situations: follow-up to the Third United Nations Conference on Landlocked Developing Countries

Follow-up to the Third United Nations Conference on Landlocked Developing Countries

Report of the Secretary-General**

Summary

The present report is submitted pursuant to resolution 79/219, in which the General Assembly requested the Secretary-General to submit to it at its eightieth session a report on the Third United Nations Conference on Landlocked Developing Countries.

The report provides an overview of the situation in landlocked developing countries in the light of the Awaza Programme of Action for the Landlocked Developing Countries for the Decade 2024–2034, adopted by the General Assembly in December 2024.

* A/80/150.

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I. Introduction

1. The 32 landlocked developing countries face profound structural disadvantages due to their geographical constraints, which create barriers shaping their development trajectories. These geographical constraints fundamentally limit their access to international markets and increase transportation costs, making sustainable development particularly challenging.

2. On 24 December 2024, the General Assembly adopted the Awaza Programme of Action for Landlocked Developing Countries for the Decade 2024–2034, a framework designed to address these persistent vulnerabilities. In the Awaza Programme of Action, which builds on the Vienna Programme of Action for Landlocked Developing Countries for the Decade 2014–2024, five priority areas are established to support sustainable development in the landlocked developing countries, including structural economic transformation, streamlined trade facilitation, enhanced connectivity infrastructure, improved climate resilience and sustainable financing mechanisms.

3. The Awaza Programme of Action represents a vital step towards enabling these countries to overcome their geographical disadvantages and achieve the goals outlined in the 2030 Agenda for Sustainable Development.

4. In the present report, the status of the five priority areas of the Awaza Programme of Action is examined. Recent socioeconomic developments are analysed and progress towards the Sustainable Development Goals is evaluated.

II. Overview of recent socioeconomic developments and progress towards the Sustainable Development Goals in landlocked developing countries

5. Landlocked developing countries account for about 7 per cent of the world population but only around 1 per cent of global gross domestic product (GDP).[1] In recent years, landlocked developing countries have made substantial progress in reducing extreme poverty, diversifying their economies, expanding basic services and increasing access to electricity, particularly in urban areas; however, the pace of improvement remains insufficient to achieve the Sustainable Development Goals by 2030.

6. Progress towards the achievement of the Sustainable Development Goals reveals persistent disparities between landlocked developing countries and the rest of the world. In 2024, 21.6 per cent of employed adults in landlocked developing countries lived below the international poverty line, compared with 6.9 per cent worldwide.[2]

7. Between 2022 and 2024, undernourishment affected 19.3 per cent of the population and moderate or severe food insecurity affected 50.7 per cent of adults in landlocked developing countries.[3] The proportion of the population with access to electricity stood at 61.4 per cent in 2023, compared with 92 per cent worldwide, and landlocked developing countries received only a small share of the $15.4 billion in international public finance for clean energy that year, indicating the need for additional investment to meet Sustainable Development Goal 7. The average human

[1] United Nations Conference on Trade and Development (UNCTAD), "Trade in merchandise", UNCTAD Data Hub. Available at https://unctadstat.unctad.org/datacentre/dataviewer/US.TradeMerchTotal (accessed on 8 July 2025).

[2] *The Sustainable Development Goals Report 2025* (United Nations publication, 2025).

[3] Ibid. Statistical annex available at https://unstats.un.org/sdgs/files/report/2025/E_2025_62_Statistical_Annex_I_and_II.pdf.

development index for landlocked developing countries increased from 0.598 in 2022 to 0.622 in 2023, with gains recorded in nearly all countries. Sustaining and accelerating this progress will require continued investment in infrastructure, human capital and data systems, together with renewed multilateral cooperation and adequate financing for the full implementation of the Awaza Programme of Action. Much remains to be done: a person living in a landlocked developing country is more than twice as likely to live in extreme poverty, three times as likely to lack safely managed drinking water and four times as likely to experience food insecurity as the global average. Limited fiscal space and gaps in statistical capacity continue to constrain evidence-based policymaking.

8. The Department of Economic and Social Affairs forecasts aggregate GDP growth of 4.7 per cent in 2024 and 4.9 per cent in 2025 for landlocked developing countries; however, those prospects are sensitive to conflict, political instability and natural hazards.[4] In April 2025, concerns about the global outlook and adjustments in trade policies resulted in elevated financial market volatility, increasing uncertainty for investors and affecting capital flows to landlocked developing countries.

9. Trade performance remains subdued. Merchandise exports worldwide reached $24.43 trillion in 2024, a rise of 2.28 per cent over 2023. Exports from landlocked developing countries totalled $281.72 billion, an increase of 0.99 per cent, and their share of global exports declined from 1.17 to 1.15 per cent.[5] Transport costs for agricultural and manufactured goods remain about 30 per cent higher than those faced by coastal developing economies, owing to infrastructure gaps, transit delays and regulatory barriers.

10. Approximately 54 per cent of land in landlocked developing countries is classified as dryland, and 60 per cent of their population lives in such areas.[6] From 2012 to 2021, the incidence of disasters was 70 per cent higher than the global average; between 2013 and 2022 the disaster-related mortality rate was 2.12 deaths per 100,000 inhabitants, compared with 0.84 globally.[7] The majority of landlocked developing countries, 75 per cent, have adopted national disaster risk reduction strategies, and 59 per cent have multi-hazard early warning systems and local disaster risk reduction plans, exceeding global averages.

11. Landlocked developing countries have made notable progress in advancing gender equality, particularly in leadership and decision-making roles. The proportion of seats held by women in national parliaments in landlocked developing countries rose significantly from 7.8 per cent in 2000 to 30.1 per cent in 2024, exceeding the global average of 26.9 per cent.[8] Progress has been made in establishing legal frameworks for gender equality in landlocked developing countries.[9] Despite these gains, these countries still face significant gender disparities across several domains. In 2024, the female labour force participation rate in landlocked developing countries

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[4] United Nations, Department of Economic and Social Affairs, "Monthly briefing on the world economic situation and prospects: economic prospects and development challenges in landlocked developing countries", No. 186, November 2024. Available at www.un.org/development/desa/dpad/wp-content/uploads/sites/45/MB186.pdf.

[5] UNCTAD, UNCTADstat.

[6] Office of the High Representative for the Least Developed Countries, Landlocked Developing Countries and Small Island Developing States, *Climate Vulnerabilities of Landlocked Developing Countries* (New York, 2025).

[7] Ibid.

[8] United Nations, "SDG Indicator 5.5.1(*a*), Proportion of seats held by women in national parliaments", Sustainable Development Goal Indicators Database. Available at https://unstats.un.org/sdgs/dataportal/database (accessed on 19 August 2025).

[9] United Nations, "SDG Indicator 5.1.1, Legal frameworks that promote, enforce and monitor gender equality", Sustainable Development Goal Indicators Database. Available at https://unstats.un.org/sdgs/dataportal/database (accessed on 19 August 2025).

stood at just 54 per cent, well below the male rate of 70.4 per cent.[10] One in three young women aged 20–24 years (33 per cent) was married or in a union before the age of 18 years, nearly double the global average, limiting their access to education and economic opportunities. This was reflected in the low upper secondary school completion rate for girls in landlocked developing countries, which remained at 29.8 per cent, compared with a global average of 61 per cent.[11]

III. Current status of the priority areas of the Awaza Programme of Action

12. Enabling landlocked developing countries to overcome their geographical constraints and advance towards the achievement of the Sustainable Development Goals would improve the lives of more than 600 million people. However, the decade ahead presents obstacles that could undermine progress in this regard. Geopolitical uncertainties, growing trade tensions and rapid technological advancement could deepen existing inequalities if landlocked nations cannot develop critical infrastructure, including digital infrastructure, and capacities. Meanwhile, intensifying climate-related disasters will continue to strain economies that are already operating under severe geographical disadvantages. The structural vulnerabilities of landlocked developing countries make them particularly exposed to global disruptions. Their dependence on transit routes through neighbouring countries, combined with transport costs that are often double those of coastal nations, creates a precarious economic foundation. The urgent need for substantial external and internal investment in transport and connectivity infrastructure leaves landlocked developing countries especially susceptible to shifts in global trade patterns and volatile investment flows.

A. Structural transformation and science, technology and innovation

13. Despite the progress achieved in the past decade during the implementation of the Vienna Programme of Action, landlocked developing countries continue to struggle with inadequate infrastructure, limited technological capabilities and a reliance on primary commodities. These constraints are evident in a low score on the productive capacities index, which stood at 37.2 in 2022, significantly lower than the global average of 46.8.[12] This gap highlights the ongoing challenges that these countries face in increasing economic resilience and global competitiveness.

14. Agriculture remains the primary employer, engaging over half of the population in landlocked developing countries. By contrast, the manufacturing sector plays a limited role in job creation, accounting for just 6.2 per cent of total employment, compared with the global average of 14.1 per cent in 2023.[13] The manufacturing sector in these countries is predominantly composed of lower-technology industries, which require less capital investment and advanced technology. While this makes it more accessible, it also restricts its potential for high-value industrial expansion. Landlocked developing countries accounted for just 0.81 per cent of global service

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[10] International Labour Organization, "Labour force participation rate, female", ILO modelled estimates, ILOSTAT database, available at https://ilostat.ilo.org/ (accessed on 18 July 2025).

[11] United Nations, "SDG Indicator 4.1.2, Completion rate, by sex, location, wealth quintile and education level", Sustainable Development Goal Indicators Database. Available at https://unstats.un.org/sdgs/dataportal/database (accessed on 19 August 2025).

[12] UNCTAD, productive capacities index, UNCTADstat. Available at https://unctadstat.unctad.org/EN/Pci.html (accessed on 8 July 2025).

[13] United Nations, "SDG Indicator 9.2.2, Manufacturing employment as a proportion of total employment", Sustainable Development Goal Indicators Database. Available at https://unstats.un.org/sdgs/dataportal/database (accessed on 19 August 2025).

exports in 2023. This highlights the limited integration of landlocked developing countries into global services trade, despite the sector's potential to drive structural transformation.

15. Inward foreign direct investment (FDI) fell by 10 per cent annually to $23 billion in 2024, widening the investment deficit that these countries face compared with the world average.[14] Inward FDI flows to landlocked developing countries amounted to 8.3 per cent of gross capital formation in 2023, surpassing the global average of 4.9 per cent, highlighting their relatively high dependency on external investment.

16. Many landlocked developing countries are dependent on a limited number of primary sectors, with 81.76 per cent of their total exports being primary commodities, compared with a global average of 30.32 per cent.[15] This overdependence on primary commodities makes landlocked developing countries highly vulnerable to global price fluctuations and prevents them from developing a diverse industrial base capable of driving long-term economic growth and structural transformation.

17. In addition, many landlocked developing countries face persistent challenges in educational access and student retention. For instance, in 2024, the primary education completion rate in landlocked developing countries was 67.3 per cent (70.5 per cent for girls and 64.3 per cent for boys), compared with a global average of 88.1 per cent. At the lower secondary level, completion rates drop to 47.7 per cent (47.0 per cent for girls and 48.3 per cent for boys), well below the global average of 78.1 per cent. The disparity becomes even more pronounced at the upper secondary level, where landlocked developing countries recorded a completion rate of just 30.5 per cent (29.8 per cent for girls and 31.2 per cent for boys), in stark contrast to the global average of 59.6 per cent.[16] These educational deficits limit the development of the necessary skills to build a skilled workforce to fully leverage opportunities in high-value sectors and economic activities.

18. In the *Global Innovation Index 2024: Unlocking the Promise of Social Entrepreneurship*, for which 133 economies were assessed, including 23 of the 32 landlocked developing countries, the highest performing landlocked developing country was ranked at 58th and the lowest at 132nd. The total number of patent applications filed in landlocked developing countries (resident and non-resident applicants) in 2023 was 2,164, just 0.6 per cent of the approximately 3.6 million filed globally. This metric further highlights disparities: Asian and European landlocked developing countries demonstrate relatively higher levels of patent filing activity, suggesting more developed national innovation systems, greater science, technology and innovation investments and stronger institutions than African landlocked developing countries. Landlocked developing countries filed 82,198 trademark applications in 2023, compared with approximately 15 million filed by the rest of the world.[17] Despite the potential for advancements in intellectual property development, most landlocked developing countries continue to struggle with limited investment, weak infrastructure and inadequate policy support, which hinder their ability to fully harness and scale homegrown innovation.

19. Digitalizing economic activities holds significant potential to drive structural transformation in landlocked developing countries. However, Internet usage in

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[14] UNCTAD, *World Investment Report 2025: International Investment in the Digital Economy* (Geneva, 2025).

[15] UNCTAD, UNCTADstat.

[16] *The Sustainable Development Goals Report 2025* (United Nations publication, 2025). Statistical annex available at https://unstats.un.org/sdgs/files/report/2025/E_2025_62_Statistical_Annex_I_and_II.pdf.

[17] World Intellectual Property Organization (WIPO), WIPO statistics database. Available at www3.wipo.int/ipstats (accessed on 8 July 2025).

landlocked developing countries remains below the global average. In 2024, only 39 per cent of the population (44 per cent of men and 35 per cent of women) were connected, with most of them being aged 15 to 24 years (54 per cent). Despite rising considerably from an Internet use rate of just 15 per cent in 2014, Internet use in landlocked developing countries is still lagging far behind the global average of 67 per cent,[18] highlighting a persistent digital divide that impedes inclusive digital transformation.

20. The industrial landscape of landlocked developing countries reflects a modest role for manufacturing, with manufacturing value added accounting for only 11.6 per cent of GDP, compared with a global average of 16.7 per cent in 2023.[19] While manufacturing value added in landlocked developing countries is growing at an annual rate of 3.7 per cent, its global footprint remains minimal. Landlocked developing countries contribute only 0.8 per cent to global manufacturing value added and 0.5 per cent to global manufacturing exports.[20]

21. Moreover, landlocked developing countries are major importers of manufactured goods, with a manufacturing trade deficit equal to 14.4 per cent of GDP in 2022.[21] Manufacturing value added growth in landlocked developing countries has been more volatile than the global average, but their post-pandemic recovery has surpassed global growth. African and Asian landlocked developing countries have driven this momentum, increasing their share of the group's manufacturing value added, whereas landlocked developing countries in Europe and Latin America have seen their contributions decline. The proportion of medium-tech and high-tech industry value added in total value added for landlocked developing countries remains small, at 13.1 per cent in 2022.[22]

B. Trade, trade facilitation and regional integration

22. Geographical challenges, remoteness from international markets and resulting high trade costs continue to contribute to the marginalization of landlocked developing countries in international trade and their dependency on exports of primary commodities for which unit logistics costs are lower.

23. An erosion of multilateral trade norms risks further fragmenting the global trade system, putting pressure on landlocked developed countries, which are reliant on affected markets and products. These challenges reinforce the need to achieve the goals of the Awaza Programme of Action to diversify the exports of landlocked developing countries by substantially increasing the value added and manufactured component of their exports and to expand their exports of services and e-commerce.

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[18] ITU, *Measuring Digital Development: Facts and Figures – Focus on Landlocked Developing Countries* (Geneva, 2024).

[19] United Nations Industrial Development Organization (UNIDO), Sustainable Development Goal 9 database. Available at https://stat.unido.org/data/table?dataset=sdg&country=WORLD.

[20] UNIDO, "Factsheet: landlocked developing countries – highlights from the International Yearbook of Industrial Statistics 2024".

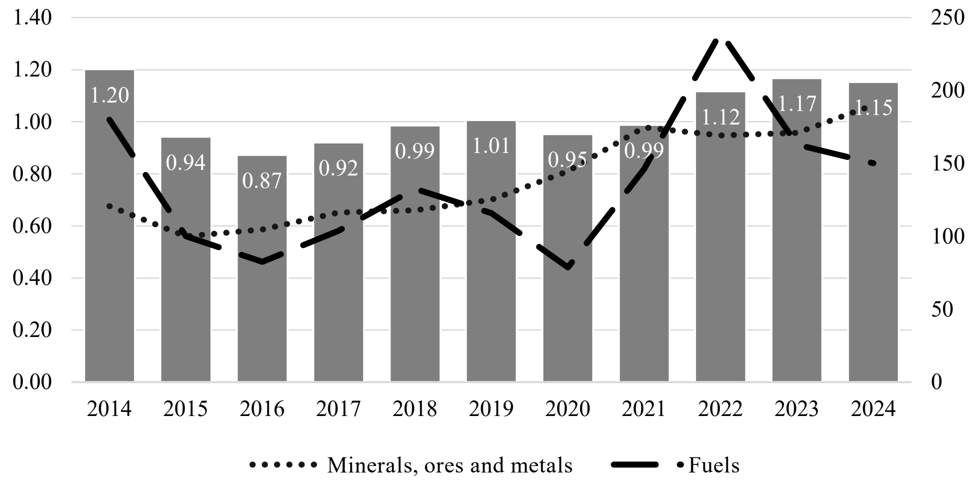
[21] Ibid.

[22] UNIDO, Sustainable Development Goal 9 database.

Figure I

Merchandise exports by landlocked developing countries as a share of world trade and selected commodity price indices

(Percentage and price indices 2015=100)



Source: Calculations based on data from UNCTAD, "Trade in merchandise", UNCTAD Data Hub. Available at https://unctadstat.unctad.org/datacentre/dataviewer/US.TradeMatrix (accessed on 8 July 2025).

24. Since the coronavirus disease (COVID-19) pandemic, landlocked developing countries have experienced faster growth in services exports, particularly digitally deliverable services, than in merchandise trade. Key sectors include information and communications technology (ICT), professional and management services, and financial services.

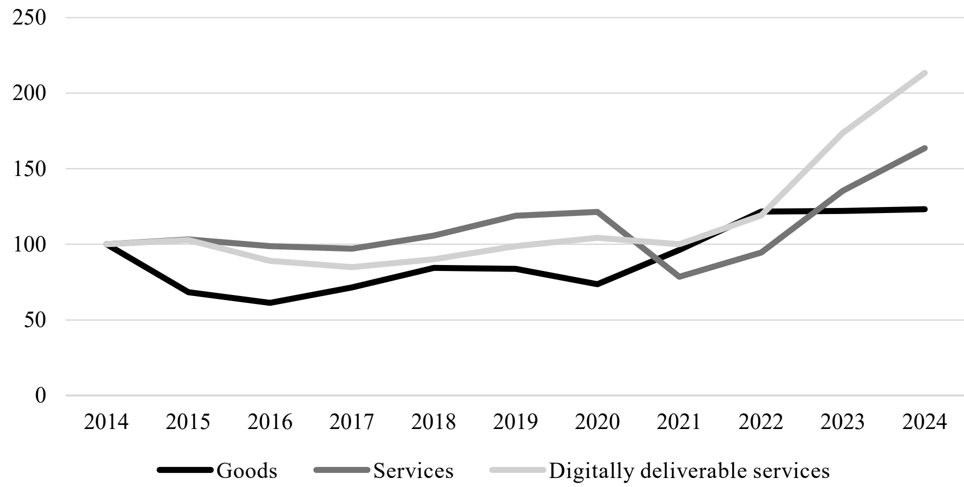
25. In 2023, landlocked developing countries exported $13.46 billion in digitally deliverable services, more than double the amount of $6.56 billion recorded in 2019 (an increase of about 105 per cent).[23] Notwithstanding this increase, landlocked developing countries still lag far behind the global average: digitally deliverable services made up just 21 per cent of the total services exports of landlocked developing countries, compared with 56 per cent for the world.[24] This underscores a key structural gap: while landlocked developing countries are expanding in digital trade, they remain less digitally integrated than other economies.

26. Ongoing initiatives to address this gap include projects led by the International Telecommunication Union (ITU) in a number of landlocked developing countries on supporting digital transformation through a whole-of-government approach and ICT benchmarking in Central Africa and the projects of the International Trade Centre (ITC) on promoting the competitiveness of small and medium-sized enterprises through digital adoption.

[23] Calculations based on data from UNCTADstat.

[24] Ibid.

Figure II
Growth in exports of goods, services and digitally deliverable services from landlocked developing countries
(Indices 2014=100)



Source: Calculations based on data from UNCTAD, “Trade in merchandise”, UNCTAD Data Hub. Available at https://unctadstat.unctad.org/datacentre/dataviewer/US.TradeMatrix (accessed on 8 July 2025).

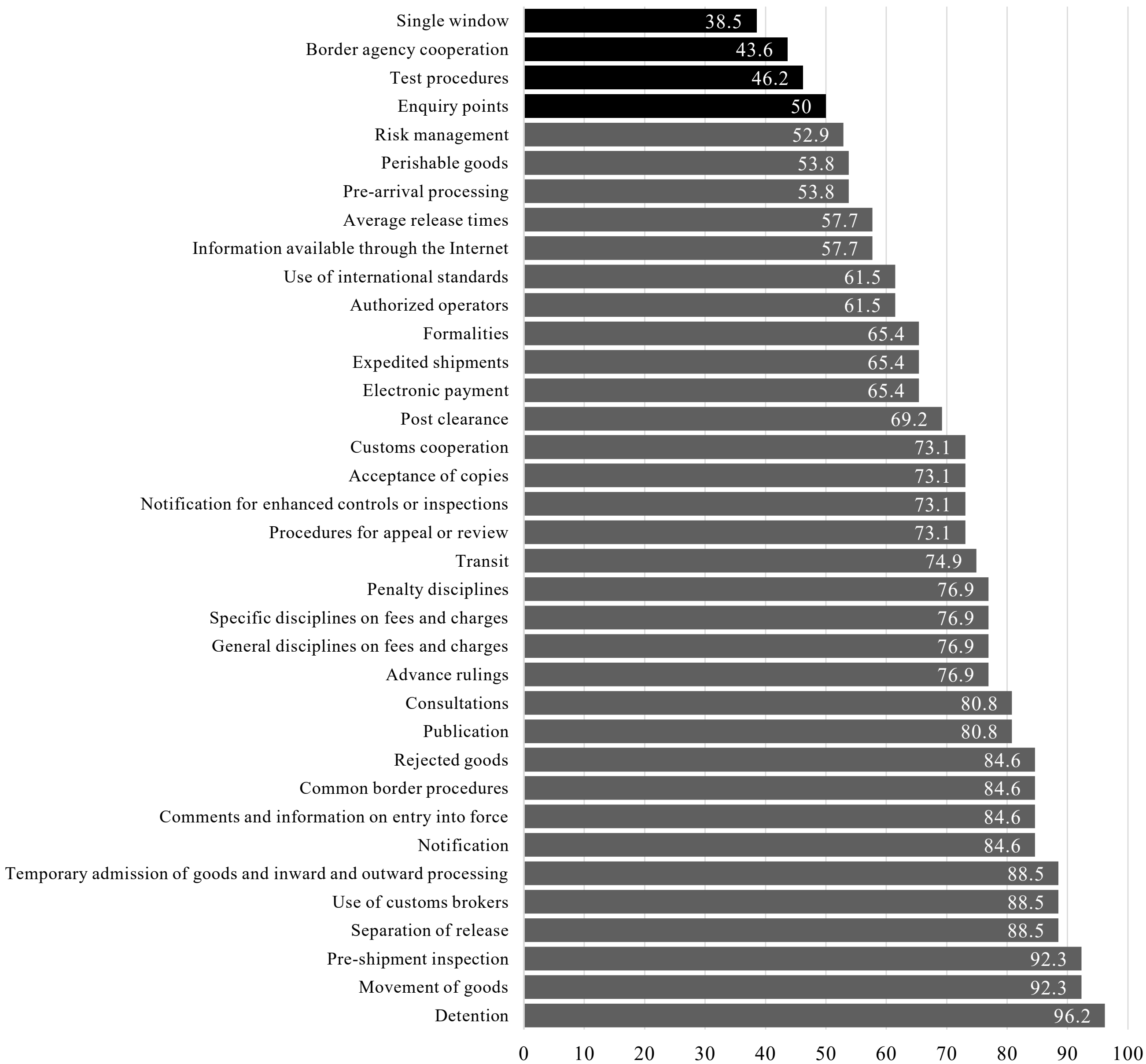
27. Landlocked developing countries face a severe “logistics cost gap”, with unit logistics costs 63 per cent higher than those of transit developing countries.[25] The logistics costs confronted by landlocked developing countries imprint themselves upon the structure of their economies by making exports of time-sensitive, delicate or perishable goods, such as manufactures and agricultural goods, relatively more costly than bulk transportable goods such as crude oil and coal. This further reinforces existing dependencies on primary commodities.

28. Trade facilitation is a core priority of the Awaza Programme of Action, aimed at reducing trade costs through the simplification, modernization and harmonization of trade procedures. Seamless, efficient, cheaper and rapid connection between landlocked developing countries and transit countries is essential for reducing trading costs and time.

29. Support from the United Nations Conference on Trade and Development (UNCTAD), the World Customs Organization, ITC, the United Nations Commission on International Trade Law and regional commissions have helped landlocked developing countries to advance their implementation of the Agreement on Trade Facilitation of the World Trade Organization (WTO). The share of commitments implemented rose from 64.1 per cent in 2024 to 71.1 per cent in 2025. Landlocked developing countries nevertheless lag behind developing countries overall, which have as a group implemented on average 86.1 per cent of commitments.

[25] Office of the High Representative for the Least Developed Countries, Landlocked Developing Countries and Small Island Developing States, *Quantifying Logistics Costs of Landlocked Developing Countries* (New York, 2025).

Figure III
Progress made by landlocked developing countries in implementing commitments under the Agreement on Trade Facilitation, by measure
(Percentage of commitments implemented, average for the landlocked developing countries, as reported as at May 2025)



Source: Calculations based on data from the WTO Trade Facilitation Agreement Database. Available at https://tfadatabase.org/en (accessed on 26 June 2025).

30. Comprehensive technical assistance should now prioritize the most critical gaps in the implementation of the Agreement on Trade Facilitation, particularly the establishment of fully functional customs single windows that streamline cross-border procedures. Important tools exist, including the Customs Convention on the International Transport of Goods under Cover of TIR Carnets, which is supported by the Economic Commission for Europe.

31. Enhanced border agency cooperation mechanisms are essential to reduce delays and administrative bottlenecks that disproportionately affect landlocked developing

countries, which are reliant on transit routes. Standardized testing procedures and accessible enquiry points require immediate attention to ensure that traders can navigate complex regulatory requirements efficiently.

32. In the 2025 United Nations Global Survey on Digital and Sustainable Trade Facilitation, landlocked developing countries improved their implementation score to 61.01 per cent, up from 54.3 per cent in 2021. However, they remain below the global average of 68.6 per cent, particularly in cross-border paperless trade. Notable support for continued improvement in this area includes the Framework Agreement on Facilitation of Cross-border Paperless Trade in Asia and the Pacific and the efforts of the International Organization for Migration to modernize border management in several landlocked developing countries.

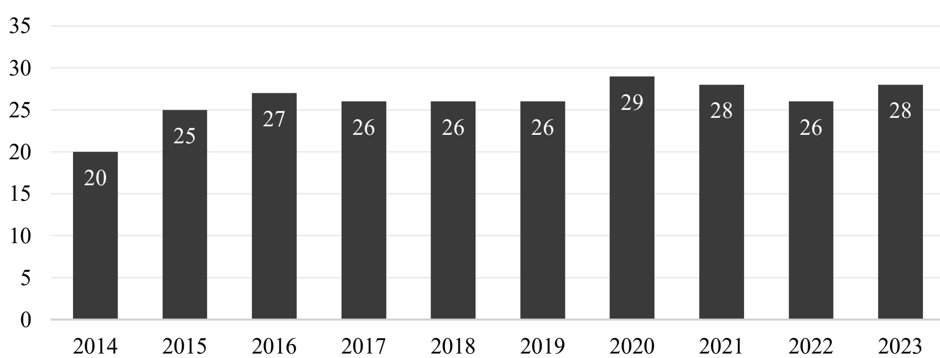
33. Regional integration is a strategic priority under the Awaza Programme of Action, which aims to substantially increase the share of landlocked developing countries in intraregional trade. In 2023, intraregional trade accounted for 28 per cent of the total exports of landlocked developing countries, representing a modest improvement from 2022.[26] Regional markets are particularly important for export diversification, with 29 per cent of total non-primary commodity exports from landlocked developing countries destined for regional partners.[27]

34. Effective implementation of regional trade agreements is essential to boosting intraregional trade, as are investments in key transport corridors. Landlocked developing countries in south Asia have used the South Asian Association for Regional Cooperation to mobilize investments in transport infrastructure, trade facilitation reforms and energy connectivity, supported by the Asian Development Bank. The Economic Commission for Africa is supporting the implementation of the African Continental Free Trade Area, including through a focus on improvements to transit corridors, such as the Lomé-Ouagadougou-Niamey corridor in West Africa, to reduce trade delays and boost digital inclusion. These efforts aim to enhance the trade and transit capabilities of target countries, improve border service delivery, and promote trade integration.

Figure IV

Landlocked developing countries' share of intraregional exports in total exports

(Percentage)



Source: Calculations based on data from UNCTAD, "Trade in merchandise", UNCTAD Data Hub. Available at https://unctadstat.unctad.org/datacentre/dataviewer/US.TradeMatrix (accessed on 8 July 2025).

Note: Share of intraregional exports in total exports is calculated on the basis of the exports of each landlocked developing country within its respective region.

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[26] Calculations by the Office of the High Representative for the Least Developed Countries, Landlocked Developing Countries and Small Island Developing States based on data from UNCTADstat.

[27] Ibid.

35. Addressing the complex breadth of trade challenges that confront landlocked developing countries requires sustained and targeted institutional attention. The Awaza Programme of Action underscores the continued interest of the landlocked developing countries in establishing a dedicated work programme to consider their specific trade issues under the World Trade Organization.

C. Transit, transport and connectivity

36. Sustainable transport infrastructure serves as the backbone of sustainable development for landlocked developing countries, directly enabling economic growth, social inclusion and climate resilience. For the landlocked developing countries worldwide, inadequate transport systems represent the single greatest barrier to industrial transformation and market access, fundamentally limiting their ability to compete in regional and global economies.

37. Despite incremental progress over the past decade, these countries continue to grapple with severe infrastructure deficits that perpetuate their economic isolation. Fragmented and inefficient multimodal transport systems prevent the seamless movement of goods and people, undermining efforts at regional integration and economic diversification. The absence of integrated transport networks, encompassing rail, road, air transport, dry ports, inland waterways and pipeline systems, creates compounding disadvantages compared with coastal countries.

38. Without reliable, cost-effective transport corridors, even the most competitive industries struggle to reach international markets, while essential imports become prohibitively expensive. This infrastructure gap perpetuates dependence on primary commodity exports and limits opportunities for the industrial upgrading necessary for sustainable development.

39. The transport challenges faced by landlocked developing countries are exacerbated by their full reliance on their transit neighbours' transport infrastructure to access seaports and global markets. Inadequate transit infrastructure and slow transit times inflate logistics expenses, reducing business profits, eroding competitiveness and limiting participation in global value chains.

40. The continued reliance of landlocked developing countries on road and rail networks for access to regional and global markets points to the urgent need for integrated and upgraded multimodal infrastructure. Strengthening these systems is vital for reducing transport costs, improving trade efficiency and supporting sustainable industrial development.

41. Although Internet usage in landlocked developing countries has nearly doubled over the past decade, during the implementation of the Vienna Programme of Action, reaching 226 million users in 2023,[28] a significant digital gap persists between landlocked developing countries and other developing and developed countries. The digital gender gap in landlocked developing countries remains significant and shows no signs of narrowing. In 2023, 44 per cent of men in landlocked developing countries were using the Internet, up from 31 per cent in 2019. By contrast, only 35 per cent of women were online in 2023 – just a 3-percentage-point increase from 2019. This results in a persistent 9-percentage-point gender gap in Internet usage.

42. Mobile broadband subscriptions in landlocked developing countries remain significantly below the global average despite strong growth over the past decade. In 2023, landlocked developing countries recorded 53 active mobile broadband

[28] ITU, *Measuring Digital Development: Facts and Figures – Focus on Landlocked Developing Countries*.

subscriptions per 100 inhabitants, compared with 87 globally. Substantial regional disparities persist within the group: landlocked developing countries in Asia had 76 subscriptions per 100 inhabitants, nearly double the rate in African landlocked developing countries, which stood at 40. Meanwhile mobile broadband coverage remains limited in landlocked developing countries, even though it is the primary means of accessing the Internet. In 2023, only 82 per cent of the population in landlocked developing countries was covered by a mobile broadband signal, compared with 95 per cent globally.[29]

43. Fixed broadband access plays a much smaller role in landlocked developing countries due to high costs and limited demand. In 2023, there were only 4 fixed broadband subscriptions per 100 inhabitants in landlocked developing countries, well below the global average of 19. Again, regional differences are stark, with Asian landlocked developing countries averaging 11 subscriptions per 100 inhabitants, compared with just 0.4 in African landlocked developing countries.[30]

44. Affordability is a major barrier to achieving universal and meaningful connectivity in landlocked developing countries. In 2023, only 12 of all landlocked developing countries met the Broadband Commission for Sustainable Development recommended cost of an entry-level broadband subscription of 2 per cent of gross national income (GNI) per capita. An additional 11 countries offered mobile broadband at a cost of less than 5 per cent of monthly GNI per capita, indicating that affordability remains a persistent challenge for many. Closing this gap is crucial for driving industrial growth and promoting inclusive economic development.[31]

45. Digital connectivity holds transformative potential, particularly when intersected with transport. Together, they facilitate efficient trade, improve supply chain integration and support innovation-led industrialization. However, limited access to reliable and affordable telecommunications infrastructure continues to undermine the ability of enterprises in landlocked developing countries to compete in global value chains.

46. Furthermore, the industrial sector in landlocked developing countries needs greater investment in digital infrastructure to enable the adoption of smart manufacturing, e-commerce and Industry 4.0 technologies. The digital divide restricts access to advanced production methods, data analytics and remote monitoring, which are key enablers of industrial productivity and competitiveness. Advancing digitalization in landlocked developing countries will be critical for achieving many of the targets of the Awaza Programme of Action.

47. Enhanced ICT connectivity would not only stimulate industrial expansion but also support economic diversification beyond commodity exports, allowing landlocked developing countries to integrate into higher value global supply chains.

48. While some landlocked developing countries, particularly in Central Asia (including Kazakhstan, Kyrgyzstan and Turkmenistan) and Europe (including Armenia, Azerbaijan and Republic of Moldova), have achieved near-universal electricity access, other landlocked developing countries are still lagging behind with regard to achieving universal access to affordable, reliable and modern energy services for all, especially those in rural areas.

49. In 2023, only 61 per cent of the population in landlocked developing countries, equivalent to 222.8 million people, had access to electricity compared with the global

[29] Ibid.
[30] Ibid.
[31] Ibid.

average of 91.7 per cent. The urban rural divide is stark, with electricity access in urban areas being 88.9 per cent compared with only 48.9 per cent in rural areas.[32]

50. In addition, access to clean fuels and technologies remains low in landlocked developing countries as only 28.3 per cent of the population has access compared with a global average of 74.1 per cent.[33] Nevertheless, landlocked developing countries show a relatively high share of renewable energy in total final energy consumption, at 40.8 per cent (compared with 17.9 per cent globally in 2022); this is largely driven by using solid biofuels rather than modern renewables sources.[34]

51. In terms of total electricity generation, landlocked developing countries lag significantly behind. Their installed renewable electricity-generating capacity stands at just 106.62 watts per capita, compared with a global average of 477.70 watts per capita.[35] Despite an encouraging 29.8 per cent growth rate in renewable capacity over the period of the implementation of the Vienna Programme of Action, this progress is insufficient to meet growing energy demand, support industrialization and achieve a just energy transition

52. Furthermore, compounding the challenge of electricity generation and access is limited financial resources. In 2022, international financial flows supporting clean energy research, development, and renewable energy production in landlocked developing countries were only $2.730 billion, substantially lower than the $17.014 billion directed globally. This underlines the urgent need to scale up targeted investments, technology transfer, and capacity-building support to enable landlocked developing countries to leapfrog to sustainable energy systems and unlock inclusive development opportunities.

D. Enhancing adaptive capacity, strengthening resilience and reducing vulnerability to climate change and disasters

53. Climate change remains a profound and persistent threat, particularly given the dependence of landlocked developing countries on climate-sensitive sectors, such as agriculture, and on limited connective transport infrastructure that can be severed by disasters. Landlocked developing countries are among the most climate-vulnerable countries, despite contributing little to global emissions. International assessments show that the adaptation needs of developing countries are 10 to 18 times greater than current public finance flows. Modelled adaptation costs for developing countries are about $215 billion per year this decade, whereas actual adaptation finance flows were only $21 billion in 2021.[36] This shortfall is acute for landlocked developing countries, which struggle to attract climate funds and technologies. To address this, many landlocked developing countries have joined global calls for scaled-up support,

[32] United Nations, "SDG Indicator 7.1.1, Proportion of population with access to electricity, by urban/rural", Sustainable Development Goal Indicators Database. Available at https://unstats.un.org/sdgs/dataportal/database (accessed on 19 August 2025).

[33] United Nations, "SDG Indicator 7.1.2, Proportion of population with primary reliance on clean fuels and technology", Sustainable Development Goal Indicators Database. Available at https://unstats.un.org/sdgs/dataportal/database (accessed on 19 August 2025).

[34] United Nations, "SDG Indicator 7.2.1 Renewable energy share in the total final energy consumption", Sustainable Development Goal Indicators Database. Available at https://unstats.un.org/sdgs/dataportal/database (accessed on 19 August 2025).

[35] United Nations, "SDG Indicator 7.b.1, Installed renewable electricity-generating capacity (watts per capita)", Sustainable Development Goal Indicators Database. Available at https://unstats.un.org/sdgs/dataportal/database (accessed on 20 August 2025).

[36] United Nations Environment Programme, *Adaptation Gap Report 2023: Underfinanced. Underprepared.* (Nairobi, 2023).

including a dedicated work programme under the United Nations Framework Convention on Climate Change to address their specific adaptation needs.

54. Landlocked developing countries suffer a disproportionate human toll from natural hazards, with a rate of disaster-related deaths and missing people that is 2.7 times higher than the global average. Only about 52 per cent of countries worldwide have multi-hazard early warning systems, and coverage in many landlocked developing countries remains inadequate.[37] These gaps were underlined in the midterm review of the Sendai Framework for Disaster Risk Reduction 2015–2030, which was conducted in 2023, resulting in calls to accelerate action to build resilient infrastructure and universal early warning in vulnerable States. Critical infrastructure in landlocked developing countries is often severely damaged or destroyed in disasters, underscoring the urgency of investing in risk reduction. Going forward, integrating disaster risk reduction strategies into development plans, expanding risk insurance and implementing early warning systems by 2027 are top priorities for resilience-building in landlocked developing countries.

55. Climate finance flows reached an estimated $1.46 trillion annually in 2022, nearly doubling since 2019.[38] Since 2023, the Green Climate Fund has broadened access to developing countries, including landlocked developing countries. Nevertheless, several landlocked developing countries remain without direct access. Furthermore, many landlocked developing countries, like other developing countries, face difficulties in meeting complex funding requirements and co-financing, prompting calls to simplify access to climate funds. While many landlocked developing countries benefit from support from the Green Climate Fund, including Mongolia, Tajikistan and Zambia, through various readiness and project funding, the Fund does not explicitly recognize landlocked developing countries as a distinct category of countries requiring specific support. Landlocked developing countries face unique climate vulnerabilities related to water scarcity, higher transport costs for climate technologies and geographical isolation. Given their specific vulnerabilities, including transboundary water management challenges, limited market access and dependency on transit countries, landlocked developing countries would benefit from explicit recognition in climate finance frameworks and substantial increases in targeted climate finance.

56. New pledges to the Adaptation Fund and the Fund for Responding to Loss and Damage could benefit vulnerable countries if properly resourced. The Resilience and Sustainability Trust of the International Monetary Fund (IMF), operational since October 2022, has deployed rechannelled special drawing rights into long-term, concessional loans for low-income and vulnerable middle-income countries, including Kyrgyzstan and Tajikistan, to strengthen balance-of-payments resilience and support climate-adaptation projects. Given their specific vulnerabilities, landlocked developing countries will need a substantial increase in climate finance.

57. Overall, closing the climate finance gap for landlocked developing countries will require donor countries to deliver on commitments (current support from the Development Assistance Committee of the Organisation for Economic Co-operation and Development (OECD) to all developing countries is only 0.37 per cent of GNI, in 2023, which falls far short of the 0.7 per cent target) and to prioritize landlocked developing countries in the financing portfolios of the Green Climate Fund, the Global Environment Facility and multilateral development banks.[39]

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[37] UNCTAD, SDG Pulse 2024.

[38] Climate Policy Initiative. “Global landscape of climate finance 2024”, 31 October 2024. Available at www.climatepolicyinitiative.org/publication/global-landscape-of-climate-finance-2024/.

[39] Focus2030, “Slight increase in official development assistance in 2023”, 16 January 2025. Available at https://focus2030.org/Slight-increase-in-Official-Development-Assistance-in-2023.

58. In landlocked developing countries, climate change affects women and men differently due to entrenched gender roles and pre-existing inequalities. Women, who often bear responsibility for supplying their families with water and food and for caregiving, are disproportionately affected by droughts, floods and resource scarcity. Limited access to land, finance, education and decision-making power further heightens their vulnerability, reducing their ability to adapt or recover from climate shocks. Meanwhile, men may face different pressures, such as migration for work or loss of income. The compounded social and economic disadvantages that women face make them more exposed to long-term risks and poverty.

59. In the Awaza Programme of Action, a special focus is placed on building climate-resilient infrastructure networks, recognizing that resilient roads, railways, bridges and power grids are essential for both economic growth and disaster mitigation. Official international support for infrastructure in landlocked developing countries has increased in recent years, reaching $8.3 billion in 2022 (in constant 2019 United States dollars),[40] supporting investments in highways, border facilities and renewable energy projects. Several landlocked developing countries are also joining initiatives like the Coalition for Disaster Resilient Infrastructure, aiming to embed resilience standards into construction. Nonetheless, the infrastructure gap remains, as evidenced in landlocked developing countries consistently ranking below the developing-country average on infrastructure quality and access. To strengthen resilience, landlocked developing countries are prioritizing "building back better" – reconstructing roads, schools and water systems to higher standards after disasters. At the same time, proactive measures like climate-proofing designs (e.g. elevating roadbeds, improving drainage) and diversifying transport modes (including rail and inland waterways) are being implemented to reduce vulnerability. Regional cooperation remains key with many landlocked developing countries working with transit neighbours on cross-border infrastructure that is resilient to climate impacts (for example, climate-resilient trade corridors in Central Asia).[41]

E. Means of implementation

60. The prevailing economic structures of landlocked developing countries, which have small industrial bases and relatively large informal sectors, coupled with constraints in administrative capacities, keep tax-to-GDP ratios relatively low, leading to structural constraints in raising sufficient domestic revenues. Several landlocked developing countries struggle to reach even the 15 per cent of GDP threshold often seen as the minimum for an effective State,[42] which is considerably lower than the 34 per cent reached in the OECD economies. In the Awaza Programme of Action, landlocked developing countries and partners are urged to intensify efforts on domestic resource mobilization, aiming to meet an aspirational target of at least 20 per cent of GDP in domestic revenue over the decade. Initiatives to strengthen tax systems and to broaden the domestic resource base, including the IMF Revenue Mobilization Trust Fund and the Tax for Sustainable Development Goals Initiative of the United Nations Development Programme, provide technical assistance on tax

[40] Office of the High Representative for the Least Developed Countries, Landlocked Developing Countries and Small Island Developing States, "Landlocked developing countries fact sheet 2022", available at www.un.org/ohrlls/sites/www.un.org.ohrlls/files/landlocked_developing_countries_factsheet_2022.pdf.

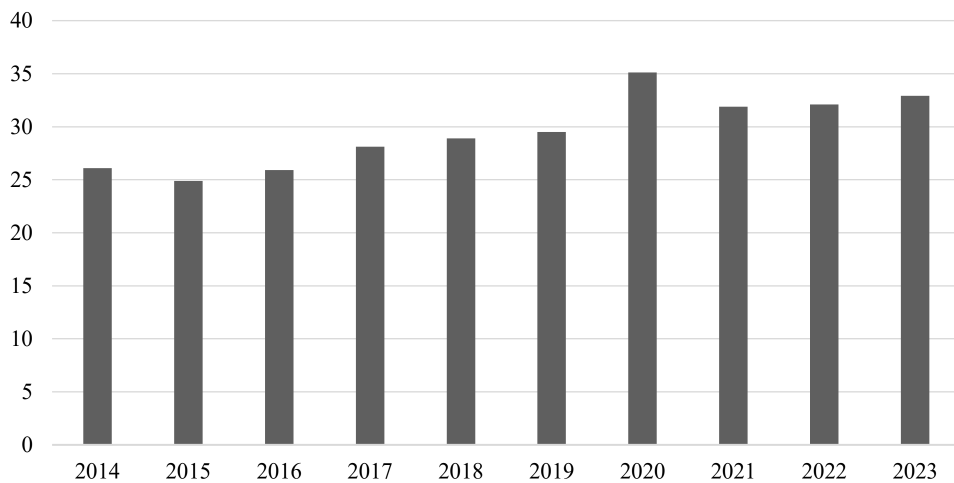
[41] *World Economic Situation and Prospects 2025* (United Nations publication, 2025).

[42] Manal Corwin and others, "Taxation and the Sustainable Development Goals: the role of the PCT", Platform for Collaboration on Tax, 30 October 2024, available at www.tax-platform.org/news/blog/Taxation-and-the-Sustainable-Development-Goals.

reforms in landlocked developing countries. Regional efforts, such as the Addis Tax Initiative, also encourage knowledge-sharing on domestic resource mobilization.

61. In 2024, for the first time in five years, official development assistance from Development Assistance Committee members declined significantly, by 7.1 per cent in real terms compared with 2023.[43] Looking ahead, the situation grows increasingly dire as announcements from 12 Development Assistance Committee members indicate substantial reductions in official development assistance for 2025 and beyond. According to OECD simulations, aid levels could plummet between 9 and 17 per cent in just one year.

Figure V
Net official development assistance received by landlocked developing countries
(Current, millions of dollars)



Source: OECD, "Net ODA", OECD data. Available at https://www.oecd.org/en/data/indicators/net-oda.html (accessed on 26 June 2025).

62. In the Awaza Programme of Action, development partners are called upon to target assistance towards the priority needs of landlocked developing countries. After a sharp decline in 2020–2021, FDI flows to landlocked developing countries initially rebounded. FDI flows to landlocked developed countries grew by about 3 per cent in 2023, but declined by 10 per cent in 2024, to $23 billion. The share of landlocked developing countries in global FDI fell from 1.7 per cent to 1.5 per cent.[44]

63. A large proportion of FDI in landlocked developing countries is concentrated sectorally and geographically. Ethiopia, Kazakhstan, Uganda, Mongolia and Uzbekistan accounted for about 55 per cent of FDI inflows to landlocked developing countries in 2022, with the distribution remaining similarly skewed in 2024, though the leading recipients shifted. Notably, FDI flows to Kazakhstan declined sharply, while Ethiopia and Uganda were among the largest recipients in 2024. A large share of FDI flows to landlocked developing countries continues to originate from a few investor countries. In 2022, China was the largest source of investment across all landlocked developing countries, followed by Thailand, Canada and Netherlands (Kingdom of the).[45] Recent estimates show that this trend persists, with substantial

[43] OECD, "International aid falls in 2024 for first time in six years, says OECD", 16 April 2025. Available at www.oecd.org/en/about/news/press-releases/2025/04/official-development-assistance-2024-figures.html.

[44] UNCTAD, *World Investment Report 2025*.

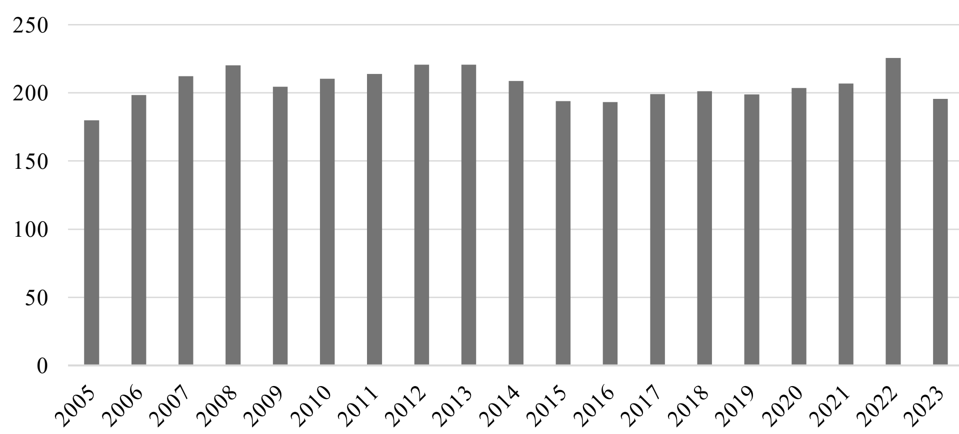
[45] Ibid.

energy-sector investments, primarily from investors from China. This uneven distribution indicates that there is room for greater sectoral diversification in investment.

64. Landlocked developing countries are undertaking reforms to enhance their business climate, supporting regional integration projects to connect to larger markets. International initiatives in support of investment promotion, such as the World Bank's International Development Association Private Sector Window, are vital for de-risking projects in landlocked developing countries. The Awaza Programme of Action includes blended finance and public-private partnerships among the vehicles to support the development financing needs of landlocked developing countries.

65. Remittances account for over 10 per cent of GDP in one quarter of landlocked developing countries and over 20 per cent of GDP in five landlocked developing countries.[46] For several landlocked developing countries, remittances represent a substantial share of their GDP: for example, in 2024, remittances represented 47.9 per cent of GDP for Tajikistan, 33.1 per cent for Nepal, 22.0 per cent for Lesotho and 14.4 per cent for Uzbekistan.[47] These steady inflows have also supported external balances, offsetting trade deficits and bolstering foreign exchange reserves. However, a few host countries are the source of the majority of remittances to landlocked developing countries, making them vulnerable to economic downturns or policy changes in those destinations. In addition, the cost of sending remittances to landlocked developing countries is often far above the Sustainable Development Goal target of 3 per cent. International efforts, including the Global Compact for Safe, Orderly and Regular Migration (in particular, objective 20 thereof, implemented through the United Nations Network on Migration), and multi-stakeholder platforms, such as the Remittance Community Task Force, are pushing to lower transfer costs and leverage remittances for development (e.g. through diaspora investment instruments).

Figure VI
Personal remittances received by landlocked developing countries
(Current, millions of United States dollars)



Source: World Bank, "Personal remittances, received (percentage of GDP)", World Development Indicators. Available at https://data.worldbank.org/indicator/BX.TRF.PWKR.DT.GD.ZS (accessed on 26 June 2025).

66. Debt-to-GDP ratios in landlocked developing countries have been rising in recent years, initially due to heavy borrowing for pandemic responses, but also in

[46] World Bank, "Personal remittances, received (percentage of GDP)", World Development Indicators. Available at https://data.worldbank.org/indicator/BX.TRF.PWKR.DT.GD.ZS (accessed on 26 June 2025).

[47] Ibid.

order to fund infrastructure spending and to offset commodity shocks. Developing countries expended at the median 11 per cent of their revenue on interest payments in 2024, over four times the share of developed economies.[48] The World Bank and IMF classified 14 landlocked developing countries as being at high risk and 4 landlocked developing countries as already being in debt distress as at March 2025.[49]

67. The widespread adoption of enhanced collective action clauses in sovereign bond contracts has supported bond market workouts. While collective action clauses do not eliminate all the challenges associated with debt restructuring, they support a more orderly process. Zambia became the first landlocked developing country to complete a full restructuring of its roughly $13.4 billion of sovereign debt under the Group of 20 Common Framework for Debt Treatments beyond the Debt Service Suspension Initiative.

68. Multilateral efforts, such as the IMF Debt Service Suspension Initiative and ongoing Common Framework cases, have provided temporary relief, but more comprehensive solutions are essential to address the structural factors affecting the increasing debt burden in landlocked developing countries. Many landlocked developing countries are facing growing debt vulnerabilities, prompting calls for expanded access to concessional finance, particularly for countries that are not eligible for existing debt relief initiatives. In addition, innovative mechanisms, such as debt-for-climate swaps, can help to reduce debt burdens while financing resilience-building projects. Reforms are further needed in strengthening cooperation between countries for debt relief, providing technical assistance and capacity-building support to borrowing countries and encouraging reforms that improve debt management.[50]

69. In the Sevilla Commitment, adopted in June 2025, States committed to reshaping global finance to better support developing countries, including landlocked developing countries, by prioritizing vulnerability over GDP, expanding access to blended finance and local currency lending, and promoting debt relief tools such as swaps and pause clauses. It also contains a call for stronger representation of developing countries in financial governance and an emphasis on country-led development strategies. States specifically undertake to explore the establishment of an infrastructure investment finance facility for landlocked developing countries.

IV. Follow-up, monitoring and review

70. Effective mainstreaming, coordination and monitoring of the Awaza Programme of Action are indispensable to effectively translate international commitments into concrete national policies and investments. The national focal points from the landlocked developing countries will play an important role in facilitating whole-of-government coordination for the implementation of activities across ministries and with resident coordinators and other partners. The Office of the High Representative for the Least Developed Countries, Landlocked Developing Countries and Small Island Developing States is in the process of developing mainstreaming guidelines and a toolkit to support national focal points and their partners in integrating the Awaza Programme of Action into country development programmes.

[48] *World Economic Situation and Prospects 2025* (United Nations publication, 2025).

[49] IMF, "List of LIC DSAs for PRGT-eligible countries", 31 March 2025, available at www.imf.org/external/Pubs/ft/dsa/DSAlist.pdf.

[50] Report of the United Nations Secretary-General's Expert Group on Debt, "Confronting the debt crisis: 11 actions to unlock sustainable financing", June 2025. Available at www.un.org/sustainabledevelopment/wp-content/uploads/2025/06/Confronting-the-Debt-Crisis_11-Actions_Report.pdf.

71. For the United Nations agencies, funds and programmes, the Awaza Programme of Action will now serve as the primary normative framework to provide guidance in developing their strategic frameworks, programmes of work and country-level implementation plans and in preparing for the next planning cycle. The Office of the High Representative for the Least Developed Countries, Landlocked Developing Countries and Small Island Developing States has developed a road map to consolidate information on implementation activities and to coordinate actions undertaken by the United Nations and relevant international organizations in support of the implementation of the Awaza Programme of Action. As at July 2025, a total of 36 entities had submitted 319 activities, projects and programmes as inputs for the road map.

72. Development partners, trading partners and transit countries should honour the commitments contained in the Awaza Programme of Action to ensure its effective implementation. The Group of Landlocked Developing Countries and the Group of Friends of Landlocked Developing Countries can play a crucial role in mobilizing country-level implementation of the Awaza Programme of Action.

73. Strengthening national statistical systems can support effective monitoring of development outcomes. Several landlocked developing countries face significant capacity constraints within their national statistical offices, including limited financial and human resources, outdated methodologies and challenges in accessing modern technologies. Supporting the modernization and digitalization of statistical systems is important, including geospatial data, real-time data collection and the integration of administrative data sources. Enhanced data capabilities will enable landlocked developing countries to better track progress under the Awaza Programme of Action, to design targeted interventions and to participate meaningfully in global and regional development dialogues.

V. Conclusion and recommendations

74. **The launch of the Awaza Programme of Action can serve as a critical inflection point for landlocked developing countries by renewing commitments and mobilizing actions to address their specific needs. Although landlocked developing countries continue to face major structural challenges that hinder their development progress, evidence continues to show that considerable progress can be made to alleviate these challenges and reduce the development "cost" of being landlocked.**

75. **The efforts of landlocked developing countries to transform their commodity-dependent economies by supporting the transition from high-volume, low-value primary commodity exports to value added products should be scaled up with additional support from development partners, transit countries and international organizations, including multilateral development banks and international financial institutions. This transition involves developing local processing capabilities that support transitioning into higher-value products before export, thereby fundamentally altering the cost-benefit equation of transport logistics.**

76. **Landlocked developing countries should prioritize strengthening innovation ecosystems, fostering strategic partnerships among universities, research institutes and industry to promote research and development and support the development of high-value supply chains domestically. This will require strengthening tertiary education in crucial areas for the digital economy, including digital logistics, advanced manufacturing and renewable energy. These sectors offer significant potential for structural economic transformation and**

can serve as catalysts for broader economic diversification. Financial support and technical assistance from development partners and international organizations should enable the required infrastructure development, as well as promote initiatives that allow landlocked developing countries to gain access to and to develop relevant technologies.

77. **Bridging the infrastructure and connectivity deficits of landlocked developing countries is crucial. The scale and depth of infrastructure development required by landlocked developing countries is substantial and includes investments in efficient transport corridors, including roads, railways and inland waterways, as well as energy and digital infrastructure. Crucial to this effort is the establishment of an infrastructure investment financing facility, as envisaged in the Awaza Programme of Action, to mobilize necessary resources, enhance innovation and foster regional collaboration and connectivity.**

78. **Transit and trade facilitation remain critical for improving the participation of landlocked developing countries in global trade. These include enhancing sustainable transportation infrastructure, advancing trade facilitation, fostering regional integration, strengthening legal frameworks and building institutional capacities. The Awaza Programme of Action contains a call to establish a high-level panel on freedom of transit, which represents a crucial initiative aimed at addressing transit barriers faced by landlocked developing countries. The panel will support landlocked developing countries and their transit neighbours in identifying practical solutions and will formulate policy recommendations to facilitate cost-effective transit and support the integration of landlocked developing countries into global and regional trade networks.**

79. **A more systematic approach to landlocked developing countries in multilateral trade frameworks, including the World Trade Organization, would reflect long-standing calls from landlocked developing countries to support their integration into the multilateral trading system and achieve the trade-related targets of the Awaza Programme of Action. Addressing trade bottlenecks in landlocked developing countries is beyond the scope of unilateral interventions and requires coordinated interventions across borders, with trading partners and through appropriate sustained and targeted institutional attention.**

80. **Climate vulnerability further compounds these challenges, with landlocked developing countries experiencing disproportionately high disaster incidence and mortality rates, alongside severe financial shortfalls in climate adaptation funding. Addressing these vulnerabilities through enhanced adaptive capacity, strengthened resilience and the integration of disaster risk reduction into development strategies is an urgent imperative. The increasingly active role of landlocked developing countries in climate change negotiations, with their stated goal of constituting themselves as a Group under the United Nations Framework Convention on Climate Change, will help them to pursue solutions to their unique climate vulnerabilities.**

81. **Mainstreaming the Awaza Programme of Action across the United Nations system and other international organizations and at the country level is critical for converting global commitments into concrete national actions and policy frameworks. Effective mainstreaming and coordination are needed to ensure the alignment of strategies and resources, enhancing the overall coherence and impact of interventions aimed at overcoming the unique geographical and developmental constraints faced by landlocked developing countries.**