Localization of Aid in Jordan and Lebanon

A longitudinal qualitative study

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About the Regional Development & Protection Programme (RDPP)

The study on localization of aid in Jordan and Lebanon was commissioned by the European Regional Development and Protection Programme (RDPP).

RDPP was launched in 2014 as a multi-donor European initiative supporting Lebanon, Jordan, and Iraq to better understand, plan, and mitigate the impact of the forced displacement of Syrian refugees on host communities. Its strategic objective is to ensure that refugees and host populations living in displacement affected communities access their rights, are safe, self-reliant, and refugees are able to avail themselves of a durable solution (voluntary repatriation, resettlement to third country, and local integration in country of asylum).

RDPP Phase II, which has run from October 2018 to December 2022, was supported by the Czech Republic, Denmark, the European Union, Ireland, and Switzerland, with an overall budget of 54.1 million Euros. Its strategic objective has been to ensure that refugees and host populations living in displacement affected communities access their rights, are safe, self-reliant, and refugees are able to avail themselves of a durable solution (voluntary repatriation, resettlement to third country, and local integration in country of asylum). The programme has focused on three thematic areas: (A) livelihoods towards durable solutions, (B) upholding and expanding protection space, and (C) research and advocacy.

RDPP's partnership strategy has a strong commitment towards localization and support of national actors, where it serves as a core focus and one of the four engaging principles of the programme. To support the strengthened localization focus, RDPP has encouraged national organizations to request budget for tailor-made capacity development activities, based on their view of their organizational or institutional needs.

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Disclaimer

The findings, interpretations and conclusions expressed in this study are the authors' and do not necessarily reflect the views of the Regional Development and Protection Programme (RDPP) and its donors.

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List of Abbreviations

AFD	Agence Francaise de Developpement
CBO	Community-Based Organization
CSO	Civil Society Organizations
DAC	Development Assistance Committee
EU	European Union
HD-nexus	Humanitarian-Development Nexus Approach
HRBA	Human Rights Based Approach
IASC	Inter-Agency Standing Committee
INGO	International Non-Governmental Organization
JIF	Jordan INGO Forum
JONAF	The Jordanian National NGO Forum
HPF	Humanitarian Partners Forum
LCRP	Lebanon Crisis Response Plan
LHDF	The Lebanon Humanitarian and Development NGOs Forum
LHIF	Lebanon Humanitarian INGO Forum
LMWG	Localization Marker Working Group
LNA	Local and national actor
LNGO	Local Non-Governmental Organization
LNNGO	Local and National Non-Governmental Organization
LPMF	Localization Performance Measurement Framework
LTT	Localization Task Team
MoPIC	Ministry of Planning and International Cooperation
MoSA	Ministry of Social Affairs
NGO	Non-Governmental Organization
NNGO	National Non-Governmental Organization
ODA	Official Development Assistance
OECD	The Organization for Economic Cooperation and Development
PMU	Programme Management Unit
RDPP	European Regional Development and Protection Programme
ROM	Results Oriented Monitoring (Review by EU)
RT	Research Team
SDC	Swiss Agency for Development and Cooperation
ToR	Terms of Reference
UN	United Nations
WHS	World Humanitarian Summit

Executive summary

Background

Six years on from the 2016 World Humanitarian Summit (WHS) in Istanbul, the impetus to localize aid is stronger than ever. Humanitarian needs have increased, and crises have grown in number, duration, and complexity over the last decade. Forced displacement has also increased and taken on a protracted nature, with no end in sight for many. Humanitarian financing is overstretched to meet the growing and long-lasting needs, resulting in a growing financing gap. It has for a while been evident that the current model of humanitarian assistance is unsustainable, giving way to a growing recognition of the critical role local and national actors have as first responders, and more systemically, the importance of strengthening capacities at the local level to build strong structures that enable resilience of affected communities in the longer-term.

Against this backdrop, the European Regional Development and Protection Programme (RDPP) commissioned a qualitative, longitudinal study on the localization of aid in Jordan and Lebanon with two objectives. First, the study set out to examine the progress, challenges, and opportunities of localizing aid in Jordan and Lebanon from the viewpoint of national and local civil society organizations (CSOs), to contribute to the wider discussion on the localization of international aid. Second, the study provides a basis for internal learning on RDPP's approach to localization and capacity development.

The study drew on a combination of desk review of existing literature and mappings of localization of aid in Jordan and Lebanon, and qualitative data collection in the form of interviews and focus group discussions (summarized in the figure below).
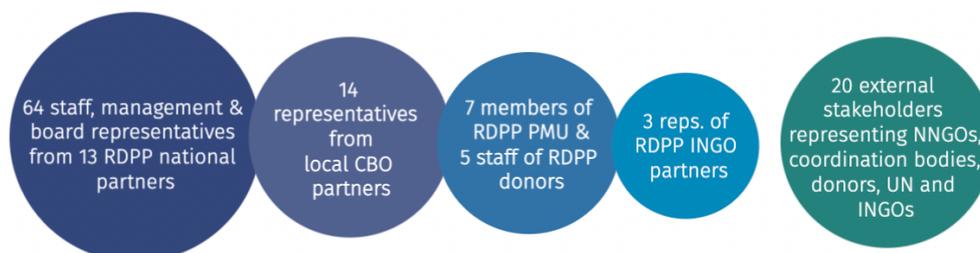
Key findings

The main study findings are summarized below, first with regard to local and national civil society actors' views on the broader localization of aid in Jordan and Lebanon, and thereafter findings related to RDPP's localization approach.

On the localization of aid in Jordan and Lebanon

The localization of aid calls for a fundamental change in how aid is planned and delivered, challenging all actors to work differently and challenging the existing structures of the international and national aid architecture. While local and national civil society actors note that there has been some progress toward localizing aid in Jordan and Lebanon, several challenges remain in relation to national ownership and leadership of localization, partnerships and capacity development, access to funding, aid coordination mechanisms, and advocacy and influencing.

The study found that there is a degree of **conceptual ambiguity** on what localization is and what it entails among both international and national actors. Grand Bargain does not reflect on the role of local and national actors, and as a result, the study found **limited local ownership of Grand Bargain**, and its related localization workstream, and more generally, an absence of a shared approach or common goals among local and national NGOs (LNNGOs). Nonetheless, there is a **sense of alignment between the localization agenda** and national and local NGOs' ambitions to

play a key role in the development of their country. In many cases, LNNGOs found that discourse on localization is solely focused on access to funding and strengthening local actors' capacities. Even though these are essential, they overlook important aspects such as advocacy, participation, inclusion, empowerment, and leadership.

In relation to **equal partnerships and support to tailored, needs-driven capacity development,** commitments made by international actors remain far from met. Most current partnership modalities do not challenge the unequal power dynamics in budgeting and decision-making. Also, many donors and INGOs continue to implement capacity development support that is standardized or purely compliance-related, with one size fits all approach that overlooks the local and national actor's actual needs. Most partnerships end after a project funding cycle, and most support continues to be short term. Furthermore, fundamental organizational gaps and needs are not capacitated, such as advocacy, internal learning, empowerment and leadership, and as a result, local and national NGOs find it challenging to sustain their activities, live in survival mode and find themselves donor driven.

Access to funding remains a key challenge; the study echoes other studies and finds that the quantity and quality of accessible funding is a key concern for local and national NGOs. The playing field is unfair; when trying to access available funds directly from donors, LNNGOs are met with several internal structural and systematic challenges. Similarly, it is evident that the donor community has limited capacities and insufficient systems to directly fund local and national NGOs. And in many cases, it is an un-friendly application process with requirements that do not match capacities within many local and national NGOs. Furthermore, the majority of available funding is short-term and project-based, often not covering overhead or core funding, which would allow the local actors to strengthen organizational needs or for example ensure the retainment of expert staff

Aid coordination mechanisms across all levels in Jordan and Lebanon are a great challenge, yet coordination is also recognized as an important opportunity for aid localization. There are existing international and national aid coordination mechanisms. Still, there is a sense of chaos, and as a result, many local and national NGOs lack a clear sense of coordination value. National coordination mechanisms have no or limited visibility, are centralized, and overlapping. International mechanisms remain international, and hence meetings are mainly conducted in English, limiting staff who can attend and meaningfully participate on behalf of local and national organizations. Coordination meetings can be a burden for LNNGOs; it is a cost and a time that is not budgeted, and it is a platform where attendees use a language and a jargon culture that is not well understood. Most importantly, it is a space where local and national NGOs do not find that they are heard.

The focus on humanitarian work and service provision, as well as Lebanon's economic and fiscal crisis, and Jordan's shrinking civic space, means **advocacy and policy influencing** has been down prioritized among many local and national NGOs. A main challenge is to the limited participation of local and national NGOs in coalition and network building. However, others are involved in advocacy and policy influencing in both countries and have achieved results in terms of both policy and social changes. Further, the donor community is active in advocacy of localization of aid by forming taskforces, fund research and promote discussions with national and international actors.

On RDPP's localization approach
Localization was considered an important underlying principle for engagement in the second phase of RDPP. The study found that **RDPP's approach to direct partnerships and financing** of local and national actors makes it a unique funding instrument geared towards localizing aid. In particular, this is due to the structure and management of the programme. The programme has both adequate internal human resources and relevant expertise and capacities in the RDPP Programme Management Unit (PMU) to partner directly with local and national NGOs. The RDPP PMU has managed to establish partnerships based on mutual trust, respect, and accountability despite the unequal power dynamic of donors and grantees.

The **risk of working with local partners** is a key obstacle for localization, however RDPP did not shy away from the risk. Instead, an initial risk assessment was carried out to allow for RDPP to work with a mix of high risk and lower-risk partners. One of the ways that risks were mitigated was

through the locally based PMU team that kept a keen eye on progress, was trusted by partners and was accessible for support with issues that arose during implementation. A key element in developing the mutual trust between RDPP PMU and the national partners was the selection, negotiation, and co-creation process. This required a sizeable investment timewise, but the usefulness of the co-creation and fine-tuning process cannot be downplayed.

The degree of ownership, self-determination and decision-making power that was allowed in the funding toward capacity development sets **RDPP's capacity development approach** apart from other approaches. The focus on broader organizational development in line with partners' own vision is unique and differs from the more typical project-based or compliance related capacity development support that national and local partners tend to receive. Given the high degree of ownership and self-determination, the capacity development activities funded by RDPP covered a variety of priority areas.

The **impact of RDPP's capacity development support** to local partners was not only felt in relation to the project activities, but also across the wider organization, and across the individual, organizational and institutional levels. At the individual level, organizations improved skills, knowledge, and performance through the training that their staff received. At the organizational level, local partners could concentrate on vision and longer-term strategies which gave many organizations a sense of empowerment to be able to work directly with donors, or to expand their operations to new areas. At the institutional level, a lot of RDPP's national partners have transferred the capacity development support they received through RDPP and other donors to their own local partners.

Despite a large project contract, the national partners in general felt it was feasible to balance an internal capacity development component alongside the project implementation. However, partners noted that some **gaps exist** within the RDPP's capacity development approach such as strengthening capacities for local actors to engage in meaningful coordination. The longevity of engagement was also raised as an issue, considering capacity development is a long-term and non-linear process. Finally, a missed opportunity was seen in relation to connecting partners for cross-learning, ensuring reflection and capacity exchange.

In addition to the findings summarized above, the study puts forth recommendations, presented in **Chapter 6,** to be addressed to different stakeholders involved in the localization of aid in Jordan and Lebanon. Following the more general recommendations, the study also includes a specific set of recommendations directed toward RDPP, with the aim to strengthen the programme's localization approach going forward.

1 Introduction

The impetus to live up to the commitments of the 2016 World Humanitarian Summit (WHS) in Istanbul is now stronger than ever. Humanitarian needs have increased sixfold over the past 15 years, and the majority of the world's most vulnerable people are living in fragile and conflict-affected contexts[1]. Crises have grown in number, duration, and complexity over the last decade, and the number of forcibly displaced has increased every year[2] with no end in sight for many. Humanitarian crises tend to take on a more protracted nature, lasting for decades[3], and humanitarian financing has been stretched to meet the growing and long-lasting needs. Nonetheless, there is a growing gap between humanitarian financing and the needs of individuals and communities affected by displacement, conflict, and crisis.

The notion that local and national actors have an essential role to play in responding to these growing vulnerabilities and urgent needs has been around for several decades[4]. The Grand Bargain agreement reaffirmed exactly that by placing localization firmly on the agenda for the biggest donors and humanitarian organizations. Signatories of the Grand Bargain[5] made six broad commitments, focusing on ensuring local organizations' access to financing, investing in their institutional capacities, forming more equitable partnerships, and ensuring national and local actors' inclusion and leadership in coordination.

In the face of an overstretched humanitarian system, with growing financing gaps, concerns related to cost-effectiveness have been a central part of the drive to localize aid. However, there is increasingly also a recognition of the critical role local and national actors have as first responders on the frontlines of emerging crises, and more systemically, the importance of strengthening capacities at the local level to build strong structures that enable resilience of affected communities in the longer-term.

The Syrian crisis has seriously impacted the neighboring countries in the Middle East who collectively host the world´s largest forced displacement crisis, and simultaneously are faced with serious economic and political crises to various extents. The region is facing growing vulnerabilities and basic human needs among the displaced and the national populations, not least in Lebanon, where the lack of political and economic reforms is felt also within the middle-class population.

Donors and international actors have seen the Syria crisis as an opportunity to operationalize the localization, working to strengthen local and national systems and actors to build longer-term resilience in displacement affected communities. Yet, six years on from Grand Bargain, the commitments are far from met in Jordan and Lebanon. It has become apparent that living up to the commitments requires system-wide shifts both at levels of policy, strategy, and practice in the delivery of aid both globally and in the two countries.

Against this backdrop, the Regional Development and Protection Programme (RDPP) commissioned this *Longitudinal localization study for RDPP national partnerships in Lebanon and Jordan (1 August – 12 December 2022)* in order to examine the progress, challenges, and opportunities of localizing aid in Jordan and Lebanon from the viewpoint of national and local civil society organizations (CSOs). The purpose of the study is twofold, to:

A) Contribute to the wider discussion on the localization of international aid and implementation of Grand Bargain by **collecting and giving voice to perspectives of national actors on**

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[1] Robillard, S., Atim, T. and D. Maxwell. (2021). *Localization: A "Landscape" Report.* Boston, MA: Feinstein International Center, Tufts University

[2] Urquhart, A., Girling, F., & Fernandez, S. M. (2021). *Global Humanitarian Assistance Report 2021.* Development Initiatives.

[3] UN OCHA, (2019). News: US$21.9 billion needed in 2019 as average length of humanitarian crises climbs. To read, click here

[4] Examples include UN Resolution 46/182 (1991), the Code of Conduct of the Red Cross and Red Crescent Movement and NGOs in Disaster Relief (1994), as well as in the Principles of Good Humanitarian Donorship (2003) and the Principles of Partnership (2007).

[5] There were 63 signatories constituted by 25 donors, 11 UN agencies, 5 international organizations (incl. IFRC and ICRC) and 22 NGOs.

localization, related to their roles and ambitions, and the gaps and opportunities, barriers, challenges, and risks they identify, pointing to recommendations for improvement.

B) **Review the RDPP approach to localization and capacity development**, including how the capacity development approach has impacted RDPP's partner organizations, in the perspective of the wider localization agenda and instruments in Jordan and Lebanon.

1.1 Approach and Methodology

The study research has been designed against the backdrop of the WHS and Grand Bargain commitments, drawing inspiration from NEAR's Localization Performance Measurement Framework (LPMF) and the literature and mappings on progress toward localization of aid in Lebanon and Jordan. Applying a *longitudinal, qualitative approach,* the focus of the study is on the national and local civil society partners' perspectives, and ambitions in relation to localization as they see it in practice. It has focused on capturing developments over time to catch critical moments, processes, barriers, or opportunities that have advanced or hindered the localization of aid across the two countries, and within the confines of RDPP. Longitudinal aspects were supported by consulting existing studies as a baseline, and by including retrospective perspectives in the discussions with RDPP´s national CSO partners which took place several times across the study.

The study also included regular check-ins with the RDPP Programme Management Unit (PMU) to update on preliminary findings and discuss emerging lessons. Interactions with relevant external stakeholders were also included during a four-month study period, allowing for both virtual and face-to-face dialogues prior to and during the first field mission. The second field mission focused on validation of preliminary findings by the RDPP's national partners through two validation workshops in Amman and Beirut respectively, and included presentation of findings, group discussions, and collective validation discussions of findings across all national partners within each country. All interactions with stakeholders were offered in both Arabic and English, with simultaneous translation applied in focus group discussions.

A participatory approach has been applied throughout all the study phases, both in terms of adapting the study to inputs from dialogues with national RDPP partners and in a close collaboration with the RDPP PMU. The values of a participatory approach[6] supported the study by fostering trust, learning and space to define, reflect and discuss localization and internal organizational challenges and risks among Management, Board representatives and staff of the 13 RDPP national civil society partners.

Given the qualitative nature of the study, the main methods applied have been a mix of in-depth, key informant interviews and focus group discussions[7], debriefing sessions with RDPP PMU supplemented by desk/document review and a light SWOT analysis applied to discussions on localization and organizational capacity development both as a programme component and as an organizational change process of the RDPP national partners. The main objective of the focus group discussions was to capture participants' understanding, definition, perception, and practice of localization as well as the main identified strengths, weaknesses, opportunities, and risks of localization for their context and organization.

Limitations

As is often the case with qualitative research, the study's many interactions with national civil society partners across several entry points of each organization were time-consuming. The study sought to include several external perspectives to triangulate data, but busy schedules limited the number of external interviews. The study has also included interviews and group discussions with the local

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[6] Bostock, J., & Freeman, J. (2003). 'No limits': Doing participatory action research with young people in Northumberland. Journal of Community & Applied Social Psychology, 13, 464-474.

[7] In total, the study team, interviewed and conducted focus group discussions with 64 members of RDPP partners representing management, field staff and board members. Conducted two focus groups with 14 members of CBOs members in Lebanon and Jordan. Also, interviewed seven staff from the RDPP PMU, five staff of RDPP donors', three RDPP International partners and 20 external stakeholders, including embassies, specialists, INGOs, coordination bodies representatives and one UN agency.

partners of RDPP's national partners to investigate the level of localized implementation approaches that national partners have applied within local communities. However, it was explained that within many communities there is a certain "visit fatigue" from the constant visits by representatives of donors, INGOs and monitoring and evaluation teams during the year. As meetings were not pushed by the study, it resulted in fewer focus group discussions than originally anticipated.

The study sets out to present the views of national civil society partners on localization of aid in Jordan and Lebanon, and therefore the primary data that has been collected is perceptions. Individual perceptions may differ and relate to how individuals or organizations are experiencing localization; however, individuals do not always have the full picture, nor do their perceptions always reflect reality. In order to qualify the perceptions of national civil society partners, the study has triangulated the primary data through interviews with other stakeholders and drawn on existing literature on localization of aid in Jordan and Lebanon.

Note on terminology

Localization has many definitions. However, this study takes its point of departure in the Grand Bagian six commitments to localize aid, drawing on the working definition put forward by OECD DAC that localization is *"the process of recognizing, respecting and strengthening the leadership by local authorities and the capacity of local civil society in humanitarian action, in order to better address the needs of affected populations and to prepare national actors for future humanitarian response.[8]"*

Referring to *local actors* is similarly a complicated and contested subject. For simplicity, this study aligns with definitions carried out by other actors, notably IASC Localization Marker Working Group (LMWG) and the OECD.

Local and national actors (LNAs) thus cover:

- *Local and national civil society actors,* which are organizations engaged in relief that are head-quartered and operating in their own aid recipient country and who are not affiliated to an international NGO. Hereunder, *National NGOs (NNGOs)* work in multiple sub-national regions, while *Local NGOs (LNGOs) & Community-Based Organizations (CBOs)* operations are limited to a specific location or community.
- *National, sub-national state actors and authorities,* i.e., the state, national government agencies, authorities, line ministries and state-led institutions in aid recipient countries.
- *Local and national private sector organizations*

Structure of the study report

The remainder of the study report has been structured as follows:

- *Chapter 2* provides necessary background on the context in Jordan and Lebanon, and including the humanitarian situation, and main characteristics of civil society organizations (CSOs) in both countries.
- *Chapter 3* covers the study findings on how local and national civil society actors view localization in Jordan and Lebanon, as well as the main challenges and opportunities related to national ownership and leadership of localization, partnerships and capacity development, access to funding, aid coordination mechanisms, and advocacy and influencing.
- *Chapter 4* contributes to RDPP's internal learning, covering findings on RDPP's localization approach, hereunder the programme's approach to direct partnerships and financing, and capacity development, presenting lessons learned and opportunities to carry forward in the next programme phase.
- *Chapter 5* presents the study recommendations for RDPP internal learning, and broader dialogue on localization and international aid.
- *Chapter 6* presents the authors' concluding remarks.

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[8] OECD. (2017). *Localising the response: World Humanitarian Summit – putting policy into practice, the commitments into action series.*

2. Context and background

The following chapter presents a brief overview of humanitarian context, civic space and civil society dynamics in Jordan and Lebanon. It aims to set the scene for the following chapters to better understand how RDPP and national partners perceive and practice localization, draw lessons for internal learning and contribute to the broader discussion on localization and international aid.

2.1 Jordan

Jordan is a constitutional hereditary monarchy in which the King plays a dominant role in politics and governance. The population exceeds ten million spread[9] across 12 governorates. Since its creation in 1921, the Kingdom has faced accumulative economic challenges, a lack of natural resources, semi-arid land, severe water shortage and vulnerability to regional political instabilities. The tribal system in Jordan is profoundly entrenched in society and functions alongside the formally established legal system, offering an alternative judicial system, and playing a political role. Jordanian social institutions, including the monarchy, and national and local governments, have relied on tribal communities to confirm national identity after independence in 1946 and to ensure the continuity of political and security support[10].
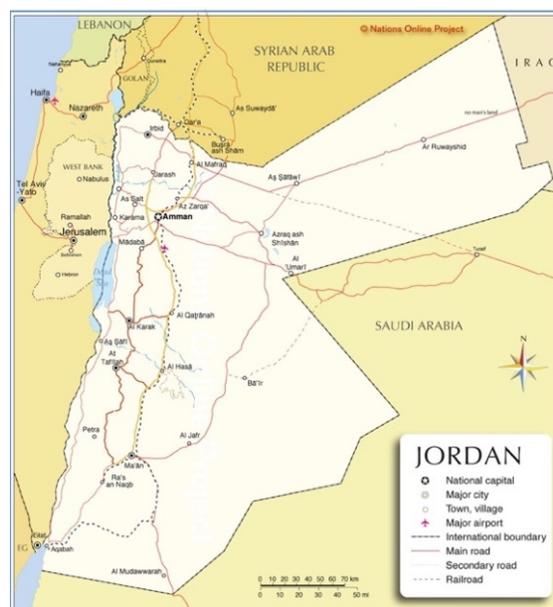
The Jordanian economy is described as upper-middle-income, considered one of the smallest in the region[11]. According to OECD/DAC 2019-2020 figures, Jordan was the 5th largest DAC recipient country of Official Development Assistance (ODA), receiving 2,322 USD million[12]. COVID-19 has significantly weakened the already fragile economy, and the high unemployment rates continue to be a challenge; unemployment reached 25% in Q1-2021, with youth unemployment rates reaching 48.1% and women's labor force participation at 14%[13]. The geopolitical realities of the Kingdom resulted in two key features: (a) state finances operate in a permanent deficit [14] and rely heavily on foreign aid, tourism, rents and remittances[15]; and (b) Jordan is the world's second-largest per capita refugee-hosting country[16].

According to the UNCHR and the UNRWA (2022) Jordan hosts about three million registered refugees: including more than 2 million registered Palestinians and 676,606 registered Syrian refugees. However, the estimated total number of Syrian refugees (including unregistered) is estimated to be 1.3 million[17]. 19.5% of Syrian refugees live in the two main refugee camps, Za'atari and Azraq, and the rest live in Jordanian towns and villages.[18] As of January 2022, 80% of Syrian

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[9] Ajlun, Aqaba, Balqa, Karak, Mafraq, Amman, Tafilah, Zarqa, Irbid, Jerash, Ma'an, and Madaba.

[10] Anderson, B. S. (2010). Yoav Alon, The Making of Jordan: Tribes, Colonialism and the Modern State (London: IB Tauris, 2007). Pp. 232. 29.50 paper. International Journal of Middle East Studies, 42(4), 705-706.

[11] Idris, I. (2016). Economic Situation in Jordan. K4D Helpdesk Research Report. Brighton, UK: Institute of Development Studies.

[12] For more click here.

[13] 3RP Regional Strategic Review, 2022

[14] Combaz, E. (2019). Jordan's environmental policies and engagement on climate change.

[15] Kumaraswamy, P. R., & Singh, M. (2018). Jordan's food security challenges. *Mediterranean Quarterly*, 29(1), 70-95.

[16] 3RP Regional Strategic Review, 2022

[17] acaps, 2022. Jordan Syria Refugees: Overview

[18] Karasapan, O (2022) Syrian refugees in Jordan: A decade and counting. Future Development. Brookings. To read click here

refugees in Jordan lived below the poverty line, and 60% are in extreme poverty.[19] COVID-19 has worsened the refugees' living conditions; according to the UNHCR, 92% of families reported resorting to negative coping strategies such as reducing food intake or accepting high-risk jobs[20]. A dire 64% are food insecure, and 55% are indebted to cover basic needs[21].

Jordan has not signed the 1951 Refugee Convention, nor does it have a dedicated refugee or disaster management governmental administration. However, the Jordan Response Plan 2020-2022 is led by the government, as the only national plan to deal with Syrian refugees. The State manages refugees' affairs through directorates in different ministries.

Civic space & civil society in Jordan

Jordan's civil society is young compared to Lebanon. While a number of professional associations and charitable organizations have existed since 1921[22], the year 1989 was a turning point for CS in Jordan due to the political liberalization measures taken by the government [23]. Following these liberalization measures, the quantity and diversity of CSOs grew; between 1989 and 1994 alone, the number of local and national NGOs nearly doubled from 477 to 796 registered CSOs.

More recently, the 2009 amendment of the Societies Law (22) also gave rise to a significant increase in the number of CSOs[24]. Today, Jordan has approximately 5700 CSOs, including cooperatives, social and charitable organizations, intellectual/educational organizations, sports clubs, chambers of commerce, unions, women's organizations, non-profit companies, family groups, environmental groups, and human rights groups[25]. Jordan also has so-called Royal Non-Governmental Organizations (RNGOs) established by Royal Decree rather than being registered under a ministry and formally independent of the state, which enjoy a privileged status. Some Royal NGOs are found under the Societies Law, but most work according to special regulations[26].

The historical development of the Jordanian state and economy has given the CS a challenging civic space in which to operate[27]. The state imposes on CS bureaucratic systems, administrative restrictions, and Laws operated and administrated by functionally distinguished government agencies and branches[28]. The Associations Law 33 of 1966 was active for more than 40 years, amended by Society Law 51 of 2008, then amended again with Society Law 22 of 2009. The Law covers all non-profit, non-political civil society organizations that provide social services. Under the Societies Law, the Registrar of the Ministry of Social Development is authorized to license and manages associations in Jordan[29,] Some associations are registered with the Ministry of Industry, Trade and Supply as non-profit companies. The Law requires all CSOs in Jordan to complete intensive

[19] Relief Web.(2021) Funding crunch forces WFP to scale back food assistance to Syrian refugees in Jordan. To read, click here

[20] UNCHR (2022) Durable solutions required for Syrian refugees in Jordan as Za'atari camp turns 10 . News briefing, 29 July 2022. To read click here

[21] International Rescue Committee (2020) A Decade In Search of Work: A review of policy commitments for Syrian refugees' livelihoods in Jordan and Lebanon. To read click here

[22] Between 1921-1948, there were around 50 entities of social societies, athletic and cultural clubs, chambers of commerce and political parties. In 1957 under Suleiman Al Nabulsi's government, political parties were banned, students and women's unions were prohibited, and leaders of labor associations were prosecuted. AL Urdun Al Jadid Research Center, (2010). Civil Society Index Analytical Country Report: Jordan 2010 The Contemporary Jordanian Civil Society: Characteristics, Challenges and Tasks.

[23] Sander, A. (2022). Rethinking shrinking civic space in the Global Souths–how development donors contribute to the restriction of civil society in Jordan. Democratization, 1-18.

[24] The amended Law allows for a group of seven or more Jordanian citizens to register an association of most types. Only four conditions must be met by anyone who wants to create an association: they must have Jordanian nationality, must be 18 years or older, must have legal competency, and must have no criminal convictions.

[25] There is no accurate number of CSOs in Jordan, the number range from 5,703 and 6,051 societies registered with the Ministry of Social Development. There are also some registered under the Ministry of industry and trade and Ministry of Waqf.

[26] Phenix Center for Economic and Informatics Studies (2021) Enabling Environment National Assessment Country report: Jordan. To read click here

[27] Brand, L. (2005). "In the Beginning Was the State...": The Quest for Civil Society in Jordan. In Civil Society in the Middle East, Volume 1 (pp. 148-185). Brill.

[28] Wiktorowicz, Q. (2000). Civil society as social control: State power in Jordan. Comparative politics, 43-61.

[29] Phenix Center for Economic and Informatics Studies (2021) Enabling Environment National Assessment Country report: Jordan.

paperwork. Government agencies can reject the application for any association or activity registration without providing any explanation. In addition, CSOs in Jordan face difficulties in receiving international funding, and the limited availability of domestic resources, which constrains their ability to act[30].

2.2 Lebanon

Lebanon is a republican parliamentary democracy with a hybrid political regime based on sectarianism;[31] a formal power-sharing agreement between its many religious communities and/or confessions[32]. The country's population of over 6.7 million people live across eight governorates[33]. Since its independence in 1943, Lebanon has witnessed several conflicts and wars[34].

The Lebanese economy is described as a lower-middle-income economy. According to DAC 2019-2020, Lebanon is ranked 5th non-DAC countries recipient of Gross ODA, receiving 0.50 USD million [35]. While Lebanon has a long history of instability and crises, the last 3 years have witnessed a rapid deterioration of the situation, as the country faced compounded political, social and economic crises[36]. Unemployment has grown in all governorates, reaching 29.6%, and the youth unemployment rate (15–24 years old) increased from 23.3% in 2018-2019 to 47.8% in January 2022[37]. The World Bank dubbed the financial and economic crisis a 'deliberate' depression, brought on by Lebanon's political elite's capture of the state and mismanagement of funds[38]. The financial crisis was compounded by the COVID-19 pandemic, further exacerbating existing vulnerabilities and humanitarian needs in the country. The final straw, the devastating Beirut port explosion, was one of the biggest non-nuclear explosions in history, leaving immense political and economic ramifications in its aftermath, in addition to the tragic human loss that it incurred.

Similar to Jordan, Lebanon has not signed the 1951 Refugee Convention, yet it hosts the second-largest ratio of refugees to native population globally, with an estimated 1.5 million Syrian refugees and over 200,000 Palestinian refugees residing in the country[39]. Lebanon has two humanitarian response plans to manage the multi-sectoral response in complementarity; the Lebanon Crisis Response Plan (LCRP), which targets the Syria crisis in Lebanon and the Emergency Response Plan (ERP), which addresses the most vulnerable Lebanese and migrants[40].

The political situation, financial collapse, and enormous inflation, and the Covid-19 pandemic have made the situation for vulnerable Lebanese households and refugees in Lebanon even more precarious. The most obvious impact is the rapid and severe deterioration of living conditions, as multi-dimensional poverty has doubled in the last two years, now affecting 80% of households in

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[30] Under the Societies Law, the government, can approve or deny registration of an association that lies with the Registrar of the Ministry of Development. The Law does not oblige the Registrar to justify a rejection. Although the applicant has the right to appeal against the decision to court, the lack of a stated ground for rejection makes it difficult to challenge— Phenix Center for Economic and Informatics Studies (2021). Enabling Environment National Assessment Country Report: Jordan

[31] The National Reconciliation Accord (Taif agreement 1989) ended the Lebanese Civil War and called for mutual coexistence among all Lebanese. The agreement established a hybrid political regime and a consociational democracy

[32] Kingston, P. W. (2013). *Reproducing sectarianism: Advocacy networks and the politics of civil society in postwar Lebanon*. Suny Press.

[33] Akkar, Baalbeck-Hermel, Beirut, Bekaa, Mount Lebanon, North Lebanon, Nabatiyeh, and South Lebanon

[34] Including 15 years of Civil War (1975-1990), the Israeli occupation of the South (1982-2000) and Israeli wars and invasions (1978, 1982, 1996 and 2006).

[35] See more here.

[36] World Bank Group. (2021). *Lebanon Economic Monitor, Spring 2021: Lebanon Sinking (to the Top 3)*. To read click here

[37] ILO (2022). Lebanon Follow-up Labour Force Survey – January 2022 Fact Sheet. To read click here

[38] World Bank Group. (2021). *Lebanon Economic Monitor, Spring 2021: Lebanon Sinking (to the Top 3)*. To read click here

[39] European Parliament. (2022). Briefing on the Situation in Lebanon: Severe and prolonged economic depression. To read click here

[40] Pilar Chaves, Tala Khlat. (2021). *Localization of aid in Lebanon: Mapping of the Aid Ecosystem in Lebanon.* Shabake Project

Lebanon.[41] Many households face food insecurity, as high levels of inflation leave them unable to cover costs of food and other basic services, such as education and healthcare. In addition, infrastructure, and basic services, which previously to a large extent were provided by the private sector, are on the brink of collapse, resulting in shortages of fuel, power, water, medication, and food.

The impact on the country's refugees is also severe. A 2021 Vulnerability Assessment of Syrian Refugees in Lebanon found that the current compounded crisis leaves nearly 90% of Syrian refugee households in a situation of severe economic vulnerability, unable to cover lifesaving needs[42]. In addition, the situation for refugees has become more politically precarious, as antagonistic sentiments towards refugees have reportedly grown in the face of growing humanitarian needs[43].

While international and national actors are working to address the rising humanitarian needs, there are many challenges. The Syria crisis has for the last decade been the basis for international actors' humanitarian operations in Lebanon, the country's recent downward spiral has introduced a slew of new challenges. The political and economic crises have increased the country's fragility and fragmentation, witnessed through increasing social unrest, growing crime rates, rising intercommunal tensions and bouts of sectarian violence. Lack of accountability, pervasive corruption and general misgovernance have left a deep-seeded mistrust of the state[44]. The compounded crises have made Lebanon an extremely complex environment for international actors to navigate, where the aid architecture increasingly is being called into question[45].

Civic space & civil society in Lebanon

Lebanon has a strong and vibrant civil society, with the region's most diverse and active NGOs[46]. The long history of war and civil conflict has fostered a high degree of political pluralism, which expresses itself through associational life. The historically weak central government allowed the citizens' self-help and decreased the regimes' ability to control civil society fully. Lebanese civil society has therefore played a leading role in responding to community needs and filling gaps in the public sector[47.]

The CSOs in Lebanon witnessed a significant rise during the Chehabist era (1958-1964) and further expanded after the Civil War[48]. On average, 250 CSOs were created annually in the early 1990s[49]. Today, the estimated number of CSOs in Lebanon exceeds 25,000, partly because Lebanese civil society has enjoyed a considerable margin of liberty compared to many other countries in the region. Civil society in Lebanon has an active charter and enjoys more freedom than most of the Arab countries. The state only needs an obligatory notification for an organization's formation, and there is no requirement for a minimum number of founders or minimum capitalization, and for the registration bodies, they are dependent on the Ministry of Interior and Municipalities.

[41] UN OCHA. (2022). Increasing Humanitarian Needs in Lebanon. Humanitarian Country Team report April 2022. To read click here
[42] UNHCR, UNICEF and WFP. (2021). Vulnerability Assessment of Syrian Refugees in Lebanon (VASyR). To read click here
[43] UN OCHA. (2022). Increasing Humanitarian Needs in Lebanon. Humanitarian Country Team report April 2022.
[44] Atrache, S. (2021). *Doing No Harm in Lebanon: The Need for an Aid Paradigm Shift.* Refugees International. To read click here
[45] Todman, W. and C. Harper. (2021). *Policy Brief: Lebanon's Growing Humanitarian Crisis.* Center for Strategic and International Studies. To read click here
[46] CS in Lebanon, along with Palestine and Morocco, is considered the most diverse and active civil society in the region
[47] Hawthorne, A. (2004). Middle Eastern Democracy: Is Civil Society the Answer?.
[48] Assi, K.A. (2006). *Lebanese Civil Society: A Long History of Achievements Facing Decisive Challenges Ahead of an Uncertain Future.* CIVICUS Civil Society Index Report.
[49] AbiYaghi, M. N., Yammine, L., & Jagarnathsingh, A. (2019). Civil society in Lebanon: The implementation trap. *Civil Society Knowledge Centre, 1*(1).

3. Challenges & opportunities for the localization of aid

This chapter examines the challenges, opportunities and risks that national civil society organizations perceive in relation to the localization agenda. It discusses alignment and ownership of the localization agenda, partnership and capacity development modalities, access to direct donor financing and support, aid coordination mechanisms, and advocacy and influencing activities of local actors. Every subsection concludes with the study's key takeaways.

3.1 Alignment and ownership of the localization agenda

While localization relates to *recognizing, respecting and strengthening leadership of LNAs,* an aim that inherently aligns with the expressed ambitions of civil society organizations in Jordan and Lebanon, some LNNGOs were dubious of the process that put localization firmly on the map. Critical voices among Jordanian and Lebanese civil society view the Grand Bargain agreement and its related localization workstream as an international agenda, one that only included international signatories, and was developed at a distance without ensuring that the LNAs it sought to empower had a seat at the table. While the consultative processes behind the World Humanitarian Summit intended to ensure the representation and influence of LNAs, the Grand Bargain still was felt to maintain the same power asymmetries in the international aid architecture that LNAs seek to redress through the localization agenda. As such (and perhaps more importantly), the Grand Bargain commitments are written for donors and international actors, with limited reflection on what the role of LNAs is in achieving localization, despite the call for local leadership.

Given that some LNNGOs involved in this study felt limited ownership of the Grand Bargain process, this section considers the ambitions of local and national civil society in terms of localization and whether they find the localization agenda aligns with their ambitions and goals.

Localization calls for fundamental changes in how aid is planned and delivered, challenging many different actors' ways of working and the existing structures of the international and national aid architecture. However, the actors involved do not have one common definition, nor are they driven by collective goals. Rather, aid localization is guided by actors' own priorities and ambitions.

National NGOs recognize that they do not have a common definition, nor clearly defined goals on localization. Localization is for example primarily seen by some LNNGOs as an approach or tool that can help LNNGOs to reach their own goals. On the other hand, others see localization as not just a means to an end, but also an end in itself, in the sense that greater self-determination, improved institutional capacities, and local leadership are ambitions they are working toward.

Conceptual clarity on localization - why it matters

The current study is not the first to note differing interpretations of localization in conversations with local, national, and international actors, even while treating localization as a universally accepted and understood concept. Global Mentoring Initiative (GMI) mapped out some of the differences in interpretation, that have very different implications for the outcome of localization:

- *Nationalization, promoting national staff across international actors.*
- *Decentralization, moving away from centralized decision-making or management structures and placing these closer to crisis-affected communities.*
- *Transformation, strengthening national capacities and leadership*
- *Multi-nationalism, building federation-like structures across global civil society*

While a process *nationalization* could appear as an opportunity for international actors to 'localize' from within, national organizations represented in the current study were critical of such an approach, finding it opposed to 'true localization'. On the other hand, *transformation* or a transfer of skills to national and local actors was stressed, and *decentralization* likewise found important, although recognizing that national organizations also require restructuring to decentralize. See more discussion in the GMI report listed below.

Source: Global Mentoring Initiative (GMI). (2020). *Localisation: Different interpretations, different outcomes.*

Since there is a lack of conceptual clarity on the 'localization agenda' among local and national (and international) actors, the study found that some question its alignment with their organizational ambitions. However, most LNNGOs in both countries share some expected outcomes or end results of localization, which include strengthened capacities of all local and national actors, including public institutions, participation as well as leadership, ownership, influence, agency, and equal representation between national and international actors across all levels of decision-making, as well as in coordination fora.

As national and local CSOs in both countries are vulnerable to domestic financial fluctuations as well as international priorities and allocation of global funds, LNNGOs' shared ambitions include having financial and organizational sustainability to respond to people's needs. They encounter growing vulnerabilities among both refugees and the local population while international funds continue to decrease, and they struggle to generate income to counteract this reality. Access to direct funding is very important, but also disproportionally dominates the discourse on localization across both countries, where LNNGOs would like to see greater emphasis on the *quality* rather than just quantity of funding, and on relationships based on more equal power dynamics.

The consequence of depending on international aid is that LNNGOs in both countries find themselves driven by donors' priorities which comes, in their view, at the risk of losing their own organizational identity and focus. Available resources often do not allow time for strategizing and long-term planning, and in the quest for funds LNNGOs acknowledge that they are forced to pursue earmarked/conditional funding rather than following their own programmatic and strategic ambitions and priorities. This concern is likely shared to various degrees across NGOs globally, including by INGOs, and is an inherent element of relying on external funding. Some LNNGOs argued that to counteract this, it is important to develop a clear organizational profile and expertise within one or few sectors, as it gives leverage to influence donors. When LNNGOs are willing to work across sectors, it is difficult to ensure relevant expertise within the organization in all sectors, and the feeling of being driven by donors is amplified.

International actors are largely perceived by LNNGOs as promoting own priorities through conditional funding both in terms of sectors, beneficiaries, and timeline. Moreover, as reflected by NNGOs, the support to local and national CSOs' capacity development continues to center around donor compliance demands rather than addressing the ambitions and identified needs of the local and national NGOs. In terms of financial sustainability, international organizations to a large extent continue to work with NNGOs as implementers of short-term projects, with no or little core funding/overhead, preventing the NNGOs from retaining qualified staff and without strengthening organizational capacities for strategy development and planning.

Across the two countries, NNGOs found that they are often challenged by donors and other international agencies in terms of their growth ambitions, which was not well received by most. This is because many NNGOs feel they have a stronger focus on strengthening expertise to deliver sustainable activities, than on growing their organization.

National initiatives to establish common platforms for coordination and advocacy on the localization of aid will be discussed further in Section 3.5 on local and national civil society's achievements on advocacy and influencing.

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Key takeaways

- Localization calls for a fundamental change in how aid is planned and delivered, challenging many different actors' ways of working and the existing structures of the international and national aid architecture.
- Critical voices among Jordanian and Lebanese civil society view the Grand Bargain agreement and its related localization workstream as an international agenda, one that only included international signatories, and was developed at a distance without ensuring that the LNAs it sought to empower had a seat at the table. Furthermore, the Grand Bargain didn't specify the LNAs role and responsibilities in the localization agenda.
- Conceptual clarity on localization is missing among international and national actors, and as such, local and national civil society in Jordan and Lebanon have no shared approach or common goals.

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- As localization relates to recognizing, respecting, and strengthening leadership of LNAs, the aim of the localization inherently aligns with the expressed ambitions of civil society organizations in Jordan and Lebanon.
- While discourse on localization tends to focus on the amount of funding to local and national actors, which is an important feature of localization, local and national actors stress the importance of a broader discussions on localization that also emphasize quality of funds and more equal power dynamics, as these are key challenges they face.

3.2 Partnerships & capacity development

Partnerships between international, national, and local actors are a central element of the localization agenda, with a Grand Bargain commitment on reducing barriers that prevent partnerships with LNAs, and another commitment to strengthening the capacities of these actors. Nonetheless, LNNGOs in Jordan and Lebanon attest that they experience a high level of "non-localized" partnerships with international agencies, including donors, and international NGOs. The majority of partnerships with international actors are still not seen by NNGOs across the two countries as 'true' partnerships. They maintain unequal power dynamics across budget, include limited risk-sharing, and planning and decision-making leave no or limited room for LNNGO and their 'partners' to be involved in shaping the partnership or activities.

Likewise, the Grand Bargain commitment on building national and local capacities is found woefully lacking in practice, with most capacity development approaches centered on donor compliance and reporting, rather than aimed at strategic and long-term, institutional strengthening. While "*capacity development*" initiatives have grown commonplace in partnerships, LNNGOs remain critical of whether they truly strengthen capacities, noting that many international partners apply standardized, repetitive, one-size-fits-all approaches, which fail to recognize existing capacities or allow organizations to define their own needs.

The following section presents national civil society organizations' experiences with partnerships and capacity development, and the challenges and opportunities that exist.

Donors

The donors in Lebanon and Jordan are signatories to the Grand Bargain and, as such, have a particular responsibility to ensure that the six commitments are followed in the two countries. However, donors and their overly bureaucratic systems are seen by LNNGOs as a major roadblock for localization to take place, evident in the low 'risk appetite' to engage in direct partnerships with LNNGOs and the continued prevalence of short-term, conditional funding. A recent donor mapping[50] corroborates this finding, indicating that few donors were working directly with national and local partners in Lebanon and Jordan, and that there is limited risk willingness to engage directly with national and local partners.

Additionally, some donors and INGOs request cost-sharing of up to 20% from LNNGOs, as a way to foster stronger ownership and sustainability; however, from the view of LNNGOs, this is a major obstacle to engaging in a partnership. Cost -sharing is a serious barrier for LNNGOs to engage because they do not have sufficient "own" funding accumulated, and often have limited additional sources of funding. The way NNGOs are able to provide funds for cost-sharing is through "internal" cost-sharing between projects; while this is often possible it relies on another donor's flexibility and willingness to allow funds to be used for gap-filling. However, it produces heavy administrative and financial demands, that often do not match the capacity of the LNNGO, posing risks across the LNNGOs project portfolio.

The NNGOs description of partnerships with donors across the two countries are mainly referred to as sub-contract agreements with them as national implementers, rather than as a real partnership.

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[50] Regional Development and Protection Programme (RDPP), Phase II, Programme Document

Project, strategic, technical, administrative, and financial tools are provided as part of the highly *conditional/earmarked* funding. There is no co-creation and interest in incorporating the NNGO's voice in the intervention's design, but rather close monitoring and control. If any capacity development is provided it is distinctly related to the compliance demands.

While this points to lack of progress, national partners also recognize that an increasing number of donors in both countries are interested in having a more direct collaboration with NNGOs. However, direct partnerships remain limited to a small scale through specific funding instruments or modalities. Therefore, only few LNNGOs had experience with a donor who sought to foster a sense of partnership, where space was provided for them to have a true voice in design and decision-making.

Likewise, capacity development is provided in accordance with donors' own identified needs, sometimes at an ad hoc basis. For some LNNGOs, donor's capacity development approach feels like an additional burden. They have to fill in assessment forms, but the donor decides which areas to support. At the same time, some partners have concerns about sharing their vulnerabilities and weaknesses with donors because they sense the lack of trust, and they fear of losing the fund.

In general, there remains a sense among national NGOs that many donors have a limited understanding of the reality on the ground, leading to inflexibility and limited confidence in LNAs. Donors' risk willingness and low confidence in LNAs was a recurrent theme across discussions with donors, international agencies, and local and national NGOs. Donors' hesitancy to partner directly with local and national partners was explained in terms of contextual, institutional, programmatic, and reputational risk (see Table 1 below). It should be noted that risk willingness has as much to do with the capacities of donors to engage in partnerships with LNNGOs as it has to do with LNNGOs perceived capacities.

TABLE 1: RISK CLASSIFICATION
Contextual risks, in relation to the politicization of civil society, degree of access to affected communities, or donors' knowledge of local capacities
Institutional risks, which relates to national responders' internal controls and systems, e.g., related to compliance, financial management, anti-corruption, or breach of anti-terrorism laws.
Programmatic risks, related to operational capacities of national actors to deliver assistance, as well as absorption capacity, reporting capacities etc.
Reputational risks, related to how direct support to local actors may be perceived to undermine donors' reputation, particularly when failing to assess partners' capacities or neutrality affects results
Adapted from OECD. (2017). *Localising the response: World Humanitarian Summit. Putting Policy Into Practice.* https://www.oecd.org/development/humanitarian-donors/docs/Localisingtheresponse.pdf

In relation to national actors' capacities, *institutional* and *programmatic* risks are at the forefront. Across both countries the study found that donors have limited confidence in local actors' organizational capacities, particularly in relation to compliance and due diligence. LNNGOs tend to have weak (or no) systems in place to ensure proper management of funds, or warning systems to detect and investigate financial mismanagement or misappropriation. LNNGOs in Jordan and Lebanon are aware of these shortcomings; however, they highlight that establishing and sustaining such systems calls for dedicated financial and human resources, which currently is not covered by the funding they receive. They also noted this was their key weakness in comparison to INGOs, with whom they compete for funds; INGOs tend to have organization-wide systems for financial management, warning and investigation of financial misappropriation that can be applied in national offices, and thereby have an easier time living up to donor compliance requirements.

Donors interviewed as part of the localization study also raised concerns related to *contextual* and *reputational* risks, noting that civil society in both countries are rather politized and not transparent in terms of their affiliations with governments, leading to a reluctance to risk taking by engaging directly with national actors and potentially "do more harm". In contrast, many INGOs have a documented track record of working with particular donors, making them easy 'go-to' partners for donors, even though this goes against localization.

Another reason why direct partnerships with local and national actors are viewed as high-risk interventions by donors relates to donors' own structural challenges: in general, many donors have inadequate support structures to manage many small grants, or to engage directly in capacity strengthening. Donors in general point to their limited resources to work directly with national and local civil society organizations; they have very few staff to oversee their overall portfolio and do not bring the expertise needed to engage with 'high-risk' partners (i.e., partners that require extra capacity development support).

It is noted by few donors, that if they want to pursue localization, they need to be more comfortable with taking risk, establish proper risk management and work longer-term with national partners, as localization cannot be projectized but requires a longer-term, programmatic approach. Some donors point to the fact that in terms of risks, working directly with international NGOs is not necessarily less risk taking than working with national partners and often also require labor intensive efforts from donors.

One of the ways in which donors work around the risks of direct partnerships with national actors is by using INGOs as an intermediary. Donors will partner with an INGO under the condition that they partner with national actors, outsourcing the management partnership and associated risk; however, the quality of the partnership is all too often not questioned by the donor, nor discussed with the LNAs, who tend not to have a direct line of communication with the donor due to the partnership set-up.

As such partner funding – where donors partner with an INGO, who then partner with LNNGOs – tends to concentrate a lot of risk with the local or national partner, without balancing these risks with adequate financial and capacities strengthening to mitigate the risk. The above classification of four main risk-sets are all relevant risks for national partners to mitigate as part of implementation. In addition to institutional and programmatic risks, national and local partners are as part of the society clearly also receptive to contextual and reputational risks. Adequate resources and support are seldom sufficient to address all risks.

INGOs

International NGOs are equally found by LNAs to pose a challenge to the localization of aid in Jordan and Lebanon and could benefit from adapting their partnership practices and approaches. LNNGOs report that the majority of INGOs continue to sub-contract NNGOs as implementers of a pre-defined project, or they establish consortia and include national partners mostly as implementers. In consortia and partnerships, INGOs take on the lead role, and receive the majority of the contract funds, while their LNNGO partners receive less funding, but are implementing the bulk of the project. Some NNGOs have been able to advocate for risk sharing within consortia, on the basis that the INGO sit with the overhead and therefore should take on a larger share of the risk.

While many donors push for consortia to encourage international-national/local partnerships, consortia are perceived as ineffective to sustainably achieving humanitarian and developmental outcomes, because unless donors require more equal power dynamics, unequal power dynamics persist. As a result, the inclusion of local and national partners' voice is missing and there is little space for their capacities to evolve. National and local NGOs find that they generally have a limited voice to influence the design of the intervention, despite their knowledge and understanding of the communities they work with and feel that this at times limits the outcomes they are able to achieve.

However, INGOs are not homogenous in their approach, and opportunities for good partnerships do exist; national partners recognize that an increasing number of international NGOs are good at promoting more equal and strategic partnerships with LNNGOs and support organizational capacity development as per needs defined by their local and national partners.

The study findings support the national partners' perceptions; for example, various stakeholders agree that partnerships and consortia are mainly sub-contracting agreements. As such, the national and local partners continue to be at the end of the value chain. Due to time constraints, efforts to strengthen capacities of LNNGOs mainly boil down to covering compliance-related capacity deficiencies. International NGOs bring many skills, but relevant capacity development of national organizations is not always at the forefront of partnerships and consortia, as seen by LNNGOs, and

they wonder if international organizations are following their exit strategies, "*as if their strategy is to stay on forever*".

Most INGO capacity development initiatives lack mentorship, mutual learning, and on-the-job support, and are not specialized or tailored to the specific needs and mandate of the organization. INGOs recognize that capacity development is a "blanket term" that is used generously, even when it only relates to adhering to donor requirements and compliance. Another key challenge that INGOs acknowledged to be an issue is the lack of standardization of approaches. One concrete example relates to child protection, where each INGO (or UN agency) has their specific approach and provide support to their implementing partners to ensure that this *specific* approach is followed when delivering support. However, from the perspective of NNGOs that have several sources of project-based funding in the same sector, this is problematic; they have to implement with several different approaches to child protection project-by-project, which poses an unreasonable burden and hinders them from developing their own approach.

On a positive note, the Lebanon Humanitarian INGO Forum (LHIF) is cognizant of the need for more standardization and coordination across capacity development approaches and has set a capacity development task force to look into how some of the tools and approaches could be streamlined, and information-sharing (e.g., on capacity assessments of specific organizations) could be institutionalized. A key issue from their perspective is their own upward accountability to their donors, which necessitates the compliance standards and related capacity development approaches that they provide to LNNGOs.

National and local actors across the two countries have different views on the way forward. In Lebanon national partners would like to circumvent INGOs as intermediaries, and thereby work and strategize more directly with donors. However, this requires a willingness from donors to engage local and national partners directly. In contrast, a large number of NNGOs in Jordan recognize the efforts of INGOs, as many INGOs have been present in Jordan prior to the establishment of some national actors. The INGOs' expertise in working in protracted crisis is therefore highly appreciated by most national partners in Jordan.

In Jordan INGOs are further recognized as relevant partners who bring unique value as advocators, whereas in Lebanon, INGOs are generally seen as non-localization actors. Across both contexts, LNNGOs are critical of international actors' knowledge and understanding of the local context, particularly at community level, emphasizing that LNAs are rooted in- and part of the communities they work in, and thereby better placed to understand and act on needs in a context sensitive way. While such critique of international actors may be historically valid, there is also a recognition that many INGOs (as well as UN agencies and donors) have *nationalized* their staff and are working toward *decentralizing* decision-making to bring it closer to local communities and contexts. However, as discussed in Section 3.1, while the process of nationalization or decentralization by INGOs may improve context awareness and sensitivity, it is not recognized as true localization by LNNGOs.

Discussions across the two countries and recommendations for the future role of international organizations identified coaching and mentoring as suitable areas for INGOs to focus on. Relevant areas of *coaching* include specialist support to develop staff competencies, skills or organizational systems and *mentoring* could entail support to review implementation, support problem-solving, brainstorming, and general sparring on ways forward on institutional strengthening.

To sum up, LNNGOs define a good partnership with INGOs as one based on equality, complementarity, and cross learning, where co-creation, decision making and contracts are equally shared between partners, including the overhead. In addition, NNGOs mentioned that good partnerships are strategic, and continue beyond a single project. A good partnership would result in strengthened capacities of LNNGOs when tailored and specialized capacity development initiatives are designed based on mutual learning and trust.

UN Agencies

The UN coordinates several overarching frameworks for the delivery of aid, hereunder the Regional Refugee Resilience Plan (3RP) guiding the regional response to the Syrian crisis, which includes a clear commitment to localization, and to enhancing local and national capacities. Nevertheless, since

commitments to the Grand Bargain were made in 2016, UN actors' efforts to localize aid in Lebanon and Jordan are found insufficient by LNAs.

As lead on international coordination, UN (and their back-donors) carry a special responsibility to ensure a comprehensive, coordinated, and consolidated humanitarian response. The various funding streams and frameworks, such as relief plans and humanitarian plans, are plenty and not supporting a common and collective effort according to NNGOs. A low hanging fruit related to the UN's role promoting localization relates to language of UN-led coordination forums and strategic frameworks. LNNGOs repeatedly noted that an easy opportunity to localize aid and enable more local leadership is the use of local language in coordination fora (discussed further in Section 3.4), and relatedly, to translate communication on the various frameworks agreements on which coordination is based into Arabic, to make it accessible to LNAs.

UN agencies have however, gradually structured their commitment to localization by investing in capacity development and encouraging INGOs to commit to the localization agenda[51]. OCHA is key in enhancing the localization agenda by ensuring LNNGOs' engagement within coordination mechanisms and structures. It focuses mainly on two areas: strengthening the coordination forums and ensuring, and supporting the ability of the national entities to be part of the coordinated response and structures under the leadership of the HC/HCT[52]

On an individual level, the experience with UN organizations as a direct donor or partner was generally positive among national partners in the study. This is because their experience with some UN partnerships was that it allowed them the space to influence planning and design and sharing of knowledge and expertise. The experience with some UN agencies also pointed to more focus on strategic, long-term partnerships, for example, UN Women, who had a 12-year strategic partnership with a Jordanian organization working on gender equality. There is also sense that some individual UN agencies recognize the need for and are investing more in outreach, working with new national partners, and new geographical areas and sectors. Furthermore, there is more recognition of capacity development than previously; for instance, OCHA in Lebanon conducted a capacity needs assessment for 35 NNGOs. 13 were selected for partnerships with OCHA, those who were not received structured feedback. In addition, OCHA funds two capacity development projects led by ACTED and TROCAIRE / Caritas.

In addition to UN agencies' mandate and coordination functions in the two countries, the UN also manages country-based multi-donor funds through the Lebanon Relief Fund (LRF), Lebanon Humanitarian Fund (LHF) and the Jordan Humanitarian Fund (JHF). Donors see these pooled funds as an opportune way to operationalize localization commitments on the financing of local and national actors, given that pooled funds offer risk-sharing within the Fund.

However, whether the pooled funds are able to live up to donors' aspirations as ideal localization instruments in practice is less apparent. In Lebanon, the LRF has evolved over the years to include direct funding and collaboration with national organizations to a greater extent. In fact, in 2022 more than 25% of the funding was allocated to national organizations, and the Fund has moved to include smaller national partners, where it only funded major national organizations previously. While these changes signal a commitment to localization, there are several shortcomings with the humanitarian pooled funds as localization instruments. First, the partnerships remain very short-term and project-based, which leaves little to no room for capacity development. Second, even though the Fund would like to include smaller national partners, it is restricted from engaging with LNNGOs that have low capacities and fail to pass the capacity development assessment, which de facto excludes a lot of smaller LNNGOs.

National and local government

Despite the differences between the national government in the two countries – *an absent and incapacitated government in Lebanon on the one hand, and a very strong and highly involved government in Jordan on the other* – they are recognized by LNAs to be key players in a successful process of

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[51] Christoplos, I., Hassouna, M. and Desta, G. (2018) Changing humanitarian practice on localisation and inclusion across the nexus. ALNAP Paper. London: ALNAP/ODI.

[52] Chaves, P. and Khlat. T (2021). *Localization of aid in Lebanon: Mapping of the Aid Ecosystem in Lebanon.* Shabake Project

localizing aid. However, currently, national civil society organizations find that the government is not properly engaged in the process and related planning and coordination, resulting in another challenge to overcome. The two countries differ in terms of the relationship between civil society and the government and how they perceive each other's role. In Lebanon, most NNGOs are service providers and fill the gap in the government's absence, while in Jordan, there is a sense that the government is a competitor.

Some national partners point to a lack of knowledge and understanding of the localization concept by governmental representatives. National partners in both countries find it challenging to work with the national government but continue to do so *because we must*". A core aspect of this work relates directly to localization, as they focus on strengthening local and national institutions and systems for inclusive and equitable service delivery. For example, in both contexts NNGOs are engaged with ministries to enhance governmental staff capacities in areas such as gender, children's rights, healthcare, protection and technical and vocational training (TVET). While some efforts are concentrated at the national level, NNGOs in both countries recognize that local government, such as municipalities in Lebanon and governorates in Jordan, are easier and more fruitful entry points to engage with, and that governmental structures across all levels need capacity support to live up to their role as the main planner and coordinator of aid.

In Jordan, LNNGOs think that the government prefers to engage with INGOs rather than local and national civil society organizations. The demands for reporting and their introduction of new procedures as part of the approval of the project's process is heavy for both LNNGOs and INGO partners. For example, one of the Jordanian NNGO experienced that the governmental approval process entailed consultations with seven different ministries, hereunder two ministries that were new to the JORISS process[53] and several others that underwent staff turnovers during the process, resulting in a very lengthy of the approval process. While LNNGOs may have an easier time navigating these national procedures, the time-consuming procedures are more manageable for INGOs who tend to have more resources at hand.

In Lebanon, the government is de facto a missing player because of low capacities and resource constraints related to the current financial and economic crisis, further exacerbated by mistrust in central government among humanitarian and development actors due to a poor track-record of financial mismanagement. The MoSA in Lebanon is leading one of the national frameworks for the delivery of aid, the Lebanon Crisis Response Plan (LCRP), and while NNGOs are engaged as sector co-leads under the LCRP, feedback was generally critical of the actual value it adds.

Discussions among national NGOs revealed a variety of collaborative approaches, but context-specific challenges hamper progress. In Jordan, some NNGOs engage in partnerships with the national government to strengthen technical capacities in ministries; however, it is time-consuming, and they see limited changes enacted in practice. In Lebanon, the context differs, and while many NNGOs have signed Memorandum of Understanding (MoUs) with the national government, the current context means they see limited to no progress or impact from these partnerships. However, across both contexts, good collaboration and partnerships exist at the local level with public institutions. For example, in Lebanon, the health sector was mentioned as the good example of a fruitful collaboration in terms of primary healthcare centers.

Local and national civil society organizations

The community of civil society organizations in both Lebanon and Jordan are largely described by NNGOs as mirroring the political, religious, and culture of society, and face the same challenges and opportunities. One challenge pertains to the limited transparency in the purpose, mandate, and non-profit/non-governmental nature of some LNNGOs. Paired with an environment described as competitive and with limited collaboration and coordination (as will be discussed further in Section 3.4), LNNGOs expressed that there is an issue with mistrust, misconceptions, and lack of confidence within the communities and across civil society. Most national NGOs stressed the need for greater collaboration across national civil society and acknowledged that the responsibility to bring about

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[53] Jordan Response Information System for the Syria Crisis (JORISS) is the national information management system which tracks and accounts for all financial resources under the Jordan Response Plan.

such collaboration sits with themselves. Some NNGOs suggested a partnership model that promotes partnerships and consortia between national and local actors, as a way of strengthening a local ecosystem of actors, stimulating collaboration across civil society, and improving coordination, learning and local leadership.

When entering into partnerships with a donor, UN agency or INGO, national NGOs across both countries admit that most often there is neither no time nor space available for the inclusion and participation of local NGOs or CBOs with whom they intend to partner in programme design. CBOs and other local partners are founded and based in communities, and when excluded from participating in the design of programming, the concern is that it limits sustainability and ownership, particularly in light of the short-term nature of most projects they are able to implement.

Capacity development of local organizations is another concern, as NNGOs seldom receive funding for horizontal support, but rather provide capacity development on a most urgent needs basis, admittedly mainly related to compliance but also some technical expertise. Some NNGOs recognize the responsibility they have, as they are best placed to advocate for inclusion of local and community organizations. Similarly, they note they have a responsibility to advocate for and support the identification of capacity development needs of the local CBOs with whom they work, who might not have clear reflections on which necessary capacities they lack.

In Lebanon, the current financial and economic crisis has had a detrimental impact on the NNGOs' capacities; some NNGOs and CBOs in Lebanon cannot run their basic day-to-day activities due to power cuts and limited internet access. Furthermore, due to the financial crisis and currency inflation, NNGOs in Lebanon are losing qualified staff to the 'brain drain', which weakens NNGOs' accumulated capacities.

In terms of localization of aid, capacity strengthening, and empowerment of local leadership, it seems clear that the local organizations most often constitute the missing layer in partnerships and consortia.

Key takeaways

- Most *donors* continue not to engage in a significant number of direct partnerships with LNNGOs in Jordan and Lebanon. On the one hand, this is due to a low-risk willingness and lack of confidence in LNNGOs' capacities, while on the other hand donors also lack capacity to engage with local actors and have a low appetite to take risks.

- The majority of *INGOs* continue to sub-contract NNGOs as implementers of a pre-defined projects, rather than engaging in 'true' partnerships with LNNGOs. As a consequence, INGOs take on the lead role, and receive the majority of the contract funds, while their LNNGO partners receive less funding, despite implementing the bulk of the project.

- Some *UN Agencies* are seen as more 'localized' actors because they allow LNNGOs to have a greater say in the partnership and project formulation. While UN-managed pooled funds are seen by many as a vehicle for localization, they continue to provide short-term funding with little capacity development.

- Nearly all LNNGOs report difficulty in working with *Government* actors in Jordan and Lebanon, particularly at the national level; however, opportunities for meaningful collaboration do exist at the local and regional levels.

- Mistrust and competition challenge meaningful collaboration between *local and national civil society organizations* in both countries. However, there is a recognition among NNGOs that they have a responsibility to lift the capacities of their local, community-based partners, recognizing that local NGOs continue to be at the end of the value chain with no funds for capacity development.

- Good partnerships are defined by an equal power dynamic, complementarity, and cross learning, where co-creation, decision making, and risks are equally shared between partners. Likewise, LNNGOs stress that good partnerships are strategic, and continue beyond a project.

- Most capacity development approaches, as experienced by national partners, are donor-driven or highly compliance related, while they are not contributing to the general strengthening of national organizational capacity, nor is it related to needs identified by national organizations.

- Localization calls for new partnership models between national and local actors to stimulate collaboration, coordination and learning on strengthen local lead programming and thereby support the civil society at large to works towards common goals in terms of localization and common modalities for implementation of localization.

3.3 Access to direct donor financing and support

While critics point out that access to funding has dominated discussions on localization, taking focus away from other important areas such as shifting power, agency and leadership to local actors, direct financing is undeniably a key challenge that underpins many other parts of the localization agenda. Funding remains one of the most visible and easy-to-measure areas of the Grand Bargain, with its target of channeling at least 25% of humanitarian funds directly to local and national actors; however, actual measurement at country level in Jordan and Lebanon is difficult to find, in part because of uneven reporting on Grand Bargain commitments. The general picture that emerges across global and national reports on the quantity of direct funding to local and national actors is that the 25% commitment is far from being met[54].

In general, NNGOs find that challenges with accessing direct donor financing persist and point out that their local counterparts (LNGOs) face even more challenges related to direct funding. Many of the challenges or barriers they face are structural, and either related to the capacities of national and local actors, or to the capacities, systems, and requirements of donor agencies (summed up in Figure 1 below).

Figure 1: Structural & systemic challenges to direct financing of local actors

For LNNGOs, the application process and management of direct grants is a challenge. In particular, the calls-for-applications processes is found to remain a high barrier to entry, because of missing capacities in organizations, and due to the high eligibility criteria of the national and local actors. Requirements for proposal writing are a burden, not least because the proposal is in English, but also because donors apply their own formats, templates, and procedures, making it difficult for LNNGOs (particularly LNGOs or CBOs) to apply. Adding to that, calls-for-proposals requirements tend to include a documented track-record and high standards for organizations' administrative and financial capacities, preventing many NNGOs from applying, despite their clear expertise and knowledge of needs in relevant communities. In general, resource constraints pose a major challenge in a competitive funding environment, where NNGOs compete with international organizations, who often have more resources in-country and access to HQ/ home-office support. This competition is particularly felt by national NGOs, who not only compete for funds with INGOs, but also with other NNGOs.

For donors, there may be several constraints on how funding can be allocated, such as anti-terrorism laws, governance, anti-corruption etc., that prevent direct funding of national actors or require greater analytical and management capacities. This is also tied to the management structure within the donor agency, e.g., whether in-country staff have decentralized decision-making authority, and the actual human resources and administrative capacity to manage grants and partnerships. For

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54 Urquhart, A., Girling, F., & Fernandez, S. M. (2021). *Global Humanitarian Assistance Report 2021*. Development Initiatives; and Barbelet, V., Davies, G., Flint, J. and Davey, E. (2021) Interrogating the evidence base on humanitarian localisation: a literature study. HPG literature review. London: ODI. To read click here

donors, all these constraints impact the flexibility of funding modalities available to NNGOs, and the quality of partnerships they can engage in (as was discussed in Section 3.2).

In addition to the structural and systemic challenges within donor agencies and national and local actors, a non-enabling political and legislative environment was noted as a significant barrier. In particular, the national governments in both countries undermine organizations' access to direct funding as they compete with national civil society for funding. This relates to another question raised by NNGOs on striking the 'right balance' between funding to different types of local and national actors; NNGOs were interested to learn what donor priorities are on how much funding should be channeled directly to the national government versus national civil society actors (or the private sector).

This becomes more critical and competitive given that there is a global decrease in humanitarian funding. The 2022 Global Humanitarian Assistance Report says that in 2021, the number of countries receiving international humanitarian assistance decreased, with the most significant decrease in funding experienced by Lebanon; in fact, humanitarian funding to Lebanon decreased by 44% from the previous year (from US$ 1,622 million in 2020 to US$914 million in 2021)[55]. UN OCHA's Financial Tracking Service (FTS) shows that Humanitarian funding in Jordan also has declined significantly over the last few years, from 936.9 USD million in 2016 to 393.2 USD million in 2022. It is important to mention here that not all funding is reported through the FTS, but it does give an indicative overview of the humanitarian funding trends.

Local and national NGOs stress that it is not just a question of the quantity of funding accessible to national and local actors, but equally important to discuss the quality of funds. Donors use a variety of funding modalities across both country contexts, which to varying degrees align with localization commitments, i.e., being direct or 'as direct as possible' as well as conditionality, allocations for capacity strengthening etc. (see Table 2 below).

TABLE 2: LOCALIZATION ACROSS DIFFERENT FUNDING MODALITIES

DIRECT		"AS DIRECT AS POSSIBLE"			INDIRECT
Core funding *Direct, unrestricted funds*	**Project funding** *Restricted funds, tied to specific activities, geographies & results*	**Pooled funding** *Multi-donor funds pooled together, accessible to local actors*	**Network funding** *Funding to International federation or network*	**Partner funding** *Funding another actor, leaving one transaction layer*	**Indirect funding /Cascade funding** *Funding that goes through several transaction layers*
Adapted from OECD. (2017). *Localising the response: World Humanitarian Summit. Putting Policy Into Practice.*					

On quality and conditions for funding, NNGOs note that they continue to experience rather short-term funding, with few opportunities and allocated funds for meaningful capacity development and organizational strengthening both of themselves, and of their local partner organizations. Further, a main challenge voiced by all NNGOs in the study is the limited or lacking allocation of funds for overhead /core funding to national and local partners, which is noted as a main barrier for the NNGOs to ensure and retain relevant staff expertise capacities, strategy development, and financial sustainability. Improvements were recognized, but they are not meeting actual needs.

Only a small group of NNGOs have experiences with direct donor funding, through specialized partnership modalities or funding instruments. On the other hand, there was more experience with direct funding from UN agencies, and as mentioned in Section 3.2, several NNGOs were more positive about these partnerships (than partnerships with donors and INGOs). UNICEF, UNHCR, UN-Women and the UN pooled funds were mentioned in this regard, as agencies willing to give direct project funding or pooled funding to LNNGOs. With regard to donors, GIZ was mentioned as a donor who works directly with LNNGOs in strategic partnerships – i.e., longer-term, programme support – but NNGOs noted that funds for capacity development were not integrated into the support, but rather added on an ad hoc, request basis. Likewise, the European Regional Development and Protection Programme (RDPP) and the Lebanon-based Project Shabake (which

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[55] The Global Humanitarian Assistance Report (2022) https://devinit.org/documents/1221/GHA2022_Digital_v8_IdHI18g.pdf

will both be discussed further in Chapter 4) were raised as examples of multi-donor programmes that specifically set out to directly finance LNNGOs and invest in their capacities.

Notably, a few NNGOs were also receiving funding directly from private foundations, in addition to 'traditional', bilateral donors. Private funding presents an interesting alternative to bilateral donors, because of different spending patterns and requirements. For example, global studies point out that private funding primarily is channeled to NGOs, contra bilateral donors channeling most funds to multilateral organizations, and that private funding tends to be more flexible, unearmarked, and with less time constraints[56]. While the study has insufficient examples of private funding to draw any conclusions related to localization, one NNGO highlighted the strategic partnership they have with Ford Foundation from whom they receive unrestricted funds for capacity development and strategy development. As the NNGO explained, "*Ford Foundation see capacity development as a whole intervention in itself,*" because they see building up emerging civil societies as a strategic purpose.

To conclude, only a few donors are ready to directly finance national actors, and often through designated projects, programmes (e.g., RDPP or Shabake Project in Lebanon) or designated funding instruments (e.g., OCHA managed pooled funds). According to NNGOs, the majority of donors operate with 'partner funding', preferring to work directly with INGOs who then partner with national actors.

Key takeaways

- Access to funding is a key obstacle, with a long way to go to meet the 25% commitment, particularly given the global decrease in humanitarian funding, which negatively impacts funding quantity and quality.
- Access to funding has focused more on quantity of funds to LNAs, while LNNGOs stress the importance of also considering the quality of funds.
- On the *quantity of funding*, there is still a long way to go, due to structural and systemic challenges within both national and local organizations (related to their organizational capacities) and within donor agencies (related to their policies, management set-up and risk willingness). In addition, the application processes are burdensome for LNNGOs, who experience significant competition for funding with other NNGOs and with INGOs and government.
- On the *quality of funding*, funding still rarely includes allowance for overhead, and core-funding remains equally rare. Funding continues largely to be shorter-term and project-based, which is at odds with capacity development, and creates funding gaps. In addition, some donors' requests for cost-sharing hinder LNNGOs from entering into partnerships.
- A non-enabling political and legislative environment is a significant barrier to accessing funding. The governments in both countries are competitors over funding, and undermining organizations' access to direct funding.
- Opportunities and good practices do exist, although on a small scale, where donors use specific modalities for localization and risk-sharing, e.g., pooled funding (LHF/JHF), multi-donor programmes (RDPP/Shabake)

3.4 Aid Coordination Mechanisms

Local leadership and meaningful participation in coordination is another key concern for localization, as studies show that local and national actors' engagement in coordination improves

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[56] Urquhart, A., Girling, F., & Fernandez, S. M. (2021). *Global Humanitarian Assistance Report 2021.* Development Initiatives; and Girling, F. (2022). *Private funding for international humanitarian assistance.* Development Initiatives Briefing. To read click here.

both the quality and coverage of humanitarian aid[57]. However, local and national actors view the international aid coordination mechanisms as one of the main challenges for localization in both countries, pointing to many structural challenges and to issues related to the 'culture' of coordination efforts.

The structure of the international UN-led aid coordination mechanisms has clearly remained international. The globally applied model for coordination of aid responses, which ensures an effective and recognizable model that facilitates quick interaction by UN, donors and INGOs who are familiar with the structure and logic, is seen as less intuitive for LNNGOs. The effectiveness and efficiency of the model did not organically include LNNGO representation, and as such did not adapt to the context. LNNGOs find that it is rather the context that needed to adapt to the system. While a few "localization" efforts were noted, such as the invitation and inclusion of LNNGOs to participate, these cement the international structures as the legitimate and main coordination fora. The Beirut blast in Lebanon in 2021 is a clear example of this, where international actors' arrival led to the establishment of parallel systems, disregarding the capacities, activities and structures already established by local and national actors who were the first responders in the immediate aftermath.

Another major issue, linked to the previous point around how the coordination structures have been established in the two countries, has to do with the many layers and parallel coordination structures, which place a high burden on national partners. As also reflected in Figure 2 below, which shows the distribution of actors who engage in coordination, the majority of NNGOs try to participate as much as possible. A few are active and take on a leadership role, co-chairing technical working groups, while a small minority do not engage in coordination with international actors. While this form of local leadership in coordination is one of the aims of the localization agenda, giving LNAs greater visibility, voice and influence, it should be weighed against the additional investment it requires of LNNGOs, some of whom question the added value for their organization.

Figure 2: NNGO engagement in international coordination structures in Lebanon and Jordan
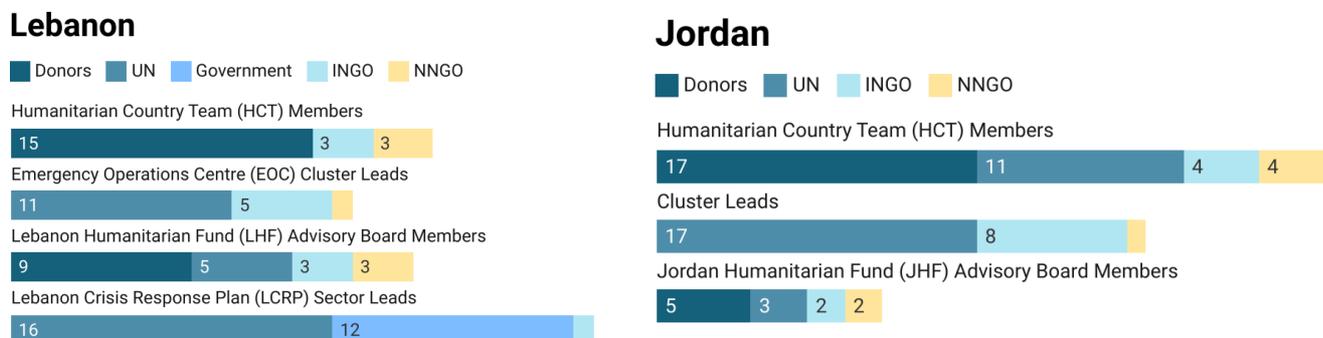

Figure Source: Clements, A.J. et al (2021) Localisation in Humanitarian Leadership: Profiling national NGO engagement in international humanitarian coordination structures in the MENA region. ICVA

Another structural issue pointed out by LNNGOs is linked to the high degree of centralization of coordination in both countries. Area-based urban coordination structures and Inter-Cluster Coordination Groups were established in Irbid and Mafraq in Jordan and regional coordination meetings in Lebanon; yet there is still a sense of centralization, as most coordination takes place in Amman and Beirut where most INGOs, donors and LNNGOs are based. The result is that coordination risks excluding local and national actors who lack the resources to travel to participate, as funding typically does not allow for investing in coordination efforts. The consequence is further that only the "usual suspects" among NNGOs are visible, and approached and supported by donors, INGOs and UN agencies.

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[57] IASC. (2021). *Guidance Note: Strengthening Participation, Representation and Leadership of Local and National Actors in IASC Humanitarian Coordination Mechanisms.* IASC Policy and Advocacy Group (OPAG). To read click here

A more 'cultural' challenge has to do with how coordination takes place and is understood by NNGOs. National CSOs in both Jordan and Lebanon describe the general coordination efforts facilitated by the international agencies and the local coordination networks as adding limited value to their organization and work. Meetings are described as lengthy and are generally not seen as very useful from the perspective of many LNNGOs, who find that more time could be allocated to the operational and technical side of things. Some NNGOs went so far as to say they were unsure of the purpose of the coordination fora in which they participate, but recognized that their participation was expected, nonetheless.

Another impediment to localization within coordination mechanisms in Jordan and Lebanon raised by most LNNGOs as an issue in both countries, is the fact that all coordination is conducted in English with no Arabic translation, in Jordan and Lebanon. This is a major concern for LNNGOs in Jordan (and also relevant in Lebanon), where in particular LNGOs have limited English capacities within their organization. This leaves only few management-level staff able to participate in the multitude of coordination meetings and may exclude smaller LNGOs or CBOs. LNNGOs also perceive the language used in coordination forums to be a barrier to entry, pointing out that the jargon of the international actors impedes some local staff from understanding and meaningfully participating in the discussions. As a result, only a small pool of staff are well-placed to engage in coordination, and these are often the ones who should be strategizing, mobilizing resources, or managing personnel, leaving coordination low on their priority list. Finally, the lack of trust between LNNGOs and international actors was described by the former as a reason why they do not prioritize participation and engagement in coordination.

National CSOs emphasized that ideally, a government should sit at the end of the table and take leadership of the development of their country and all aid coordination efforts. However, reality proves that this is not possible in the current environment for different reasons, including insufficient capacities and perhaps lack of political will to take on this role. As such, it is recognized that the international UN-led aid system is necessary to assume responsibility and take lead, to ensure needs are addressed. However, it is also emphasized by LNNGOs that existing and locally led responses are disregarded in that process. In Lebanon, for example, the international community was seen by LNNGOs as having established parallel structures to the locally led Blast response and thereby not supporting localization and local leadership. It was further noted by LNNGOs that national plans developed by governments in both contexts have limited effect, and therefore the international community have developed many different country frameworks and funding streams that appear to be working in parallel, rather than as a coherent response. This complicates coordination efforts and many NNGOs found it confusing rather than in support of implementation.

Parallel with the international aid coordination mechanisms, there are growing practices of LNNGOs that take local leadership through national and local coordination networks in both countries. Efforts are recognized by some NNGOs, while others are not aware of their existence but point to continuous overlap of implemented activities in communities. The lack of awareness among LNNGOs points to a non-existing or failed external communication and visibility strategy, as well as a lack of orientation. Retention of members was also an issue raised by LNNGO networks. Since national NGOs typically take lead, a key challenge for local NGOs is that the networks are centralized, and with non-existing "own" resources, travel cost are considered too high to prioritize participation in NNGO led networks and coordination. Another challenge is related to expectations among LNNGOs of what that coordination means; the perception that coordination equals access to funding in Jordan, for example, meant the Jordan National NGOs Forum (JONAF) initially had high interest and membership at meetings, which quickly declined when it became clear that it was not a funding platform.

In discussions, NNGOs at large reflected on the necessity to strengthen their own engagement in collective national networks, but also quickly point to the related challenges of cost, time, and added value. The current competitive environment for local and national NGOs combined with limited transparency and engagement of actors is only conducive for misconceptions and lack of trust and confidence.

LNNGOs have an important role and responsibility in localizing well-coordinated aid and taking a leadership role in coordination, which is currently hard to see taking place at scale in the two civil

societies. So, without a strong collective voice and common support to leadership, and without a clear presence and engagement in both international and nationally led coordination mechanisms, the opportunities for advocating, influencing, making change, and taking actual leadership continue to be missed opportunities.

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Key takeaways

- Aid coordination mechanisms are mainly international and remain a major challenge for LNNGOs at and across all levels. Coordination mechanisms are multi-layered, and with parallel structures, and as result, only a few LNNGOs find it meaningful to be engaged in coordination efforts.

- Key impediments to LNNGOs' meaningful participation in coordination forums include the language (i.e., coordination takes place in English, and use of international aid jargon), lack of dedicated staff and financial resources for coordination, a degree of centralization in coordination forums, and overall lack of clarity on purpose and the added value of coordination.

- While government should have a central role in coordination, this is not happening in either country. Reasons include insufficient capacities or lack of political will to take on this role. As a result, the international UN-led aid system has assumed responsibility and taken the lead to ensure that needs are addressed, while locally led coordination efforts sidelined.

- Space has been created for local actors to participate and co-lead sector working groups; but it's not just about being invited, it's about being part of decision-making and meaningful participation.

- There are growing practices of LNNGOs taking leadership through national and local coordination networks; however, visibility, recruitment, and engagement of members remains a challenge. Likewise, mistrust and competition pose a barrier for local and national coordination effort.

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3.5 Advocacy and policy influencing

Local and national civil society organizations are to varying degrees involved in advocacy and policy influencing; it is a priority and the primary mandate for some but is less of a priority for others. LNNGOs note that advocacy and policy influencing takes time, effort, and entails risk because it challenges the social and political status quo in a context where "*there is no culture for advocacy*." In amid of the socio-economic crisis in both countries, where some LNNGOs are in 'survival mode', advocacy becomes down prioritized.

A key challenge related to upward advocacy and policy influencing in both countries is the lack of enabling environments, particularly felt in Jordan. Local, national, and international NGOs work within a shrinking civic space, with limited media freedom, and are never autonomous from the state's control[58]. Furthermore, civil society in Jordan faces an othering discourse, a general atmosphere of suspicion, particularly NGOs working on 'sensitive' issues such as women's empowerment and gender equality.

In Lebanon, civil society is generally stronger (as discussed in Chapter 2) and enjoys more civic space and fewer governmental restrictions. However, the governmental absence and the sectarian division of the country affect advocacy work as some advocacy campaigns must rely on the support of

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[58] The government forces CSOs to inform them of the dates of their general assemblies and allow delegates of state authorities to attend these meetings. They must have the government's permission to amend their by-laws. Also, the government can dissolve a CSO's board of directors, appoint an interim board, and fine and dissolve CSOs if they do not conform to the regulations.

political or religious leaders and avoid calling for law reforms[59]. Furthermore, the last few years have witnessed an increasing narrative accusing some civil society organizations of implementing western agendas, particularly on social issues such as gender and LGBTQ rights[60].

In addition to the above, other challenges hinder NNGOs' work on advocacy and policy influence; first, the absence of a unified vision on thematic areas for advocacy work among actors; this is due to the lack or weak coordination among actors and competition for funding. Second, with humanitarian funding linked to the Syria displacement crisis being the predominant funding source in both countries, broader advocacy and policy influencing is not always a priority (on issues not related to refugees), particularly not for the many LNNGOs who focus on service delivery; third, advocacy is a very long walk, and it requires challenging the current and deeply rooted socio-political structures in both countries, which entails higher risks, particularly with subjects considered culturally or politically sensitive.

Despite the many challenges described above, NNGOs feel there is a margin for advocacy and policy influence, and that they are able to make a difference through their engagement. For instance, in Jordan, some NNGOS are involved in coalitions to push for legal reform for agriculture workers, update strategy for child labor, the campaign against early marriage, entrepreneurship law, legalization of home-based business, flexible working hours, work permits for Syrian refugees and establishing the human economic development platform. In Lebanon, some NNGOs are members of networks and coalitions advocating against gender-based violence, positive masculinities, mental health and well-being, sexual harassment at work, child marriage, submitting shadow reports (governmental commitment against torture), human rights, including refugees and migrant workers' rights, the right to a fair trial, monitoring and reporting human rights violations.

NNGOs' approaches to advocacy include research and studies, media and social media campaigns, raising awareness of local communities, lobbying political and religious leaders and international actors and participating in national, regional and international working groups and sessions.

Advocating for localization

Another area where LNAs have been active in advocating is toward a more localized aid architecture. Since 2016, NNGOs worked alongside international advocates for localization in Jordan. In 2019, a Localization Task Team (LTT) was formed by the Humanitarian Partners Forum (HPF), chaired by UN Women and the Jordan INGO Forum (JIF), and co-chaired by JONAF. The LTT includes national and international actors focusing on gender-responsive[61] localization and it aims to encourage Jordanian LNNGOs to participate in strategic fora (such as the HPF), enhance partnerships, and advocate for more direct funding to LNNGOs. Also, there are thematic forums, such as HIMAM: Coalition of Jordanian Human Rights Civil Society Organizations, Shama'a network (combating violence against women network) and others. However, outcomes and visibility are limited, and evidence of progress is hard to measure.

Likewise, the national NGO forum in Jordan, JONAF, has taken on a role in localization advocacy efforts, e.g., by facilitating events for members to seek a common definition and approach, discuss challenges and opportunities related to implementation of localization and identify needed capacities of national organizations to localize aid. However, in Jordan alliances and established platforms for dialogue are not thriving due to lack of engagement and participation of civil society.

Several national and international actors in Lebanon have also invested efforts to promote localization since 2016. Some national networks in Lebanon also take on this advocacy role, notably the Lebanon Humanitarian and Development NGOs Forum (LHDF), which has an advocacy workstream invested in highlighting challenges for LNNGOs on localization of aid. Moreover, a Localization Task Force (LTF) was formed in Lebanon under the Shabake Project and led by a Coordination Committee, which includes Live Love Lebanon and LHDF (discussed further in

[59] AbiYaghi, M. N., Yammine, L., & Jagarnathsingh, A. (2019). Civil society in Lebanon: The implementation trap. *Civil Society Knowledge Centre*, 1(1).
[60] Chaves, P. and Khlat T. (2021). *Localization of aid in Lebanon: Mapping of the Aid Ecosystem in Lebanon.* Shabake Project
[61] Calling for quality and sustainable funding for local women-led and women's rights organizations (WLOs and WROs).

Section 4.3). The LTF focuses on two main areas; stronger partnerships, accountability and effectiveness, and strengthening capacities of local CSOs in Lebanon.

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Key takeaways

- Local and national civil society organizations are involved in advocacy and policy influencing to varying degrees. Due to several factors, such as the economic crisis and a lack of advocacy culture, some LNNGOs across both contexts have down-prioritized advocacy activities.

- Some organizations see themselves as service providers, where advocacy and influencing are outside of their core mandate; other LNNGOs specialize in research, advocacy and influencing, and are active across several levels of society.

- Many of the challenges related to coordination also apply to advocacy and influencing. While LNNGOs do engage in advocacy, they face difficulties in building coalitions, common goals and a collective voice.

- Advocacy gains are often incremental, and require a significant time investment. Advocacy also often entails risk due to social and political opposition, particularly on contentious issues.

- Nonetheless, LNNGOs have had an impact - many examples exist of changes brought about due to their efforts across two levels: advocating to national government for *policy change* and engaging local government, decision-makers and community leaders to enable *social change*.

- Several LNNGOs in Jordan and Lebanon are involved in advocacy on localization; this includes forming task forces, research and engaging with national and international actors in discussions to promote aid localization.

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4. RDPP's localization approach – Internal learning

4.1 RDPP´s approach to localization

The following chapter sets out to review RDPP's approach to localization, looking to synthesize learning on what has worked well, where challenges have arisen, and which gaps exist, comparing RDPP's approach to other localization instruments in Lebanon and Jordan.

Localization: an engagement principle

Localization was considered an important underlying principle for engagement in the second phase of RDPP. As such, it has not been treated as an objective of the programme, but rather as an overarching approach which guides how the programme engages in partnerships, and with whom. Localization clearly has an elevated status in Phase II of RDPP, however, the programme offers no specific definition, framework, or approach to localization. Likewise, while RDPP's donors all are signatories of the Grand Bargain agreement – Switzerland and Denmark even taking a leading role in the localization workstream as co-conveners – they also lack a common, institutionalized definition of what localization means to their organization.

Both across literature on localization and in the discussions that arose during this study, it is evident that there are many different interpretations of what localization means across different levels and stakeholders (as was discussed in Section 3.1). Several of RDPP's donors, for example, noted that they tend to apply a broader conceptual understanding of localization than the six commitments articulated in the Grand Bargain agreement; localization, in their view, also relates to strengthening the *diversity* of civil society, or strengthening a local *ecosystem and networks* across stakeholders, going beyond typical humanitarian and development actors to include a *broader palette of local actors*, in particular emphasizing the private sector.

What has RDPP's ambition been when applying localization as an engagement principle? The programme document gives some guidance on RDPP's underlying priorities on localization, hereunder engagement in direct partnerships with local actors, multi-year, direct financing to gradually shift responsibility from international to local partners, developing their capacities, and coordinating with other donors to explore synergies. More specifically, it states:

> *"In phase II, RDPP will aim to prioritise direct partnerships with local actors and by providing direct multiyear financing RDPP promotes long term planning of local stakeholders. Where direct financing would not be possible from the beginning of the partnership, it will be sought to increasingly shift responsibility from international partners to local actors. Hence, partnerships may constitute international and local actors together, provided there is plan for gradual transfer of responsibility to the local partner in the course of implementation. (...) RDPP will coordinate as appropriate to explore synergies with other donors, such as AFD, SIDA, SDC and ECHO that have capacity building of local partners as a priority. To further support the localisation principle, partners will be encouraged to include meaningful capacity development in proposals through the inclusion of allocated activities and budget. The PMU will support this and the localisation principles in general through the dedicated focus of the Partnerships and Localisation specialist in the Programme Management Unit (PMU), who will work with partners to identify capacity building needs and support their development."[62]*

The study found that in practice RDPP's approach to localization in particular concentrates on two interrelated features: **direct partnerships and financing of national and local actors** and **a tailored capacity development component**. These two features are unfolded further in the two subsequent sections.

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[62] Ministry of Foreign Affairs of Denmark. (2021). *Regional Development and Protection Program in the Middle East (RDPP II) October 2018 – December 2022: Programme document*. (Updated 10.09.2021). p. 10-11.

4.2 Direct partnerships & financing

From the outset, RDPP has had a strong partnership approach. Phase I of the programme was implemented through 45 strategic partnerships with multilateral organizations, international NGOs, local NGOs and academia, where approximately one fifth were local NGOs (21%).[63] While RDPP Phase I was not specifically designed to emphasize localization, both an evaluation and ROM Review found that its strong commitment to working with local partners and developing local capacities to be a key strength of the programme.

In the design of Phase II, RDPP therefore carried out a donor mapping which found that few donors directly fund a significant number of local partners, and particularly not for longer-term humanitarian projects, where they also strengthen capacities[64]. RDPP Phase II has made an active decision to bridge this apparent gap and set itself apart from other donors and instruments. As a result, Phase II of the programme established direct partnerships with 13 national organizations, amounting to 59 % of the committed budget of RDPP for partnerships.

Most of RDPP's donors do not engage in direct partnerships with national NGOs in Jordan and Lebanon, because their internal systems and capacities are geared more toward larger grants, which come with heavy compliance and reporting requirements, that are misaligned to the typical local actor's absorption capacities, human resources etc. (challenges that also were discussed in Section 3.2). As such, there is a clear value addition in a funding instrument like RDPP, which is geared toward working with local actors, and has the human resources and internal capacities (in the PMU) to work directly with and to strengthen national partners' capacities.

> "We began as a high-risk partner, but with all the capacity development support, we are safe now. RDPP really believe in localization, that's why they selected us. They have many options, and everyone wants to work with RDPP; being chosen by them [despite the high-risk status] is a testimony to their localization approach."
>
> -RDPP national partner

From the perspective of RDPP's national partners, the PMU made a concerted effort to establish a partnership where their voice was heard and respected. Nearly all of the national partners spoke of a good balance between being given space and ownership of their projects and organizational development and receiving hands-on guidance and support from RDPP. Despite the unequal power dynamic in a donor/grantee relationship, the partnership between the RDPP partners and PMU was felt to be based on mutual trust, respect, and accountability.

> "RDPP gives you a serious exam, but they don't want you to fail."
>
> "They give us freedom, but they make you want to be accountable to them."
>
> -RDPP national partners

Balance is a key word in this context, because both the PMU and national partners indicated the challenges and risk associated with partnerships, particularly when a donor/grantee power dynamic is at play. From the PMU's perspective, being 'too close' could result in the chain of accountability falling apart, going from partners to co-implementers, or risk becoming patronizing toward the partner. On the other hand, giving partners too much space could result in the PMU being unaware of issues that could de-rail implementation, because partners waited too long, or were afraid to ask the 'donor' for help. National partners' perspective mirrors these challenges, noting that donors that are too close have a tendency to 'micro-manage' and create an additional reporting and communication burden for staff; on the other hand, donors that manage from a distance tend to be out of touch with the reality on the ground and are therefore not approachable when issues arise.

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[63] Tana. (2018). *Evaluation of the Regional Development and Protection Programme in Lebanon, Jordan and Iraq (2014-2017).* Copenhagen: Ministry of Foreign Affairs of Denmark. p. 28.
[64] Ministry of Foreign Affairs of Denmark. (2021). RDPP II Programme Document. p. 10-11.

The selection & co-creation process

A key step in developing the mutual trust in the partnership was the selection and co-creation process. All national partners responded to the Call for Proposals with their concept note for a project. The RDPP PMU selected partners to take forward based on pre-defined selection criteria which gave weight to national and local actors, keeping a balance between countries and thematic programmes areas. A decision was made to consider a mix of more established and less well-known actors, but ultimately deliberating on whether the organizations had the ability to deliver or not. The study finds that RDPP selected a variety of national partners – ranging from NGOs with a humanitarian, development or advocacy and research mandate to TVET centers and to semi-governmental organizations[65]. Beyond RDPP's direct partners, the programme also reaches and supports a wide range of CSOs and CBOs indirectly, through the local networks and working groups that it supports through its national partners. These networks inter alia include the Persons Affected by the Syrian Crisis (PASC) and My Work, My Rights! network and their 40+ CSO / CBO members in Lebanon, and the Shama'a network of over 90 civil society actors in Jordan.

Risk willingness often is the sore point for international actors looking to localize aid, owing to the perception that local actors inherently are more risky partners than international actors (as discussed previously in Section 3.2). With RDPP, as part of the initial dialogue with all partners, an initial risk assessment was carried out of the partners to identify risk levels and areas in need of immediate addressing, which mainly looked into organizations' financial, procurement and internal HR policies. The conclusions of the assessment informed the partnership monitoring plan for each individual partner. To this end, partners were categorized according to risk level, however a 'high risk' classification was not grounds for exclusion of partners. Rather, 'high risk' was understood as needing extra capacity support; as such, these partners were given more structured capacity development support, in order to live up to some minimum criteria, in addition to the capacity development needs they identified themselves. Risks were thus mitigated by more 'compliance-focused' capacity support to build up stronger internal systems, procedures and management structures, i.e., a procurement policy, sub-granting procedures, etc. and allowing for higher degree of diversity among the selected partners.

"The unique thing about RDPP was the co-creation and development of our proposal. It allowed us to get to know one another. Their involvement at that early stage was great."

"After the proposal, there was a long co-creation process which took almost a year. It wasn't just us and RDPP – we also engaged our partner, which meant they had an upfront investment – and that helped our partnership with them."

-RDPP national partners

As part of the negotiation process following the selection of new partners, the RDPP PMU decided to pilot a co-creation process on four of the selected concept notes from national partners. The co-creation process was described by the PMU as an intensified negotiation process, where the partner organisation, possible sub-partners, and the RDPP PMU, engaged in developing the project idea presented in the concept note into a full project document. The PMU arranged for a 5-day workshop with select partners, a process that allowed both parties to get acquainted, and to dig down into the project proposal and discuss areas of improvement.

While the co-creation process was described as intense by both the PMU and the national partners, feedback from the partners who participated in the workshops was very positive. Partners explained that the positive impact of co-creation was threefold: i) it improved the project design and the overall quality of narrative and logic in the eventual project documents; ii) the investment of time also supported the development of stronger partnerships and the relations between national partners, their local partners, and the RDPP PMU; and iii) it was viewed as a form of capacity development, as the sparring and technical inputs provided by the RDPP PMU were seen as transferrable to national partners' other project proposals. From the perspective of the PMU, it was noted that the co-creation started the partnership off in a different way that grew trust in the partners, which also meant that RDPP was able to partner with some organizations that would not typically have been

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[65] For example, the Jordanian National Commission for Women (JNCW)

considered viable partners. As such co-creation process emerged as a cornerstone of RDPP's value addition.

Even for partners that did not undergo a full co-creation process, there was a negotiation and fine-tuning process. This process between the RDPP PMU and partners was viewed by both parties as time-consuming and somewhat taxing on resources. In particular, this is because it turned out that most partners and the RDPP PMU needed significantly longer to reach a final programme document that the PMU deemed ready for contracting. As such, the process took around 6 months for most partners, but for some it took up to a year.

The time and resources were however not spent in vain. Several of RDPP's partners expressed that the process allowed them to elaborate on their project concept; they were challenged by the RDPP team along the way, but generally still had a strong sense of ownership. Sitting with a "donor" and unfolding a project proposal was also seen as a valuable learning process, giving partners transferrable skills to take into future proposal writing processes. However, feedback was not unanimously positive: a minority of RDPP's partners expressed a sentiment that RDPP imposed some elements onto their project, which followed them into the implementation phase, and made it difficult to deliver the expected results.

Management, processes and procedures

Many of the same elements that were discussed in relation to the co-creation phase carried over into the implementation and day-to-day engagement between the RDPP PMU and partners. Most of the partners found the RDPP PMU to be sufficiently flexible, and in touch with the specific context on the ground, which was critical when looking at the very volatile and complex context partners were operating in, particularly with the economic collapse in Lebanon, and the many challenges to project implementation presented by the COVID-19 pandemic.

The programme implementation and necessary adaptations illustrate that these contextual challenges and risks impact national and international partners in different ways. For example, while national partners faced the same restrictions as others during the pandemic, their networks and staff for a large part remained in place at the sub-national or local level. While many INGOs had to pause activities, several of RDPP's national partners were able to continue to reach beneficiaries. In some instances, national partners were able to negotiate favourably with local and national authorities allowing them to navigate movement and curfew restrictions during lockdowns. While this is just one example, it serves to nuance the discussion on the inherent 'riskiness' of engaging with national partners (versus international partners). In discussions with the RDPP PMU, they also challenged the idea that LNAs are far riskier to engage with, however noted that the INGOs tend to be better at communicating the risks, which may make them *appear less risky* to donors. Therefore, one way to mitigate the risk was linked to encouraging openness and trust, so partners would feel comfortable raising issues in a timely manner and being open to adaptation to meet a volatile context.

Adaptive management was to a large degree possible due to the decentralized structure of RDPP, with a strong presence on the ground, that allowed the PMU to follow context developments closely and discuss grounds for adaptation with partners as issues arose.

However, there were also concerns expressed in discussions with partners, for example, on MEAL indicators that were experienced as rigid, as some indicators remained static despite significant changes to the context for the worse. A few partners found this to negatively impact their ability to attain the expected results and therefore saw RDPP as somewhat inflexible in that regard. While partners may see RDPP as a donor because of their funding and power relations, it is important to recognize that RDPP is a programme with its own set of donors, to whom the programme is accountable and held accountable to the same results framework and indicators. In this manner, the RDPP PMU's ability to be flexible toward partners was dependent on the programme donors' flexibility. For the most part, however, partners found the programme flexible and adaptive, and several mentioned that the foundation of trust established through the partnership development and co-creation processes enabled subsequent discussions on adapting programming and risks.

In general, it was stressed that the RDPP PMU had ensured the staff with relevant technical expertise to guide partners both in the co-creation and partnership phases as well as in the day-to-day implementation and collaboration. When issues arose, often in relation to financial management, monitoring and evaluation, the RDPP PMU would bring quality support to solving issues. It was clear to most partners that the PMU were familiar with the projects and reading submitted reports and engaged in progress and developments.

4.3 RDPP's Capacity development approach

Capacity development is, in many ways, the foundation of RDPP's localization approach, as it underpins and enables partnerships with local actors, shifting responsibility from the international system and actors to local ones while also ensuring that the local partners have the capacities needed to lift the programme. In Phase II, RDPP developed a clear approach to capacity development concretized in an approach paper. Allocating funding through the project budgets, RDPP's capacity development approach paper explains that "*RDPP adopts a flexible and needs-based capacity development approach to ensure organizations have enhanced their institutional capacities to deliver quality and efficient response to the communities on the long term.[66]*"

The RDPP approach is not focused on the partner's ability to deliver better outputs or outcomes per the RDPP results framework but on enhancing the capacities of the national partner based on their vision and identified gaps in their organisation. As such, the strategic objective of RDPP's approach sets it apart from many other capacity development approaches, which focus on enhancing a partner's ability to be compliant and deliver on a specific set of activities.

The process was broken down into four steps - facilitated and supported by RDPP´s Localization and Partnerships Specialist, who worked with each partner and continued to follow and monitor the implementation throughout the partnership. The four steps were: i) a needs assessment of partner organizational and institutional capacities and vision for their organisation; ii); the development of a plan to strengthen organizational, institutional and individual capacities and support the sustainability of the organization; iii) the implementation of the capacity development activities outlined in the plan; and finally, iv) monitoring and evaluation of the capacity development process.

"We have never worked with a donor who said, "*we will use your policies*". They always come with their own policies, which we have to use. RDPP was different, and it allowed us to build a culture of agency at the individual and organizational level, a sense that we are able and capable."

-RDPP national partner

In general, the RDPP capacity development approach was a 'new' model for many national partners. For example, partners were allowed to direct up to a fifth (20 per cent) of the project budget toward capacity development activities. In reality, the majority of the 13 national partners in Jordan and Lebanon allocated just under 10 per cent, explaining that several of them were hesitant to ask for the full budget, thinking it was like 'overhead', where the donor might be critical of too high a rate. Many of RDPP's local partners also contrasted the RDPP capacity development approach with other forms of capacity development they have received, noting (as discussed in Section 3.2) that the predominant model for capacity development is related to compliance and reporting formats of a specific donor.

The RDPP's capacity development approach sets itself apart through the degree of ownership, self-determination and decision-making power allowed by the funding toward capacity development. Organizations that already had carried out organizational capacity assessments could use those instead of the format RDPP suggested, and the focus of the *tailored* capacity development plans were to a large degree determined by the organizations themselves. In certain instances, partners explained that RDPP set some minimum criteria for them, particularly for some of the 'high risk' partners, who had never managed funding of a similar proportion prior to receiving the grant from RDPP. For such partners, RDPP did outline some minimum standards or criteria to be included in the capacity development plan (e.g., in relation to financial management), while allowing the organization to define other priority areas themselves.

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[66] Capacity Development Approach Paper, RDPP Phase II

Partners' capacity development plans

Given the large degree of freedom granted to RDPP's local partners in developing a capacity development plan for their organizations, it is not surprising that a lot of different approaches and priority areas emerged. The objectives of the capacity development plans ranged from improving specific internal procedures and processes through the development of specific tools to strengthening organisational profiling and identity. Generally, capacity development support can be grouped into the following areas: i) governance and accountability; ii) financial management and administration; iii) technical capacities related to implementation; iv) monitoring, learning and evaluation; and finally, iv) sustainability and resource mobilization.

For example, some partners focused on human resource development and are currently considering how to ensure the transfer and internalizing of new knowledge and expertise. Other partners were also focusing on internal learning as part of their capacity development needs or to enhance broader capacities on monitoring, evaluation, accountability, and learning. One organization was pursuing revenue generation to secure some unrestricted funds, and others included longer more open coaching into their capacity development plans.

National partners expressed that managing an internal capacity development component alongside the project implementation was feasible, even though it at times was difficult. As pointed to by many partners, most of the capacity development gains were directly benefitting the project cycle management and implementation, why it was seen as an opportunity rather than a burden.

Some of the challenges that arose were related to their own lack of foresight or expectations, while others were more structural challenges that the capacity development component failed to address. For example, several partners reflected on shortcomings in their own capacity development plans, noting that they had omitted critical considerations e.g., in relation to how much time it takes to hire new staff or to strengthen capacities of existing staff, which therefore were not reflected in the budget. More structural issues, however, were particularly felt in Lebanon, where the current compounded financial and economic crisis has left many local actors in a constant battle for survival, where capacity development concerns take the back seat.

The impact of the capacity development support has been felt not only in relation to the project activities, but also across the individual, organizational and institutional levels.

At the *individual* level, organizations noted improvements to skills, knowledge and performance through the training that their staff received, particularly noted in relation to targeted trainings, e.g., targeted M&E training for an organization's MEAL officer. Such skills were often found to be transferable to all the organization's other work outside of RDPP. RDPP's partners emphasized efforts to institutionalize individual's capacity development improvements, to ensure longer-term sustainability.

At the *organizational* level, many organizations undertook initiatives to revisit or develop organizational strategies, plans and regulations which extend beyond RDPP. Some organizations took the opportunity to think more strategically about their vision and longer-term strategy. For some of the smaller or less-established partners, there was a strong sense of empowerment attached to the organizational capacity development, a feeling of having 'levelled up' and being able to work directly with donors or to expand their operations to new areas. Another impact of the organizational capacity development was related to sustainability and funding, particularly the ability to secure new donors because the organization now has established best practices, including policies and procedures that donors look for. One national partner looked into the organization's financial sustainability through venues for internal revenue generation, although the longer-term impact of the initiatives remains to be seen, as they still were nascent.

> "It's hard, because as local actors, we are wasting away in the day-to-day activities of project implementation. No one in the organization has the time to take a step back, have the eagle eye, and see what is needed or missing in the organization."
>
> -RDPP national partner

At the *institutional* level, many of RDPP's national partners have transferred the capacity development support they received through RDPP and other donors to their own local partners as mentioned in several discussions that arose during the study. It became obvious that capacities at the local level were deficient for partners who sub-grants to local partners, and partners adapted projects to include trainings and coaching as part of the collaboration. Others noted that the strengthened organizational structures and capacities of RDPP's partners had a "trickle-down effect" on their local partners through enhanced programming and partnership approaches with local actors.

4.4 Gaps, opportunities, and lessons

The value of RDPP's localization approach with regard to direct partnerships and financing is self-evident. However, a few gaps or areas of improvement have emerged in discussions with local partners, donors and external stakeholders.

At a *strategic* level, RDPP has no common, institutionalized understanding of what localization is. A few of RDPP's local partners expressed an interest in gaining some insight into what RDPP means by localization both in general, and in their specific country context. For example, a common understanding of localization entails working with local and national actors and structures, but a question was raised as to which balance RDPP wishes to strike between working with and through the government versus partnering with civil society. Engaging partners and donors alike in concretizing some of the dimensions of what localization means and entails in RDPP would remediate some of the issues local partners see with the localization agenda as a top-down, donor-driven approach (as was discussed Section 3.1) and make it more tangible to measure progress.

Considering how to measure results of- or progress toward localization is a complex exercise, but also an important step to take to be accountable to commitments made. In RDPP's overall theory of change, localization and the other engagement principles are ways of working across the three thematic areas (protection, livelihoods, and research/advocacy) to reach thematic outcomes. As a

'way of working', localization is not an outcome, nor does the programme document reflect on how RDPP sees the value addition of a localization approach in reaching the programmatic or thematic outcomes. Nevertheless, given the considerable human resources that RDPP invested, not least through a dedicated Partnerships and Localization specialist in the PMU, it is a missed opportunity not to consider measuring the programme's progress on localization, whether this is as an approach that adds value to the attainment of other outcomes, or as an additional outcome in itself. Noting that several actors have spent considerable time developing indicators to measure progress on localization the study has not suggested any specific indicators or measures of progress for RDPP going forward. Instead, the study team suggests that RDPP draws inspiration from other initiatives, such as the work done by the Grand Bargain Localization Working Group and NEAR, on their Localization Performance Measurement Framework.

Another strategic consideration pertains to the involvement of national and local actors in defining the overall priorities and vision of the programme. While the programme formulation engaged multiple local and national actors in the process, these were not necessarily the same actors who were selected as partners. As such, some partners were mostly focused on and aware of their own individual projects, rather than having a holistic view of the programme. For example, some partners explained that they had not seen the consolidated results framework.

Relatedly, an area that most partners highlighted could be improved upon was the effort by RDPP to bring national and local partners together for cross-learning, and to bring about stronger linkages, networks or coalitions among partners. The study acknowledges that shared trainings have been provided by RDPP as also confirmed by the RDPP PMU who emphasized that it being a conscious decision to avoid the risk of overburden partners with meetings and time away from implementation. However, across both countries, partners expressed a missed opportunity for the programme to enable knowledge and experience exchange between organizations. RDPP's partners stress such exchanges would add value, and should not just be related to project implementation, but also learning on capacity development and opportunities for capacity exchange. Some national partners recognized that they could have taken lead on such endeavors themselves, however a majority felt that it was RDPP's responsibility to create the space for it to take place.

Local actors also emphasized that RDPP has a role to play in engaging with and linking them up to other donors, and their UN and INGO partners on localization, noting that the programme constitutes a best practice that others could learn from. However, the study also notes that RDPP does already coordinate with other donors on partners' capacity development plans to ensure complementarity. In Jordan, in particular, RDPP's national and local partners extended this role to national Government as well, noting that RDPP (and more generally their donors) has the legitimacy and agency to advocate for localization with the Jordan government.

Partners and donors pointed to certain gaps that RDPP's capacity development approach did not address, such as strengthening capacities for local actors to engage in meaningful coordination. Another consideration is related to the longevity of support. All RDPP's partners are grateful for multi-year project support, given that this has allowed them to work more strategically than short-term funding and partners allow for. However, there is also a consensus to push for a longer-term partnership, e.g., for a duration of 4-5 years. RDPP's co-creation approach was valued highly, however the long co-creation period (up to a full year) should be balanced with a long implementation and partnership period. Likewise, strengthening capacities is a long-term, and at times, non-linear process, but in RDPP, capacity development is somehow projectized, and has had to fit into a shorter period of time.

Finally, it was noted by some partners that there are risks associated with RDPP supporting organizational development, supporting them to elevate capacities and number of human resources for the duration of the project; the concern relates to the sustainability of such support, and whether it will all fall apart again, if continuation of funds is not secured. On the other hand, they recognize that the strengthened organizational capacities place them much better in terms of securing more funds in the future.

On RDPP's direct partnerships and financing...

- Direct partnerships and direct financing of local actors remains rare among donors in Jordan and Lebanon. In contrast, RDPP has shown to be a unique funding instrument which is effectively geared toward localizing aid and has human resources and internal capacities (in the PMU) to work directly with- and capacitate national partners.

- Localization is treated as an engagement principle in RDPP, but no clear approach or definition has been concretized. Likewise, there are no targets or indicators included in the results framework of the programme on localization. Given the considerable financial and human resources that RDPP invested in efforts to localize the programme, it is a missed opportunity that the programme did not consider how to measure results on localization.

- Despite the unequal power dynamic in a donor/grantee relationship, the partnership between the RDPP partners and PMU was based on mutual trust, respect and accountability. Nearly all of the RDPP's national partners spoke of a good balance between being given space and ownership of their projects and organizational development and receiving hands on guidance and support from RDPP.

- While the risk of working with local partners is often cited as a key obstacle for localization, RDPP did not shy away from the risk. Instead, RDPP carried out an initial risk assessment and ended up working with a mix of high risk and lower risk partners. One of the ways that risks were mitigated was through a locally based team that kept a keen eye on progress, was trusted by- and accessible to partners for support with issues that arose during implementation.

- A key step in developing the mutual trust in the partnership was the selection, negotiation and co-creation process. Even though this required a sizeable investment timewise, the usefulness of the co-creation and fine-tuning process cannot be downplayed.

On tailored capacity development of national and local partners...

- Capacity development is in many ways the foundation of RDPP's localization approach, as it underpins and enables partnerships with local actors, shifting responsibility from the international system and actors to local ones, while also ensuring that the local partners have the capacities needed to lift the programme.

- RDPP's capacity development approach sets itself apart through the degree of ownership, self-determination and decision-making power that was allowed in the funding toward capacity development. Likewise, the focus on broader organizational development in line with partners' vision is unique and differs from other actors' more project-based capacity development, which tends to concentrate on capacities to deliver on specific programme activities.

- RDPP's local partners received capacity development support covering a wide range of priority areas, covering i) governance and accountability; ii) financial management and administration; iii) technical capacities related to implementation; iv) monitoring and evaluation; and finally, iv) sustainability and resource mobilization.

- Generally national partners felt it was feasible to balance an internal capacity development component alongside the project implementation. Some of the challenges that arose were related to their own lack of foresight or expectations, while others were more structural challenges that the capacity development component failed to address.

- The impact of the capacity development support has been felt not only in relation to the project activities, but also across the individual, organizational and institutional levels. At the individual level, organizations noted improvements to skills, knowledge, and performance through the training that their staff received. At the organizational level, local partners were able to consider their organization's vision and longer-term strategy, which for many organizations gave a sense of empowerment a feeling of having 'levelled up' and being able to work directly with donors, or to expand their operations to new areas. At the institutional level, a lot of RDPP's national partners have transferred the capacity development support they received through RDPP and other donors to their own local partners.

- Partners and donors pointed to certain gaps that RDPP's capacity development approach did not address, such as strengthening capacities for local actors to engage in meaningful coordination. The longevity of engagement was also raised as an issue, considering capacity development is a long-term and non-linear process. Finally, a missed opportunity was seen in relation to connecting partners for cross-learning, ensuring reflection and capacity exchange.

5. Recommendations

Based on the study findings presented in the two previous chapters, the following recommendations are put forth addressed to different stakeholders involved in the localization of aid in Jordan and Lebanon.

The study recommendations are twofold: the first set is intended to address some of the challenges and barriers that have been discussed in relation to alignment, local ownership, partnerships, capacity development, funding, coordination and advocacy and policy influence.

Thereafter, the study presents a set of recommendations that specifically aim to improve the next phase of RDPP with regard to its localization approach.

No.	TO WHOM	RECOMMENDATION
On alignment and local ownership:		
1	LNNGOs	1) Local and national actors should collaborate to establish an institutionalized, common understanding and position on what localization entails from their perspective and to work toward setting collective outcomes.
On partnerships & capacity development:		
2	Donors & UN	2A) To promote the localization of aid, donors and UN Agencies must make the necessary structural changes to **directly** partner with LNNGOs: • Increase staff pool with relevant expertise in-country. • Simplify procedures and requirements, recognizing and building on LNNGOs' existing systems and capacities. • Increase risk appetite through appropriate risk mitigation measures. 2B) When **direct partnerships are not possible**, demand real (50-50) partnerships between INGOs and LNNGOs based on equal power- and resource-sharing, hereunder an equal distribution of overhead, risks, ownership, and decision-making. In addition, ensure direct dialogue and communication with local and national partners as well as INGO partners.
3	INGOs	3A) Engage in true, equitable partnerships, with power and risk sharing. 3B) Shift to a more 'localized' approach throughout the project cycle – i.e., move away from direct implementation and sub-contracting of LNNGOs – toward a role that involves coaching and mentoring of LNNGOs as part of a gradual phase out.
4	LNNGOs	4A) Build coalitions and a collective voice to challenge the current power asymmetries in partnerships with international actors. 4B) Reflect on and improve organizational governance, accountability, and transparency to build an enabling environment for partnerships and collaboration. 4C) Be accountable to local NGO/CBO partners by applying a 'localized' approach that entails greater power sharing and allows for capacity strengthening based on a needs-basis.
5	All	5A) Adopt tailored capacity development approaches based on LNAs' own identified needs that go beyond project implementation and compliance related concerns.
On access to funding:		

6	Donors, UN	6A) Remove internal barriers that prevent the realization of Grand Bargain commitments on quantity of funds (25% commitment) and quality of funds. This entail ensuring that funds are available for capacity development, coordination, and advocacy, as well as overhead.
		6B) Avoid cost-sharing requirements with LNNGOs.
On aid coordination mechanisms:		
7	Donors, UN	7) Facilitate an inclusive and enabling environment for local and national actors to meaningfully participate (and take leadership) in coordination, which entails bi-lingual meetings practices, improved orientation for new members, and dedicated support for coordination activities.
8	LNNGOs	8A) Prioritize participation, leadership, and engagement in the international aid coordination, paired with advocacy efforts to secure allocation of funds to cover coordination tasks and adequate staff.
		8B) Prioritize attending national coordination platforms to influence and contribute to collective civil society positions, including on localization.

No	RECOMMENDATION
On how RDPP Phase III can be improved:	
1	A) Concretize a common, institutionalized understanding and approach to localization with national partners.
	B) Develop concrete localization-related targets and indicators, in dialogue with local and national partners, to be included in the results framework of the programme to measure progress.
2	Scale up the co-creation process to include more partners but consider shortening the duration to leave more time for implementation.
3	Explore the potential to engage in longer-term, strategic partnerships with local and national partners, which may continue beyond the project funding cycle.
4	Apply an 'ecosystem approach' by engaging a diverse range of local and national partners inter alia including the private sector and/or refugee-led organizations and coalitions.
	In the same vein, invest more time and resources in supporting linkages between partners, strengthening opportunities for cross-learning, reflection, and capacity exchange.
5	Allocate funding toward capacity development support for RDPP's national partners' local NGO and community-based partners and promote more equitable partnerships between LNAs.

6 Concluding remarks

For many actors, the COVID-19 pandemic renewed the impetus to localize aid, highlighting the importance of local and national actors as first responders when crises arise and able to access affected communities. Likewise, many humanitarian and development practitioners have seen the Syrian displacement crisis' complexity, protractedness and overwhelming scope, as an opportunity to address a humanitarian system that is overstretched and underperforming by working with- and strengthening local systems, institutions, and actors.

As a concept, localization is nearly unanimously backed by international and national humanitarian and development actors. However, moving from policy to practice has proved difficult. Looking at the operationalization of commitments to localization in Jordan and Lebanon, as this study has done, there are many roadblocks that stem from the context, such as the capacities of local and national actors, but even more related to structural and institutional challenges to do with the aid architecture, donors, UN agencies and even INGOs.

Living up to the commitments clearly requires system-wide shifts at the levels of policy, strategy, and practice in the delivery of aid globally and the two countries. As this study has illustrated, local and national actors pinpoint many of the challenges that undermine the operationalization of localization. As many of these problems are situated at the top of the food chain, this requires decision-makers in donor agencies, the UN and the biggest INGOs to reflect on how to overcome the institutional barriers that impede progress and make the necessary changes. While this calls for changes at the top of the system, it is important to acknowledge that the international system only is half of the equation – albeit a large part – where local and national actors are the other half.

While the Grand Bargain commitments have been instrumental in setting the agenda for the international community, limited reflection has taken place on the role and responsibilities of local and national actors in achieving localization, despite the call for local leadership. As the study found, local and national civil society actors still have work to do to establish a common institutionalized understanding of localization that could guide collective outcome setting and a way forward.

While the study found commonalities in the challenges that Jordanian and Lebanese civil society face (which undoubtedly apply to many contexts) there are also distinct challenges that exist in each country. However, two facts remain: first, it's time for local and national actors to step up, seek common ground, take ownership and leadership to charter their path forward within the realities and civic space in which they operate; and second, the international community needs to *walk the talk*, and enable local leadership in the delivery of aid.

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