



# Unfulfilled Promises

Addressing the gap between commitments and practice in locally led humanitarian action



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# Abbreviations

A4eP	Alliance for Empowering Partnership
BHA	Bureau for Humanitarian Assistance
C4C	Charter for Change
CO	Country Office
CRS	Catholic Relief Services
CV	Curriculum Vitae
DAC	Development Assistance Committee
DRC	Democratic Republic of the Congo
FARC	Revolutionary Armed Forces of Colombia
FBO	Faith-based organisation
GHA	Global Humanitarian Assistance
HQ	Headquarters
ICRC	International Committee of the Red Cross
ICR	Indirect Cost Recovery
INGO	International non-governmental organisation
IOM	International Organisation for Migration
IRC	International Rescue Committee
LHDF	Lebanon Humanitarian and Development Forum
MSF	Médecins sans Frontières
NEAR	Network for Empowered Aid Response
NGO	Non-governmental organisation
NRC	Norwegian Refugee Council
ODA	Official Development Assistance
SOGIESC	Sexual orientation, gender identity, gender expression, and sex characteristics
UN	United Nations
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations International Children's Emergency Fund
UNRWA	United Nations Relief and Works Agency for Palestine Refugees in the Near East
USAID	United States Agency for International Development
USD	United States dollar
WFP	World Food Programme
WHO	World Health Organisation
WLO	Women-led organisation

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# Foreword

Addressing the gap between commitments  
and practice in locally led humanitarian action



It is with gratitude towards the members of Caritas Europa who commissioned this report, the Centre for Humanitarian Action who carried out the research as well as Caritas Lebanon, Caritas Colombia, and Catholic Relief Services (CRS) who contributed to the report's development that we share with you **Unfulfilled Promises: Addressing the gap between commitments and practice in locally led humanitarian action.**

It is clear that the international humanitarian system is facing an urgent crisis. The humanitarian funding gap is wider than it has ever been, and needs are growing at an unprecedented rate in a humanitarian system few believe to be fit for purpose. As internationally agreed, a key reform against this backdrop is to make humanitarian action far more locally led and participatory. This report attempts to take stock of what is and what is not working and what local solutions may offer in the way of building a resilient and responsive humanitarian system.

Locally led humanitarian action is at the heart of Caritas' work. The principle of subsidiarity – i.e., being as local as possible, as international as necessary – guides our day-to-day interactions between Caritas members as well as our advocacy towards donors and policymakers. We believe that a local response is not only efficient, agile, and context-specific, it is one that is fuelled by connectivity and solidarity.

When war or crisis hits, Caritas members who are locally rooted in their community are often one of the first to respond. However, they are not alone in their response. The global Caritas confederation is able to quickly mobilise funds and technical support, often based on long-standing partnerships that are built on trust, common understanding, and shared history. These local and national organisations often share with us that simply knowing they are not alone as they confront destruction and need is powerful. It is because of our structure as a confederation comprised of diverse national and local organisations that we are committed to promoting, reflecting on, and improving humanitarian response through a greater emphasis on the role of local organisations.

Based on this commitment to locally led humanitarian action, and to better evaluate the current state-of-play regarding global commitments towards this, we decided to explore what gaps remain between commitments and practice by donors and international humanitarian actors. Through the development of an index, we identified whether government donors, UN agencies, and INGOs are walking the talk on funding to local organisations, leadership of local actors, and more. We qualified these findings by speaking directly with local organisations and asking for their assessment of these donors and organisations. The findings show that there is ample room for improvement in all areas.

After years of discussion, pledges, and compelling evidence to support the benefits of locally led humanitarian action it is high time that donors, UN agencies, and INGOs uphold their commitments to locally led humanitarian action, demonstrating their dedication through tangible actions rather than mere rhetoric. The findings of the report underline the need for all humanitarian stakeholders and donors to earnestly reflect upon our common commitments to locally led humanitarian action. We must collectively and individually scrutinise where we currently stand and take concrete steps forward in support of a more empowered and effective local response.

In the pages that follow, you will find an exploration of these themes, backed by data and informed by the shared experiences of many individuals and local organisations. We hope that this report will serve as a catalyst for dialogue and change, and, ultimately, a more human-centred, contextually relevant, and just humanitarian system.



**Maria Nyman, Secretary General, Caritas Europa**

# Introduction

When someone says “humanitarian worker”, often we imagine a person with a privileged background, somebody who travels long distances to help people affected by a conflict, flood, or earthquake. Yet, **humanitarian workers are, first and foremost, people working in and for their own communities:** individuals who provide support to people with whom they share a language, history, culture, and possibly challenges. This is the case of Venezuelan refugees who came to Colombia because of the economic crisis in their country and who are now working with refugee communities at the Colombian–Venezuelan border. This is also the case of Lebanese women who are living the consequences of Lebanon’s economic collapse and organising help for communities in various districts of Beirut.

Some call themselves “humanitarian workers”, while others self-designate as social workers, as volunteers, or all of the above. Some view themselves as teachers, nurses, doctors, or priests, and consider humanitarianism as an integral part of their work. Local humanitarian organisations vary in size, from small teams with around ten employees to larger groups with several hundred or even a thousand team members. Still, all of them are undertaking work that aims at improving the situation of people in vulnerable circumstances.

Recent years have brought a growing recognition of the importance of ensuring that people affected by emergencies have a meaningful say in the delivery of assistance and protection in their contexts. In the wake of the Black Lives Matter movement, increased attention to **decolonising aid and addressing structural racism** in all institutions, including those involved in aid delivery, has brought new urgency to the deliberations on support for “localisation” of humanitarian action. At the same time, the international humanitarian system is facing significant funding shortages. In 2022, only 57.5% of global funding requirements were met.<sup>1</sup> This has sparked debates about enhancing **efficiency and effectiveness** in aid delivery. In this context, it is important to consider the comparative advantages offered by local humanitarian actors and their access to and acceptance by the communities they serve, their contextual knowledge, their long-term presence, and the shorter funding chains associated with working directly with local actors.<sup>2</sup>



International humanitarian actors, such as donor governments, United Nations (UN) agencies, and international non-governmental organisations (INGOs), have made various **commitments to support local humanitarian actors**. Nevertheless, **progress has been very limited**.<sup>3</sup> Data suggests that in 2022, local actors directly received only 1.2% of humanitarian funding.<sup>4</sup> In addition to funding struggles, local actors feel their work is insufficiently recognised, and their decision-making is often restricted.<sup>5</sup> An important barrier to strengthening locally led humanitarian action is the lack of accountability by international actors regarding their commitments in the field of supporting local humanitarian actors.<sup>6</sup>

In addition to highlighting the importance of locally led humanitarian action and the barriers that local actors face, this report aims to foster international actors' accountability by exploring the extent to which they have lived up to their commitments. For this, **we developed an index and compared the performances** of the five largest UN agencies, five largest INGOs, and ten largest government donors. Additionally, we undertook **in-depth interviews in Lebanon and Colombia** to hear from local actors first-hand about their struggles and best practices when working in local-international partnerships. The methods of this report include a literature review, surveys with local and international humanitarian actors, document analysis, and semi-structured interviews with local actors in two crisis contexts.<sup>7</sup>

The structure of this report is the following: Part I discusses the importance of local humanitarian actors in terms of effectiveness and justice, the international policies aimed at fostering locally led humanitarian action, and the barriers faced by local humanitarian actors. Part II of the report introduces our index, which is designed to evaluate top international humanitarian actors' organisational policies and practices with respect to locally led humanitarian action. This part also highlights the extent to which the largest international actors have fulfilled their commitments in this regard. Part III covers the perspectives of local actors in Lebanon and Colombia regarding their work with international humanitarian actors. Finally, we present our conclusions.

Part I

# Setting the scene



# The role of local humanitarian actors: effectiveness and justice

When a crisis strikes, various local actors – neighbours, volunteers, civil society organisations, and governmental institutions – have a crucial role to play. This is true for all kinds of crises around the world: be it an apartment fire in New York City, a tsunami in the Philippines, or floods in Germany.

## Local actors are usually the first to respond

While international humanitarian aid tends to receive more media attention, it has been

shown to rarely, if ever, be the most significant source of aid in terms of both the amount of aid people receive<sup>8</sup>, and the appropriateness and timeliness of the aid.<sup>9</sup> Local actors are usually the **first to respond**, whereas the bureaucratised international response has been known to sometimes arrive “criminally late”.<sup>10</sup>

Local actors arguably have a **better understanding of the context** including its history, politics, language, religion, customs, culture, and the actual needs of the communities.<sup>11</sup> Furthermore, local actors are more adept at delivering this assistance and knowing who to consult with.<sup>12</sup> Their familiarity with local dynamics and their community involvement can also lead to more **acceptance and trust by the people affected by crises**. For example, local faith actors tend to have especially strong and trusting bonds with communities,<sup>13</sup> and their religious and community affiliation makes them better at providing psychological comfort, courage, and hope to the communities they assist.<sup>14</sup> The presence of local actors in communities has also

been shown to increase **accountability to the affected people**, as it is often easier for those receiving aid to access local organisations as compared to international ones.<sup>15</sup>

While both international and local organisations face access challenges and being local, in itself, is not necessarily sufficient to ensure access, local organisations’ proximity to communities and their contextual knowledge provide them with a comparative advantage when **accessing people in need**.<sup>16</sup> For example, local actors are likely to have **pre-established networks** that enable them to work in particularly hard-to-reach areas.<sup>17</sup> Furthermore, attributes like religious authority and the trust local faith actors enjoy might also prove useful when negotiating access.<sup>18</sup> Local faith actors may not be legally registered as NGOs or may not be perceived as such by the government, which can, in some cases, facilitate their access to crisis-affected populations.<sup>19</sup>

As local actors are present before, during, and after an acute humanitarian crisis, working together with them can help to integrate the humanitarian, development, and peacebuilding dimensions (also known as the Humanitarian–Development–Peace Nexus approach), thus increasing the **sustainability** of humanitarian response.<sup>20</sup> Working across these different fields is crucial in tackling problems that require systemic approaches beyond the emergency phase, such as gender-based violence.<sup>21</sup> The work of local feminist organisations is therefore key in offering holistic solutions in this regard.

Given the humanitarian funding gap, there is also an economic argument to consider. A study by the Share Trust and the Warande Advisory Centre explored the economic implications of shifting 25% of governments' Official Development Assistance (ODA) from international to local intermediary structures. The analysis estimates that **"local intermediaries could deliver programming that is 32% more cost efficient** than international intermediaries, by stripping out inflated international overhead and salary costs".<sup>22</sup>



**32%**

Local intermediaries could deliver programming that is 32% more cost efficient<sup>22</sup>

At the same time, it is important to highlight that "local humanitarian actors" are **not a homogeneous category**.<sup>23 24</sup> For instance, in refugee contexts, humanitarian actors might be local in terms of the host country's nationality but may not share the same background as the refugees.<sup>25</sup> Additionally, it is not a given that locally led humanitarian action leads to more inclusivity in terms of both the affected people and various local humanitarians as **power imbalances can persist among local actors as well**. Local organisations may be led by and represent the local elites, thereby lacking a connection to the broader community and potentially perpetuating local power hierarchies.<sup>26</sup> For different reasons, faith-based organisations (FBOs) and women-led organisations (WLOs) may face forms of exclusion from the mainstream humanitarian system, affecting their access to funding and influence, in contrast to their male-led or secular counterparts.<sup>27</sup> Furthermore, local organisations of persons with disabilities, older people's associations, organisations led by people with diverse SOGIESC,<sup>28</sup> or ethnic minority associations all encounter additional barriers within local contexts (see also section "Barriers faced by local humanitarian actors").<sup>29</sup>

Some argue that in conflict settings, local humanitarian actors face challenges when it comes to adhering to the core **humanitarian principles**, particularly neutrality and independence.<sup>30</sup> This may stem from local actors being entwined in the local dynamics, and this might be intentional (i.e., favouring a particular geographic area or population group) or unintentional (i.e., simply being affiliated with some institutions, groups, or communities).<sup>31</sup> At the same time, it could be said that any humanitarian presence, whether local or international, is political, and it would be naïve to believe that international actors are "somehow immune from the politics of disasters".<sup>32</sup> In some cases, it is local organisations that express concerns about the neutrality of international actors due to perceived links between international actors and the government.<sup>33</sup>

Nevertheless, local humanitarian actors hold comparative advantages that can lead to better outcomes for affected people, and **"a failure to put local actors and local knowledge in the driving seat can seriously hobble [aid] effectiveness"**.<sup>34</sup> As argued by Fast and Bennet: "[l]ocal humanitarian action is not always better, but without it humanitarian action is always worse. In all cases, humanitarian action that is not or does not account for the 'local' in its myriad forms is always less relevant, less effective, and more likely to fall short of the imperative to do no harm. Local humanitarian action is not on its own sufficient to make responses more effective, but it is absolutely necessary".<sup>35</sup>

At the same time, locally led humanitarian action is not only about effectiveness but also about **justice**. This means **self-determination**,<sup>36</sup> **shifting the power**,<sup>37</sup> and **countering the still-prevalent colonial dynamics** within the system – dynamics that assign superiority to Western actors, favour Eurocentric perspectives, approaches, and conceptualisations of the future, systematically exclude local actors from decision-making and funding, and perpetuate structural racism.<sup>38</sup> It is simply a question of principle that people affected by crises should meaningfully participate in designing the responses to these crises – a

principle of “nothing about us without us”.<sup>39</sup> It is worth noting that **local organisations led by historically marginalised groups**, such as local women-led organisations, undertake an especially challenging role in countering the oppressive structures. In this case, their work embodies both an anti-colonial and a feminist struggle.

Local faith actors can also play an **emancipatory role, rooted in their religious and spiritual grounding** – especially given the humanitarian sectors’ strong secular bias.<sup>40</sup> In the case of Christianity and Christian actors, it is worth noting that while the Catholic Church was an integral part of Western colonial rule, people inspired by their Christian faith and Christian organisations have also played important roles in various forms of local resistance movements, and in both anti- and post-colonial liberation movements. As discussed by Baretto and Sirvent, there coexist “[b]oth the ways in which Christianity is complicit in empire and coloniality and also the instances in which it provides unique and important resources for resisting, un-thinking, un-disciplining, and re-imagining alternative ways of being in the world”.<sup>41</sup>

Additionally, concepts like **subsidiarity, solidarity, agency, dignity, and the common good** – also found within Catholic Social Teaching<sup>42</sup> – can be linked to locally led humanitarian action and the call to decolonise the sector. A key principle of Catholic social theory, “subsidiarity helps to establish the autonomy of groups and to specify

the correct relationships that ought to exist between different organisations and associations within society”.<sup>43</sup> Essentially, subsidiarity means that decision-making should be situated as closely as possible to the people whom the decisions will affect the most.<sup>44</sup> Action at an individual or lower

**A more timely, appropriate, flexible, sustainable, trustworthy, and accessible humanitarian aid**

level should therefore be preferable – wherever possible – to action at a higher level.<sup>45</sup>

Related to this is the principle of solidarity, according to which, “people must respect each other’s dignity and assist each other in times of need”.<sup>46</sup> This way, the common good can be reached.<sup>47</sup>

Overall, locally led humanitarian action is necessary for more timely, appropriate, flexible, sustainable, trustworthy, and accessible humanitarian aid. Locally led humanitarian action is therefore important for effectively reaching people in the most vulnerable circumstances. At the same time, locally led humanitarian action is essential for justice in this sector because people who are from the crisis contexts should be shaping decisions that concern them. This is in line with the decolonisation agenda, as well as the principles of subsidiarity and solidarity, which point to respecting each person’s dignity and agency.

## The localisation agenda

While local actors have always participated in humanitarian responses,<sup>48</sup> at the international level their importance was first recognised in 1991, in the **UN General Assembly Resolution 46/182**.<sup>49</sup> Three years later, the Code of Conduct of the Red Cross and Red Crescent Movement and NGOs in Disaster Relief emphasised the need to strengthen local capacities.<sup>50</sup> Additionally, the first edition of SPHERE standards,<sup>51</sup> the Principles of Good Humanitarian Donorship,<sup>52</sup> the Principles of

Partnership,<sup>53</sup> the Core Humanitarian Standard,<sup>54</sup> the Development Assistance Committee (DAC) Recommendation on Enabling Civil Society in Development Co-operation and Humanitarian Assistance,<sup>55</sup> and the International Disaster Response Law (IDRL) Guidelines<sup>56</sup> all recognise the key role of local actors.<sup>57</sup>

Yet, it was the **2016 World Humanitarian Summit and the Grand Bargain framework** that elevated

the “localisation of humanitarian action”<sup>58</sup> to new and broader prominence on the international agenda. International organisations and donors committed to making humanitarian action “as local as possible and as international as necessary”<sup>59</sup> and to allocating at least 25% of humanitarian funding to local and national responders – either directly or through a single intermediary organisation or pooled funding – by 2020.<sup>60</sup> The **Grand Bargain 2.0 framework** (endorsed in 2021) continued prioritising locally led humanitarian action with one of the two so-called “critical priorities” being “greater support [...] for the leadership, delivery, and capacity of local responders and the participation of affected communities in addressing humanitarian needs”.<sup>61</sup> The current **Grand Bargain 3.0 framework** (endorsed in June 2023) also features localisation as part of its two “focus areas” by calling for “greater funding and support for the leadership, delivery, and capacity of local responders” as well as “greater support for the participation of affected communities in addressing humanitarian needs”.<sup>62</sup>

The last decade also saw the launch of some prominent networks and initiatives<sup>63</sup> that seek

to make more space for locally led responses. Born in 2010, the **Start Network** (initially called the Consortium of British Humanitarian Agencies) aims at “making systemic-level shifts in the way humanitarian aid is approached and delivered by shifting power and decentralising decision making to locally led networks and organisations”.<sup>64</sup> Around the World Humanitarian Summit of 2016, various local and international NGOs launched the **Charter for Change**, which includes eight commitments that INGOs agree to implement “to address imbalances and inequality in the global humanitarian system”.<sup>65</sup> The year 2016 saw the launch of the **Network for Empowered Aid Response (NEAR)**, which consists of local and national civil society organisations from the Global South “who share a common goal of a fair, equitable and dignified aid system”<sup>66</sup> and in 2018, the **Alliance for Empowering Partnership (A4eP)**, “a network of local and national organisations and global activists that are advocating for more just and equitable aid system”,<sup>67</sup> started its work. Most recently, in October 2022, **The Pledge for Change 2030** was launched with its three main pledges of equitable partnerships, authentic storytelling, and influencing wider change.<sup>68</sup>

## Barriers faced by local humanitarian actors

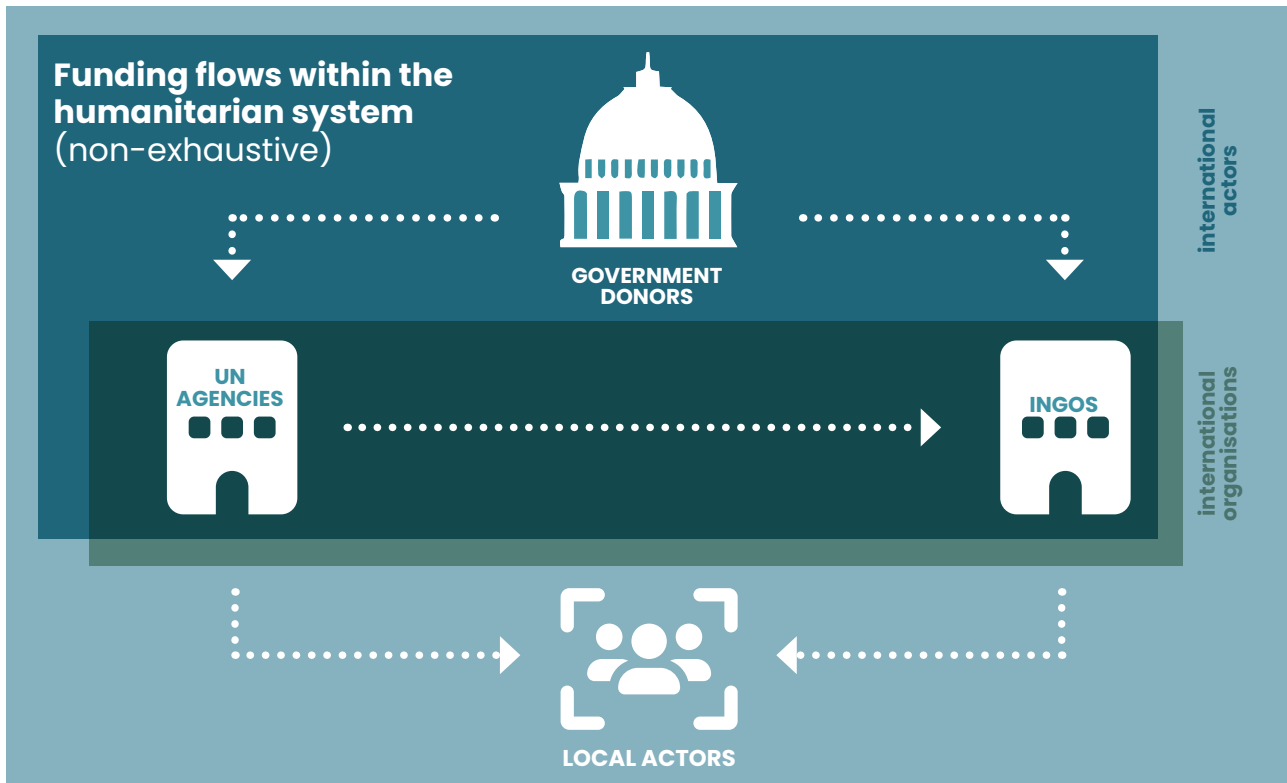
### In the current humanitarian system local humanitarian actors do not have the lead

system is still a long way from being one in which local humanitarian actors take the lead.<sup>69</sup> This, in turn, hinders the effectiveness and justice of humanitarian response.

Discriminatory practices and power imbalances that undermine the status of local actors within the international humanitarian system are well-

Despite the many localisation policies and initiatives, it is widely acknowledged that the current humanitarian

reflected by **donor funding**. According to the Global Humanitarian Assistance (GHA) Report, while direct funding to local actors peaked at 3% in 2018, it fell to a new low of 1.2% in 2021 and stayed there in 2022.<sup>70</sup> Traditional models of aid see risk averse government donors funding international actors – UN agencies and international NGOs – which have donor-centric management structures and risk-mitigation measures. INGO and UN recipients of this funding are seen by donors as bearers of risk, which is typically transferred in the form of administratively heavy and time-consuming **accountability requirements** if and when funding is passed on to local actors.



Graph 1: Funding Flows within the humanitarian system

Furthermore, funding that local organisations receive from intermediary organisations tends to be **short-term, inflexible (with conditionalities), and typically does not cover fixed/indirect costs**.<sup>71</sup> This, in turn, does not allow local organisations to plan ahead and strengthen their capacities, which puts them in a precarious position. As noted by Wilkinson et al.: “[t]he requirements on local actors to have audited records, elaborate financial systems, policies, and reporting procedures in place before they are funded becomes a barrier and a vicious cycle: without funding, local actors cannot institute these systems, but without these systems, they cannot cross eligibility thresholds to gain funding”.<sup>72</sup> In other words, it is a “chicken-and-egg problem of not having the funding or recognition to build capacity but not having the capacity to acquire funding or recognition”.<sup>73</sup>

Additionally, in some contexts, local organisations struggle with the dilemma of whether to “change their structure to facilitate access to institutional funds, but lose their flexibility and agility in the process, or stay small and nimble, but continue to struggle for funds”.<sup>74</sup>

Research indicates that international actors are often perceived as preferring local actors who most closely resemble their own institutional form and ways of working.<sup>75</sup> According to Pellowska, “humanitarian imprints such as using English as main working language as well as technical terminologies prevail”,<sup>76</sup> and the local organisations who cannot (or do not want to) comply may be excluded from international funding or face mistrust by international actors. The **pressure to “professionalise”** according to the donors and international organisations’ standards particularly affects local faith actors, since those who have not “co-opted the formal language of the international humanitarian system, including downplaying faith identities”, tend to be excluded.<sup>77</sup> As noted by de Geoffroy and Grunewald, there is a “temptation [...] to impose a replicated system of the [international] norms, standards and procedures on national and local actors, which would potentially reduce comparative advantage and complementarity in different contexts”.<sup>78</sup> This means that local actors may not be able to work flexibly and in remote regions, which are “some of the very attributes international actors seek”.<sup>79</sup>

The scarcity of funding from international to local organisations also increases the **competition for funds** among different local organisations in the same context.<sup>80</sup> Furthermore, various **power dynamics** also play a role in the local contexts. For example, evidence shows that local women’s rights organisations or organisations working on gender issues are often the last in the line for funding, and male-dominated organisations are more likely to profit from flexible funding.<sup>81</sup> Local faith organisations are also competing for resources with their secular counterparts and can be “doubly marginalised” because of being both local and faith-based.<sup>82</sup>

The vicious cycle related to funding and capacity discussed above is also related to the **understanding of capacity**. What constitutes “capacity” has “largely [been] defined by donors, in line with their bureaucratic requirements”.<sup>83</sup> Furthermore, as argued by Fast and Bennet, “understandings and definitions of capacity have been used, consciously or unconsciously, as a way to keep resources in the hands of the most powerful”.<sup>84</sup> As discussed in the preceding section, local organisations frequently possess a comparative advantage over international organisations in terms of their nuanced contextual understanding. This advantage enables them to ensure access, timeliness, and appropriateness of aid, and to gain the trust and acceptance of the affected people. However, these capacities tend to be undervalued within the international humanitarian system and are rarely included into the capacity measures adopted by INGOs.<sup>85</sup> The commonly used phrase “capacity building” illustrates the persistent implication that local organisations simply lack skills.<sup>86</sup> Baguios et al. note how these assumptions “can even translate into local organisations not recognising their own capacities”.<sup>87</sup> At the same time, as noted by Barnett, Vandermass–Peeler, and Patel, “there are many post-evaluation reports that castigate INGOs for their failings, but rarely are these [INGO] failings integrated into definitions of capacity”.<sup>88</sup>

The failure to acknowledge the capacities of local actors leads to a “provider/beneficiary” or a **subcontracting model** between international and

local actors – despite the rhetoric describing these relationships as “partnerships”.<sup>89</sup> This approach diminishes local actors’ decision-making power and further hampers their agency.<sup>90</sup> Another detrimental aspect of this inequitable partnership and a hindrance to locally led humanitarian action is the **transferring of risk** from international to local actors.<sup>91</sup> When international actors face access constraints due to security concerns, they tend to outsource local actors without providing adequate support for managing security risks.<sup>92</sup> As argued by de Geoffroy and Grunewald, “[i]n the event of a security problem, local actors often do not have the same protection or solutions as international actors”, and the “difference in treatment” is especially evident in the context of evacuations, which are often carried out only for international staff.<sup>93</sup> Notably, the “casualty rates among national humanitarian workers are highest”.<sup>94</sup> According to the Aid Worker Security Database, there were 184 casualties experienced by national NGOs in 2022.<sup>95</sup>

The perpetuation of both the lack of sustainable and so-called quality (multi-year and flexible) funding and the systematic devaluation of local capacities is largely due to the **dominance of international actors within the leadership and coordination mechanisms** of the humanitarian system.<sup>96</sup> As argued by de Geoffroy and Grunewald: “[h]umanitarian coordination mechanisms are often very complex and resource-heavy, and national and local actors often find it difficult

**The exclusion of local actors is directly related to the lack of trust in their capabilities**

to find their place within them. Meetings held in a foreign language, information generally transferred by internet, means of transport often

unavailable and time constraints make it difficult for them to take part”.<sup>97</sup> Consequently, local actors are frequently underrepresented within these mechanisms or, when they do participate, their voices are not adequately heard.<sup>98</sup> Tokenism, or the practice of inviting local actors for the sake of appearing inclusive without truly valuing their input, is a significant concern.<sup>99</sup> Additionally, local faith actors have reported a lack of faith literacy



and an instrumentalist approach to FBOs within coordination mechanisms. While UN agencies acknowledge the trust that affected people have in faith actors and FBOs close ties to the communities, “the fact that FBOs ‘do not look like’ international agencies, represent [...] obstacles to effective engagement”.<sup>100</sup>

The exclusion of local actors is directly related to the **lack of trust** in their capabilities.<sup>101</sup> Although this lack of trust is often based on assumptions rather than concrete evidence, donors are often hesitant to grant more authority to local actors due to their perception of fiduciary risk, i.e., the risk that funds will not be used for the intended purposes or will not be properly accounted for.<sup>102</sup> Additionally, research conducted in the Democratic Republic of the Congo (DRC) has revealed that INGOs doubted whether local organisations had the necessary policies and processes in place to fulfil reporting requirements.<sup>103</sup> Furthermore, international actors suspected that local actors might struggle to uphold the humanitarian principles of neutrality, impartiality, and independence, or to resist the pressure to divert aid to their own communities.<sup>104</sup> Similar concerns regarding adherence to the humanitarian principles, though not necessarily substantiated, also exist with regard to local faith actors.<sup>105</sup> However, this lack of trust and suspicion towards local faith actors is often more a consequence of a “secular-religious divide” than of an “international-local divide”.<sup>106</sup> Additionally, local faith organisations that have Muslim affiliations tend to be particularly marginalised.<sup>107</sup>

According to Roepstorff, there are “structural and systemic factors that clearly feed the trust-deficit and hamper localisation: the **legacies of colonialism, racism, classism, and unequal power relations** prevalent in the daily interactions of people in the humanitarian arena”.<sup>108</sup> A survey conducted in 2021 among humanitarian workers on issues related to power in humanitarian governance found that more than six in ten (62%) of respondents working in the West identified racism within international agencies as a major obstacle to building trust between local and international agencies.<sup>109</sup> Ultimately,

it comes down to the underlying assumptions and mindsets of the privileged Western/Northern actors. It is therefore key to acknowledge the role of structural racism in creating the barriers that local organisations are facing.<sup>110</sup> Structural racism is intertwined with various issues, including the lack of funding, failure to recognise local



## 62%

of respondents in a survey identified racism within international agencies as a major obstacle to building trust between local and international agencies<sup>109</sup>

capacities and the definition of what constitutes knowledge and “professionalism”, organisational structures and cultures that exclude local actors, as well as the contractor-contractee relationships between international and local organisations.<sup>111</sup> Additionally, structural racism relates to the risks experienced by local actors.<sup>112</sup> As noted in a discussion paper by Peace Direct, “[l]ocalisation [...] is only likely to succeed if situated within a deeper conversation about power and structural racism, a conversation that the decolonising agenda has helped bring to the surface”.<sup>113</sup>



*Caritas Hoima teams working with community members on how to use solar water filters in Kyangwali refugee settlement, Western Uganda.*

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# Pre-existing localisation assessment frameworks

During the 2016 World Humanitarian Summit and through the Grand Bargain framework, as well as through initiatives such as the Charter for Change (C4C) or the Pledge for Change 2030, international humanitarian actors, including donors, UN agencies, and INGOs, made commitments to endorse and support locally led humanitarian action. To assess the localisation efforts by international actors, multiple frameworks and tools<sup>114</sup> have been developed with varying involvement of local actors.

While there are some differences within the frameworks in terms of framing and classification of localisation components, most of them include **indicators in four core areas**: funding, capacity strengthening, partnership, and decision-making/coordination/visibility.

First, international actors should ensure adequate funding for local organisations and local civil society coordination mechanisms. They should remove barriers to **accessing funding** that is either direct or as direct as possible (i.e., channelled through a maximum of one intermediary organisation or pooled funds).<sup>115</sup> International organisations should also enable direct contact between local actors and donors<sup>116</sup> and should not impose additional conditions beyond those established by the donors.<sup>117</sup> Donors, in turn, should encourage proposals put forth by international organisations that align with localisation commitments.<sup>118</sup> Additionally, international actors should be **transparent** with respect to resource transfers to local actors and publish these figures/percentages in their public accounts.<sup>119</sup>

Regarding the funding itself, the frameworks propose looking both at the **quantity and the quality of funding**. The quantity of funding is reflected by the percentage of the donor or international agencies' overall humanitarian funding allocated to local organisations. According to the original Grand Bargain

commitments, an aggregated target of at least 25% of the humanitarian funding should go to local actors "as directly as possible", meaning through a maximum of one intermediary organisation,<sup>120</sup> whereas the Charter for Change pledges passing 25% of the organisation's own funding to local NGOs.<sup>121</sup> As for the quality of funding, international actors should strive for it to be long-term (as opposed to project-based), predictable, and should make efforts to minimise the imposition of conditionalities.<sup>122</sup>



**25%**

of the humanitarian funding should go to local actors<sup>121</sup>

Providing adequate administrative support, including covering unearmarked overhead

**Covering unearmarked overhead costs is crucial to strengthening the capacity of local partners**

costs, is crucial to **strengthening the capacity of local partners**.<sup>123</sup> Local, national, and regional capacity should be used over international expertise,<sup>124</sup> and international actors

should be careful not to undermine local capacities.<sup>125</sup> At the same time, international actors should strengthen their own capacities to be able to work with local actors.<sup>126</sup>

Overall, **partnerships** between international and local actors should be **ethical, equitable, and complementary**, as opposed to a sub-contracting type of relationship.<sup>127</sup> Additionally, there should be a shift from project-based to strategic partnerships, and partners should engage throughout the whole project cycle.<sup>128</sup>



*Re-building a community childcare centre in rural Malawi that had been destroyed by extreme weather.  
© James Cave / SCIAF (Caritas Scotland)*

Within these partnerships, barriers to **local actors' decision-making** should be removed.<sup>129</sup> This should involve the active inclusion of local actors in decision-making, especially when it comes to security risk management.<sup>130</sup> International actors should work with in-country leadership structures and contribute to the support and strengthening of local leadership. Local actors should play a central role in defining and leading responses.<sup>131</sup> At the same time, the priorities of affected communities should be fully recognised through participative processes and with a focus on inclusion of marginalised groups.<sup>132</sup>

Similarly, at the international level, efforts should be made to eliminate barriers and provide support for the **diverse and meaningful participation, leadership, recognition, and visibility of local actors** within humanitarian coordination mechanisms.<sup>133</sup> This includes acknowledging and crediting local actors for their contributions to the design and implementation of humanitarian projects in international actors' reporting. It also involves promoting the role of local actors to the media and obtaining the approval of local actors for communications that could put them at risk.<sup>134</sup>

Part II

# Living up to the localisation commitments – or not?



# The localisation index

While numerous localisation frameworks and criteria exist, it remains **difficult to establish accountability among international humanitarian actors** regarding their commitments to foster locally led humanitarian action. Some measurement frameworks are designed to assess specific partnerships between local and international actors,<sup>135</sup> while others aim to capture a broader picture. However, international actors' self-reporting is typically either aggregated and anonymous,<sup>136</sup> or limited in scope, with minimal data provided.<sup>137</sup> **Data availability and transparency** thus remain problematic in the context of strengthening locally led humanitarian action, and hinder international actors' accountability.<sup>138</sup> Additionally, in most of these self-reporting processes, local actors' voices are not heard.

To counter the accountability problem, some humanitarian practitioners and researchers have proposed the idea of a **humanitarian "TripAdvisor-style" feedback system**.<sup>139</sup> James Whitehead from Oxfam asks: "Is there space for 'Rate My Aid'? In a humanitarian crisis, the affected populations are often over-surveyed yet have very little voice in the services they receive. Feedback from communities could be cross-referenced against data on back donors to create a leaderboard of best UN agencies, best INGOs, best local NGOs, and worst..."<sup>140</sup> Oheneba Boateng and Claudia Meier echo this by saying that "to monitor localisation progress in a result-oriented way, the roles of international actors as both player and referee cannot be sustained".<sup>141</sup> They have proposed an idea of a "Localisation

Index that puts homegrown initiatives in charge of evaluating localisation efforts [...]. National NGOs should define the benchmarks of localisation success based on what they see as priorities, and they should anonymously rate how individual international organisations are doing in meeting them."<sup>142</sup>

Considering the persistent barriers that local humanitarian actors face (see section "Barriers faced by local humanitarian actors") and the lack of accountability by the international actors, this report represents an attempt to **build a localisation index that assesses selected international actors' performances with respect to their localisation commitments**.

## Index design

In addition to exploring the need for and barriers to locally led humanitarian action, this report also poses the question: **To what extent do international humanitarian actors employ successful approaches to work with local humanitarian actors?**

### Definitions of international and local humanitarian actors

Here, the term “**international humanitarian actors**” encompasses INGOs, UN agencies, and donors, whereas the term “international humanitarian organisations” refers solely to INGOs and UN agencies.

Regarding the term “**local humanitarian actors**”, while acknowledging its limitations,<sup>143</sup> we adopted the same definition used by all humanitarian actors, including local entities, within the Grand Bargain process in order to collect and compare data. This definition encompasses “organisations engaged in relief that are headquartered and operating in their own aid recipient country and which are not affiliated to an international NGO” as well as “state authorities of the affected aid recipient country engaged in relief, whether at the local or national level”. According to the same definition, “a local actor is not considered to be affiliated [to an international NGO] merely because it is part of a network, confederation, or alliance wherein it maintains independent fundraising and governance systems”.

Based on preexisting localisation measurement frameworks developed by or with local actors, we first identified the (measurable) success criteria to assess international actors’ approaches to strengthening locally led humanitarian action. Second, building on these criteria, we designed **two surveys** that were shared with the twenty largest international actors (based on humanitarian expenditure) to capture their factual reporting and self-perception with respect to the strengthening of locally led humanitarian action. One survey was directed at the **ten largest government donors**, and another survey was shared with the **five largest INGOs and five largest UN agencies**.

Both surveys covered four areas: funding to local humanitarian actors, local actors’ capacity strengthening, partnerships between

local and international humanitarian actors, and coordination and local actors’ leadership. These aspects were explored by 1) asking the international actors to indicate the **extent to which they agree with specific statements related to their work** (international actors’ self-perception), and 2) requesting international actors to provide **evidence on their localisation policies and practices** (international actors’ factual reporting).<sup>144</sup> The responses were cross-checked with publicly available data, such as the Grand Bargain self-reporting exercise documents, and other reports, as needed. After reviewing the data and quantifying it where necessary, the international actors’ answers were scored according to a template developed by CHA researchers.<sup>145</sup>

While this report is initiated by Caritas Europa, due to the methodological approach to focus the report on the five largest INGOs only, no Caritas organisation is included in the main analysis. However, to assure transparency, **Catholic Relief Services (CRS)** as the largest Caritas organisation within the Caritas confederation (Caritas Internationalis) provided data regarding their localisation work based on the same factual reporting questionnaire that was shared with the largest international organisations.

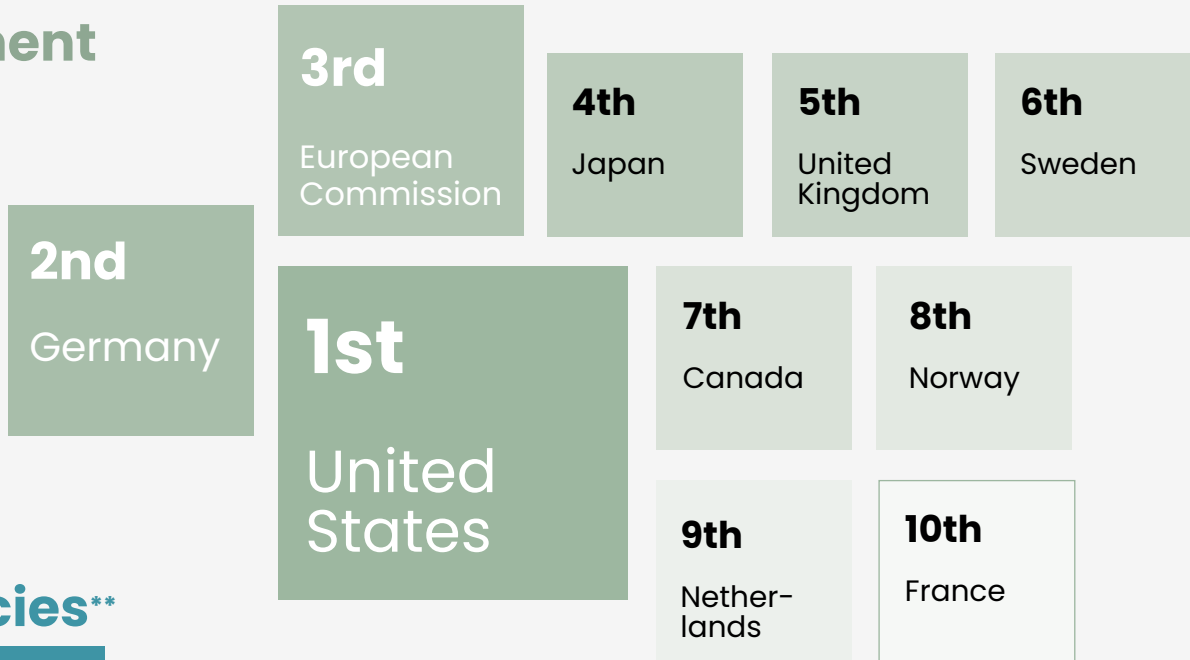
To capture **local actors’ perspectives** regarding the work of the largest international actors, we developed a **third survey**. This survey, available in English, Spanish, and French, was shared with **five international associations of local actors** who were asked to distribute it among their network members. Local actors were then asked to provide their **feedback on each of the twenty above-mentioned international actors** by indicating the extent to which they agree with specific statements. The same set of statements was repeated with respect to each international actor. Additionally, this set of statements corresponded to the international actors’ self-perception statements, thus making the international actors’ self-perception and the local actors’ perception comparable.

Finally, the **results of the international actors’ self-perception survey, the international**

# The biggest international humanitarian actors

(based on humanitarian expenditure)

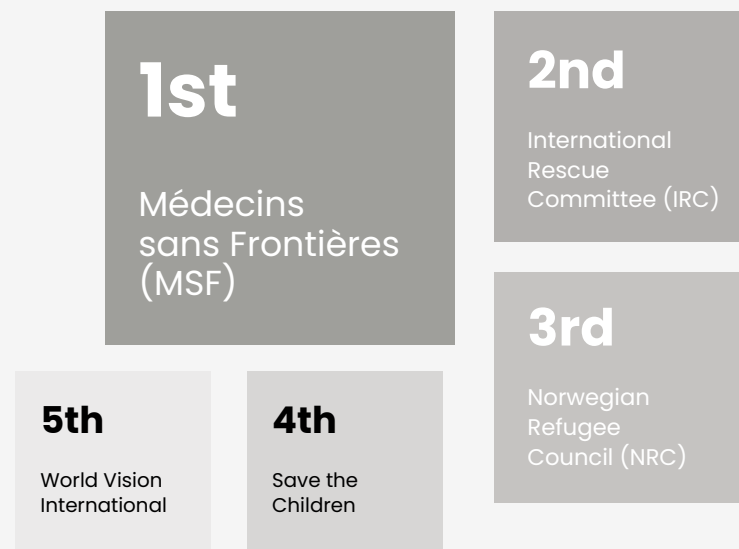
## Government donors\*



## UN agencies\*\*



## INGOs\*\*\*



\* Based on the Global Humanitarian Assistance Report 2023 by Development Initiatives, accessed at <https://devinit.org/resources/global-humanitarian-assistance-report-2023/key-trends-humanitarian-need-funding-2022/>.

\*\* Based on the IATI data on the d-portal, accessed at <https://d-portal.org/ctrack.html>

\*\*\* As identified in the latest "The State of the Humanitarian System" report by ALNAP (2022), accessed at <https://sohs.alnap.org/sohs-2022-report/a-reader%E2%80%99s-guide-to-this-report>

Graph 2: The biggest international humanitarian actors

**actors' factual reporting, and the local actors' perception survey were weighted** to give 50% weight to the local actors' perceptions, 30% to the international actors' factual reporting, and 20% to the international actors' self-perception.

## Limitations and potential biases

This type of analysis is prone to various biases and limitations. In the case of the international actors' surveys, despite asking respondents to provide their institutional position, personal biases may have influenced their responses, especially when indicating the level of agreement with specific statements. With respect to the qualitative answers in the factual survey that were later quantified, the quality of reporting, including the details provided, differed among respondents. This created a risk of interpreting lower reporting quality as poorer organisational performance. To mitigate this risk, the received data was cross-checked with publicly available data, such as the Grand Bargain self-reporting documents and other published reports and policies, as necessary. Additionally, in cases where there was uncertainty about the correct interpretation of responses, or where multiple interpretations were possible, we followed up with the international actors to clarify the responses. Time constraints were also a limiting factor in this report, and additional time for follow-up and analysis could have added more depth.

While the scoring process followed clear criteria,<sup>146</sup> the scoring exercise can be contested as it involves some level of interpretation. We minimised the personal biases of the researchers involved in the scoring exercise by cross-checking the provided scores by two different team members, as well as by consulting the wider team regarding the answers that were found to be difficult to interpret. Furthermore, as we undertook the comparative analysis, our inquiries were primarily quantitative in nature, or we needed to quantify certain qualitative responses. This inevitably led to omitting some important aspects of locally led humanitarian action that are difficult to quantify. These include elements like the

visibility of local actors, the aspects related to the actual efficiency and effectiveness of international actors' ways of working, and the implementation quality of certain policies. Although we were unable to assess the international actors in this regard, we conducted in-depth interviews with local actors to ensure these issues were not left unaddressed.

Concerning the local actors' survey, it is important to note that the survey is not representative, as some geographical regions are overrepresented. However, we chose not to weigh the regional/country context to not give too much weight to individual responses.<sup>147</sup> Furthermore, we were

**This index aims to challenge the system to adopt and implement more coordinated and effective approaches to accountability**

unable to control the number of respondents from the same organisation, as we opted not to request the organisation's name in order to prevent potential risks for local

actors. Regarding the local actors' responses, although our report focuses on humanitarian action, some of the international organisations in question work across the dual humanitarian-development mandate, and local actors might have not differentiated between these mandates when assessing the organisations.

Overall, we believe that we managed to address and mitigate these biases and that, despite its shortcomings, this report offers valuable insights into the commitment of international actors to strengthening locally led humanitarian action and thus contributes to enhancing the international actors' accountability. Beyond the question of holding individual donors, INGOs, and UN agencies accountable, this index also aims to challenge all these actors and the broader system to adopt and implement more coordinated and effective approaches to accountability. It is our hope that this index will inspire those surveyed to methodologically strengthen future exercises with the same goals of enhanced accountability.



# Government donors and localisation – who is walking the talk?

As discussed in the previous section, the first survey was shared with the **ten largest government donors** based on their humanitarian expenditure. These include the United States, Germany, the European Commission, Japan, the United Kingdom, Sweden, Canada, Norway, the Netherlands, and France.<sup>148</sup> While **seven donors submitted their responses**, unfortunately, France, Japan, and the Netherlands did not. As way of explanation, the Netherlands explained that the original input request (made on 10 July 2023) coincided with unfortunate timing, and that they required more time beyond the deadline of 22 September 2023 to provide the required input. Japan initially communicated its readiness to respond but later cited time constraints as the reason for not participating. In the case of France, despite multiple attempts to contact different staff members, they did not provide a response.

## Government donors’ self-perception

Regarding the government donors’ self-perception survey, the donors were asked to indicate a level of agreement on a scale from 0 (completely disagree) to 10 (totally agree) with seven statements covering different aspects of locally led humanitarian action.<sup>149</sup>

As Table 1 shows, among the seven government donors who filled out the survey, **Canada’s self-perception with regard to fulfilling its localisation commitments is the highest**, scoring 74 out of 100 points, followed by the close scores between Germany (63 points) and the United States<sup>150</sup> (62 points). Norway was the most self-critical among the government donors with a score of 43 points.

As part of their self-evaluation, the institutions were asked to indicate the extent to which they agree with the statement “as a humanitarian donor, my institution is a **strong and reliable supporter of locally led humanitarian action**

and is comprehensively fulfilling its commitments to the localisation agenda”. The surveyed donors’ responses varied between 5 and 8 points, with an average value of 7 points.<sup>151</sup> Asked whether it is their “priority to provide **as much direct funding (without any intermediaries) to local humanitarian actors as possible**”, the responses varied much more, between 0 and 9 points, with an average of 5 points. Three surveyed donors did not see direct local funding as a key priority (or perhaps as a doable way forward) for their current or future localisation efforts. A contradiction can also be observed: the donor who indicated very high agreement (9 points) with the statement on funding without intermediaries did not provide any direct funding to local actors in 2022 as per the factual reporting (see section “Government donors’ factual reporting”).

On “seeing **intermediary organisations as holding the key responsibility** to support and ensure locally led humanitarian action”, the donors’ responses also varied, with some assigning full responsibility to intermediary organisations (10 points), and others attributing them much less responsibility in this regard

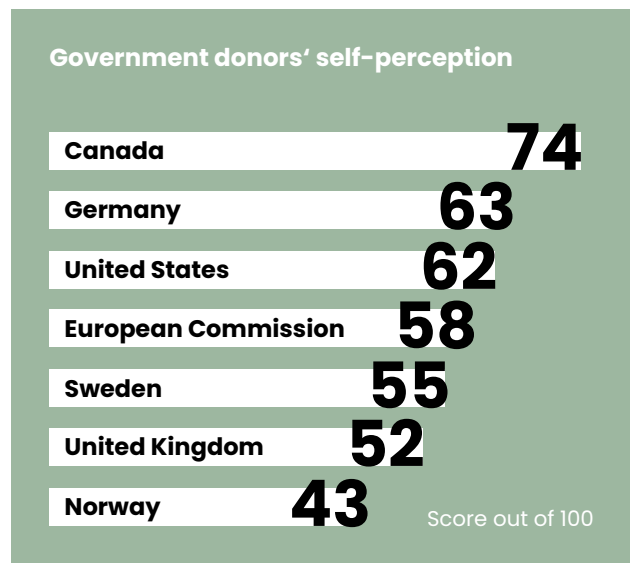


Table 1: Government donor’s self-perception (Data not submitted from Japan, Netherlands, and France)

(3 points). The average value was 6 points.<sup>152</sup> The donors' responses also varied around "requiring that intermediary organisations receiving [their] funding work in **inclusive and transparent partnerships with local actors**" as well as "ensuring that intermediary organisations **pass a fair share of received overhead costs** onto their local partners". The average values of agreement with both statements were only 5 points.

Both of the preceding statements concerned the responsibilities assigned to intermediaries by the donors, and while their average values are not high, a negative correlation can be noticed between 1) the donors' prioritisation of providing direct funding themselves, and 2) what they expect or require from the intermediary. The

### The lack of contact with local representatives is problematic

vice versa. If we look at the relationship between 1) prioritising direct funding and 2) the donors' perception that intermediary organisations hold the key responsibility, a negative correlation can be noticed with respect to three out of seven surveyed donors. At the same time, it is worth noting that two other donors scored high in both prioritising direct funding and perceiving intermediaries as primarily responsible. One scored both aspects as average, and the remaining donor scored both aspects as low, which could be interpreted as a lack of coherence in their approach.

For most donors "**capacity strengthening of local humanitarian actors** is a priority", with all scores equal to or higher than 5. Four donors' scores varied between 8 and 10 points, resulting in an average score of 7 points. Lastly, government donors were asked whether they "**regularly meet with representatives of local humanitarian organisations**". To this, one donor replied with 0 points, while the remaining values were between 5 and 7, with the average being 5 points. The lack of contact with local representatives is problematic because even,

and especially, donors who primarily fund local actors through intermediary organisations should regularly meet with local actors to ensure that the assistance provided reflects local priorities.

Overall, a self-assessment is by nature a very subjective exercise. At the same time, the diverse scores indicate that most donors made a substantial effort to give feedback that goes beyond promoting their own achievements and success stories. **While most surveyed donors generally assess their localisation work as 5 points or above** (first statement), out of all the areas considered within this exercise, **only capacity strengthening emerges as their clear priority area**. There is no consensus among the largest surveyed government donors regarding whether localisation is their responsibility or that of the intermediary organisations. While most donors have a coherent approach, setting more requirements for intermediaries if they believe intermediaries hold the key responsibility in the area of localisation, this exercise also revealed some inconsistencies in donors' approaches and priorities.

### Government donors' factual reporting

As previously mentioned, the survey also requested that international actors provide specific figures and additional details regarding their localisation policies and practices.<sup>153</sup> Where deemed necessary, their responses were cross-checked with other publicly available data, such as the Grand Bargain self-reporting exercise documents and other reports. As part of the data evaluation, some qualitative data was quantified, and all responses were scored according to a template developed by CHA researchers.<sup>154</sup>

In terms of factual reporting (see Table 2), **Germany scored highest** (50 out of 100), followed by the European Commission (46 points). Canada and the United Kingdom scored 39 and 36 points respectively, and the United States reached 33 points. Sweden and Norway received 20 and

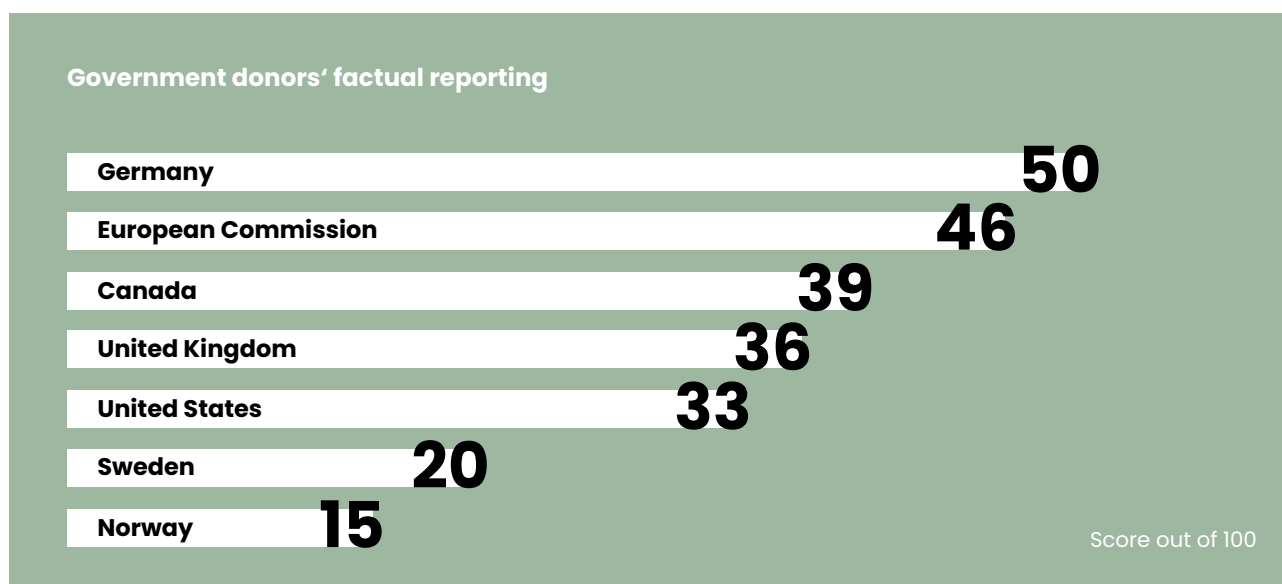


Table 2: Government donors' factual reporting (Data not submitted from Japan, Netherlands, and France)

15 points respectively. The overall scores are significantly lower than in the self-perception assessment (Table 1), with **no government donor scoring more than 50 out of 100 points.**

According to the scoring template,<sup>155</sup> 45% of the total score is based on questions about 1) the share of the overall humanitarian funding going to local implementing actors through a maximum of one intermediary organisation (30% of the total score) and 2) the share of the overall humanitarian funding that goes to local implementing actors without any intermediaries (15% of the total score). The lack of data on these aspects was interpreted as 0 points, in the same manner as if no funding to local actors were provided by these donors. While not tracking this data considerably lowered the overall scores by certain donors, **all donors in question are Grand Bargain signatories**, thus not having this data on hand demonstrates a significant lack in their commitment to follow up on their localisation promises.

The overall data availability of funding figures is very limited. **Only three<sup>156</sup> out of the seven donors participating in the survey were able to provide aggregated figures that reflect the share of the overall humanitarian funding to local actors** that goes to them directly through a maximum of one intermediary organisation. Providing at least 25% of the overall humanitarian funding to local actors through a maximum

of one intermediary organisation is a Grand Bargain commitment from 2016. However, seven years on, most international donors are still not tracking this figure, making it very difficult to hold them accountable in this regard. **Out of the three donors who were able to provide data in our factual survey, none indicated meeting the 25% target**, while in its Grand Bargain self-report, France indicated having exceeded this target in 2022.<sup>157</sup> With respect to the percentage of direct overall humanitarian funding provided to local actors (without any intermediary organisations), five donors submitted data. However, these figures are very small (around 1%) and mostly reflect direct support through embassies. Additionally, the donors were asked about the existence of alternative approaches to pass funds to smaller grassroots local actors that may not be able to meet high levels of international compliance requirements. Five out of seven donors who responded have such approaches, and one donor responded that a pilot project is underway.

In the area of capacity strengthening (worth 18% of the total score), government donors were asked about having a policy that requires intermediary organisations to pass a certain share of funding for overhead costs onto their local partners. **Only one donor reported having a policy that enables local implementing partners of INGOs to receive funding for overhead costs through a dedicated budget line**, which can amount up to 7.5% of their

direct project costs (as opposed to a share for the overhead costs allocated to an intermediary INGO partner). While it is not mandatory for the intermediary organisations to use this budget line, the intermediaries are asked to outline their plans for working with local actors. Two other donors who participated in the survey do not have specific policies in place but provide guidelines with recommendations to pass funds for overheads, coupled with reporting requirements.

In addition to the questions surrounding covering overhead costs, the donors were also asked whether they have a specific policy that aims to ensure capacity strengthening of local humanitarian actors. Once again, **only one donor reported having a specific policy on capacity strengthening**, while another donor reported requiring intermediary NGOs to outline their capacity needs and local partners' requests as well as the way to address them. In a similar but less ambitious way, another donor "encourages" partners to include specific capacity strengthening plans into the partnership agreements. Lastly, one donor reported having specific projects in this area, while not having a policy.

Concerning equitable partnerships (worth 10% of the total score), donors were asked whether they have a **policy under which intermediary organisations they fund are obliged to share full<sup>158</sup> project budgets** and financial reports with their local implementing partners. While **none of the donors who responded has such a policy** in place, one has an expectation (as part of a guidance) that its partner organisations share project and budget information with their local and national partners. Additionally, the donors were asked whether they require intermediary organisations to establish **feedback and/or partnership assessment mechanisms** with their local partners. While **none of the responses indicated a policy**, one of the donors "strongly encourages" its multilateral and non-governmental intermediary organisations to establish feedback and/or partnership assessment mechanisms with their local partners.

In the area of coordination and leadership (worth 20% of the total score), the donors were asked whether they meet directly with representatives of local organisations and, if so, how these meetings take place. While **all seven donors reported meeting local actors through their project and other kinds of engagements**, three reported hosting dialogue events where local actors could participate meaningfully. In addition to meetings,

**Most of the largest donor governments still have to realise their commitments to strengthen locally led humanitarian action**

the donors were asked whether they have or support any specific initiatives that aim to foster local participation and/or leadership in coordination fora. In this regard, **most**

**donors support local actors' participation at coordination fora**, whereas several actors specifically support local actors' leadership and/or have designated funding for local actors' participation or leadership. One of the seven donors reported having a policy that includes commitments to strengthening local participation and leadership, while another donors' policy is currently being developed.

Overall, **most of the largest donor governments still have yet to fully realise their commitments to strengthen locally led humanitarian action.**

The funding data is largely lacking, and – with the exception of France – the reported percentages of humanitarian funding that reach local actors do not reach the 25% target. While some donors seem to perform better regarding the alternative funding approaches that enable the allocation of small funds with less strict compliance requirements, as well as with respect to supporting local actors' participation and/or leadership, **donor requirements towards intermediary organisations are still not widely adopted.** Specifically, only one donor has a policy in place on supporting local actors' overhead costs, and just one donor has a specific policy for strengthening the capacity of local actors. At the same time, no donor has a policy obligating intermediary organisations to share full project budgets with their local partners. Similarly, none

of the donors has a policy that would require intermediaries to establish feedback and/or partnership assessment mechanisms with their local partners.

### Local actors’ perception of government donors

Regarding local actors’ perceptions of the government donors’ performance regarding their localisation work (Table 3), local actors were asked to indicate their level of agreement with seven statements covering different aspects of the ten selected government donors’ ways of working. These statements mirrored the statements in the donors’ self-perception part (see Table 1).<sup>159</sup> In total, local actors from six different regions provided 140 valid entries.<sup>160</sup>

According to these entries, **Germany is rated the highest by the local actors**, receiving 64 points. However, as Table 3 illustrates, the **differences between the scores are minor**, except for France, which scored the lowest with 47 points. Comparing the government donors’ self-perception with the local actors’ perception of them, the latter are generally lower than the

former. The scores reflecting how Germany and the United States are perceived by local actors are very similar to their own scores (respectively 64 vs. 63 points for Germany and 61 vs. 62 points for the United States). The largest differences can be noticed with Norway and Canada. Norway ranks much higher according to local actors’ perception (62 points – third place) as opposed to its self-perception (43 points – eighth place). By contrast, Canada was given 59 points by local actors (seventh place), whereas according to its self-perception, it received 74 points (first place). While the highest donor self-perception score is 74 points, **no donor was rated higher than 64 out of 100 points by local actors**. This indicates substantial room for improvement for all government actors.

Slightly lower than the government donors’ self-perception, the average value provided by local actors regarding the statement “this donor is a **strong and reliable supporter of locally led humanitarian action**” is 6.5 points. With the exception of one actor who scored 5 points, the rest received 6 or 7 points. With respect to the **donors prioritising direct funding**, the average value given by the actors is 5.5, with the lowest value of 4.5 and the highest one of 6 points.

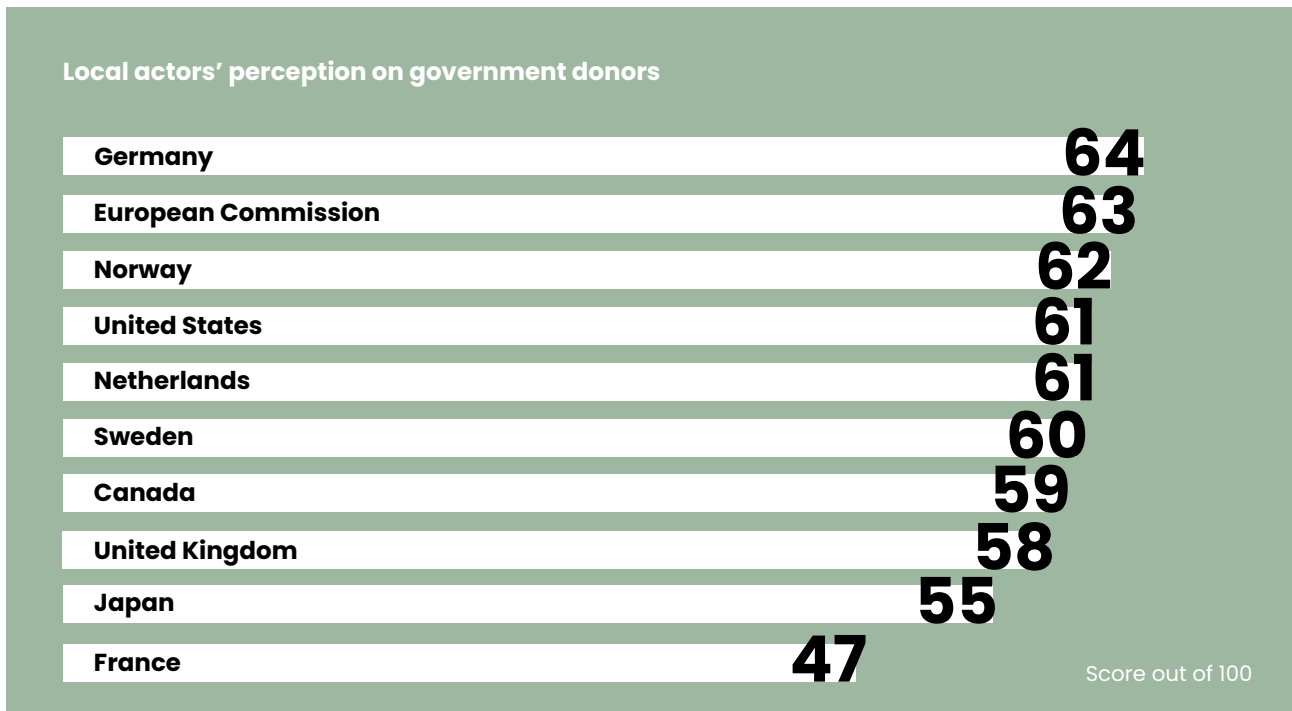


Table 3: Local actors’ perception on government donors

Local actors gave an average rating of 7 points to the statement regarding donors “**seeing intermediary organisations as holding the key responsibility** to support and ensure locally led humanitarian action”.<sup>161</sup> All donors received either 6 or 7 points for this statement. Concerning the **donors’ requirement for intermediary organisations to work in inclusive and transparent partnerships** with local actors, the local actors assigned scores of either 6 or 7 points to all donors except for one, with an average of 6.5 points. Regarding **donors ensuring that intermediary organisations pass a fair share of funding for overhead costs**, eight out of ten donors were given scores ranging from 6 to 6.5 points, with an average score of 6 points among the ten donors.

Regarding **donors seeing capacity strengthening of local organisations as a priority**, eight donors were given scores between 6 and 7 points, whereas the average score given for this statement was 6 points. As for the **donors regularly meeting with representative of local organisations**, scores were very close, with an average of 5.5 points.

Donors tend to see intermediary organisations as holding the key responsibility in the localisation context

Overall, the scores assigned to statements which reflect government donors’ commitment to supporting and strengthening locally

led humanitarian action are around 5 points. **No donor was given 8, 9, or 10 points for any statement**, which clearly signals a need for improvement. It is also noteworthy that, according to the local actors’ perception, all of the largest donors tend to see intermediary organisations as holding the key responsibility in the localisation context – despite some of the same donors having indicated less responsibility by the intermediaries in this context.

## Overall ranking of government donors

As mentioned, the results were weighted to give a 50% proportion to the local actors’ perceptions, 30% to the international actors’ factual reporting, and 20% to the international actors’ self-perception. Table 4 shows the overall government donors’ ranking and scores. **Germany finished in first place (60 points)**, followed by the European Commission (57 points) and Canada (56 points). The donors’ scores decrease slowly from first to seventh place, by 2-4 points between the adjacent donors. Additionally, it is important to note that the overall scores by the Netherlands, Japan, and France are affected by the absence of their factual reporting and self-perception scores.

While **Germany and the European Commission consistently showed good scores across the different parts of the survey** (from first to fourth place), Canada compensated its lower rank from the local actors’ perception survey (seventh place) with a high self-perception score (first place). In the three survey parts, the United States quite consistently took places three to five, whereas the United Kingdom performed better in the factual reporting part (fourth place) than in the self-perception part (sixth place) or the local actors’ perception part (eighth place). Sweden consistently ranked in fifth/sixth places, while **Norway’s self-perception and factual reporting ranks** (both seventh place) **are in stark contrast with its favourable rank given by local actors’** (third place).

The self-perception portion of the survey provided insights into the practices, priorities, and (in)consistencies within the surveyed donors’ localisation work. Strengthening locally led humanitarian action in general, as well as local actors’ capacity strengthening seem to be important to all of the surveyed donors. However, there are variations among them in terms of who they consider primarily responsible for achieving the goals of localisation, and regarding their approaches regarding requirements for intermediary organisations. Furthermore, the survey revealed that some government donors

# Ranking and overall scores of government donors

<b>1</b>	<b>Germany</b>	60
<b>2</b>	<b>European Commission</b>	57
<b>3</b>	<b>Canada</b>	56
<b>4</b>	<b>United States</b>	53
<b>5</b>	<b>United Kingdom</b>	50
<b>6</b>	<b>Sweden</b>	47
<b>7</b>	<b>Norway</b>	44
<b>8</b>	<b>Netherlands</b>	
<b>9</b>	<b>Japan</b>	
<b>10</b>	<b>France</b>	

Overview	Self-perception		Factual reporting		Local actors' perception	
	Score*	Rank	Score*	Rank	Score*	Rank
Germany	63	2	50	1	64	1
European Commission	58	4	46	2	63	2
Canada	74	1	39	3	59	7
United States	62	3	33	5	61	4
United Kingdom	52	6	36	4	58	8
Sweden	55	5	20	6	60	6
Norway	43	7	15	7	62	3
Netherlands	—**		—**		61	4
Japan	—**		—**		55	9
France	—**		—**		47	10

\* out of 100 / \*\* Data not submitted

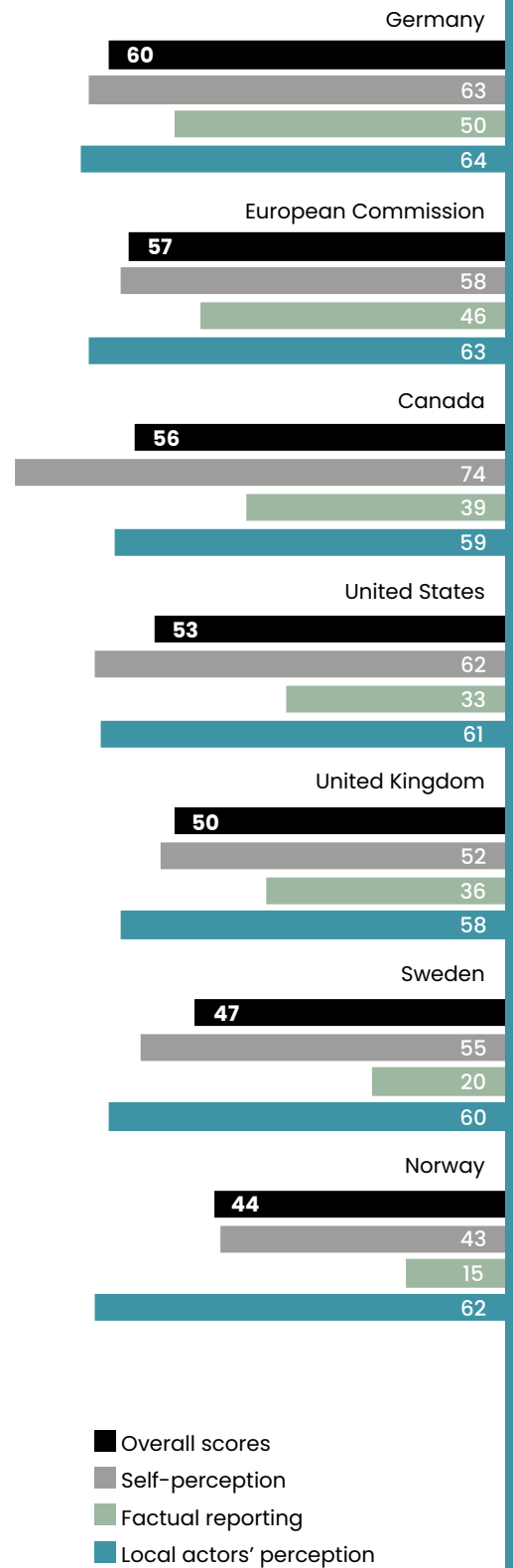


Table 4 (left) and Graph 3 (right): Ranking and overall scores (out of 100) by government donors

do not seem to prioritise direct contact with local actors. This is concerning, given that maintaining direct contact with local actors is crucial, even if local actors primarily receive funding through intermediary organisations.

The factual reporting portion of the survey reflected (and confirmed) the suspected data gaps, particularly with respect to the data on funding for local actors. It also highlighted the fact that none of the surveyed donors were able to report having reached the 25% Grand Bargain target. The lack of policies regarding local actors' capacity strengthening and funding for overhead costs remains prevalent among government donors, and while some donors have recommendations in place along with reporting requirements, clear policies or guidance are still missing. Additionally, there is a lack of clear policies or guidance concerning the transparency of intermediaries towards their local partners, as well as feedback and partnership assessment mechanisms. Similarly, the policies aimed at fostering local actors' leadership are missing, though government donors reported

undertaking various activities in this regard. The local organisations' perception indicated an overall average / above-average assessment of most government donors, with the exception of some below-average responses concerning one specific donor. Across all the largest donors, there was no significant difference in the points awarded to different localisation areas, resulting in very close scores provided by local actors for most government donors.

While the surveyed government donors have some positive initiatives for strengthening locally led humanitarian action, these **initiatives seem to be sporadic**. With the **highest final score being 60 out of 100 points**, there is significant room for improvement across the board. At the same time, it is worth noting that some donors received higher scores due to having related policies in place, since in some cases it is methodologically easier to assess policy than practice. However, some of these policies are relatively new, and their impact is yet to be seen in practice.

## UN agencies and INGOs – partners or superiors?

As mentioned in the section on the index design, the second survey was shared with the **five largest INGOs and the five largest UN agencies** based on their humanitarian expenditure. The assessed INGOs are Médecins sans Frontières (MSF), International Rescue Committee (IRC), Norwegian Refugee Council (NRC), Save the Children, and World Vision International.<sup>162</sup> The UN agencies assessed in this report are the World Food Programme (WFP), UN High Commissioner for Refugees (UNHCR), World Health Organisation (WHO), UN International Children's Emergency Fund (UNICEF), and United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA).<sup>163</sup> **All ten actors submitted their responses** to the survey.

### International organisations' self-perception

Following the same logic as the government donors' survey, the international organisations' self-perception survey asked the INGOs and UN agencies to indicate their level of agreement on a scale from 0 (completely disagree) to 10 (totally agree), with eight statements covering different aspects of their work in the area of localisation.<sup>164</sup> The statements included the organisation's general support of locally led humanitarian action, long-term capacity strengthening agreements, the quality of funding, transparency concerns, feedback mechanisms and partnership assessments, as well as initiatives aimed at



fostering membership and (co-)leadership of local actors in relevant fora.

As Table 5 shows, three UN organisations and one NGO replied in a much more self-confident manner than the other actors: the **WFP's self-perception score (78 points) is the highest**, closely followed by UNHCR (77 points), UNICEF (75 points), and World Vision International (73 points). The remaining organisations' self-perception scores are considerably lower, ranging from 36 to 58 points.

As part of their self-evaluation, the international organisations were asked to indicate the extent to which they agree with the statement "my institution is a **strong and reliable supporter of locally led humanitarian action** and is comprehensively fulfilling its commitments to the localisation agenda". The organisations' responses varied between 4 and 10 points, with the average value being 7 points.

Asked whether their "typical form of partnership with local actors includes **agreements on long-term strategic capacity strengthening commitments** that go beyond the project cycles", the organisations provided varying responses, with 3 points as the lowest response, 9 points as the highest, and 5 points as the average. For the statement "**most of the funding that we pass onto our local partners is short-term**", six organisations provided rather self-critical responses equal to 8 points or more, and three organisations responded between 4 and 5 points. The average value for this answer was 7 points.<sup>165</sup> If we compare the same actors' responses to 1) the statement on the typical form or partnership including long-term strategic commitments and 2) the statement on most of the funding passed onto local partners being short-term, some inconsistencies can be observed. Some organisations that claim that their typical form or partnership includes strategic commitments also indicated that they provide mostly short-term funding, and vice versa.

Regarding the statement "the **financial information that is shared with the local**

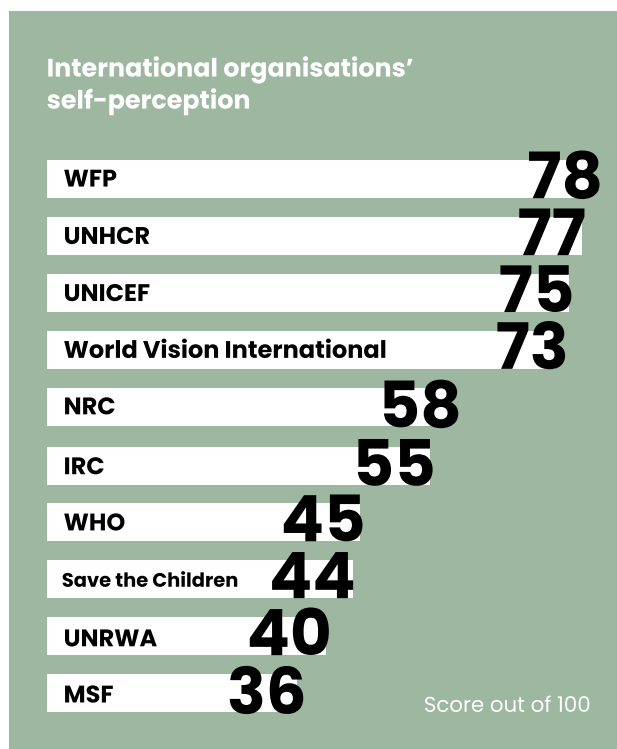


Table 5: International organisations' self perception

**partners usually concerns only specific project-related funding lines**", five organisations replied with 8 or more points indicating a high level of agreement, which signals a low level of transparency. The other responses were 1, 4, and 5 points, and the average value for this statement was 6 points.<sup>166</sup> The organisation that most strongly disagreed with this statement by giving it 1 point, which suggests that this organisation has a high level of transparency towards its local partners, in the factual reporting part of the survey indicated that it publicly shares its "generic financial statements".<sup>167</sup>

All organisations responded with 5 or more points to the statement that "**feedback mechanisms are an integral part of [their] partnerships with local actors**", averaging 7 points.<sup>168</sup> However, the scores were different with respect to "**two-way partnership assessments** [being] an integral part of [their] partnerships with local actors", with only three organisations responding with 7 or more points, while the average value of the responses to this statement was 5 points.<sup>169</sup> This means that most largest international organisations have yet to adopt the practice of being evaluated by their local partners. In terms of having "**specific tools**



At the Mar Elias Centre in Beirut, Lebanon  
© Bente Stachowske / Caritas Germany

**and/or initiatives that aim to foster membership, co-leadership, or leadership by local actors in consortia or coordination mechanisms”,** five organisations replied with 8 points or more, and the average value was 7 points, indicating a rather high level of engagement in this area.<sup>170</sup>

Overall, as in the case of the government donors’ self-assessment, the subjectivity element cannot be completely taken out of this exercise. However, the diverse scores provided by the organisations suggest that organisational interests may not be the sole factor at play. As we will highlight later, while most international organisations assess themselves substantially better compared to how local actors assess them, the following sections indicate that these varying self-assessments align proportionally with the assessments based on factual reporting and the perceptions of local actors. In most cases, the same organisations are either leading the way or falling behind.

## International organisations’ factual reporting

Part of the survey requested that the international organisations provide specific figures and elaborate on their localisation policies and practices.<sup>171</sup> As with the government donors, the responses were cross-checked with other publicly available data, such as the Grand Bargain self-

reporting exercise documents and other reports, as needed. As part of the data evaluation, some qualitative data was quantified, and all responses were scored according to a template developed by CHA researchers.<sup>172</sup>

Table 6 indicates the international organisations’ factual reporting results. **UNHCR clearly scored the highest (81 points)**, followed by WFP (76 points), and UNICEF (72 points), while IRC (56 points) and MSF (49 points) scored best on the INGO side. UNRWA received 0 points, as it does not partner with local organisations at all. Overall, three UN agencies have the highest scores, whereas the INGOs’ scores vary between 35 points and 56 points.

Based on the scoring template,<sup>173</sup> 30% of the total score reflects the organisations’ responses with respect to 1) the share of the overall humanitarian funding that goes to local implementing actors through a maximum of one intermediary organisation (18%) and 2) the share of the overall humanitarian funding that goes to local implementing actors without any intermediaries (12%). As in the case of the government donors, the lack of data on these aspects resulted in 0 points, as if no funding to local organisations were provided by these intermediaries. Therefore, the inability of some organisations to track and provide this data lowered their overall scores considerably. At the same time, as with the government donors, these responses reflect the organisations’ fulfilment of the Grand Bargain commitments – or lack thereof, if the data is not tracked. **All five of the UN agencies and four of the INGOs surveyed are Grand Bargain signatories.**

Compared to government donors, international organisations have better data availability, although it is not without its issues. In terms of the share of funding going through a maximum of one intermediary organisation (the Grand Bargain commitment), eight organisations were able to provide this data, and one organisation reported a share of 0%. **Among the five INGOs, two were not able to provide the funding data, whereas all five UN agencies had clear data.** Besides the

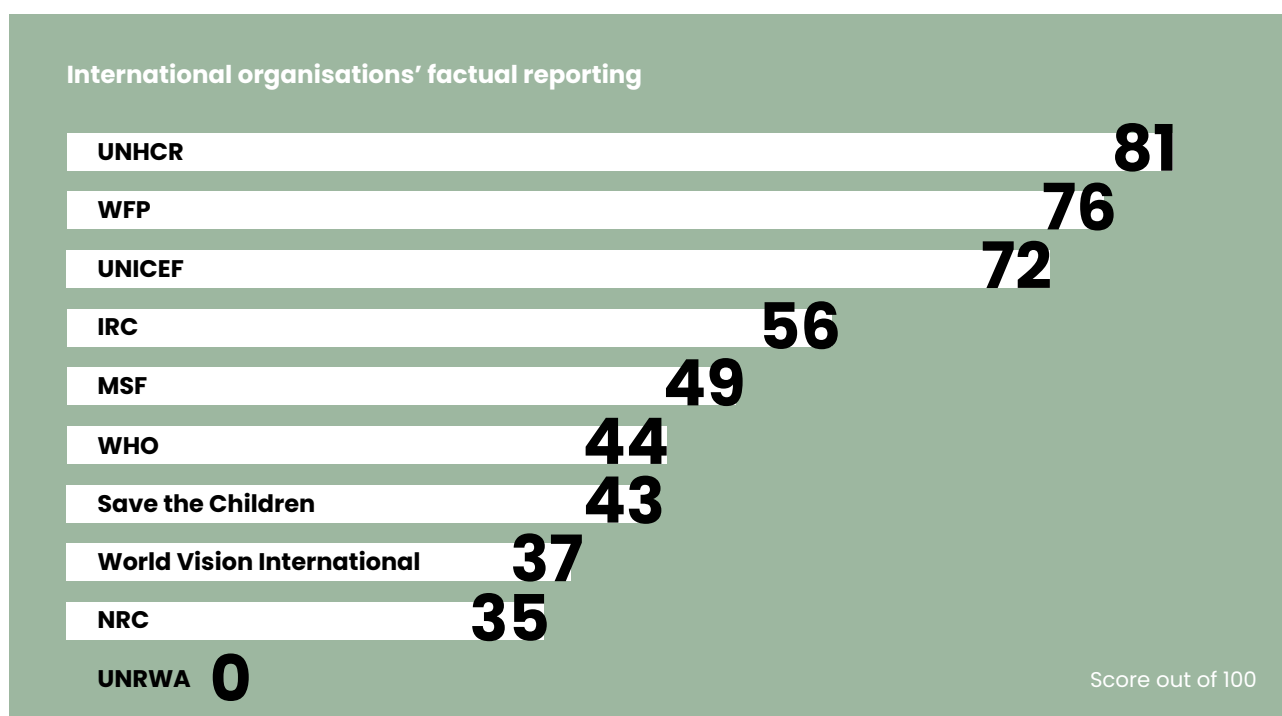


Table 6: International organisations' factual reporting

one organisation reporting 0%, other responses varied considerably, with funding going to local organisations through a single intermediary

### Compared to government donors, international organisations have better data availability

ranging from less than 5% to more than 40%. Regarding the share of funding going directly to local actors without intermediaries, data is largely unavailable.

Only three organisations out of ten were able to respond, and the responses varied considerably, from less than 5% to more than 20%.

Overall, better tracking and reporting, as well as higher percentages of funding being passed to local actors by UN agencies, led to notable differences in scores between the surveyed INGOs and UN agencies: UN agencies received significantly more points (apart from UNRWA, which does not work with local actors). At the same time, organisations that implement large-scale cash programmes delivered through local actors automatically scored higher in terms of funding passed to local actors. However, this does not necessarily reflect the overall quality of the partnership approach itself.

We also asked organisations about the share of their total received multi-year funding that is cascaded to their local implementing partners in a multi-year manner. The responses show that only one organisation partially tracks this, and **one organisation estimated that 5% of their funding is cascaded in a multi-year way**. Additionally, the organisations were asked about alternative funding models for passing funds to small grassroots organisations without the usual accountability requirements. Five organisations responded that they have such models in place, while a few other organisations are in the process of developing them.

With respect to strengthening local actors' capacity (worth 20% of the overall score), international organisations were asked whether all their partnership agreements with local organisations include agreements on covering overhead costs. That is the case in six organisations: **five have a policy on funding for overheads in place and one a "standard operating procedure"**. Regarding the percentage of funding for overhead costs established within partnership agreements, among the organisations having a policy, one organisation reported 4%, two organisations 7%, and two

## Catholic Relief Services

Due to the report's focus on the five largest INGOs only, no Caritas organisation is included in the main analysis. Yet, to assure transparency, Catholic Relief Services (CRS) provided data about their localisation work based on the same questionnaire that was shared with the biggest international organisations.

Based on currently available data, CRS awarded \$79M in **humanitarian funding** to local/national responders in 2022 (12% out of a total of \$655.3M in emergency response expenses). This includes funds allocated to local actors directly from donors with CRS acting as an intermediary, and from CRS private funds. Concerning the total multi-year funding that is cascaded to their local implementing partners, CRS does not track this data. Regarding the alternative approaches for passing funds to smaller grassroots local actors that may not be able to meet high levels of international compliance requirements, CRS's approaches include the establishment of an initial Framework Agreement with local organisations, which allows for quick disbursement of funds for an emergency response based on specified deliverables through a contractual process. CRS has also used "community grants" or direct cash assistance platforms involving less heavy compliance requirements to pass funds to smaller grassroots local actors.

Concerning **capacity strengthening and funding for overhead costs**, CRS has an existing policy on the provision of Subaward Indirect Cost Recovery (ICR) to partners under the United States Government assistance awards. For other partnerships CRS is rolling out a new policy that will enable the tracking of subaward and partner ICR provisions across the organisation, which will be completed by the end of 2023. At this time, CRS is therefore unable to report on the percentage of overhead costs shared with local partners.

CRS also allocates resources to support local organisations in developing their own ICR policies, so they can access ICR directly from donors. In addition to that, with resource mobilisation capacity strengthening support from CRS, CRS' local partners were successful in mobilising over \$81.2 million USD in direct humanitarian funding from donors in 2022. Overall, in 2022, CRS invested \$20.6 Million in capacity strengthening initiatives and currently has 1,748 active local partners.

organisations reported two different percentages (4% or 7%, and 7% or 10%), which depend on whether the primary donor foresees any extra funds for overheads for partners. Additionally, we asked about the existence of partnerships that would include strategic long-term capacity strengthening that goes beyond specific project cycles. Eight organisations reported having such partnerships with local actors.

In the area of partnerships (worth 30% of the overall score), the organisations were asked

about transparency, feedback mechanisms, and two-way partnership assessments. In relation to transparency, the survey showed that **organisations mostly do not share full<sup>174</sup> project budgets with their local implementing partners**, with only one organisation responding that it "varies". By contrast, seven international organisations either have a policy, or it is their standard practice to inform their local partners on who the primary funding source is. With respect to feedback mechanisms, with the exception of one organisation which does not work with local

partners, all remaining **nine organisations have established feedback mechanisms within their partnerships with local actors, and seven of them have follow-up actions included** in these mechanisms. Regarding two-way partnership assessments, where both the international organisation and the local one assess each other, only four organisations require their local

partners to assess them, as well as include follow-up actions in the partnership assessment. This indicates that such assessments and follow-up actions are not widely adopted among the surveyed international organisations, highlighting another area where improvement is needed to ensure equitable partnerships.



A widow in southern Ethiopia receiving cash dispersals from the CST office  
© Zacharias Abubeker / SCIAF (Caritas Scotland)

## Catholic Relief Services

CRS has **partnerships with local actors** that include strategic long-term capacity strengthening commitments going beyond specific project cycles. CRS also has established feedback mechanisms within their partnerships with local actors, which include follow-up actions. Two-way partnership assessments take place within CRS' partnerships with local actors. For this, CRS uses a Partnership Scorecard, which is a survey that CRS and partners complete to rate performance on key partnership criteria in 5 areas: partnership; transparency and accountability; capacity strengthening; civil society development; and general rating enabling CRS and partners to identify major strengths and weaknesses in their partnership.

Regarding transparency, it is not a common practice across CRS to share full project budgets and financial reports with the local implementing partners, but it has been done in some instances. At the same time, CRS has a policy to always inform their local partners who the primary funding source is.

Concerning **coordination and leadership**, most CRS country programmes prioritise the inclusion of local partners in their meetings with donors, especially meetings related to updates on ongoing project implementation, mid-term reviews, and final evaluations. At the same time, CRS is decentralised, operating in over 100 countries, and, for the most part, each country team operates independently in their donor interactions and decisions about when to include local partners in conversations with donor counterparts. Therefore, it is difficult to provide specifics on the types and regularity of these meetings. CRS also has several initiatives that aim to foster membership, co-leadership, or leadership by local actors in consortia or coordination mechanisms. For example, CRS is investing its own resources towards the organisation's commitment to advancing local leadership and launched "The Advance Local Leadership in the Right Way (ALL Right) Fund", in November 2021. The fund is providing focused resources to accelerate partnership and capacity strengthening support to its local partners globally, which includes funding to foster membership, co-leadership or leadership by local actors in consortia or coordination mechanisms. This is a multi-year initiative that has allocated \$6M in resources to date and has more in the pipeline for future projects.

Lastly, the assessment evaluated coordination and leadership aspects (worth 10% of the overall score). When asked whether they regularly involve local partners in meetings with donor counterparts, only four organisations replied that they do so, for instance, when donors are visiting, or in specific annual meetings. Additionally, **seven organisations reported having specific tools and/or initiatives to foster membership, co-leadership, or leadership** by local actors in coordination mechanisms, including one international organisation facilitating the coordination of local actors' platforms.

Overall, while most surveyed international organisations were able to share the percentage of their funding that reaches local actors through

a maximum of one intermediary organisation, only three were able to report on their funding that was directly passed to the local actors. These figures varied considerably among organisations, from less than 5% to more than 40%, and from less than 5% to more than 20%, respectively. Only half of the surveyed organisations have alternative funding models to pass smaller grants. Additionally, only half of the organisations have a policy on funding for overhead costs, only four require their local partners to assess them, and only four reported regularly involving local partners in meetings with donors. None of the organisations systematically share full project budgets with their local partners. On a positive note, most organisations have initiatives to foster local actors' participation and leadership, and all organisations that work

with partners (one does not) have feedback mechanisms in place.

## Local actors' perceptions of international organisations

Concerning the **local actors' perception of the INGOs and UN agencies** (Table 7), local actors were asked to indicate their level of agreement with seven statements covering different aspects of each international organisation's localisation work. Similarly to government donors, these statements mirrored the statements given to the INGOs and UN agencies (see Table 5).<sup>175</sup> As mentioned, local actors from six different regions provided 140 valid entries in total.<sup>176</sup>

**Save the Children is rated the highest by local actors (with 57 points).** The second place is shared by UNHCR and UNICEF (53 points each). Overall, the difference between the scores of the first and the last place is only 10 points (54 vs. 44 points). Also, as discussed in the section on potential biases, local actors might not differentiate between organisations' humanitarian and development mandates, which in turn might have influenced their scoring.

While Save the Children is rated the highest, its self-perception places it only in the seventh place (44 points). UNHCR, UNICEF, World Vision International, and WFP are rated high both by local actors and by themselves, both times securing second to fourth/fifth places. However, these organisations' score differences are considerable (51–53 points given by local actors, as opposed to 73–78 points from the self-perception survey). MSF received low scores in both surveys. Regarding the organisation being “a **strong and reliable supporter of locally led humanitarian action**”, nine organisations received between 5 and 6.5 points, while one organisation received 4 points. The average value for this statement was 5 points, indicating that the surveyed local actors do not see the largest humanitarian organisations as very strong and/or reliable localisation supporters.

Concerning the organisation offering **multi-year partnership agreements on strategic capacity strengthening that go beyond project cycles**, the scores were similar though slightly lower, mostly between 4.5 and 6 points, with one score of 3 points and the average of 5 points. Regarding **most of the funding received from the specific organisation being short-term**, the scores varied between 5 and 6 points with the average value of



Table 7: Local actors' perception on international organisations

6 points, which suggests that most of the funding is short-term.<sup>177</sup> The scores of both of these statements indicate that there is still a long way to go for the biggest international organisations with respect to providing quality funding and capacity strengthening. The statement regarding **international organisations sharing only specific project-related funding lines in terms of financial information** received the highest score, with five organisations receiving 7 points and an average score of 6 points. Importantly, this higher score indicates that local actors see a lack of transparency on the part of international organisations.<sup>178</sup> Looking at the statement on **feedback mechanisms being an integral part of partnerships with a specific international actor**, all the scores provided by local actors are between 5 and 6 points, with an average of 5.5 points. With respect to **two-way partnership assessments being an integral part of local-international partnerships**, the scores were similar, although a bit lower, with one international organisation receiving only 3.5 points and an average of 5 points. The scores of the two latter statements signal that the surveyed local actors do not perceive feedback mechanisms and two-way partnership assessments as well-integrated within their partnerships with international actors.

With respect to the international organisations having **specific tools and/or initiatives to foster membership, co-leadership, or leadership of local actors** in consortia or coordination mechanisms, most organisations received scores of 5 or 6, with one organisation scoring 4 points, and the average of 5 points. This, too, indicates the lacking engagement from international organisations in this area, as perceived by the surveyed local actors.

Overall, the average scores provided to the largest international organisations by the surveyed local actors mostly hover around 5 points. This indicates the need for international organisations to step up their game in areas like transparency, multi-year funding, capacity strengthening, feedback mechanisms, two-way partnership assessments, and fostering local leadership.

## Overall ranking of international organisations

As with the government donors, the last step consisted of weighing the results to give 50% weight to the local actors' perceptions and 50% to international actors' responses (within the latter 50%, 30% was given to the self-reporting part and 20% to the self-perception part). As Table 8 illustrates, **UNHCR finishes in first place (66 points)**, WFP second (64 points), and UNICEF third (63 points). The trend of these three UN agencies scoring higher than INGOs is evident throughout the different surveys as well.

Among the INGOs, the best result was achieved by IRC. Despite not receiving a high rating from local actors (seventh place), it performed much better in the factual reporting part (fourth place) and secured the fourth place in the overall ranking. World Vision International, despite its eighth place in the factual reporting ranking, achieved better results in the self-perception and local actors' perception parts (fourth place each) and secured the fifth place in the overall ranking. WHO consistently took sixth or seventh place, with an overall rank of seventh. NRC ranked ninth in the factual ranking and local actors' perception parts but fared better in the self-perception part (fifth place) and finished seventh overall.

At the same time, MSF was in the tenth place in both the self- and the local actors' perception parts, whereas it ranked fifth in the factual reporting part. Lastly, UNRWA, which did not receive any points in the factual reporting part (tenth place), ranked ninth based on its self-reporting and was assigned the sixth place by the local actors, finishing up in the tenth place overall. As mentioned, funding scores represented 40% of the total factual reporting scores, therefore the **UN agencies' better tracking and higher percentages of funding passed to local actors significantly influenced the factual reporting and the overall results**. While funding is definitely an important aspect of localisation, it is also important to ensure that partnerships between international and local actors are equitable, based on trust, characterised by transparency, as well as strategic,



# Ranking and overall scores of international organisations

<b>1</b>	<b>UNHCR</b>	66
<b>2</b>	<b>WFP</b>	64
<b>3</b>	<b>UNICEF</b>	63
<b>4</b>	<b>IRC</b>	52
<b>5</b>	<b>World Vision International</b>	51
<b>6</b>	<b>Save the Children</b>	50
<b>7</b>	<b>WHO</b>	46
<b>8</b>	<b>NRC</b>	46
<b>9</b>	<b>MSF</b>	43
<b>10</b>	<b>UNRWA</b>	33

Overview	Self-perception		Factual reporting		Local actors' perception	
	Score*	Rank	Score*	Rank	Score*	Rank
UNHCR	77	2	81	1	53	2
WFP	78	1	76	2	51	4
UNICEF	75	3	72	3	53	2
IRC	55	6	56	4	48	7
World Vision International	73	4	37	8	51	4
Save the Children	44	8	43	7	57	1
WHO	45	7	44	6	48	7
NRC	58	5	35	9	47	9
MSF	36	10	49	5	42	10
UNRWA	40	9	0	10	49	6

\* out of 100

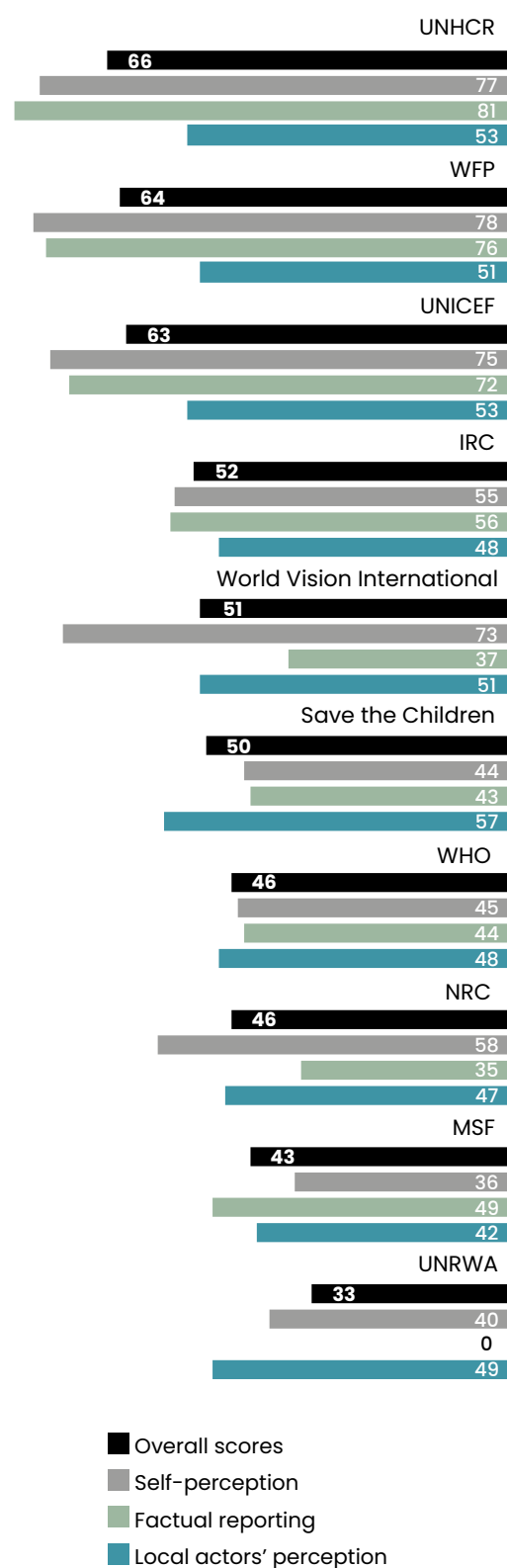


Table 8 (left) and Graph 4 (right): Ranking and overall scores (out of 100) of international organisations

rather than just project-based. While the surveys asked about transparency, feedback, and two-way partnership assessment mechanisms, not all issues could be covered, such as, for example, cost efficiency. Moreover, as in the case of the government donors, having localisation policies in place helped some organisations receive higher scores; however, the policies have to be systematically implemented. An index also cannot cover, if actors are in the middle of progress at the time of the assessment. For example, Save the Children underlined its engagement in different workstreams to advance its localisation approach, from creating more equitable partnerships and reviewing its compliance requirements to revising its organisational capacity offer to local actors and granting flexible direct funding. **Policies and practice may differ significantly**, especially between global headquarters (HQ) and country offices (COs). An index of ten organisations is also not a suitable tool for comparing different types of organisations, particularly considering the diversity of thousands of INGOs in terms of their size and mandates, which cannot be adequately reflected.

Additionally, **some organisations operate according to specific working models that have an impact on their place within the ranking.**

In some cases, these models also influence how the data is tracked, which may have led to them falling through the cracks within this report. For example, MSF does not consider its partnerships with Ministries of Health – which are very widespread<sup>179</sup> – as part of its local partnerships, although within the Grand Bargain framework, partnering with national institutions

like ministries is part of localisation. Faith-based organisations like World Vision International or INGOs with dual humanitarian and development mandates may have an advantage in forming partnerships with local actors. **More stable development settings may be more conducive to establishing partnerships** before a crisis hits, as opposed to conflict and fragile settings where some organisations with a purely humanitarian mandate operate.

**The context in which organisations primarily work can therefore play a role.** For instance, in the case of NRC, roughly two-thirds of its countries of intervention are involved in an armed conflict, which often results in highly volatile contexts. Building sustainable partnerships in such environments can be more challenging than, for example, in politically more stable contexts affected by weather disasters. In conflict-driven and highly politicised contexts, debates about humanitarian principles as a perceived obstacle for faster localisation, whether they are valid or not, tend to be more prominent. In the case of IRC, the organisation is known for working in often-fragile refugee settings and is on a journey to always ask “why not partner?”. UNRWA, on the other hand, has a particular mandate to provide assistance and protection to Palestine refugees in Jordan, Lebanon, Syria, and politically highly sensitive contexts like the Gaza Strip and the West Bank, including East Jerusalem. While UNRWA does not work through partners but delivers services directly, the overwhelming majority of its staff (90%+) are Palestine refugees from the communities they serve.

## Final index considerations

Overall, perhaps unsurprisingly, most actors’ self-perception scores are higher than those based on local actors’ perceptions. It is important to note that the scores of donors cannot be compared to the scores of international agencies (UN agencies and INGOs), since we used two different questionnaires and two different scoring

systems, due to their different working methods. That said, the **front-runner in both groups did not score higher than 66 points out of 100 in the final rankings.** This reinforces the notion that all actors must strive for improvement in fulfilling their commitments to localisation.



Part III

# Local actors' perspectives



In addition to evaluating the performance of major humanitarian actors in fulfilling their commitments to enhance locally led humanitarian action, we found it important to gather insights directly from

local actors into the challenges and best practices in local-international partnerships. For this we conducted in-depth interviews in two contexts: Lebanon and Colombia.

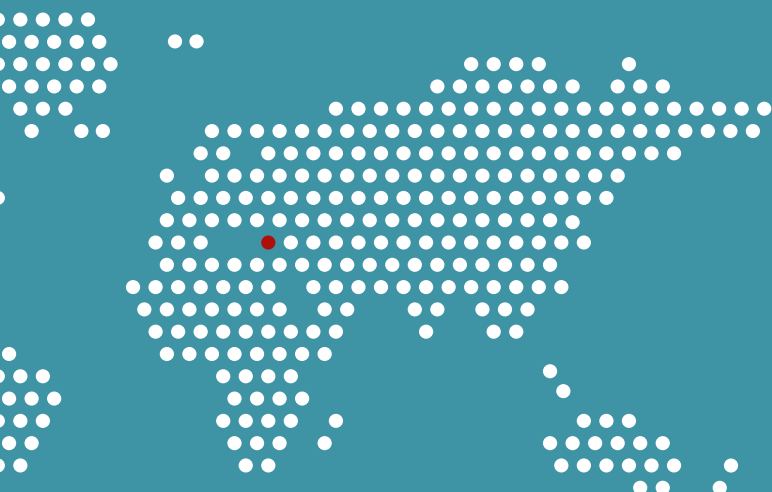
## Perspectives from local humanitarian actors in Lebanon: "We want a fair partnership"

For the last several years, Lebanon has been grappling with an increasingly severe humanitarian crisis rooted in a **catastrophic economic downturn**. This crisis is characterised by hyperinflation and soaring unemployment rates, pushing **74% of the population into income poverty**<sup>188</sup> and practically eliminating the Lebanese middle class.<sup>189</sup> Additionally, an estimated **90% of Syrian refugee households in Lebanon were living in extreme poverty in 2021**.<sup>190</sup>

The COVID-19 pandemic and the 2020 Beirut port explosion have exacerbated the country's existing challenges, deepening economic hardships and straining its public infrastructure to the breaking point, notably the electricity grid and the healthcare system. Additionally, disruptions in the food supply chain due to global conflicts have driven up prices, making food unaffordable for a significant proportion of Lebanese and refugee households.<sup>191</sup> The acute shortage of fuel has

not only crippled transportation but has also led to water supply disruptions, disproportionately affecting vulnerable communities and contributing to a cholera outbreak in October 2022.<sup>192</sup> Environmental issues, coupled with the impacts of climate change, are exacerbating the situation, and Lebanon's political instability and internal sociopolitical tensions are adding an extra layer of complexity to the crisis.

At the same time, Lebanon boasts a **historically vibrant and diverse civil society**, with an estimated 1,000 active local and national civil society organisations. Approximately 70 local civil society organisations collaborate through the Lebanon Humanitarian and Development Forum (LHDF), established in January 2014.<sup>193</sup> Local NGOs assume a vital role during critical events, as exemplified by their response to the Beirut port explosion in August 2020.



### Lebanon

Total population:	5.8M <sup>180</sup>
People in need:	3.9M <sup>181</sup>
People targeted for assistance:	3.2M <sup>182</sup>
Lebanese in need:	2.1M <sup>183</sup>
Displaced Syrians in need:	1.5M <sup>184</sup>
Palestine refugees in need:	211,400 <sup>185</sup>
Migrants in need:	81,500 <sup>186</sup>
Inflation rate (October 2023):	229.85 <sup>187</sup>

## Methodological approach

As part of this report, we conducted nine recorded interviews and/or focus group discussions and two non-recorded meetings with staff from local and national humanitarian organisations in Lebanon (more specifically in Beirut and Saida). These organisations have different ethnic/non-sectarian and religious/secular affiliations and differ in size and focus area. The interviews took place in English and French.

## Local actors' perspectives

The interviews highlight that **funding for local actors, including the quality of funding in terms of multi-year funding commitments and flexibility**, is one of the most significant issues in Lebanon. According to a representative from a local humanitarian organisation, the primary difference between international and local NGOs lies in their access to funds: "This is the only difference because we are all operating under the same umbrella, which is the humanitarian standards". Interviewees also noted that other crises are sometimes given priority over Lebanon and "funds are not like before".

**Receiving consistent overhead funding, which would help strengthen organisational capacities**

**and secure sustainability, is a challenge**, as underlined in the following statement by one of the interviewees: "In all our projects here, there is no money allocated for sustainability, so is it localisation? Localisation [means that] we are a sustainable organisation, or we have a sustainability plan. [...] All the local NGOs, except those who are related to governments or religious groups, are threatened to be closed." These challenges relate to the evidence from the previous donor analysis, which revealed that only one surveyed donor has a policy that enables local implementing partners of INGOs to receive funds for overhead costs through the inclusion of a dedicated budget line in their direct project costs. Additionally, only half of all largest organisations (INGOs and UN agencies) have a clear overheads policy, which contributes to the problem.

Interviewees found the intermediaries' reluctance to share overhead costs problematic. They discussed the **vicious cycle between funding needed to develop and sustain organisational capacity on one hand and the donor requirements** that organisations must fulfil to secure funding on the other: "You need to pass the due diligence? To pass that you need to have many departments in your organisations. [And] to have those departments you need funds." Insufficient funding affects an organisation's ability to hire and retain personnel, leading to

personnel losses. As stressed by one interviewee, INGOs can pay much better salaries than local NGOs, which results in experienced staff leaving to work for INGOs.

Local representatives discussed the **increasing donor demands**, which are becoming "overwhelming" due to the time, energy, and other costs. Sometimes, the small funds provided do not seem worth the effort. One of the interviewees noted that having many years of operational experience allows them to observe trends with respect to donor requirements, and the situation seems to have reached a "degree that is weakening the humanitarian response". Other interviewees shared their perception that the donors "want a well-established organisation", however, "if you want a local NGO to work like an INGO, this is not localisation; you should work with the resources that they have". This resonates with the following statement by another interviewee: "Especially the UN agencies expect you to match the criteria 100%, without even questioning [...] how it comes that you have this structure [...]. They don't ask. It's not that they don't care. They want you to be ready." This reflects the previously raised issue of local actions feeling the pressure to "professionalise" according to the standards raised by international actors or otherwise risking exclusion.

Another funding-related issue is a lack of transparency. According to interviewees, **international actors are reluctant to share the entire project budgets**, and most of the time local organisations only receive information that specifically pertains to their work. These local organisations' complaints are unsurprising, especially considering that within the international organisations' survey, only one organisation responded that its practice of sharing full financial information "varies", and only one of seven donors has an expectation towards intermediaries in this regard. One representative of a local organisation in Lebanon expressed their sense of injustice regarding this situation: "INGOs can see all our budgets, all our work, but we don't know anything about them. Why can INGOs have access to our budget? It's not fair. We want a fair partnership."

At the same time, as reflected by one of the interviewees, local organisations "are not in a strong position to force them to share it".

In addition to the previously mentioned financial aspects of capacity strengthening, such as providing support for overhead costs, some local humanitarian organisations highlighted the **importance of offering technical support and training**. Overall, the interviewees underlined the need to invest in local capacity strengthening: "International NGOs will not stay for a long time here in Lebanon. So, our expectation is to work on the technical issues or the technical system for the local NGOs so [that] they can run without any support from the international NGOs."

At the same time, there seem to be some **contradictions regarding local capacity strengthening**. "A lot of money is spent in developing our policies and helping us, and we put a lot of energy in that, and at the end INGOs want to use their own policies", noted one local representative. Additionally, another interviewee shared a sentiment that "some international NGOs like to work with poor performance NGOs. We witness this in many areas. They feel scared to work with well-established organisations [...],

**Local representatives detect feelings of superiority by international actors when it comes to capacity**

because [well-established local organisations] understand that accountability is two-way, not one way. And they will not accept anyone

to play a dominant role, and they will not accept to have priorities [...] from the outside [...]." Echoing the power relations issues raised in previous sections, local representatives also detect **feelings of superiority by international actors when it comes to capacity**: "They are contradicting themselves when they are saying 'we are building an organisation'. No, they are not building; they are giving us pieces for organisation, and we are doing all the work to be able to continue to serve our beneficiaries". Another interviewee shared their expectation of international actors starting to depend more on the staff of local organisations

in, for example, financial reporting, and the importance of international actors not playing "the master role".

The last point illustrates that the **international actors' attitude matters when it comes to strengthening local capacity**. On a positive note, one of the interviewees shared that "[s]ome of the international partners have the mentality that they are with you in the field, and if they see a gap, they try to improve [this aspect], which is really nice. This is how it should go." Additionally, another local representative noted that they enjoy working with international actors when they feel that these are honest and want to shrink their staff, as well as put more money into strengthening local capacities. This interviewee shared a good experience they had with one of the partners regarding capacity strengthening in one particular area – a multi-year programme for which the international organisation used its own funds. Another interviewee recounted the following: "When we started as a new NGO with very limited experience, [the international actor was] doing all the designs and we were just implementing partners. They did a lot of capacity building for our teams, and slowly our team became strong enough to be able to co-design, so we were invited to co-design with them. Finally, we were able to submit a direct proposal to [a UN agency], and they wanted to be the implementing partner with us, so it changed."

An area where capacity and partnership equitability intersect is capacity assessment. **While local actors are typically assessed by international actors, conducting a two-way capacity assessment remains uncommon**, as confirmed by the international actors' survey responses. According to local organisations in Lebanon, international actors usually request feedback or recommendations. However, one local organisation mentioned implementing a new policy on a two-way assessment: "We need to have the CV [Curriculum Vitae] of anyone who comes to assess us before accepting any assessment, and we need to [also] assess the international organisation." As the previous analysis showed, two-way partnership assessment is still not widely adopted.

To understand how the partnerships between local and international actors work, we also need to look at decision-making processes and whose priorities count. Some local organisations shared having good experiences with international actors in this area, reflected in **participatory approaches and mutual development of proposals**: "Sometimes the partners ask you to develop the whole concept, because they want the idea to be coming from the grassroots [...]." Some representatives of local organisations also spoke highly of their relationship with embassies, describing them as knowledgeable, supportive, reliable, and respectful.

However, the **equitability and flexibility are not always there**, as discussed by one interviewee: "[International organisations] are taking into consideration our opinions. But there are many issues. For example, they agree with what we are saying and the issues we are raising, but if they don't want to implement what we are raising, they will make many justifications not to." Additionally, one respondent pointed out that they only received the business plan for feedback from certain INGOs during the final stages of the project. Interviewees expressed a feeling that international actors consider their proposals as "untouchable," placing the onus on local actors to adapt, as emphasised by one local representative: "From my experience, they don't have the sense of partnership because when you say you are partner, it starts from the beginning, from the designing point and later [concerns] everything. So yes, there are some [organisations] who are really very supportive, and they are working on the localisation and building the capacity of their local [partners]. However, others are really not considering us as partners, not even as implementing partners. Just make the work and take data." Additionally, some interviewees have experienced tokenistic scenarios: "[International actors] invite you to take the decision, but the decision is already taken. Not all the time [...], but most of the time it's like this."

Regarding the importance of equitable decision-making, as underlined by one of the interviewees, local organisation's priorities are representing the



local community; "it's not about [being] stubborn". This respondent highlighted that **international actors may sometimes lack an understanding of the local organisation's work context and principles**. Additionally, inflexible project rules and limitations can sometimes conflict with the approaches of local organisations. Another local representative was very clear: "Agendas should not come from Europe."

Several interviewees also spoke about the problematic **lack of overall experience and contextual knowledge by international organisations' staff**, which is sometimes coupled with a perceived **feeling of superiority**. According to one of these interviewees, "if these recruited people have experience, they can understand you exactly and discuss the details and together come up with the best outcome." However, "there are some international NGOs that have a lower level [of knowledge/experience] than the local NGOs, but because they are the mediator, they feel they are stronger and may abuse local NGOs [...]. [They might not] understand the local context in Lebanon, but they demand to implement something, because they have money or get money from other donors".

One of the interviewees discussed how **international actors' feeling of superiority hinders equitable partnership, perpetuates inequalities, and makes work difficult**: "The challenge is that they always see us in condescending attitude, and we always try to remind them that it's an equal partnership. [...] It's not that if you have the money, you are allowed to boss us. And, unfortunately, we have been seeing lots of behaviour that we call **neocolonialism**, of making the life of local partners

**"They say that they want localisation, but mean that the local organisation is working for them."**

very hard, instead of comprehending the challenges and working together and making the best out of these funds. And this really weakens the humanitarian response." Another interviewee discussed how these problems relate to the definition of localisation: "Is it to bring a local organisation and make it a maid working for an

INGO? This is the case with most of them, you know, they say that they want localisation, but it [means] that the local organisation is working for them." At the same time, this interviewee talked about the importance of always establishing rules during the first meeting: "No prejudice, no top-down, no overstepping management, no micromanagement. [S]etting the rules sometimes is good."

Local organisations try to make their voices heard not only in bilateral partnerships but also within coordination mechanisms. One interviewee shared about their request "that all co-coordinators are local, because they are able to bring local experience that internationals cannot have". However, **participating in coordination mechanisms might be challenging in terms of resources**, as shared by another local leader: "Mainly the challenges that we are facing, is the coordination. [...] We are trying to be in the working groups that are relevant to our work, but it takes time, and it needs operational budget [...]. It's a lot of the resources, and you cannot take the salaries of those people from grants, so you have to get them somewhere else, like overheads, or you have to fundraise for this [...]." In addition to time and financial constraints, **language and terminology** can sometimes be a problem, because not all local NGO representatives speak English or understand the acronyms within the international humanitarian system.

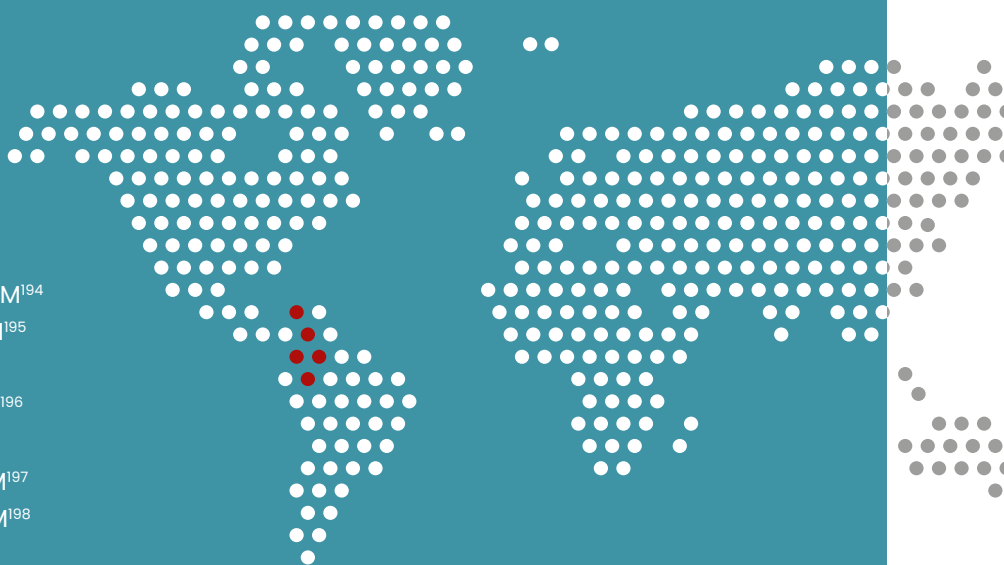
While challenges exist, there are notable examples of good practices in coordination, such as the **effective coordination among organisations after the Beirut blast**, or the **work done by the forum of local organisations, the Lebanon Humanitarian and Development NGOs Forum (LHDF)**. Multiple local organisations appreciate the role and work done by the forum in representation (especially, when it comes to smaller local organisations), increasing the exposure of local NGOs both locally and internationally, providing information, and organising trainings, thus contributing to strengthening the capacity of local organisations. However, like individual organisations, such local coordination structures also need support by international actors.

# Perspectives from local humanitarian actors in Colombia: "There must be a caregiver for the caregiver"



## Colombia

Population:	52.2M <sup>194</sup>
People in need:	7.7M <sup>195</sup>
People targeted for assistance:	1.6M <sup>196</sup>
Venezuelan refugees and migrants in Colombia:	2.9M <sup>197</sup>
IDPs:	4.8M <sup>198</sup>



Colombia is facing a **multifaceted humanitarian crisis** that continues to evolve, even after the 2016 Peace Agreement between the government and the Revolutionary Armed Forces of Colombia (FARC).<sup>199</sup> Since 2020, the situation has been marked by the fragmentation of armed groups and organised criminal entities competing for territorial control in strategic areas.<sup>200</sup> In 2022, the International Committee of the Red Cross (ICRC) identified **six ongoing armed conflicts** in Colombia.<sup>201</sup> The ensuing violence, deliberate assassinations of social leaders, forced displacements, human trafficking, child recruitment, and dangerous drug trafficking<sup>202</sup> have resulted in an estimated 7.7 million individuals requiring humanitarian assistance in 2023.<sup>203</sup> Furthermore, Colombia grapples with persistent high levels of inequality and poverty, coupled with limited access to essential services, further exacerbating the vulnerability of its population. Economic difficulties, informal land ownership, limited livelihood opportunities, and constrained access to basic social services in

Colombia were further exacerbated by COVID-19 measures and the global economic recession.<sup>204</sup> Colombia's susceptibility to natural disasters across multiple departments also adds to the challenges.

Additionally, Colombia is host to approximately **2.9 million refugees and migrants from Venezuela**.<sup>205</sup> Venezuelans in Colombia face xenophobia, high levels of poverty, food insecurity, as well as limited access to healthcare, education, the labour market, and housing. The COVID-19 pandemic and its measures have worsened these challenges.<sup>206</sup> Furthermore, "caminantes" (Spanish for "walkers"), referring to migrants and refugees who undertake their journey on foot, face significant protection risks, including exposure to extortion, exploitation, physical and sexual violence as well as the lack of access to support systems.<sup>207</sup>

Previous research suggests the existence of **two seemingly parallel systems of humanitarian response in Colombia**: one that is locally led and

another that is not.<sup>208</sup> The formal humanitarian coordination mechanisms are primarily based in Bogotá and predominantly composed of UN agencies and INGOs.<sup>209</sup> At the same time, due to longstanding social mobilisation traditions and experiences in dealing with crisis situations, as well as considering the limited reach of the Colombian state in some regions, there are **instances of robust local humanitarian leadership**, even if the actors themselves may not define themselves as "humanitarian".<sup>210</sup>

## Methodological approach

Within the context of this report, we conducted 23 recorded interviews and/or focus group discussions, along with two non-recorded interviews/discussions, three phone calls and one introductory meeting with staff from local, national, and international humanitarian organisations in Colombia. These organisations operate in various geographical areas, including Bogotá, Soacha, Cúcuta, Tibú, Puerto Carreño, Chocó, and Ocaña. The actors that we spoke with come from different backgrounds and include representatives from faith-based, secular, refugee-led, women-led, and community-based local organisations as well as a governmental body. Additionally, we spoke with representatives of several international organisations involved in different kinds of partnerships with local actors, as well as coordination bodies with different work and membership structures. The local actors that provided their views to this report also vary in size, ranging from small community-based organisations to large organisations with operations extending beyond Colombia. They focus on different issue areas in their work. All interviews were conducted in Spanish.

## Local actors' perspectives

Similar to the challenges faced by local humanitarian actors in Lebanon, as discussed in the previous section, **local actors in Colombia also struggle with funding**. As one representative from a local organisation shared: "[The situation]

is very different from, for example, being able to say that you can be calm because every month you know that you can pay for the services, for food, for everything. When you have to think every month 'how are we going to do that even next month?', that's complicated, that's very complicated." Some of the local actors interviewed expressed **concerns about the intermediaries in the funding chain**, as

### Capabilities of local actors are systematically undervalued

they often result in local organisations receiving limited resources. Furthermore, according to one of

the local representatives, sometimes it is **hard to compete with international NGOs**: "[It seems that] sometimes resources are based on nationality and not on capacity. [...] Because [the funders] like to give resources [...] to their own NGOs; some countries give money only if [...] the NGO is of their nationality, or if it is not Colombian. So, it almost turns out to be a condition." In addition to this, **local actors also perceive prejudice from international actors** in terms of capacities that local organisations are often believed to lack. This aligns with the previously discussed issue of the biased understanding of capacity, whereby the capabilities of local actors are systematically undervalued.

Additionally, an interviewee who assists people from Venezuela attributed the lack of funding to the **changing international actors' priorities**: "They are already thinking that Venezuelan migration is becoming a secondary issue, that it is no longer so important [...], they are turning their eyes elsewhere. So, it is no longer being seen as a priority, and that is very worrying because [...] if you look at the figures, the figures remain the same or they continue to increase. [...] We are not saying that case management [that international organisations do] is not important, it is very important. But for the population that is going to stay here and that is going to start a new life project, you have to have a shelter, you have to provide them with education, and what worries us is that we are being left alone."

In addition to the initial struggle to secure funding, **organisations, particularly small community-based ones, also face numerous challenges in covering overhead costs**, such as rent, transportation and other services. This echoes the experiences of local organisations in Lebanon. In Colombia, some interviewees also mentioned their **inability to receive salaries, forcing them to support themselves through other activities**.

Reaching financial sustainability within their organisations is their priority in order to "continue surviving and to be able to continue helping other people without having to ask for anything from anyone". One interviewee shared: "Sometimes we feel used because there is no support for us anywhere; we have to work with our fingernails, we have to struggle in our homes, sometimes we don't dedicate as much time to our families as we should, because we have to dedicate it to the community, and that also affects us sometimes. And no one has come to the conclusion of telling us, 'well, look, you are going to work and you are going to have a salary'. [...] We are not asking to be given anything for free, but we are asking to be able to be stable, to have a salary for the work we do, because sometimes we do what other organisations, the state, should be doing."

Similar to the experiences of local actors in Lebanon, local actors in Colombia have raised **concerns about the bureaucratic requirements, regulations, and "extreme" audits** conducted by international actors. They believe that these practices hinder internal work processes, consume valuable time, and reduce capacity to implement other things that would help communities they serve. According to one interviewee, even small

**The focus on quantitative indicators often fails to capture what truly matters**

projects are subjected to "an exaggerated amount of monitoring and auditing", which can be exhausting for small organisations.

Another interviewee echoed this, saying that the need for transparency is understandable; however, "the regulations and the administrative and accounting requirements don't fit the realities of the communities". They also questioned the focus on quantitative

indicators, which often fail to capture what truly matters, and suggested a shift towards a focus on processes. According to this interviewee, some of the requirements imposed by international actors are either impossible to document, or the documentation process itself generates mistrust within the community. Furthermore, the reporting formats sometimes provide limited space to address critical issues.

Organisations shared that they sometimes need to assess whether the funding is worth the bureaucratic effort it involves. Some have made decisions not to collaborate with certain international partners in the future. When they perceive unfair treatment, they do not feel that they have many options: "Since they are partners and Europeans, we can't easily sue them, because we know that they might not work with us again. So, there is very uncomfortable moral blackmail." At the same time, the interviewees emphasised that the **size of the local organisation makes a difference. Larger local organisations, thanks to their financial stability, are in a better position to refuse partnerships** if they do not agree with the proposed conditions.

Building on the previous arguments about the unequal power relations, one interviewee noted that the control mechanisms are related to "a power dynamic that is very difficult to manage, because [if they were] the UN contractor, of course, [they would be] the most powerful, the one who has the money, the one who decides how things are done. [There are] a lot of officials from international entities [...] who fall into this power game [...] And then they begin to control from a very superior position, which makes the processes for local organisations very difficult." Additionally, another interviewee recounted how these power dynamics went beyond bureaucratic and decision-making control and manifested themselves in ageist comments by the international counterparts who openly questioned the age of a local organisation's leadership.

The interviewees also recalled some **problematic dynamics related to the visits by international actors**. As told by one interviewee, "that doesn't

happen in all cases but, for example, projects are worth 5,000 dollars and the visit of the person who comes to see how much or what we did comes at a cost of 1,000 dollars". **In addition to the financial costs, organising such visits requires a great amount of time from the local organisation.**

This perspective brings some nuance to the perception that direct meetings between local and international actors are inherently positive. It emphasises the importance of looking into how these meetings are organised and conducted. Additionally, according to the interviewees, the **international actors who are visiting sometimes disrespect the privacy of the affected people:** "Visibility is very important to them [...]. Of course, it is understandable that it is very important for them to know the context and to really know where their resources are going, but then, [if I were an affected person], it becomes a matter of five people on top of me filming me, taking pictures of me [...]. Tell me your story? I'm not even telling it to my mum."

Local leaders from smaller grassroots organisations also expressed their frustration with the lack of recognition and how they are **often perceived as being "non-professional" by international actors**, despite their vast experience of working within communities and having professional social workers, psychologists, accountants, and lawyers working in their organisations (albeit on a voluntary basis due to funding struggles). These observations about the lack of recognition are directly related to the previous discussion on how local actors' capacities are undervalued and the pressure they feel to align with international actors' standards. Local actors in Colombia also shared that they sometimes feel instrumentalised when asked to help international organisations without receiving anything in return: "We are tired of international organisations calling us to get information because we don't get any help from them [...]. They don't think that we deserve help. And that is a big mistake, because if we are leaders and we are with the community, we also need to have a salary to sustain ourselves." Several interviewees, from both smaller and larger local organisations, have also mentioned the lack of visibility given

to local organisations when they work with international actors. **International actors' communication and reporting sometimes create the impression that local organisations have not participated,** leaving

**There is a lack of visibility and recognition given to local organisations**

the latter with a sense of being used. The lack of recognition also extends to opportunities for

participation within coordination mechanisms involving the governmental institutions: "We, the civil society, should be [there]. [...] But they don't recognise us. We, the civil society, are not recognised by the government."



*Caritas workers in Colombia with a Venezuelan woman and her daughter, who benefit from the EuroPana programme.  
© Bente Stachowske / Caritas Germany*

Despite the challenging dynamics discussed above, **some organisations feel that their capacity has been significantly strengthened by international actors:** "I think it was a very important experience for us. [...] We did things that were a learning experience for us. We have grown a lot and appreciate the work of the international institutions because if it were not for them, we would not have had so many growth possibilities." Other interviewees perceive the strengthening of their capacity as an indirect outcome of their partnerships with international actors, since these collaborations require them to revise and update various internal processes. However, not



*A Venezuelan migrant in Colombia leads the Nueva Alianza project, securing vital infrastructure and education.  
© Philipp Spalek / Caritas Germany*

all interviewees perceive that their organisational capacities have been strengthened by international partnerships.

**The degree of complementarity and decision-making power held by local actors**, as outlined by one interviewee, **varies greatly depending on the nature of their relationship with international actors**. This distinction is evident in two main partnership models: subcontracting and consortium-based partnerships. Subcontracting – or being “simply the implementer in the sense ‘I need someone to do this, I hire you to do this’” – significantly lowers the local organisation’s negotiation capacity. As stated by one interviewee: “In those cases it is difficult for us to achieve the complementarity that we have as an organisation, if we are contracted as an implementer.” This is echoed by another interviewee: “By being merely executors, we lose the capacity to make decisions, and we lose the capacity to deal with whatever happens. We are working on community issues; we are working on humanitarian emergencies. The reality is constantly changing [...]. Contexts vary, and when I commit myself to an international organisation through money, [...] I have to restrict myself to doing only what has been agreed. So, if I go to a context that has changed, and I have to sit down to negotiate a change with them, it is almost impossible.”

Other interviewees share a similar perspective: “It is about their objectives. [...] If we want to work with them, we have to adapt to their reality.”

However, local organisations often find that this reality does not align with their lived experiences: “The reality that we live here every day is different from what [the international actors] are seeing.” For example, as previously discussed, many local actors feel that the situation of Venezuelan refugees and migrants remains very fragile and requires comprehensive, holistic solutions. In contrast, international organisations have shifted their focus to case management. Local actors have also criticised cash and service provision in certain contexts, viewing them as unsustainable and insufficient for helping the affected people to generate their capacities. In a broader sense, various local actors, particularly those based in remote areas, have wished for a more sustainable long-term presence from the international community rather than short-term projects with limited mandates.

In line with the discussion in the first part of this report, **local organisations in Colombia sometimes find themselves having to adapt to the requirements of international actors**.

In certain cases, this alignment also means having to “adjust” their identity, as shared by representatives of one local faith-based organisation: “We start from the fact that [we] belong to the Catholic Church. [...] But within the projects we have always been required to be impartial in this. We have always had the doors open for whoever needs it [...], whatever religious belief they have, their sexual orientation, whatever. We have always been open, respectful [...]. But it has been a bit rigid, that we have to avoid talking about belonging to the Catholic Church. So, we’ve had to be careful with that, because yes, if it is a requirement, we have to respect it.”

Representatives from a local organisation described situations where, as implementing partners, they initially encounter strict conditions set by the international partners regarding what can and cannot be done. However, when the international organisation realises that the project goals are at risk of not being met, they

may change the conditions, such as who the local organisation can assist. It then becomes the responsibility of the local organisation to fulfil these goals. "That means that in the end we have to start moving heaven and earth to see who we can attend to; to attend to all those people that

### There is a lack of transparency by international actors with respect to project budgets

**of trust or the perception by international organisations that local organisations are incapable of identifying priorities.** Similar to the case in Lebanon, local organisations also recounted the **lack of transparency by international actors with respect to project budgets.** In most cases, only the part which concerns a specific local actor's work is shared and the information regarding overall overhead costs remains unclear.

At the same time, some actors noted that being in a **consortium type of partnership with international actors allows for an equitable and transparent dynamic.** Furthermore, some faith-based actors felt that their partnerships were generally equitable, and their voice was being heard due to their belonging to the Catholic Church. Some interviewees also expressed positive feedback related to their work with specific donor governments, noting these donors' understanding of the local perspective, their "follow-up attitude", as well as the provision of resources as needed. In terms of engaging with government donors, these interviewees mentioned that the contact with government donors is typically initiated by the governments, embassies, or the local organisation itself. In this organisation's experience, no INGO or UN agency has ever facilitated direct contact between the local organisation and governments.

For the coordination mechanisms, some aspects of the partnership dynamics are also evident there. Some representatives from local humanitarian organisations felt that

we had identified that they didn't let us attend to [in the first place]", shared one of the interviewees. A related issue that arises is the **lack**

the agendas within coordination bodies are predetermined, decisions are already made, and local organisations have limited influence. However, local actors appreciated having the space for different organisations to meet up, stay informed, and prevent redundant efforts. During the interviews, a positive example of best practice was shared, where an **international organisation covered the membership fees of their local partners within a coordination mechanism**, thus facilitating their participation.

Overall, the demanding nature of the work local humanitarian organisations undertake, which includes financial struggles, heavy workloads, and having to deal with unequal power dynamics **negatively impacts the well-being of local humanitarian workers.** Women leaders from community-based organisations shared that they often face **personal security threats** and recounted numerous instances of women leaders who were killed. They shared that speaking out against gender-based violence is a risk factor, sometimes forcing them to leave their homes temporarily due to security concerns. These factors take a **heavy toll on the local humanitarian workers' mental and physical health**, especially given that self-care is very challenging under these circumstances. Furthermore, local women leaders expressed the desire to serve as role models for girls and young women whom they work with: "We are leading girls and young women. And if the girls and young women see that this is the result of a leader, [that] this leader doesn't [...] even have the money to pay the bus fare. Then they won't want to be like me." Local community leaders feel they need support to stay well and to be able to do their job, as one interviewee put it: "There must be a caregiver for the caregiver."

# Conclusions





This report highlights the importance of locally led humanitarian action and delves into the challenges and barriers faced by local actors. It also explores the extent to which top international humanitarian actors – government donors, INGOs, and UN agencies – have fulfilled their localisation commitments. To achieve this, drawing on the pre-existing localisation measurement frameworks **we piloted a localisation index**. This index is designed to assess the performance of key international actors and rank them accordingly.

Regarding the role and importance of local actors, two main arguments can be made: justice and efficiency/effectiveness. While power imbalances exist in any

**Locally led humanitarian action tends to promote greater justice within the humanitarian system**

context, **locally led humanitarian action tends to promote greater justice within the humanitarian system**. Locally led humanitarian

action is about self-determination, and removing barriers to local organisations' agency is key if the humanitarian system is to be decolonised. In terms of **aid efficiency and effectiveness**, local actors are typically the first ones to respond and the last ones to leave, fostering the linkages between humanitarian response and sustainable solutions. They often possess a better understanding of the local context and maintain closer proximity and better access to affected populations. Last but not least, having fewer and more cost-efficient intermediary organisations within the humanitarian funding chains has been

shown to significantly increase cost efficiency of humanitarian operations – an argument that is especially relevant given the large humanitarian funding gap.

Meanwhile, local actors face numerous challenges in their work. Both the existing literature and the conversations with local actors in Lebanon and Colombia undertaken for this report highlight the ongoing **struggles with funding, especially concerning the coverage of overhead costs** required for organisational sustainability. Furthermore, local organisations often feel that they are the ones required to adapt to the expectations of international actors, potentially leading to a loss of identity or comparative advantages. The local-international partnerships are characterised by **limited decision-making power for local actors, condescending and possibly racist attitudes by international actors, lack of trust, and unequal risk sharing**. The burden of these challenges impacts the well-being of local actors, particularly those who are directly affected by the ongoing crisis.

At the same time, we have identified some positive practices among international actors in their support of local actors. For instance, one international INGO in Colombia finances its local partners' membership within a local-international coordination forum, making their participation possible. Furthermore, various local organisations in Lebanon maintain strong working relationships with the embassies of major donors.

Despite some positive practices, the overall progress of the localisation agenda – which was

put in place to counter these barriers – has been slow.<sup>21</sup> This challenge is compounded by the lack of accountability and a shortage of mechanisms for tracking and transparency by international actors when it comes to localisation data. Against this backdrop, we developed an index which enabled us to **compare the performances of the five largest UN agencies, five largest INGOs, and ten largest government donors** in terms of fulfilment of their localisation commitments. These international actors were invited to self-evaluate their performance and to provide data related to their localisation work. Local actors were asked to share their perspectives on each of these international actors, with the latter accounting for 50% of the international actors' assessment.

Among the government donors, **Germany scored the most points (60) within the overall ranking**,<sup>22</sup> closely followed by the European Commission (58 points) and Canada (50 points). When considering only the perceptions of local actors, Germany is also in first place (64 points), closely followed by the European Commission (63 points) and Norway (62 points). However, **even among the better-performing donors, data availability, transparency, and tracking remain problematic, especially with respect to funding**. Only three<sup>23</sup> of the surveyed donors were able to provide aggregated figures for funding reaching local organisations through a maximum of one intermediary organisation. Additionally, **none of the surveyed donors met the 25% target established by the Grand Bargain**. Although five out of seven surveyed donors reported implementing alternative funding approaches to provide resources to smaller grassroots local actors, only one donor had a designated policy for covering overhead costs. This shortfall is especially disappointing given that these commitments were made in 2016.

There are also notable shortcomings regarding other obligations. It is concerning that only one donor, as part of their guidance, expects that intermediaries share full project budgets and financial reports with their local implementing partners. A similar development can be observed with respect to requiring intermediary

organisations to establish feedback and/or partnership assessment mechanisms with their local partners: none of the donors has a policy in place, and only one of the donors

**Only one of the donors has a policy which includes commitments to strengthening local participation and leadership**

strongly encourages its intermediary organisations to establish such mechanisms. It is important for donors to recognise that, as primary funders, they hold the power to

ensure that the agreed commitments are upheld. They should leverage this power for the greater good by ensuring fairness and accountability throughout the funding chains.

When it comes to local leadership and coordination, the performance of donors is somewhat better: all seven donors are in direct contact with local actors through their engagements, and several of them host dialogue events with meaningful participation of local actors. Additionally, most donors reported taking steps to support local actors' participation in coordination fora, with some going further and specifically supporting local actors' leadership and/or designating funding for this purpose. However, it is worth noting that only one of the surveyed donors currently has a policy which includes commitments to strengthening local participation and leadership. This highlights the need for further improvements in this area.

All five of the largest INGOs and all five of the largest UN agencies responded to our request for self-evaluation and factual information. In the overall ranking, the **first place belongs to UNHCR (66 points)**, closely followed by WFP (64 points), and UNICEF (63 points). At the same time, Save the Children is perceived most favourably by local actors (57 points), with UNHCR and UNICEF sharing the second place (53 points each), and World Vision and WFP sharing the fourth place (51 points each). **The high scores of these three UN agencies largely originate from the funding data they provided**. All five of the largest UN agencies were able to report on the

share of funding that goes through a maximum of one intermediary organisation, while only three out of the five largest INGOs have clear figures in this regard. The percentages provided by the three UN agencies are also generally higher than those provided by INGOs, whereas overall the reported funding percentage varies considerably, from less than 5% to more than 40%.<sup>214</sup>

When it comes to the funding passed directly to local actors without intermediaries, only three out of the ten surveyed organisations can provide data, with the amounts varying from less than 5% to more than 20%. Despite the long-standing Grand Bargain commitments, the multi-year funding that is cascaded to local actors remains largely untracked. Additionally, only half of the surveyed organisations have implemented alternative funding models for smaller partners to pass grants that come with fewer of the usual accountability requirements.

Eight organisations reported having partnerships with local actors that involve strategic long-term capacity strengthening extending beyond specific project cycles. However, only half of the ten surveyed international organisations have a policy regarding funding for overhead costs. Similar to government donors, INGOs and UN agencies are reluctant to share full project budgets with their local implementing partners, but most of them do inform their local partners of the primary funding source. On a positive note, all organisations working with local partners have feedback mechanisms in place, and four of them require their local partners to assess them. Additionally, only four organisations reported regularly involving local partners in meetings with donor counterparts, although most have specific initiatives aimed at fostering local actors' participation and leadership.

Overall, to fulfil the commitments they have made and be good partners, INGOs and UN agencies should recognise and embrace their responsibilities as intermediaries. This includes passing funds (and ensuring proper tracking), funding overhead costs, maintaining transparency regarding project budgets, and

facilitating connections between their local partners and the primary donors. Additionally, they should systematically expose themselves to the local actors' assessment in order to improve their practices.

The overall index scores demonstrate that there is still a significant distance to cover for international actors to turn their localisation promises into a reality. Although a direct comparison between them is not feasible, the **highest overall scores achieved by both donors and international organisations – 60 and 66 points, respectively – are significantly below the maximum of 100 points** that could have been reached. This report, incorporating a literature analysis,

**The highest overall scores achieved by both donors and international organisations are significantly below the maximum of 100 points**

local perspectives from Lebanon and Colombia, and the localisation index results, underscores the substantial need for all international actors to step up in supporting locally led humanitarian action

and fulfilling their localisation commitments. This is a crucial step towards ensuring that humanitarian action during times of dire need becomes more equitable, efficient, and effective.



Members of a Caritas supported community protection committee take part in a savings and loan meeting in the province of South Kivu, Democratic Republic of Congo © Guerchom Ndebo / Caritas Belgium

# Endnotes

- Introduction**
- 1 FTS OCHA 2023
- 2 See also Cabot Venton et al. 2022
- 3 Metcalfe–Hough, Fenton, and Manji 2023
- 4 Development Initiatives 2023
- 5 Ignatiou and Ramsay 2022
- 6 Boateng and Meier 2021
- 7 More information on the index design and methods can be found in each of the empirical parts II and III, as well as in the annex.
- Part I: Setting the Scene**
- 8 It has been estimated that international humanitarian assistance comprises only 1% of resource flows to countries affected by humanitarian crisis (Willitts–King, Bryant, and Spencer 2019, p. 7).
- 9 Willitts–King, Bryant, and Spencer 2019; Fast and Bennett 2020
- 10 DuBois et al. 2015
- 11 de Wolf and Wilkinson 2019; Wilkinson et al. 2022a
- 12 Guyatt 2022
- 13 Wilkinson et al. 2022a
- 14 ACT Alliance 2015
- 15 Guyatt 2022
- 16 Barbelet 2017; Svoboda, Barbelet, and Mosel 2018
- 17 IFRC 2018, p. 3
- 18 Wilkinson et al. 2022a, p. 8
- 19 Caritas Internationalis 2021, p. 4
- 20 Wilkinson et al. 2022a, p. 12; de Geoffroy and Grunewald 2017, p. 7; de Wolf and Wilkinson 2019
- 21 Martin and de la Puente 2019; Südhoff and Milasiute 2021
- 22 Cabot Venton et al. 2022
- 23 Roepstorff 2020; Robillard et al. 2020; Baguios et al. 2021, p. 15
- 24 The lack of clarity with respect to what “local” means has been identified as one of the barriers to implementing the “localisation” agenda (see Roepstorff 2020; Fast and Bennett 2020). On the differences between “localisation” and “locally led” see section [“The localisation agenda”](#).
- 25 Fast and Bennett 2020
- 26 Roepstorff 2020; Fast and Bennett 2020, p. 10; peace direct et al. 2021, p. 12p. 12
- 27 Latimir and Mollett 2018; Wilkinson et al. 2022a
- 28 SOGIESC stands for sexual orientation, gender identity, gender expression and sex characteristics.
- 29 Barbelet, Lough, and Njeri 2022, p. 7
- 30 Schenkenberg 2016; de Geoffroy and Grunewald 2017, p. 5
- 31 Schenkenberg 2016
- 32 See also van Brabant and Patel 2017, p. 7; Barakat and Milton 2020, p. 150; Baguios et al. 2021, p. 24
- 33 de Geoffroy and Grunewald 2017, p. 5
- 34 Barbelet and Lough 2021
- 35 Fast and Bennett 2020, p. 19. On the impact of localisation at the community level, and the measurement thereof, see HAG, CoLAB & GLOW 2023
- 36 Slim 2021
- 37 Baguios et al. 2021
- 38 Importantly, there has been criticism that the “localisation” agenda (not locally led humanitarian action as such) is not sufficiently situated within the decolonisation agenda peace direct et al. 2021; peace direct 2022. On the difference between “localisation” and “locally led”, see section [“The localisation agenda”](#).
- 39 Charlton 2000
- 40 Ager and Ager 2015
- 41 Barreto and Sirvent 2019, p. 10
- 42 Catholic Social Teaching (or CST) usually refers to the tradition of public “circular letters” (encyclicals) addressed from the Pope to all Catholics. However, CST can also refer more broadly to the practice of reflecting upon social issues in light of the Christian faith, Biblical teachings of the Old and New Testament, Theology, as well as the experience of Catholics and the struggles of people in vulnerable circumstances. Dwyer, ed. 1994, p. 928
- 43 Caritas Aotearoa New Zealand n.d.
- 44 Pope Pius XI 1931; Evans 2013, p. 45
- 45 Evans 2013, p. 53
- 46 Caritas Australia n.d.
- 47 See Boateng 2021
- 48 United Nations 1991
- 49 IFRC and ICRC 1994
- 50 The Sphere Project 1998
- 51 GHD 2003
- 52 ICVA 2007
- 53 CHS n.d.
- 54 OECD DAC 2021
- 55 IFRC 2017
- 56 For a comprehensive overview of the international localisation policies until 2016, see Wall and Hedlund 2016.
- 57 Notably, “localisation” and “locally led humanitarian action” are not the same concepts. Baguios et al. (2021, p. 1) propose viewing “localisation as the journey towards an end-goal of locally led practice”. At the same time, it has been noted that the term “localisation” lacks a clear definition (see van Brabant and Patel 2017; Pincock, Betts and Easton–Calabria 2021; Boateng 2021). Additionally, “localisation” (agenda) has been criticised for being Western/Northern-centric, neglecting colonial legacies and structural racism, and thus upholding the power hierarchies (see Fast and Bennett 2020; Baguios et al. 2021; Boateng 2021; Narayanaswamy 2021; peace direct 2022).
- 58 IASC 2016
- 59 Pooled funds consolidate contributions from various donors to deliver flexible humanitarian financial support during crises. Often overseen by a fund manager or secretariat, these mechanisms have seen heightened donor investment in recent years (ICVA 2017b; IASC n.d.).
- 60 IASC 2021
- 61 IASC 2023
- 62 Baguios et al. (2021) provide many examples of various existing initiatives that promote localisation and locally led practice, including localisation measurement frameworks.
- 63 <https://startnetwork.org/locally-led-action>
- 64 <https://charter4change.org/>
- 65 <https://www.near.ngo/>
- 66 <http://a4ep.net/>
- 67 <https://pledgeforchange2030.org/>
- 68 de Wolf and Wilkinson 2019; Fast and Bennett 2020; Slim 2021; peace direct et al. 2021
- 69 Development Initiatives 2023
- 70 de Geoffroy and Grunewald 2017, p. 3; Caritas Internationalis 2021
- 71 Wilkinson et al. 2022a, p. 3
- 72 Pincock, Betts, and Easton–Calabria 2021, p. 731
- 73 Svoboda, Barbelet, and Mosel 2018, p. iii
- 74 Caritas Internationalis 2021; Pellowaska 2023, p. 13
- 75 2023, pp. 13–14
- 76 Tomalin 2018 in Wilkinson et al. 2022a, p. 2
- 77 de Geoffroy and Grunewald 2017, p. 2
- 78 de Wolf and Wilkinson 2019, p. 10
- 79 See also de Geoffroy and Grunewald 2017, p. 7;

- 81 Robillard et al. 2020; Baguios et al. 2021, p. 22  
Latimir and Mollett 2018
- 82 Wilkinson et al. 2022a, pp. 2–3
- 83 Baguios et al. 2021, p. 24
- 84 Fast and Bennett 2020, p. 13
- 85 Barbelet 2019; Fast and Bennett 2020; Barnett, Vandermass–Peeler, and Patel 2021; Wilkinson et al. 2022a
- 86 Jayawickrama 2018; peace direct et al. 2021  
2021, p. 24
- 87 Barnett, Vandermass–Peeler, and Patel 2021
- 88 Baguios et al. 2021, p. 24; Slim 2021, p. 1
- 89 Baguios et al. 2021, p. 21
- 90 de Geoffroy and Grunewald 2017, pp. 5–6
- 91 Arthur and Moutard 2022, pp. 7–8; Wilkinson et al. 2022a, p. 12
- 92 2017, p. 6
- 93 de Geoffroy and Grunewald 2017
- 94 Humanitarian Outcomes 2023
- 95 Fast and Bennett 2020, p. 11; For more information about coordination mechanisms and the architecture of the humanitarian system, see ICVA 2017a; Elhra and Humanitarian Innovation Fund n.d.
- 96 de Geoffroy and Grunewald 2017
- 97 Wilkinson et al. 2022a
- 98 A4eP 2021, p. 3; Cheung and Sethi 2022
- 100 Caritas Internationalis 2021, p. 13
- 101 Barnett, Vandermass–Peeler, and Patel 2021
- 102 Baguios et al. 2021, p. 18; Barbelet et al. 2021
- 103 Barbelet 2019
- 104 Barbelet 2019
- 105 Wilkinson et al. 2022a, p. 2
- 106 Wilkinson et al. 2022a, p. 9
- 107 Wilkinson and Ager 2017, pp. 42–43; Taraboulsi–McCarthy and Cimatti 2018; Wilkinson et al. 2022b, p. 6
- 108 Roepstorff 2021, p. 25
- 109 Barnett, Vandermass–Peeler, and Patel 2021
- 110 Degan Ali cited in Cornish 2019; Slim 2020; Baguios et al. 2021, p. 5; peace direct 2022
- 111 Barter and Sumlut 2022; peace direct 2022Barter and Sumlut 2022; peace direct 2022
- 112 Arthur and Moutard 2022
- 113 peace direct 2022, p. 5
- 114 These include the Principles of Partnership (2007); the Charter4Change (2015); the Seven Dimensions Framework (2018); the NEAR Localisation Performance Measurement Framework (2019); the PIANGO and HAG’s “Measuring Localisation: Framework and Tools (2019)”; “Pathways to Localisation: A framework towards locally led humanitarian response in partnership-based action” (2019) with its “Partnership Practices for Localisation” Guidance Note (2019); the Grand Bargain Localisation Workstream Guidance Notes (2020); as well as the most recent “Pledge for Change (P4C) 2030” (2022). The development of the Seven Dimensions Framework; “Pathways to Localisation”; the PIANGO and HAG’s “Measuring Localisation: Framework and Tools”; the Grand Bargain Localisation Workstream Guidance Notes; and of the “Pledge for Change 2030” included representatives of local actors. The Charter4Change initiative is led by both national and international NGOs, whereas NEAR is a consortium of only local organisations.
- 115 Van Brabant and Patel 2018; Christian Aid et al. 2019; NEAR 2019; HAG and PIANGO 2019; Grand Bargain Localisation Workstream n.d.
- 116 Van Brabant and Patel 2018; NEAR 2019
- 117 Van Brabant and Patel 2018
- 118 Van Brabant and Patel 2018
- 119 Charter4Change 2015; Van Brabant and Patel 2018; NEAR 2019; HAG and PIANGO 2019
- 120 Grand Bargain Localisation Workstream n.d.
- 121 Charter4Change 2015
- 122 Christian Aid et al. 2019; NEAR 2019
- 123 Charter4Change 2015; Van Brabant and Patel 2018; Christian Aid et al. 2019; NEAR 2019
- 124 HAG and PIANGO 2019
- 125 Charter4Change 2015; NEAR 2019; HAG and PIANGO 2019
- 126 See Christian Aid et al. 2019
- 127 Charter4Change 2015; Van Brabant and Patel 2018; NEAR 2019; HAG and PIANGO 2019; Pledge for Change 2022
- 128 NEAR 2019; HAG and PIANGO 2019
- 129 Christian Aid et al. 2019; HAG and PIANGO 2019; Pledge for Change 2022
- 130 Christian Aid et al. 2019
- 131 HAG and PIANGO 2019; Pledge for Change 2022
- 132 Van Brabant and Patel 2018; Christian Aid et al. 2019; NEAR 2019; HAG and PIANGO 2019
- 133 Van Brabant and Patel 2018; Christian Aid et al. 2019; NEAR 2019
- 134 Charter4Change 2015; Van Brabant and Patel 2018; NEAR 2019; Pledge for Change 2022
- Part II: Living up to the Localisation Commitments – or not?**
- 135 See NEAR 2019; HAG and PIANGO 2019
- 136 See Charter4Change 2015
- 137 See Grand Bargain self-reporting exercise
- 138 Metcalfe–Hough, Fenton, and Manji 2023
- 139 Green 2015
- 140 Cited in Green 2015
- 141 Boateng and Meier 2021
- 142 Boateng 2021
- 143 On the criticism of the definition of “local and national actors” within the Grand Bargain process, see A4EP 2019.
- 144 More details on the survey shared with international actors can be found in the subsequent sections and in the annex.
- 145 For the assessment template, please consult the annex.
- 146 For the assessment template, please consult the annex.
- 147 For the regional overview of the local actors’ survey respondents, please consult the annex.
- 148 Based on the Global Humanitarian Assistance Report 2023 by Development Initiatives, accessed at <https://devinit.org/resources/global-humanitarian-assistance-report-2023/key-trends-humanitarian-need-funding-2022/>.
- 149 For the complete list of statements, please consult the annex.
- 150 Here and in the rest of the report, the United States’ responses reflect the USAID’s Bureau for Humanitarian Assistance (BHA) perceptions, policies, and practices (not those of the entire USAID).
- 151 The numbers have been rounded here and when discussing the rest of the perception data within this report.
- 152 Regarding the aggregated individual actors’ scores, the higher the aggregated score, the better an actor performs in terms of fulfilling the localisation commitments. At the same time, this and some other statements within the surveys were formulated in what we here call an “inversed” way, meaning that a high score indicates a poor localisation performance. Therefore, before counting the aggregated score shown in the table, these scores were reversed by subtracting the indicated score from a maximum of 10 points. This applies to all the surveys we conducted for this report. For more details, please consult the annex.
- 153 More details on the survey shared with government donors can be found in in the annex.
- 154 For the government donors’ assessment template, please consult the annex.
- 155 For donors’ scoring template, please consult the annex.
- 156 One of the donors that was not able to provide this

	aggregated figure was able to provide only the figure reflecting the share of humanitarian funding that goes to local actors without any intermediary organisations. As this figure was less than 1%, having the aggregated figure would be essential to fully understand how much funding this donor passes to local actors.	
157	French Ministry of Foreign Affairs 2023	
158	Full project budgets and financial reports include information beyond the specific funding lines that concern the specific project a local actor is implementing.	
159	For the complete list of statements shared with local actors, please consult the annex.	
160	For a regional overview of the local actors' survey respondents, please consult the annex.	
161	As this is an "inversed" statement, meaning that a high score indicates a poor localisation performance, before counting the aggregated score shown in the table, each of these statements' scores were reversed by subtracting the indicated score from a maximum of 10 points. For more details, please consult the annex.	179
162	As identified in the latest "The State of the Humanitarian System" report by ALNAP (2022) accessed at <a href="https://sohs.alnap.org/sohs-2022-report/a-reader%E2%80%99s-guide-to-this-report">https://sohs.alnap.org/sohs-2022-report/a-reader%E2%80%99s-guide-to-this-report</a>	180
163	Based on the IATI data on the d-portal accessed at <a href="https://d-portal.org/ctrack.html">https://d-portal.org/ctrack.html</a>	181
164	More details on the survey shared with international organisations can be found in in the annex.	182
165	As this is an "inversed" statement, meaning that a high score indicates a poor localisation performance, before counting the aggregated score shown in the table, each of these statements' scores were reversed by subtracting the indicated score from a maximum of 10 points. For more details, please consult the annex. Also, UNRWA was not considered in this responses overview and average, as it does not have partnerships with local actors.	183
166	As this is an "inversed" statement, meaning that a high score indicates a poor localisation performance, before counting the aggregated score shown in the table, each of these statements' scores were reversed by subtracting the indicated score from a maximum of 10 points. For more details, please consult the annex.	184
167	UNRWA was not considered in this responses overview and average, as it does not have partnerships with local actors.	185
168	Idem.	186
169	Idem.	187
170	Idem.	188
171	More details on the survey shared with international organisations can be found in the subsequent sections and in the annex.	189
172	For the international organisations' assessment template, please consult the annex.	190
173	For the international organisations' scoring template, please consult the annex.	191
174	Full project budgets and financial reports include information beyond the specific funding lines that concern the specific project a local actor is implementing.	192
175	For the complete list of statements shared with local actors, please consult the annex.	193
176	For a regional overview of the local actors' survey respondents, please consult the annex.	194
177	As this is an "inversed" statement, meaning that a high score indicates a poor localisation performance, before counting the aggregated score shown in the table, each of these statements' scores were reversed by subtracting the indicated score from a maximum of 10 points. For more details, please consult the annex.	195
178	As this is an "inversed" statement, meaning that a high score indicates a poor localisation performance,	196
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before counting the aggregated score shown in the table, each of these statements' scores were reversed by subtracting the indicated score from a maximum of 10 points. For more details, please consult the annex. Healy et al. 2020

### Part III: Local Actors' Perspectives

180	UN OCHA 2023a
181	UN OCHA 2023a
182	Government of Lebanon and United Nations 2023
183	UN OCHA 2023a
184	UN OCHA 2023a
185	UN OCHA 2023a
186	UN OCHA 2023a
187	Libanon - Inflationsrate   2008-2023 Daten   2024-2025 Prognose" o. J. <a href="https://de.tradingeconomics.com/lebanon/inflation-cpi">https://de.tradingeconomics.com/lebanon/inflation-cpi</a>
188	UN ESCWA 2021
189	Holleis 2023
190	IOM 2022
191	World Food Programme 2022
192	World Health Organisation 2022
193	Chaves and Khlaf 2021, p. 27
194	UN OCHA 2023b
195	UN OCHA 2023b
196	UN OCHA 2023b
197	UN OCHA 2023b
198	IDMC 2023
199	OCHA 2022; UNHCR 2022
200	ACAPS n.d.
201	ICRC 2022; Collins and Díaz 2022
202	OCHA et al. 2021; JEP 2022; Rey Marcos and GómezGonzález 2023
203	UN OCHA 2023b
204	IOM 2023
205	UN OCHA 2023b
206	Eigner et al. 2021
207	ACAPS 2021; Pérez-Rodríguez 2022
208	Robillard et al. 2020, p. 27
209	Robillard et al. 2020, p. 27
210	Saavedra 2016; Robillard et al. 2020, pp. 25-27

### Conclusions

211	Metcalfe-Hough, Fenton, and Manji 2023
212	Within the final ranking, the results of the international actors' self-perception survey, the international actors' factual reporting, and the local actors' perception survey were weighted to give a 50% weight to the local actors' perceptions and 50% to international actors' responses (within the latter 50%, 30% was given to the factual reporting part and 20% to the self-perception).
213	One of the donors that were not able to provide this aggregated figure was able to provide only the figure reflecting the share of humanitarian funding that goes to local actors without any intermediary organisations. As this figure was less than 1%, having the aggregated figure would be essential to fully understand how much funding this donor passes to local actors.
214	Besides the mentioned UN agency which reported 0%.

### Annexes

215	Within the East Africa region, at least 40 responses came from Uganda.
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# Annexes

# Government donors' survey

## Self-assessment by government donors

Government donors were asked to what extent from 0 (completely disagree) to 10 (totally agree) they agreed with statements related to their localisation work. As part of the data evaluation, the aggregated scores of all statements within this survey were taken and awarded points.

No.	Statement	Scoring system (max. 100 points)
1	As a humanitarian donor, my institution is a strong and reliable supporter of locally led humanitarian action and is comprehensively fulfilling its commitments to the localisation agenda.	10 (totally agree) = 40 points [...] 0 (completely disagree) = 0 points
2	It is a priority for us to provide as much direct funding (without any intermediaries) to local humanitarian actors as possible.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
3	We see intermediary organisations as holding the key responsibility to support and ensure locally led humanitarian action.	10 (totally agree) = 0 points [...] 0 (completely disagree) = 10 points
4	We require that intermediary organisations receiving our funding work in inclusive and transparent partnerships with local actors.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
5	We ensure that intermediary organisations pass a fair share of funding for overhead costs received from us onto their local partners.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
6	Capacity-strengthening of local humanitarian actors is a priority for us.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
7	We regularly meet with representatives of local humanitarian organisations.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points

## Factual self-reporting by government donors

No.	Scoring criteria	Max. points	Scoring system
<b>1.</b>	<b>Funding (max. 50 points)</b>		
1.1	The share of overall humanitarian funding that reaches local implementing actors as directly as possible (through max. one intermediary)	30	0% or no data = 0 points 0.1% - 5% = 5 points 5.1% - 10% = 10 points 10.1% - 15% = 15 points 15.1% - 20% = 20 points 20.1% - 24.9% = 25 points 25% and more = 30 points
1.2	The share of overall humanitarian funding that directly reaches local implementing actors (without any intermediaries)	15	0% or no data = 0 points 0.1% - 1% = 2 points 1.1% - 2% = 4 points 2.1% - 3% = 6 points 3.1% - 4% = 8 points 4.1% - 5% = 10 points 5.1% - 5.9% = 12 points 6% and more = 15 points
1.3	If this donor has alternative approaches to pass funds to smaller grassroots local actors that may not be able to meet high levels of international compliance requirements designed for INGOs and UN agencies	5	No = 0 points Yes = 5 points

<b>2.</b>	<b>Capacity (max. 20 points)</b>		
2.1	If this donor has a policy or a requirement on the share of funding for overhead costs that intermediary organisations receiving its funding should pass onto their local partners	5	No requirement/policy = 0 points It is recommended and reporting is mandatory = 3 points Yes, there is a requirement or a policy = 5 points
2.2	The share of funding for overheads that this requirement establishes (see 2.1)	5	Under 5 % or a range = 3 points 5% or more (fixed) = 5 points
2.3	If this donor requires intermediary organisations receiving its funding to report on how funding for overheads will be/have been passed through funding chains	5	No = 0 points It is partially required = 3 points Yes = 5 points
2.4	If this donor has a specific policy which aims at ensuring capacity strengthening of local humanitarian actors	5	There is a policy which seeks to ensure local capacity strengthening / intermediaries are required to ensure local capacity strengthening = 5 points Local capacity strengthening is strongly encouraged, and specific projects are undertaken in this area = 3 points Local capacity strengthening is encouraged = 2 points
<b>3.</b>	<b>Partnerships (max. 10 points)</b>		
3.1	If this donor has a policy under which intermediary organisations that receive its funding are obliged to share full project budgets and financial reports with their local implementing partners	5	No = 0 points Not a policy but an explicitly stated expectation = 3 points Yes = 5 points
3.2	If this donor requires intermediary organisations that receive its funding to establish feedback and/or partnership assessment mechanisms with their local partners	5	No = 0 points It is strongly encouraged = 3 points Yes = 5 points
<b>4.</b>	<b>Leadership/coordination (max. 20 points)</b>		
4.1	If this donor meets directly with representatives of local organisations; if so, does it hold bilateral meetings with local organisations / attend coordination fora where local actors are present	10	No = 0 points Project-based meetings or meetings taking place through country-level non-project engagements = 5 points Project-based meetings and meetings taking place through country-level non-project engagements = 7 points Project-based meetings or meetings taking place through country-level non-project engagements and hosting dialogues with local actors meaningfully participating = 8 points Project-based meetings and meetings taking place through country-level non-project engagements and hosting dialogues with local actors meaningfully participating = 10 points
4.2	If this donor has or supports any specific initiatives that aim at fostering local participation and/or leadership in coordination for a	10	No = 0 points Advocacy for local actors' participation = 4 points Policy on local actors' participation = 6 points Designated funding/projects on local actors' participation = 6 points Policy and designated funding/projects on local actors' participation = 8 points Advocacy for local actors' (participation and) leadership = 6 points Policy on local actors' (participation and) leadership = 8 points Designated funding/projects on local actors' participation local actors' leadership = 8 points Policy and designated funding/projects on local actors' leadership = 10 points N.B.: If the policy is being developed and the draft is available, 1 point is to be subtracted from the score including the 'policy' component.
	<b>Total points</b>	<b>100</b>	

# UN agencies and INGOs' survey

## Self-assessment by UN agencies and INGOs

UN agencies and INGOs were asked to what extent from 0 (completely disagree) to 10 (totally agree) they agreed with statements related to their localisation work. As part of the data evaluation, the aggregated scores of all statements within this survey were taken and awarded points.

No.	Statement	Scoring system (max. 100 points)
1	My organisation is a strong and reliable supporter of locally led humanitarian action and is comprehensively fulfilling its commitments to the localisation agenda.	10 (totally agree) = 40 points [...] 0 (completely disagree) = 0 points
2	Our typical form of partnership with local actors includes agreements on long-term strategic capacity strengthening commitments that go beyond the project cycles.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
3	Most of the funding that we pass onto our local partners is short-term.	10 (totally agree) = 0 points [...] 0 (completely disagree) = 10 points
4	The financial information that we share with our local partners usually concerns only specific project-related funding lines.	10 (totally agree) = 0 points [...] 0 (completely disagree) = 10 points
5	Feedback mechanisms are an integral part of our partnerships with local actors.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
6	Two-way partnership assessments are an integral part of our partnerships with local actors.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
7	We have specific tools and/or initiatives that aim to foster membership, co-leadership, or leadership by local actors in consortia or coordination mechanisms.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points

## Factual reporting by UN agencies and INGOs

No.	Scoring criteria	Max. points	Scoring system
<b>1.</b>	<b>Funding (max. 40 points)</b>		
1.1	The share of overall humanitarian funding that reaches local implementing actors as directly as possible (through max. one intermediary)	18	0% or not tracked = 0 points 0.1%-5% = 3 points 5.1%-10% = 6 points 10.1%-15% = 9 points 15.1%-20% = 12 points 20.1%-24.9% = 15 points 25% or more = 18 points
1.2	The share of overall humanitarian funding that directly reaches local implementing actors (without any intermediaries)	12	0% or no data = 0 points 0.1%- 5% = 3 points 5.1%-10% = 6 points 10.1%-14.9% = 9 points More than 15% = 12 points
1.3	If the share of total received multi-year funding that cascades to local implanting partners in a multi-year manner is tracked	5	Not tracked = 0 points Partially tracked = 3 points Tracked = 5 points
1.4	If this international organisation has alternative approaches to pass funds to smaller grassroots local actors that may not be able to meet high levels of international compliance requirements designed for INGOs and UN agencies	5	No = 0 points In progress = 2 points Yes = 5 points
<b>2.</b>	<b>Capacity (max. 20 points)</b>		
2.1	If all partnership agreements of this international actor include agreements on covering funding for overhead costs	5	No = 0 points Yes = 5 points
2.2	The percentage of funding for overhead costs that partnership agreements with local organisations establishes	10	The percentage = score In case there is no standardised percentage, the average percentage is considered
2.3	If this international organisation has partnerships with local actors that include strategic (long-term) capacity strengthening that goes beyond specific project cycles	5	No = 0 points Yes = 5 points
<b>3.</b>	<b>Partnerships (max. 30 points)</b>		
3.1	If this international organisation shares full* project budgets and financial reports with their local implementing partners	5	No = 0 points It varies = 2 points Yes = 5 points
3.2	If this international organisation has a policy to always inform their local partners on who the primary funding source is	5	No = 0 points Practice = 3 points Standard practice / policy = 5 points
3.3	If this international organisation has established feedback mechanisms within their partnerships with local actors	5	No = 0 points Yes = 5 points
3.4	If these feedback mechanisms within these partnerships (see 3.3) include follow-up actions	5	No = 0 points In progress = 2 points Yes = 5 points
3.5	If international organisations require local actors to assess their organisation as part of a partnership assessment	5	No = 0 points In progress = 2 points Yes = 5 points
3.6	If these partnership assessments (see 3.5) include follow-up actions	5	No = 0 points In progress = 2 points Yes = 5 points
<b>4.</b>	<b>Leadership (max 10 points)</b>		
4.1	If this international organisation regularly involves local partners in meetings with donor counterparts	5	No = 0 points It varies = 2 points Yes = 5 points
4.2	If this donor has or supports any specific initiatives that aim at fostering local participation and/or leadership in coordination fora	5	No = 0 points In progress = 2 points Yes = 5 points

# Local actors' survey

## Local actors' regional overview

Region	No of responses
East Africa <sup>215</sup>	83
Central Africa	8
West Africa	4
Southeast Asia	35
Middle East	2
South America	8
<b>Total</b>	140

## Local actors' perception of government donors

Local actors were asked to what extent from 0 (completely disagree) to 10 (totally agree) they agreed with statements related to specific government donors. As part of the data evaluation, the average response of all valid responses within this survey was taken and awarded points.

No.	Statement	Scoring system (max. 100 points)
1	This donor is a strong and reliable supporter of locally led humanitarian action.	10 (totally agree) = 40 points [...] 0 (completely disagree) = 0 points
2	This donor prioritises providing as much direct funding (without any intermediaries) to local humanitarian actors as possible.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
3	This donor sees intermediary organisations as holding the key responsibility to support and ensure locally led humanitarian action.	10 (totally agree) = 0 points [...] 0 (completely disagree) = 10 points
4	This donor requires intermediary organisations receiving its funding to work in inclusive and transparent partnerships with local actors.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
5	This donor ensures that intermediary organisations pass a fair share of funding for overhead costs received from them onto local actors.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
6	Capacity- strengthening of local humanitarian actors is a priority for this donor.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
7	This donor regularly meets with representatives of local humanitarian organisations.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points



## Local actors' perception of international organisations

For this survey, the average response of all valid responses was taken and awarded points. Local and national actors were asked to what extent (from 0 to 10) they agreed with statements related to specific UN agencies and INGOs.

No.	Statement	Scoring system (max. 100 points)
1	This international actor is a strong and reliable supporter of locally led humanitarian action.	10 (totally agree) = 40 points [...] 0 (completely disagree) = 0 points
2	This actor offers multi-year partnership agreements on strategic capacity strengthening commitments that go beyond project cycles.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
3	Most of the funding received from this actor is short-term.	10 (totally agree) = 0 points [...] 0 (completely disagree) = 10 points
4	The financial information that this actor shares usually concerns only specific project-related funding lines.	10 (totally agree) = 0 points [...] 0 (completely disagree) = 10 points
5	Feedback mechanisms are an integral part of partnerships with this actor.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
6	Two-way partnership assessments are an integral part of partnerships with this actor.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points
7	This actor has specific tools and/or initiatives that aim to foster membership, co- leadership, or leadership by local actors in consortia or coordination mechanisms.	10 (totally agree) = 10 points [...] 0 (completely disagree) = 0 points

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## Imprint

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## Other publications





**“It is high time that donors,  
UN agencies, and INGOs  
uphold their commitments  
to locally led humanitarian  
action.”**

*Maria Nyman, Secretary General, Caritas Europa*



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