A HUMANITARIAN LOCALIZATION BASELINE FOR UKRAINE:
PROGRESS REPORT 2024

ACKNOWLEDGEMENTS

| FOREWORD

The ongoing war in Ukraine has profoundly reshaped the humanitarian landscape and highlighted the critical role of Ukrainian civil society in responding to the vast and evolving needs of the population. From the first day of Russia's full-scale invasion, local organizations demonstrated remarkable resilience and leadership, providing essential support where needed most. The humanitarian response in Ukraine was initiated ten years ago, following Russian aggression in Crimea, Donetsk and Luhansk oblasts; two years later, the Grand Bargain was signed. The capacity and ability of Ukrainian humanitarians during this period have been recognized and documented, their projects viewed as efficient and high quality, their bravery praised, and their deaths mourned. However, the humanitarian system has failed to adjust, live up to commitments, support policy influence, fair funding, and local leadership, and, as a result, has perpetuated distrust between international and national stakeholders.

While we have identified positive and noticeable progress related to the localization of humanitarian efforts in Ukraine, efforts are still hampered by the power dynamics inherent in the humanitarian sector and rigid support systems. Political and policy statements are not always translated into practical efforts, many systems remain inefficient and outdated, and the humanitarian sector is becoming increasingly competitive and commercialized. Stakeholders need to be given adequate tools to effectively translate commitments to operational change and a locally led humanitarian response.

The responsibility to execute effective change and practical reform does not lie entirely with international actors. National actors have a responsibility to raise their voices, abide by their own commitments, both demand accountability and be accountable, and to improve systems and ways of working rather than perpetuating inefficient approaches. The strength of Ukrainian civil society lies in its diversity, and humanitarian stakeholders should avoid contributing to oligopoly in the sector, where few have too much and many have too little to respond to humanitarian needs effectively.

As we enter the second stage of this initiative, the importance of empowering local actors has become even more evident. Localization is not only a strategy for effective and efficient aid delivery; it reflects the actual strengths and capabilities of Ukrainian civil society and the importance of complementarity. Reinforcing localization efforts leads to a more responsive and resilient humanitarian framework, enhancing the quality, reach and relevance of aid.

Many international actors have shown strong commitment towards localization. In some sense, Ukraine has become a beacon for innovation and creativity, providing essential lessons for a wider global audience. The progress so far highlights the potential to turn global policy commitments into tangible actions within Ukraine's humanitarian response. However, this potential must be realized through deliberate steps on a road that will not necessarily be smooth and straight but potholed and winding, requiring trial and error, risk sharing, and transparency of results.

While there is growing consensus among humanitarian stakeholders on the importance of localization, there is a need for more practical and strategic efforts underpinned by accountability initiatives. This initiative facilitates strategic approaches that can guide stakeholders sharing common or individual organizational objectives related to localization. We are confident that a coalition of the principled can achieve a more accountable, locally led and effective humanitarian response.

Fredric Larsson
Director
NGORC

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| ACRONYMS

CATI	Computer-Assisted Telephone Interviewing
CAWI	Computer-Assisted Web Interviewing
CSO	Civil Society Organization
DAC	Development Assistance Committee
DEC	United Kingdom's Disasters Emergency Committee
FCDO	Foreign, Commonwealth and Development Office, United Kingdom
HAG	Humanitarian Advisory Group
HCT	Humanitarian Country Team
HRP	Humanitarian Response Plan
IASC	Inter-Agency Standing Committee
ICR	Indirect cost recovery (overheads)
ICVA	International Council of Voluntary Agencies
IDI	In-Depth Interviews
IDP	Internally Displaced Person
INGO	International Non-Governmental Organization
LGBTQIA+	Lesbian, Gay, Bisexual, Transgender, Intersex, Queer/Questioning or Asexual
L/NA	Local and National Actors
NGO	Non-Governmental Organization
NGORC	NGO Resource Center
OCHA	UN Office for the Coordination of Humanitarian Affairs
OECD	Organisation for Economic Co-operation and Development
p.p.	Percentage points
PIANGO	Pacific Islands Association of Non-Government Organisations
UN	United Nations
WFP	UN World Food Programme
WHO	World Health Organization
WHS	World Humanitarian Summit

EXECUTIVE SUMMARY

Humanitarian response localization continues to be a central focus for both national and international humanitarian actors in Ukraine. The ongoing war has further highlighted the necessity for local leadership in humanitarian response, in alignment with global commitments like the Grand Bargain and Charter for Change that emphasize the importance of local actors in driving efficient, accountable and effective humanitarian action. However, while there has been notable progress in some areas, initiatives designed to achieve a locally led response face substantial hurdles.

This report describes the findings of the second stage of a localization assessment initiative in Ukraine. It reveals that while some progress is being made in five of seven domains of localization, significant challenges remain in Funding and Policy Influence. The strongest evidence for localization continues to be within the domains of Capacity and Participation. The Funding domain remains critical, considering its linkages with other areas, because many local actors still lack access to direct and equitable funding streams.

The second stage of this initiative confirms the importance of establishing clear baselines to measure progress over time. The findings encourage greater accountability and continuous improvement by providing stakeholders with the tools to assess and track localization development. This report serves as a resource for international and national actors, offering a roadmap to strengthen localization in Ukraine's humanitarian response and ensure that all actors, especially local ones, can shape aid delivery.

About the initiative

This initiative assesses evidence of localization within the humanitarian response in Ukraine and tracks progress compared to the 2023 Humanitarian Localization Baseline for Ukraine. The second stage research was conducted by NGO Resource Center (NGORC) with the support of InfoSapiens and Humanitarian Advisory Group (HAG), and financial support from the International Council of Voluntary Agencies (ICVA), Helvetas, and principled donors of NGORC (via shared overheads).

The study used a contextualized localization measurement approach and framework[1], originally developed by HAG and the Pacific Islands Association of Non-Governmental Organisations as a universal method for tracking localization progress at country and regional levels. The study included a survey of 279 key non-governmental organization (NGO) and international NGO staff, 19 in-depth interviews with key informants, and document analysis.

The main objective of this ongoing initiative is to annually determine progress in localization of the humanitarian response compared to the 2023 Humanitarian Localization Baseline for Ukraine. The study includes a comparative analysis of localization in Ukraine within seven specific domains, with key indicators that provide an evidence base for stakeholders to assess and track progress. The study's results can serve as a resource for international and national actors, donors and governments to monitor the implementation of localization commitments and identify challenges and appropriate responses. They can also act as a resource and evidence base for accountability and advocacy. Comprehensive interpretations and recommendations are beyond the scope of this initiative.

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[1] PIANGO and Humanitarian Advisory Group (2019) Localization Measurement Framework and Methods.

Key findings

The Localization Baseline study analyzed seven key domains supporting the localization of the humanitarian response in Ukraine. Comparative analysis provides evidence of changes within several domains, allowing us to identify trends in progress towards a localized response. In this second stage of the study, five of the seven domains show some progress compared to the baseline, with the level of evidence for the other two domains remaining the same (Figure 1).

Figure 1. Level of localization evidence: progress from 2023 to 2024

Partnership (**1.8**)

Leadership (**1.9**)

Coordination and complementarity (**2.0**)

Funding (**1.1**)

Capacity (**2.3**)

Policy influence (**0.8**)

Participation (**2.5**)

None (0)　　Limited (1)　　Some (2)　　Strong (3)
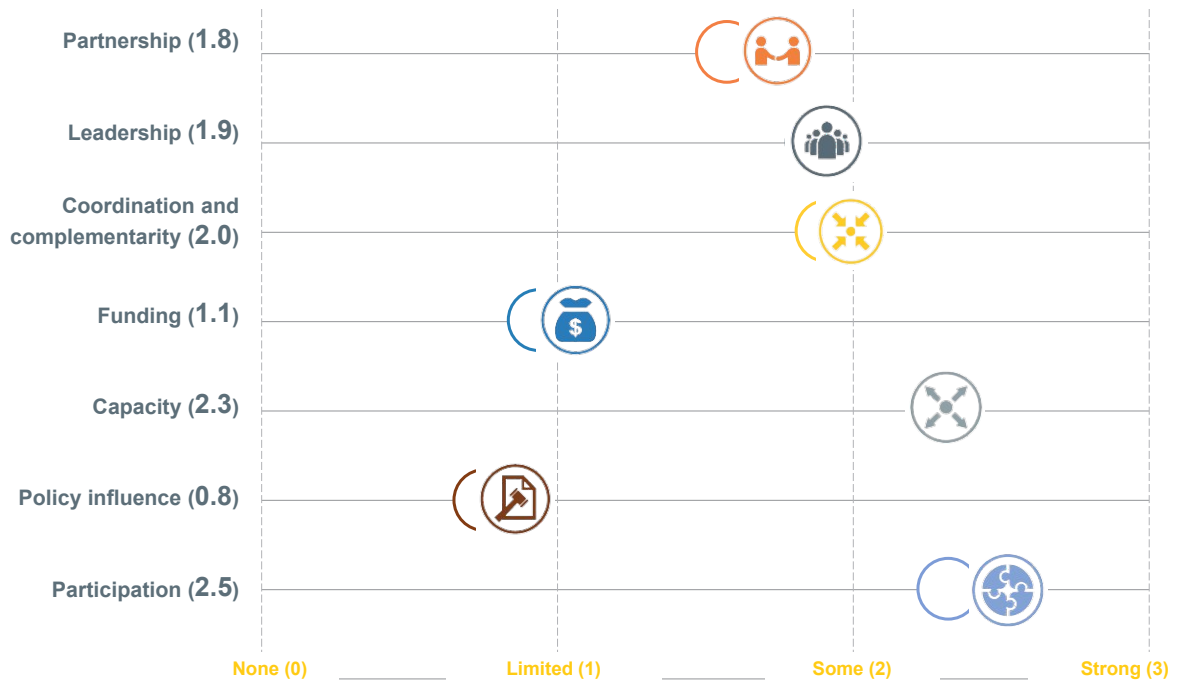
INTRODUCTION

Since the full-scale Russian invasion of Ukraine in February 2022, the humanitarian crisis has continued to evolve, creating enormous challenges for the country. This is further accentuated by the conscious and continuous targeting of the civilian population, energy infrastructure, schools, hospitals, and supermarkets, and humanitarian structures and staff. As of September 2024, the war has left over 14.6 million people in need of humanitarian assistance. Approximately 6 million Ukrainians have become refugees. The number of internally displaced persons (IDPs) changes as the conflict evolves, but stood at approximately 3.3 million as of September 2024.[2] Humanitarian needs are complex and massive, with a significant portion of the population requiring everything from shelter to psychosocial support.

The humanitarian response in Ukraine was initiated more than 10 years ago, and humanitarian structures and systems have long been in place. Throughout this prolonged crisis, Ukrainian civil society organizations (CSOs) and non-governmental organizations (NGOs) have remained at the forefront of the response, often acting as the primary responders. Despite facing significant obstacles, ranging from inadequate resources to infrastructure damage, displacement, and staff challenges, local actors have shown incredible resilience.

Since the Ukrainian Humanitarian Localization Baseline was published in 2023, the humanitarian landscape in Ukraine has evolved significantly. Advocacy and action from both national and international organizations, combined with growing pressure from governments and donors, have led to a more focused push towards implementing commitments under initiatives such as the Grand Bargain and Charter for Change, both of which aim to strengthen the role of local actors in humanitarian response. With its robust civil society and governmental frameworks, Ukraine is widely regarded as a context where genuine progress toward localization is feasible and necessary. However, the implementation of these frameworks remains uneven, and challenges persist for Ukrainian organizations trying to break into and navigate global humanitarian systems.

Some important localization milestones were achieved over the last year:

- The 2nd Annual Ukrainian Aid Leadership Conference brought together 400 representatives of local and national CSOs, volunteer networks, international NGOs, United Nations (UN) agencies, donors, the Ukrainian government, and private sector representatives in Kyiv to discuss Ukrainian leadership within the humanitarian response

- In consultation with approximately 100 national and local organizations, the Alliance for Ukrainian CSOs created a strategy for ensuring local leadership in responding to humanitarian crises and setting the foundation for recovery processes in Ukraine[3]

- The Ukraine Humanitarian Fund shifted important resources towards Ukrainian organizations and developed a scorecard with criteria that recognized the added value of local partners and the importance of Fund partners sharing overhead costs with their local and national sub-grantees. Furthermore, the creation of locally led combined funds, for example, by the National Network of Local Philanthropy Development, aims to increase the amount of humanitarian funding to local and national actors[4]

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[2] UN OCHA (2023) Ukraine Humanitarian Needs and Response Plan 2024.

[3] Alliance UA CSO (2024) Strategy for ensuring local leadership in responding to humanitarian crises and setting the foundation for recovery processes in Ukraine.

[4] Ukraine Pooled Fund (2024) National Network for the Development of Local Philanthropy.

- Recent research, Passing the Buck: The Economics of Localizing Aid in Ukraine, illustrates the cost efficiencies that come through localization and a locally led response[5].

- Through an initiative by Ukraine Humanitarian Country Team area-based coordination is being piloted in specific locations within Ukraine to complement the cluster approach. The objective is to enhance coordination closer to where assistance is needed via a contextualized approach, led by local and national stakeholders, that adjusts to regional differences and provides more holistic and locally led humanitarian assistance.

The findings presented in this report are based on extensive data collection and analysis, including surveys and in-depth interviews with a diverse group of both national and international actors. By examining how localization plays out across the seven domains of the Localization Measurement Framework, this report provides a nuanced understanding of where progress has been made and further efforts are required.

This report aims to strengthen the evidence base for a localized humanitarian response in Ukraine, ensuring that all actors remain accountable to their commitments while empowering national actors to deliver practical assistance. This resource also serves as a tool for stakeholders, national and international organizations, donors, and governments in their advocacy efforts, ensuring they can continue pushing for a more locally led and sustainable humanitarian response.

Photo provided by National Network of Local Philanthropy Development

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[5] Venton CC (2024) Passing the buck: The economics of localizing aid in Ukraine.

METHODOLOGY

The methodology for the study was based on the Localization Measurement Framework and Methods[6] developed by Humanitarian Advisory Group (HAG) and the Pacific Islands Association of Non-Government Organisations (PIANGO). The Framework (Figure 2) allows participants to conduct holistic measurement of progress in localization. This approach has been applied in many other humanitarian contexts, including Fiji, Vanuatu, Tonga, Solomon Islands, Myanmar, Bangladesh, Pakistan, Afghanistan, Yemen, and in regional initiatives.

The study was undertaken with a partnership approach. Info Sapiens, a research organization, worked closely with NGO Resource Center (NGORC) as the lead implementer, with ongoing engagement from HAG throughout the study. The baseline study was also supported by a Research Advisory Group composed of representatives of donors, United Nations (UN), international NGOs, private sector, and local and national NGOs.

Humanitarian Advisory Group provided initial and ongoing technical and practical support for the in-country research on how to contextualize and use the localization baselining process (as outlined in the Localization Measurement Framework) and approaches to identify key priorities for collective action by national and international stakeholders.

Using the localization measurement framework

Figure 2. Localization measurement framework

The measurement framework comprises seven domains that provide a holistic overview of the localization process: Partnership, Leadership, Coordination and Complementarity, Financing, Capacity, Policy Influence, and Participation. Each area has a performance indicator and several

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[6] PIANGO and Humanitarian Advisory Group (2019) Localization Measurement Framework and Methods.

progress indicators that allow for quantitative and qualitative data integration. The indicators are often linked, and progress or deterioration in one domain usually correlates with changes in another.

This methodology was adapted to the Ukrainian context; NGORC, HAG and InfoSapiens collaborated closely to ensure the toolkit complied with the operational context. In 2024, the methodology was supplemented with several additional indicators while fully maintaining the data's comparability. Rare cases in which data comparability should be treated cautiously, due to a change in the question's wording, are noted. In addition, how Ukraine's localization progress compares to global data from other humanitarian contexts is explained.
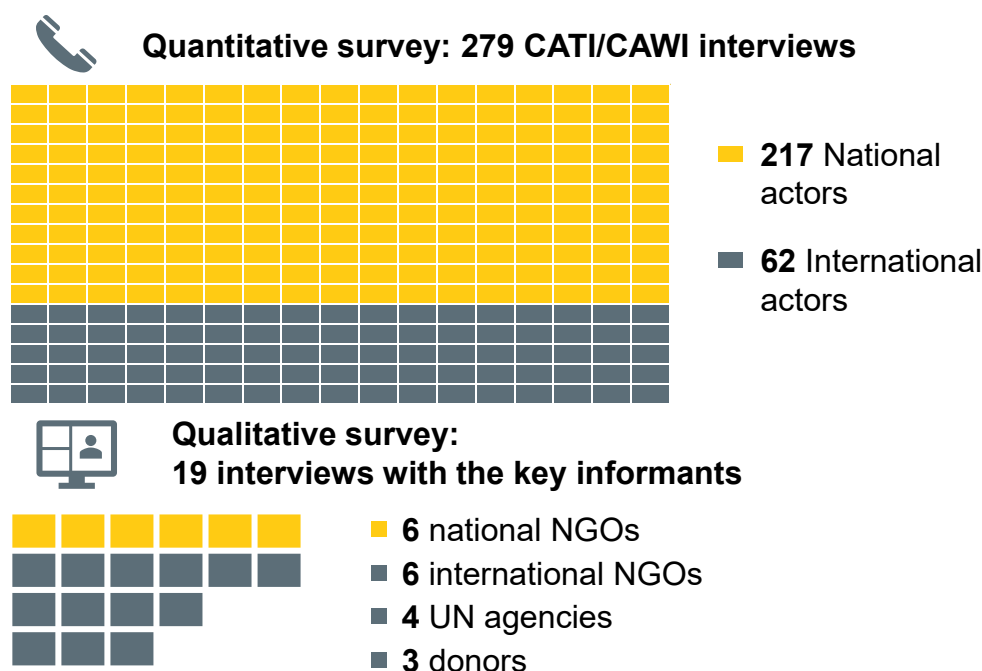
In this study, we assessed the level of evidence of actions using indicators in each of the seven domains. There are four levels of evidence: no evidence, limited evidence, some evidence, and strong evidence.

Data collection

The study used a mixed methods approach involving both quantitative and qualitative data (see Figure 3). A quantitative survey was conducted in May–June 2024 using computer-assisted telephone interviewing (CATI) and web interviewing (CAWI) methods. A total of 279 respondents were interviewed, most of whom were representatives of Ukrainian organizations. All respondents, including those who participated in in-depth interviews (IDIs), had worked in the humanitarian sphere for over six months and held senior positions.

Nineteen in-depth qualitative interviews were conducted with representatives of national and international organizations, UN agencies, and donors (Figure 3). The data collection tool was provided by HAG and adapted and translated by InfoSapiens with the support of NGORC.

Figure 3. Data sources

Quantitative survey: 279 CATI/CAWI interviews

- **217** National actors
- **62** International actors

Qualitative survey: 19 interviews with the key informants

- **6** national NGOs
- **6** international NGOs
- **4** UN agencies
- **3** donors

Limitations

- Interpretation bias: different understandings of key terms used in the survey may have affected the data.

- Level of evidence: If indicators are assessed as having no or limited evidence, this does not necessarily mean that progress is not taking place; it is possible that it was not detected.

- The report provides a high-level analysis of the localization of the humanitarian response in Ukraine. It is not intended to analyze progress or represent the overall humanitarian response.

- Many national respondents are located in different regions of Ukraine, but the sample may not fully represent the country's geography.

- The study was limited to the territories controlled by Ukraine at the time of the survey.

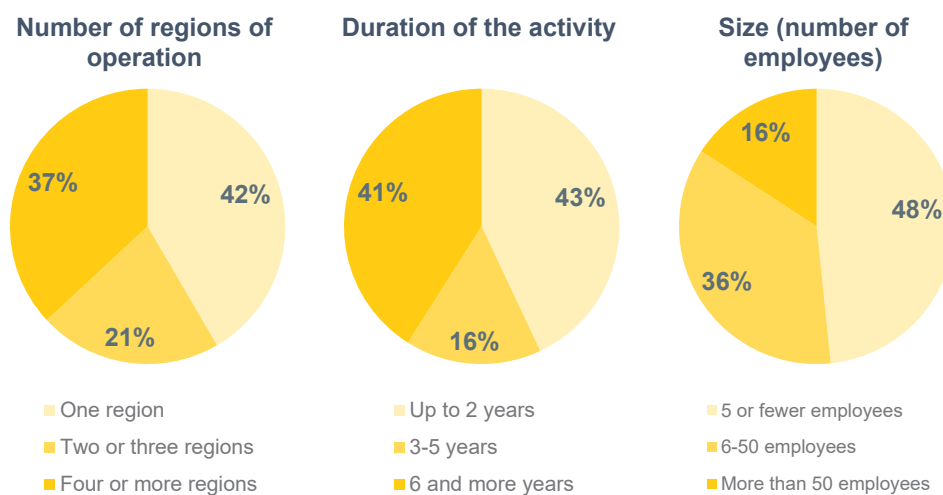## Portrait of research participants

National actors

Of the surveyed national organizations, a large minority operate in one region of the country, with slightly fewer operating in two or three regions (Figure 4). Almost half started working after the invasion, with a large majority having been in operation for less than five years. Almost half of the responding national organizations have five or fewer employees; only around one in six have more than 50 staff.

Figure 4. Portrait of participating national actors

How many oblasts[7] of Ukraine do your activities cover?
How long has your current organization worked in the humanitarian field in Ukraine?
How many full-time employees does your organization have for now in Ukraine?

| Number of regions of operation	Duration of the activity	Size (number of employees)
42% One region	43% Up to 2 years	48% 5 or fewer employees
21% Two or three regions	16% 3-5 years	36% 6-50 employees
37% Four or more regions	41% 6 and more years	16% More than 50 employees

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[7] Oblast: An administrative division in Ukraine, similar to a province or region. Ukraine is divided into 24 oblasts, each serving as a territorial unit for local governance and administration.

As discussed in subsequent sections, these characteristics are strongly associated with the levels and quality of funding and leadership of the humanitarian organizations operating in Ukraine.

Fifty-three per cent of humanitarian organizations operating in Ukraine do not identify themselves as a specific type of organization, such as a women's or LGBTQIA+-focused organization. Among those that do, women's organizations rank first, with a share of 32%. The second most common national organizations are NGOs led by IDPs (15%), and the third are youth organizations (12%). National organizations are primarily involved in several sectors of humanitarian assistance, with an average of 3-4 sectors per organization. The sectors serviced by the largest proportions of surveyed humanitarian organizations (all over 50%) are food security and livelihoods, health, protection and education (see Figure 5).

Figure 5. Sector of activity for participating national organizations

Which cluster/sector do you work for?
What is the main sector of activity?
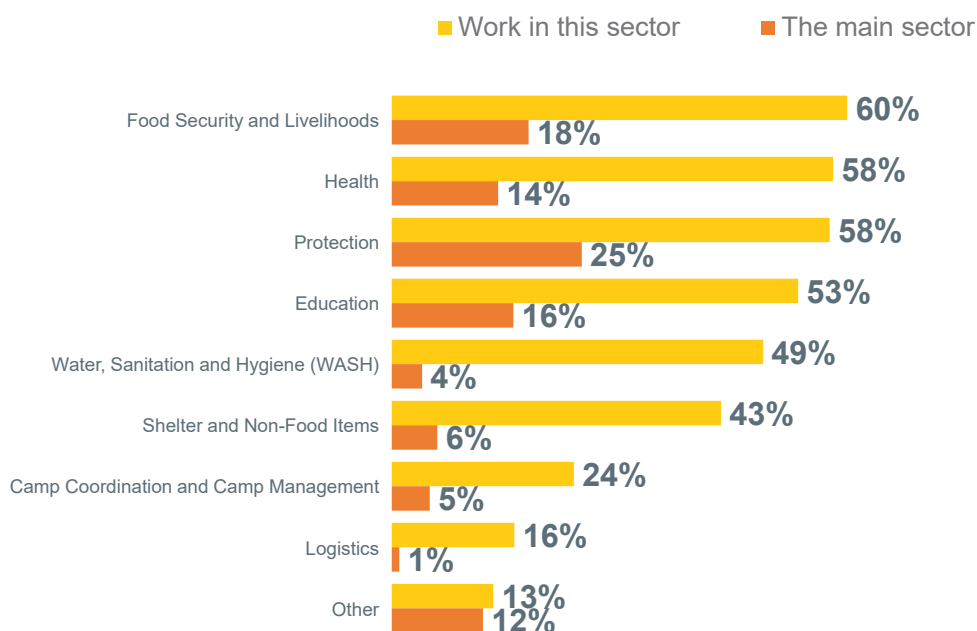
International actors

Of the 62 international organizations surveyed, four are donor agencies (or representatives of foreign missions), five represent UN agencies, and the remaining 53 (85%) are international or foreign NGOs. Half of the respondents were senior managers, and half were middle managers. The most prevalent sectors of activity of international organizations are protection (68% work in the sector, 28% consider it the main one), health (60% work in the sector, 23% consider it the main one), shelter and non-food items (55% work in the sector, 8% consider it the main one) and food security and livelihoods (48% work in the sector, 17% consider it the main one).

Thirty-nine per cent of surveyed international organizations had been working in Ukraine for up to two years, meaning they started their activities in Ukraine after the Russian full-scale invasion on February 24, 2022. International humanitarian organizations in Ukraine are much larger than national organizations; for example, 54% of international organizations have more than 50 employees (three times more than national organizations), and 64% reported that the number of staff had increased significantly since 2023 (twice as much as national organizations).

Women's organizations in focus

A quarter of the national and international organizations that participated in the quantitative survey classified themselves as women's organizations (no criteria specified). Women's organizations form a higher proportion of national than international organizations – 31% and 6%, respectively. Women's organizations work in all sectors of the humanitarian response, but are highly represented in the education (61%) and protection (including child protection, gender-based violence, and mine action) sectors (76%). Forty-two per cent of women's organizations identified protection as their main sector of activity.

It should be noted that women's organizations are much more likely than others to also identify themselves as organizations of people with disabilities, LGBTQIA+ organizations, youth organizations, or IDP- or refugee-led organizations. The share of organizations that did not identify themselves with any of the segments from this list among women's organizations was 7%, and among other organizations 75%.

There were no statistically significant differences between women's organizations and national organizations in general in terms of region or average duration of operation, or by sector or average size (number of employees). There were also no significant differences in the average number of partnership agreements with international actors or perceived financial stability. However, national women's organizations were more likely to participate in strengths and weakness assessments of their international partners (43% among women's organizations, 26% among other organizations). Women's organizations were more inclined to consider the opinion of the affected population (85% of national and 100% of international women's organizations reported always collecting this information).

There were no significant differences between women's organizations in terms of funding and other localization indicators. However, women's organizations were more likely to report improvements in staffing (only 15% of women's organizations reported deterioration, while among other organizations, this figure was twice as high). Very few women's organizations reported deterioration in operation (4% of women's organizations compared to 14% of other organizations).

| FINDINGS

This section of the report presents the study's findings on localization progress in Ukraine in 2024 compared to the 2023 baseline. This data allows us to track progress and conduct comparative analysis at the country level. Below is a summary of the results for seven domains, which are discussed and analyzed individually. We also compare Ukrainian localization progress to that of other humanitarian contexts.

Table 1. Summarized results of the survey

Areas	Average score (Level of evidence on a scale from 0 to 3)*	
	2023	2024
Partnerships	1.6	1.8
Leadership	1.9	1.9
Coordination and complementarity	1.9	2.0
Funding	0.9	1.1
Capacity	2.3	2.3
Policy influence	0.7	0.8
Participation	2.3	2.5

* 0 = no evidence; 1 = limited evidence; 2 = some evidence; 3 = significant evidence[8].

Photo provided by NGORC

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[8] According to the methodology, «no evidence» means up to 30% of answers to an indicative question were positive, «limited evidence» means 31–50% positive answers, «some evidence» means 51%–75% positive answers, and «strong evidence» means more than 75% positive answers.

ᯤ PARTNERSHIPS

1.6

KEY FINDING:

The overall score for localization in partnerships increased from 1.6 to 1.8[9].

Progress indicators	The level of evidence	
	2023	2024
Partnerships are based on equitable and ethical partnership practices	1.0	1.8
Longer-term strategic partnerships exist that aim to build systems and processes mirroring the ambitions and goals of the local or national partner	2.0	2.0
Increased power and decision-making of local and national actors within partnerships	1.7	1.7

Genuine and longstanding partnerships based on equality between international and local humanitarian actors are crucial to achieving a locally led humanitarian response. This study reflects this, showing that partnerships are a key factor for localization progress and have a direct influence on several other domains, including funding and capacity.

Some progress was recorded within this domain. Partnerships are increasingly built on the grounds of fairness and ethics and are increasingly strategic and long term in nature. This is also reflected in international organizations exploring new partnership models and assessing their ways of working in Ukraine[10].

In 2024, international organizations still had more official partnerships (through some form of written contract) than national organizations, which primarily function as implementing partners (see Figure 6). Sixty-six per cent of the surveyed international organizations reported more than six partnership agreements[11]; of national organizations, 25% had more than six. These figures have not changed since 2023. However, the number of national organizations with 1–2 partnerships decreased (from 29% to 21%), and the share of national organizations with 3–5 partnerships increased (29% to 33%).

While the number of international organizations with more than 10 partnerships decreased, no similar trend was observed among big national organizations with a similar partnership structure. Among the 22% of national organizations without international partnerships, more than 60% work in one oblast only. Seventeen per cent of international organizations reported working without Ukrainian implementing partners.

Equality and practical interaction is essential for a meaningful partnership. However, there is a significant difference between international and national organizations perceptions of involvement of local partners in the decision-making process (see Figure 7). In 2024, there was a notable increase in international partners stating that they always involve national actors in such processes. While most international actors claimed that they involved local and national actors in decision-making

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[9] 0 = no evidence; 1 = limited evidence; 2 = some evidence; 3 = significant evidence

[10] World Vision and Action Deutschland Hilft (2024) Transforming Partnerships in Ukraine and Moldova; Oxfam (2024) Prioritizing Partnerships: Modelling an alternative international humanitarian response in the Ukraine crisis; Helvetas and NGORC (2024) Supporting community led shelter assistance in Eastern Ukraine, a principled partnership supporting Equity, Efficiency, and Effectiveness (EEE).

[11] By «partnership agreements» we mean any signed documents between organizations, such as memorandums of cooperation, project implementation agreements, contracts, etc.

all the time or mostly, only half of Ukrainian respondents had the same perception (only slightly higher than in 2023). This indicates a continuing disparity in international and national organizations perceptions and expectations of how local and national actors are engaged in decision-making, and to what degree.

Figure 6. Number of partnership agreements

National actors: How many partnership agreements do you have with international/foreign actors?
International actors: How many partnership agreements do you have with local/national actors?
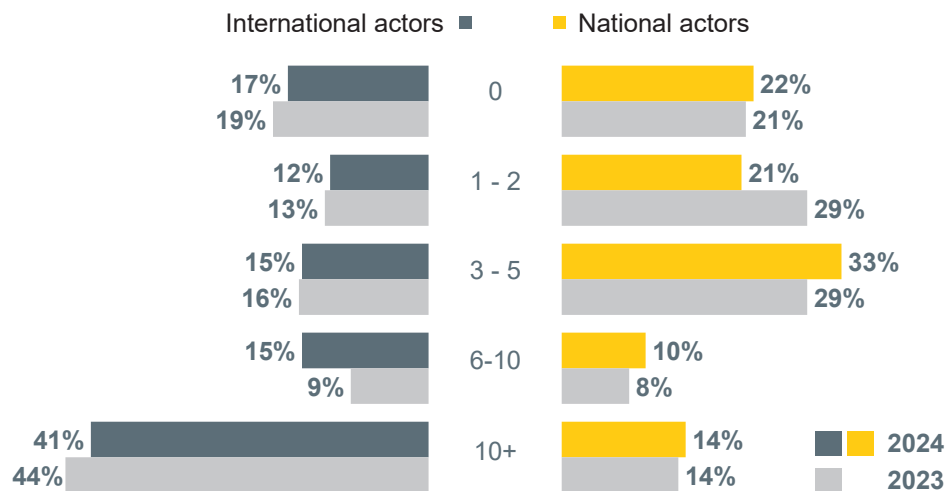
Figure 7. Involvement in the decision-making process

National actors: Is your organization involved in decision-making in partnerships with international/foreign actors, e.g., decisions on changing the geographic focus of a project, target groups, or decisions on budget reallocations?
International actors: Is your local/ national partner organization involved in decision-making in partnerships, e.g., decisions on changing geographic focus, target groups of a project, or decisions on budget reallocations?
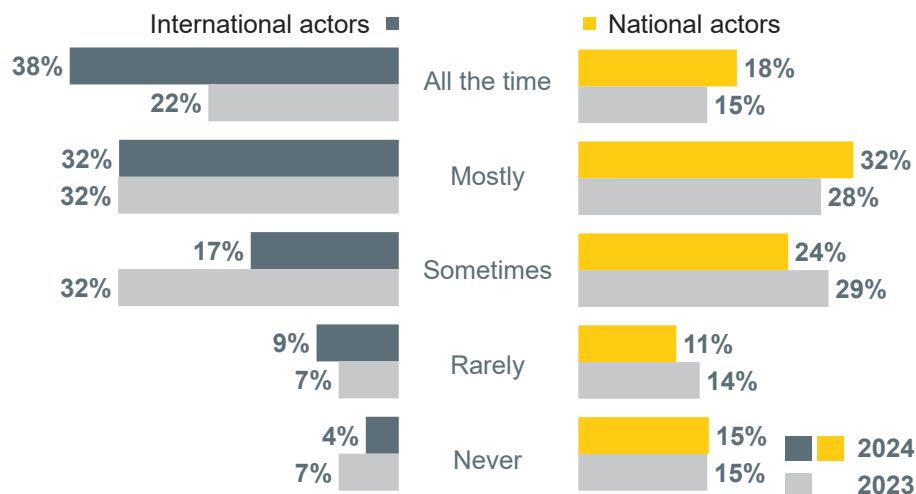
Examples emerged from the key informant interviews of how partnerships are based on equity and ethics and aim to create systems and processes based on strategic aspirations and goals. This reflects the change in ways of working among international partners and, to a lesser degree, the choice of national partners with whom to work.

Question: Do you feel your partnership is meaningful?

IDI 19: «It's meaningful in many ways. We are adaptive; we adapt to the context here. We consider the partner's feedback. We have specifically changed our tools to make it easier for national NGOs to work with us»...

International actor

Still, some evidence suggests that partnerships do not always bring positive outcomes. Monitoring and reporting requirements, micromanagement, and donor organizations and intermediaries imposing priorities and work processes result in national actors refusing partnerships due to perceived risks. Usually, only the largest national organizations have this option; most local and national organizations that have few resourcing options are forced to agree to unfavorable contractual arrangements to maintain operational continuity.

Question: How do partnerships operate?

IDI 3: «There are mutually beneficial partnerships... Unfortunately, not many donors provide useful feedback. In recent years, we have realized that we should choose our donors rather than take money from everybody... Because there are donors who strong-arm us, impose priorities, monitor, and practically micromanage us».

National actor

The more partnership agreements national organizations have, the more actively they participate in decision-making. Of the national organizations with 1–2 partnerships, 40% stated that they rarely or never participate in decision-making. In contrast, of national organizations with more than six partnerships (also the more financially stable), only 6% reported rarely or never being involved in decision-making in partnerships (see Figure 8). Still, the results for 2024 show a positive trend, with organizations with fewer partnerships feeling less excluded from decision-making than at the 2023 baseline.

Photo provided by East SOS

Figure 8. Involvement in decision-making (national actors by number of partnerships, % of answers «Never» or «Rarely»)

National actors: Is your organization involved in decision making in partnerships with international/foreign actors e.g. decisions on changing geographic focus of a project, target groups or decisions on budget reallocations?

	Up to 2 partnerships	3-5 partnerships	6+ partnerships
2024	40%	19%	6%
2023	54%	25%	3%
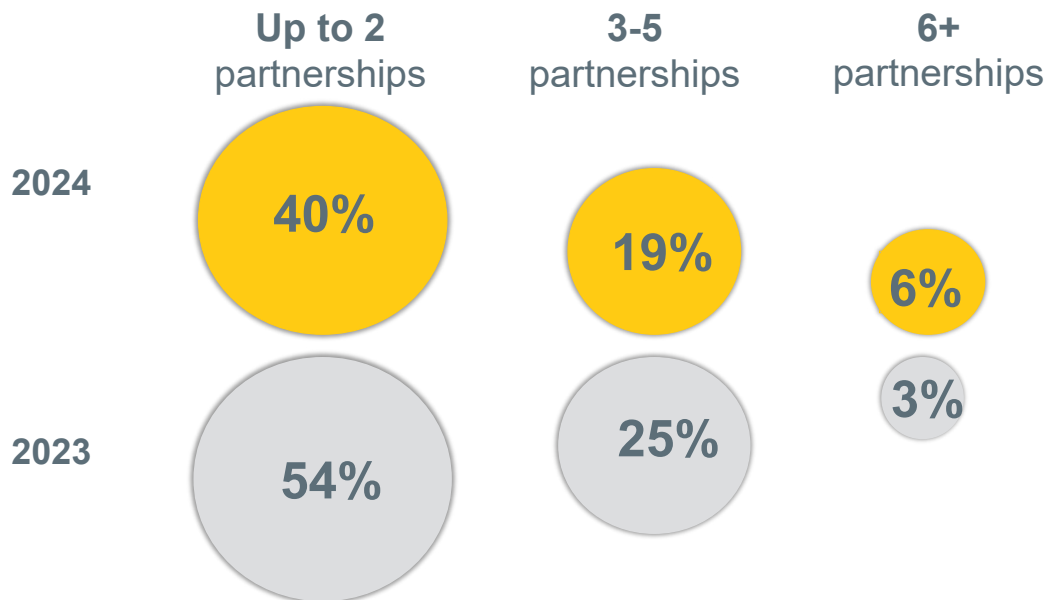
Our study confirmed, as expected, that larger national organizations that have been working in this sector for longer, cover several regions of Ukraine, and have more employees, are also more actively involved in international partnerships. For example, almost half of the organizations that work in only one region have up to two international partnerships, and only 10% have more than six partnerships. The situation is reversed among national organizations that operate within the macro-regions: only 9% have up to two partnerships, and more than half have more than six partnerships. Similarly, as expected, the number of partnerships increases with experience in the humanitarian sphere and with the organization's size (i.e., the number of employees) (see Table 2), indicating international actors prefer to work with established national organizations with wider reach and experience.

Table 2: Number of international partnerships depending on the profile of the national organization

	By number of regions of operation			By years of operation in the sector			By number of employees (size)		
	1	2–3	≥4	≤2	3–5	>5	≤5	6—50	>50
Up to 2 partnerships	49%	32%	9%	41%	32%	16%	36%	33%	3%
3-5 partnerships	41%	50%	36%	38%	45%	41%	51%	39%	22%
6+ partnerships	10%	18%	56%	21%	23%	43%	13%	28%	75%

Many Ukrainian NGOs administrative costs are not covered in partnerships with international organizations, nor are costs related to training and professional development of the organization's staff. Almost half of national organizations stated they never receive funding for their overhead costs (see Figure 9). Less than a tenth of national organizations claimed that they always receive overheads within partnerships, which is concerning for the long-term sustainability and development of Ukrainian civil society. Within the Ukrainian humanitarian response, national organizations with the lowest number of partnerships remain the most vulnerable with respect to funding from international actors.

Higher reimbursement of indirect project costs contributes to the institutional development of local organizations. It increases flexibility related to tasks such as project implementation and enhancing duty of care. However, few small national organizations know about overhead funding, and even fewer have experienced receiving it. As an example, NGORC conducted a series of workshops related to the 2023 Humanitarian Localization Baseline funded by ICVA for organizations in Dnipro, Mykolaiv and Odesa. None of the participants in these events knew it was possible to discuss overhead cost funding within their partnerships. It is also important to consider the responsibility of international and large national partners, who would have received overhead funding from their donors, to share it with their partners on the frontline.

Figure 9. Partnership funding (National actors)

In your partnerships with international/foreign actors, do the partnerships fund the following[12]?
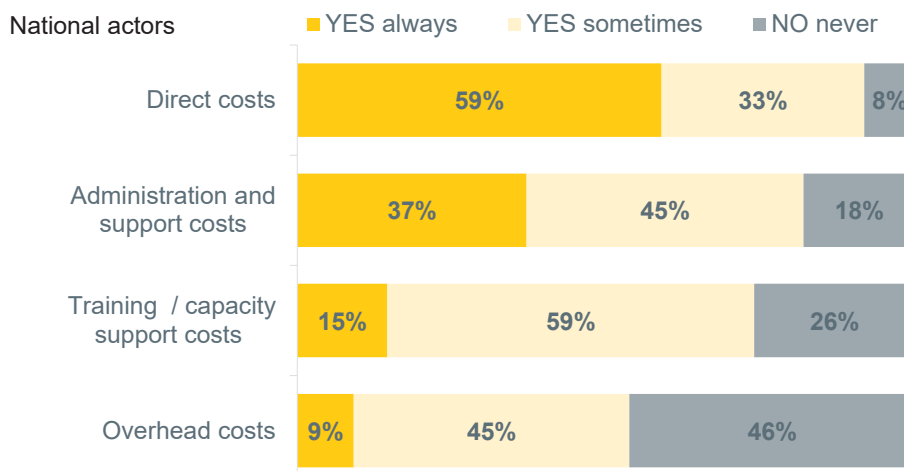
Forty-one per cent of national NGOs experienced not receiving direct cost funding. This illustrates that some stakeholders are continuing the practice, long reported by local actors, of handing over humanitarian assistance to local and national actors to distribute to communities without covering any costs for staff, transportation, or logistical needs, let alone indirect and overhead costs. Such practices usually prevail when power imbalances are present and sometimes when there is direct dependence. These practices often take advantage of the goodwill and sense of responsibility that local and national actors have in delivering aid to affected communities, regardless of financial viability.

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[12] Wording in the questionnaire:
- Direct costs (itemised costs of project/program activities);
- Administration, support, or shared costs (costs incurred as a direct result of the project activities which may or may not be itemised);
- Training/ capacity support costs (costs provided to support training and learning needs of staff);
- Indirect or Overhead costs (costs not directly attributed to project activities, that are calculated as a percentage of the total project expenditure and provided as unrestricted funds).

Among the respondents, three quarters of national actors believed that their ideas and views were always or mostly considered within partnerships, the same level as in 2023 (Figure 10). About a fifth of national organizations believe their opinions are always considered. National organizations possess unique knowledge and expertise, work closely with communities, and are more aware of their situations. Giving greater weight to their opinions would benefit communities and contribute to a more effective and efficient humanitarian response in Ukraine.

Figure 10. Sharing ideas within the partnership (National actors)

Are your organizations ideas and views considered in partnerships with international/foreign actors?

National actors

Category	2024	2023
All the time	22%	19%
Mostly	53%	57%
Sometimes	20%	20%
Rarely	4%	3%
Never	2%	2%
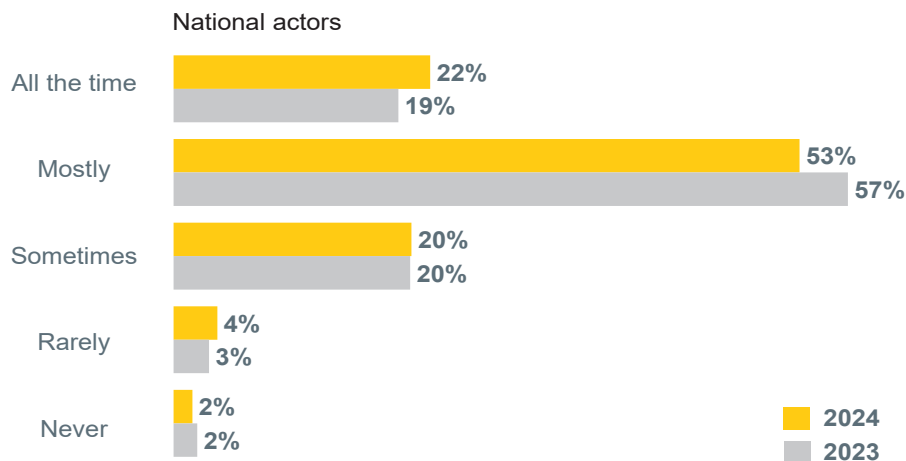
Feedback communication remains low despite often positive cooperation during the project implementation, reflected in both the quantitative survey responses and key informant interviews. About a quarter of international organizations reported that their local/national partner organizations formally assessed their capacity, an increase from 2023 (Figure 11). Significant progress was recorded in providing recommendations for improving cooperation: the proportion of international actors who received such recommendations from Ukrainian partners almost doubled between 2023 and 2024. This is disproportionate despite the progress when considering that approximately eighty per cent of Ukrainian organizations reported undergoing assessments and receiving recommendations from their foreign partners.
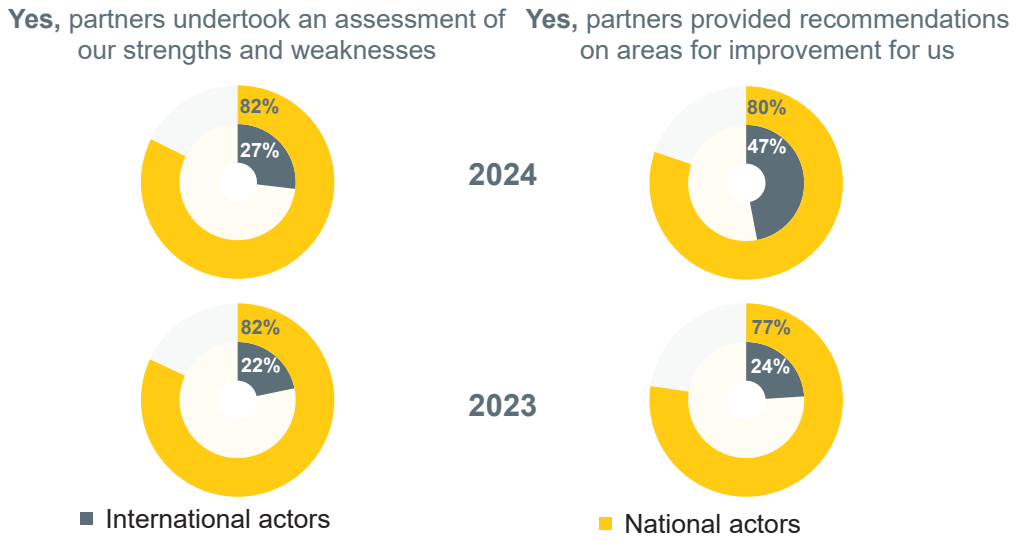

Photo provided by Proliska

As in 2023, the practice of giving feedback to partners is still more widespread among international organizations than national organizations, and there is no evidence that this practice is becoming more common. Considering national organizations significant operational and context-related expertise, a more equal approach could benefit Ukraine's humanitarian response (Figure 12).

Figure 11. Receipt of feedback

National actors: Has your international/foreign partner organization ever formally assessed your capacity in your partnership?
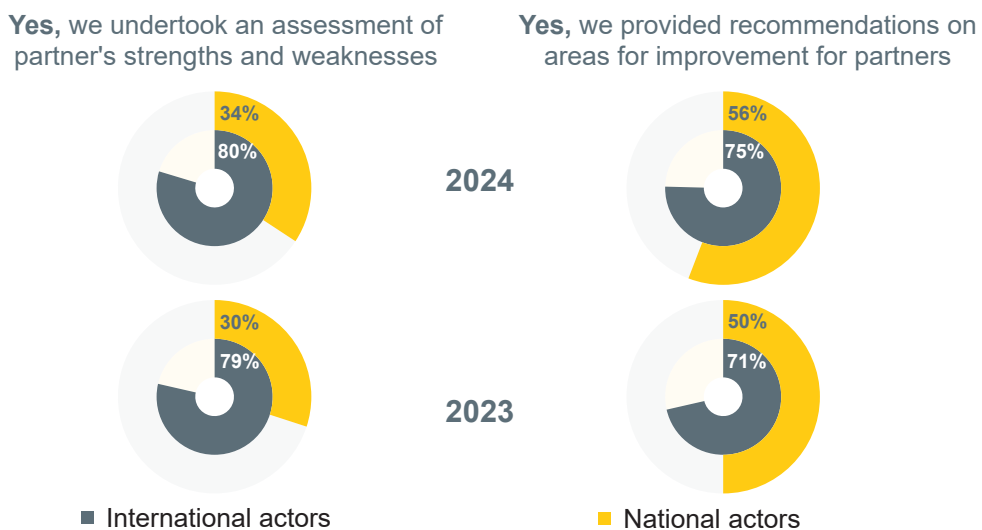*International actors: Has your local/national partner organization ever formally assessed your capacity in your partnership?*

Yes, partners undertook an assessment of our strengths and weaknesses — 2024: 82%, 27%; 2023: 82%, 22%

Yes, partners provided recommendations on areas for improvement for us — 2024: 80%, 47%; 2023: 77%, 24%

■ International actors   ■ National actors

Figure 12. Provision of feedback

National actors: Have you ever formally assessed the capacity of your international/foreign partners in your partnerships, e.g., undertaken an assessment of their strengths and weaknesses and provided recommendations on areas for improvement?
International actors: Have you ever formally assessed the capacity of your local/ national partner in your partnership?

Yes, we undertook an assessment of partner's strengths and weaknesses — 2024: 34%, 80%; 2023: 30%, 79%

Yes, we provided recommendations on areas for improvement for partners — 2024: 56%, 75%; 2023: 50%, 71%

■ International actors   ■ National actors

👥 LEADERSHIP

1.9

KEY FINDING:

In 2024, the overall localization score for leadership remained at the same level, 1.9[13], as in the Humanitarian Localization Baseline survey.

Progress indicators	Evidence level	
	2023	2024
International actors support and strengthen national leadership	1.3	1.0
Local and national actors lead response and dominate decision-making	1.8	2.3
International actors work with and respect in-country leadership structures and mechanisms	2.8	2.5

Humanitarian leadership should be inclusive, representative, gender-balanced, accountable, and supportive of the entire humanitarian community. L/NAs should have equitable opportunities with international actors and among their own peers ... to take on leadership and co-leadership roles at both national and sub-national levels, including as part of strategic advisory groups and coordination mechanisms[14].

Without local leadership, a humanitarian response cannot be localized. In 2024, there is limited evidence that international actors in Ukraine are focusing their efforts on increasing support and strengthening national leadership, which is concerning because leadership is recognized as the key component of effective localization. Still, there is continuing strong evidence that international actors respect and cooperate with leadership structures in Ukraine. As many studies have highlighted, leadership and funding are often linked; this study finds only weak progress within both areas.

Photo provided by UNHCR

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[13] 0 = no evidence; 1 = limited evidence; 2 = some evidence; 3 = significant evidence

[14] Strengthening participation, representation and leadership of local and national actors in IASC humanitarian coordination mechanisms, IASC Results Group 1 on Operational Response.

As noted above, the number of partnership agreements within Ukrainian organizations influences various other domains, such as access to resources and participation in decision-making. The exact correlation is observed through contacts and direct interaction with foreign actors. Figure 13 depicts strong progress for organizations with 3–5 partnerships.

Figure 13. Share of organizations that have had direct meetings with an international/foreign partner five or more times in the last six months (National actors by the number of partnerships)
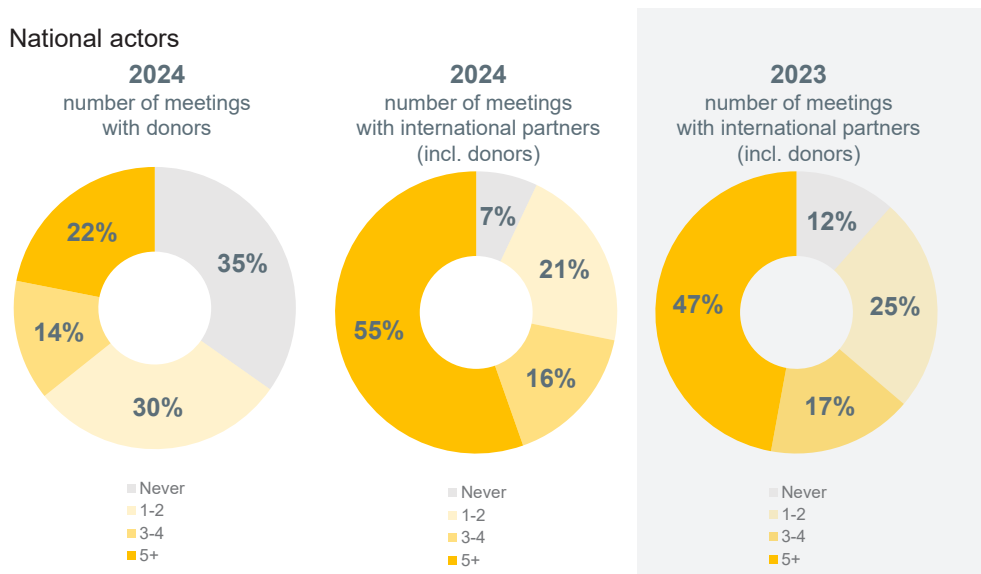
How often in the last six months has your organization met directly with an international/foreign partner?

National actors

	Up to 2 partnerships	3-5 partnerships	6+ partnerships
2024	37%	71%	80%
2023	43%	55%	76%
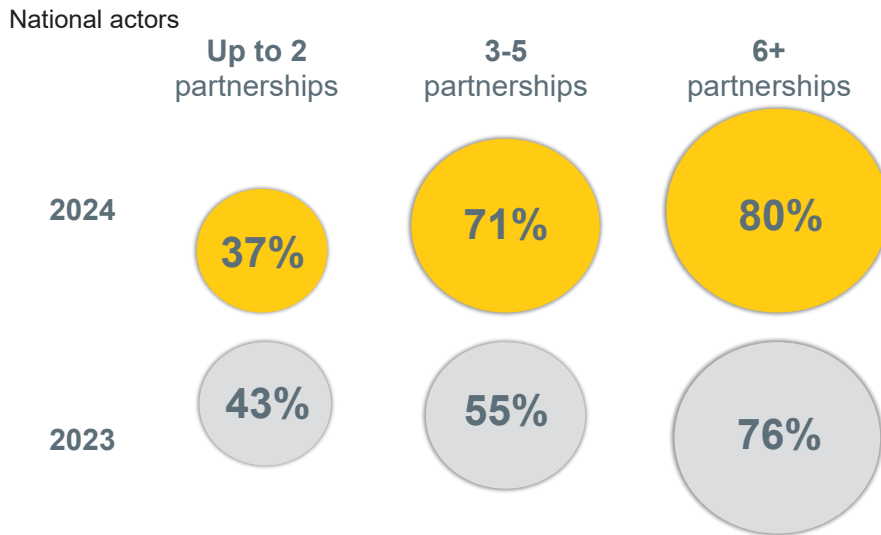
For organizations with two or fewer partnerships, the frequency of meetings with donors and international organizations has not improved (Figure 14). The 2024 survey data shows no significant shift in the number of meetings with foreign partners, which generally corresponds to the results in 2023. Over a third had no meetings with institutional donors, and only about a fifth had five or more meetings in the last six months.

Figure 14. Meeting with donors (National actors)

How often in the last six months has your organization met directly with an institutional donor?

National actors

2024 number of meetings with donors

- Never 35%
- 1-2 30%
- 3-4 14%
- 5+ 22%

2024 number of meetings with international partners (incl. donors)

- Never 7%
- 1-2 21%
- 3-4 16%
- 5+ 55%

2023 number of meetings with international partners (incl. donors)

- Never 12%
- 1-2 25%
- 3-4 17%
- 5+ 47%

Legend:
- Never
- 1-2
- 3-4
- 5+

The largest national organizations with six or more partnerships met donors most often; almost half of them reported meeting with institutional donors five or more times (Table 3). Of organizations with two or fewer partnerships, only about a tenth reported the same frequency of meetings. A concerning point is that more than half of local or national actors with two or fewer partnerships had not met with any institutional donors in the six months before the survey.

Table 3: Number of meetings with institutional donors depending on the number of international partnerships in the national organization

	≤2 partnerships	3–5 partnerships	≥6 partnerships
0 (never)	53%	25%	12%
1-2 meetings over the past 6 months	27%	36%	22%
3-4 meetings over the past 6 months	8%	17%	20%
More than 5 meetings over the past 6 months	12%	22%	45%

Within the Ukrainian humanitarian response, international organizations often stress that they facilitate direct contact between local partners and donors. In 2023, 85% of respondents (among international organizations) stated that they did this; in 2024, the figure was 73%.

There are discrepancies in international and national responses, and it can be assumed that international stakeholders often facilitate meetings for the same organizations, primarily large and experienced national humanitarian organizations, with institutional donors.

Question: Do you support national organization meetings in direct engagement with the donors?

IDI 11: We do what we can. The way that we're funded means that we don't have a huge amount of contact with donors in Ukraine. But part of our strategy and part of our plans is to utilize our position as an international actor that is recognized by donors to try to facilitate contact and more visibility for our partners in front of donors.
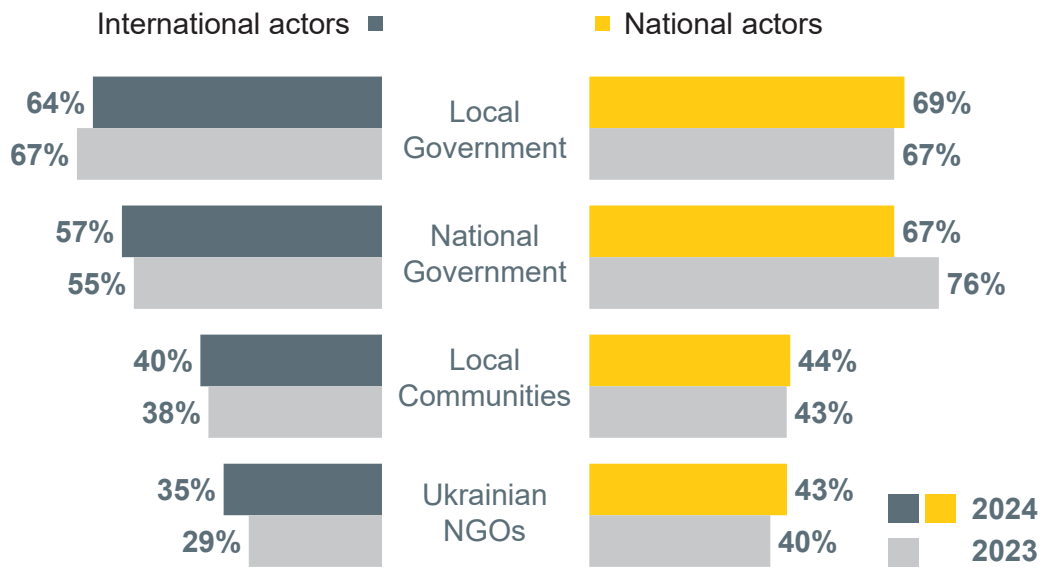
International actor

No significant shifts are apparent in the leadership role of the national government in decision-making about humanitarian response (Figure 15). National organizations tend to attribute more importance to the national government than international organizations, but their perception of the extent to which central government leads decreased slightly since 2023. National and international organizations have similar opinions on the leadership role of local authorities, with no significant shifts.

Assessments of the leadership role of local communities and Ukrainian CSOs also remained at 2023 levels. Still, the growing recognition of the leadership role of NGOs among international organizations can be considered a positive trend, possibly attributed to greater accumulated knowledge and experience among international organizations, strengthened capacities, and more visible national initiatives.

**Figure 15. Leading the decision-making process**

Do you think the following local and national stakeholders lead on decision making in the humanitarian response in Ukraine? (% of answers «always» and «mostly»)

International actors increasingly respect state institutional requirements, administrative procedures, and management mechanisms. In 2024, only 9% of representatives of international organizations said that international/foreign actors always respect and cooperate with leadership structures and mechanisms in the country, which has increased significantly to 23% in 2024 (Figure 16).

**Figure 16. Respect towards in-country leadership**

Do international/foreign actors respect and work with in-country leadership structures and mechanisms?
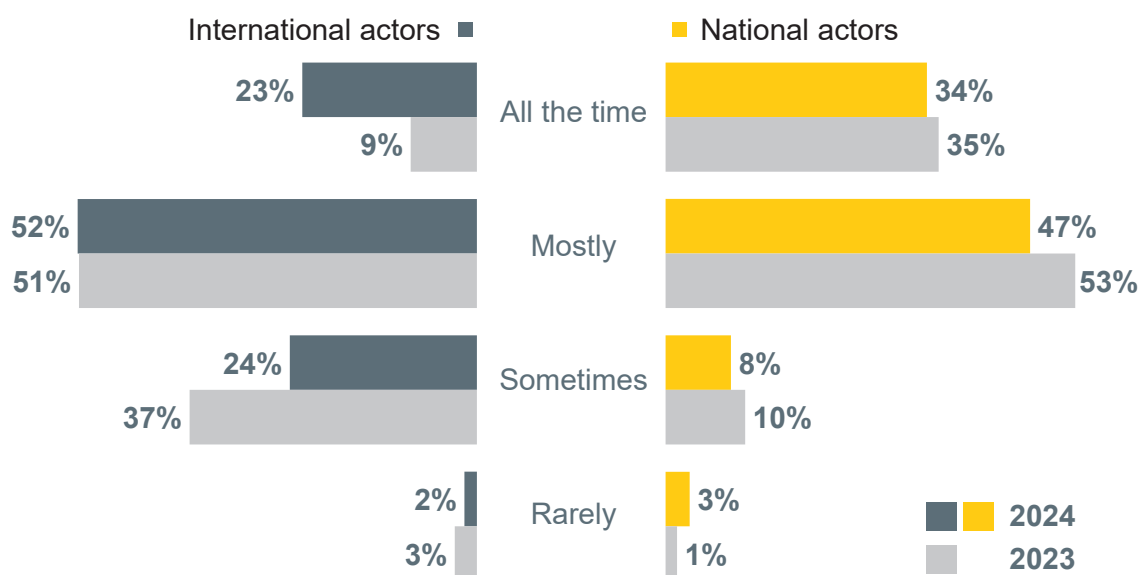
National organizations feel they have become more influential in local decision-making within the humanitarian response in Ukraine. Two thirds of national actors say that their organization has become more influential, a significant increase.

Figure 17. Responsibilities (National actors)

Did your organization get more responsibility for decision-making locally in Ukraine in 2023?

National actors
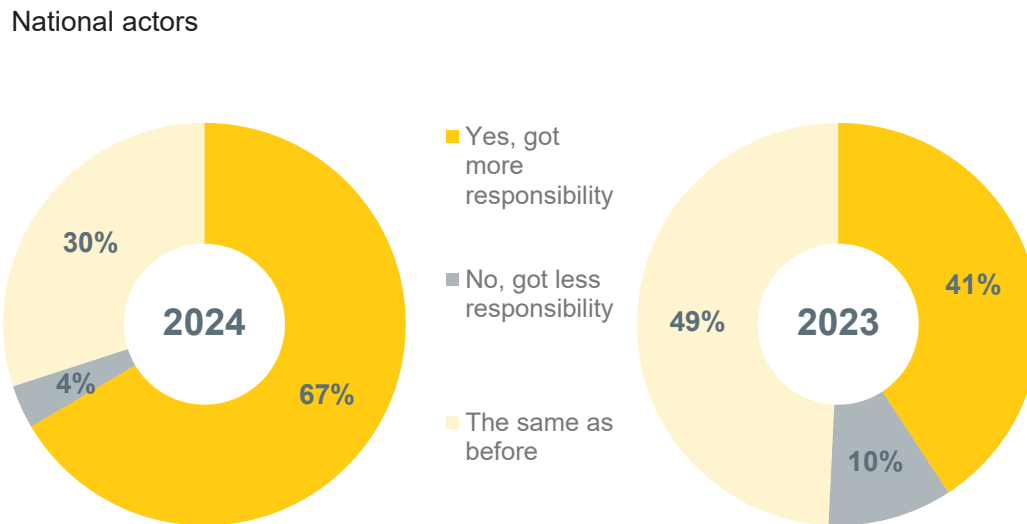
Interestingly, most national NGOs report increased influence, regardless of their experience or geographical coverage, but there is a clear link to organization size. However, even among small organizations with five or fewer employees, more than half report a perceived increase in impact (Table 4). Approximately 80% of national organizations with six or more partnerships report increasing influence. Furthermore, the primary correlation with policy influence for national organizations comes from improved operations. Funding and staffing are also associated with an organization's influence.

Table 4: Evaluation of the growth dynamics of the national organizations influence at the local level by the number of employees

|	≤5 employees	6–50 employees	>50 employees
The organization has become more influential	55%	76%	81%
The organization has become less influential	5%	1%	3%
The organization is as influential as it was before	40%	23%	16%

COORDINATION AND COMPLEMENTARITY

1.9

KEY FINDING:

The overall localization score in the coordination area increased from 1.9 to 2.0[15].

Progress indicators	Evidence level	
	2023	2024
National representation and engagement in coordination forums and meetings	1.8	2.0
Clearly defined parameters for international actors complementing local and national actors in humanitarian response[16]	2.0	2.0

The importance of coordination in the humanitarian response cannot be overstated. Complementarity, avoidance of duplication, and a balance between local and international actors are key factors in the effectiveness and efficiency of humanitarian response. More actors from both international and national organizations are participating in coordination meetings within the Ukrainian humanitarian response (Figure 18). While national organizations participation is increasing, they still lag international organizations.

Figure 18. Cluster participation

Do you/your organization participate in international and national coordination forums and meetings, such as clusters?
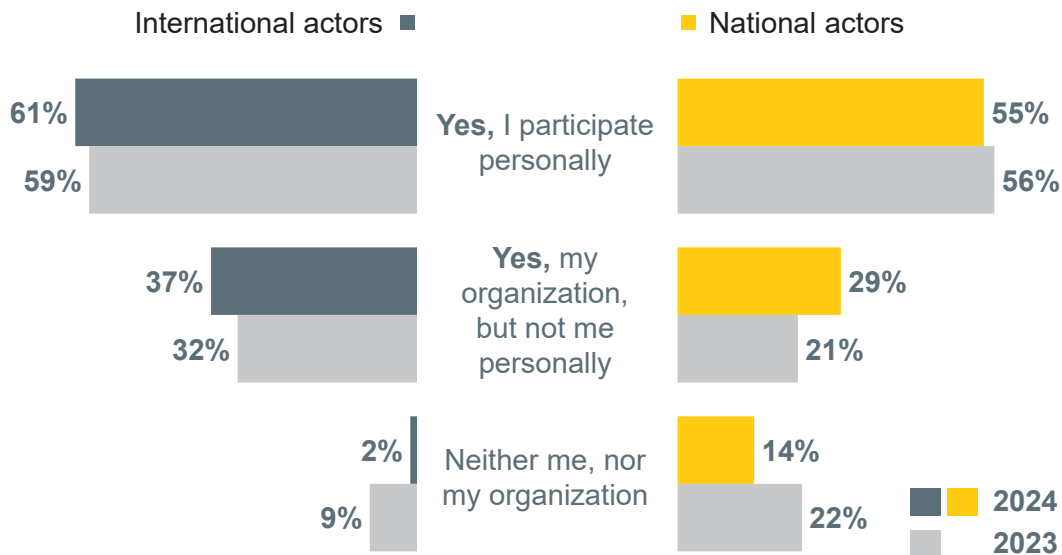
There is a clear correlation between an organization's number of partners and its level of participation in coordination forums. For example, in 2023, 34% of national organizations with two or fewer foreign partnerships had no experience of participating in coordination meetings. In 2024, this figure decreased slightly to 29%.

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[15] 0 = no evidence; 1 = limited evidence; 2 = some evidence; 3 = significant evidence.

[16] The indicator was assessed using a qualitative survey of key informants.

Furthermore, the larger the geographical area of activity, the higher the level of involvement of national organizations in coordination mechanisms. Thus, among organizations that operate in four or more regions, involvement was almost universal (Table 5). For organizations covering 2–3 regions, the level of involvement was slightly lower, and lower again among those operating within one region. A similar correlation was observed with organization size. Thus, smaller and local national organizations are less inclined to join and contribute to coordination meetings and platforms, and are less visible than others within coordination efforts.
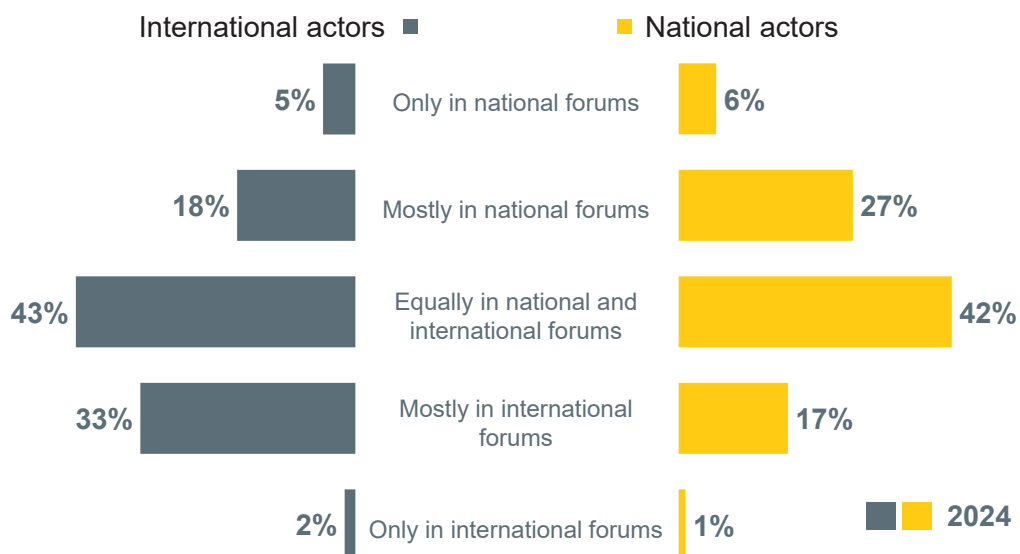
Table 5. Participation in coordination forums by national organization profile

	By number of partnerships			By number of regions			By number of employees (size)		
	≤2	3–5	≥6	1	2–3	≥4	≤5	6–50	>50
Participating personally	52%	56%	60%	52%	63%	57%	50%	66%	57%
Participating as an organization	19%	39%	38%	23%	26%	41%	30%	27%	42%
Do not participate	29%	6%	2%	25%	11%	3%	21%	7%	1%

The profile of national actors participating in various coordination bodies is increasingly similar to that of international organizations, with large minorities of both national and international actors reporting participating equally in both international and national coordination forums (Figure 19). Still, as expected, national organizations are more involved in national forums, and international organizations are more engaged in international forums. In particular, one third of the national organizations responded that they participate exclusively or mainly in national coordination meetings, which aligns with the baseline results. Almost the same proportion of international organizations reported participating solely or primarily in international forums (less than the 2023 baseline figure of 57%).

Figure 19. Forum participation

What national or international forums do you engage in the most?

	International actors ■	National actors ■
Only in national forums	5%	6%
Mostly in national forums	18%	27%
Equally in national and international forums	43%	42%
Mostly in international forums	33%	17%
Only in international forums	2%	1%

2024

The larger the organization, the more partnerships it has and the more regions it covers, the more often it participates in national and international forums. Smaller organizations (by all criteria) participate more often in national forums. The largest national organizations are similar to international organizations in their participation in international forums: approximately a third participate mainly or exclusively in international forums.
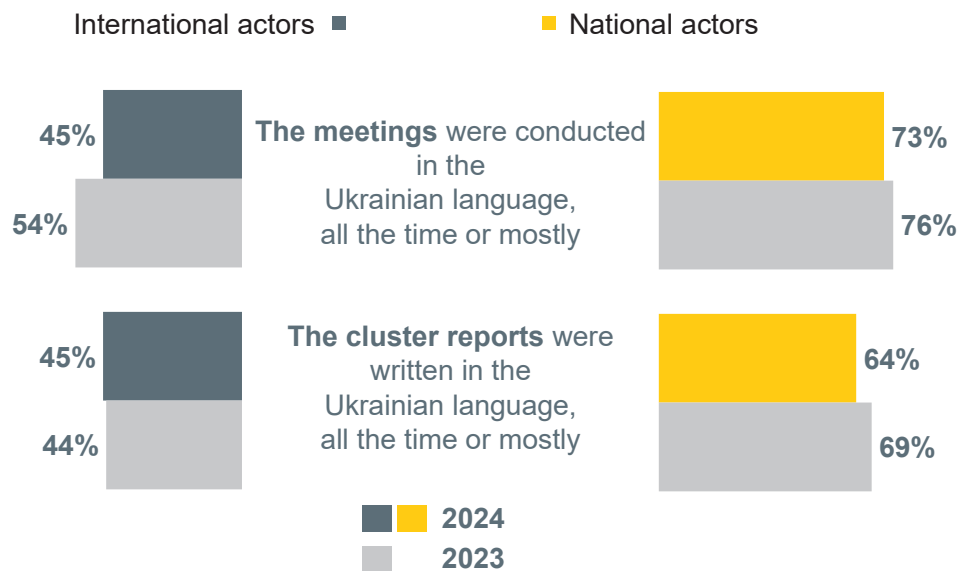
Table 6. Types of coordination forums according to the profile of the national organization

	By number of partnerships			By number of regions			By number of employees (size)		
	≤2	3–5	>6	1	2–3	≥4	≤5	6–50	>50
Mostly or exclusively national forums	39%	34%	20%	50%	44%	19%	46%	32%	17%
Both national and international forums	42%	42%	63%	40%	32%	58%	38%	46%	52%
Mostly or exclusively international forums	18%	23%	16%	10%	24%	23%	16%	22%	31%

Most respondents reported using Ukrainian language at coordination meetings in Ukraine, which broadly aligns with the previous year (Figure 20). However, both national and international organizations reported a decline in using Ukrainian in coordination meetings. This was somewhat unexpected, but could result from more coordination forums, broader geographical scope, and more specialized and technical forums.

Figure 20. Ukrainian language at coordination meetings

Please share your impressions about cluster meetings and other international forums.

International actors ■   ■ National actors

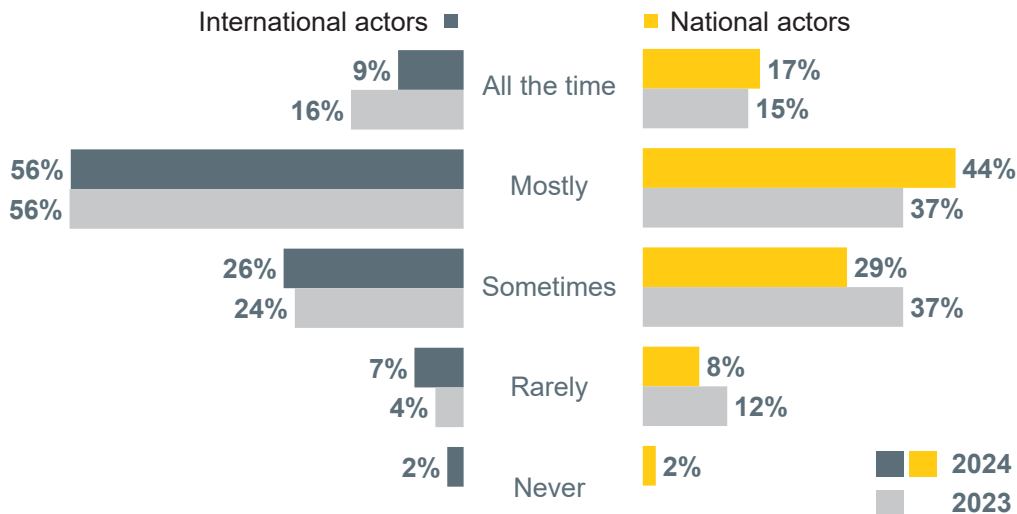|	International actors	National actors
The meetings were conducted in the Ukrainian language, all the time or mostly	45% / 54%	73% / 76%
The cluster reports were written in the Ukrainian language, all the time or mostly	45% / 44%	64% / 69%

2024
2023

While the participation of national and international actors in coordination mechanisms, as well as the availability of tools to overcome language barriers, are essential factors in the progress of localization in the areas of coordination and complementarity, perhaps more important is whether

national NGOs are heard. National organizations made some progress in this over 2023–24 (Figure 21); the proportion of national actors who reported that their voices were sometimes or rarely heard decreased. The trend of small organizations with fewer partnerships being less likely to have their voices heard in forums was also reversed (Figure 22). As noted earlier, small NGOs are less likely to participate in coordination mechanisms, but the chance to be heard has increased for those who do.
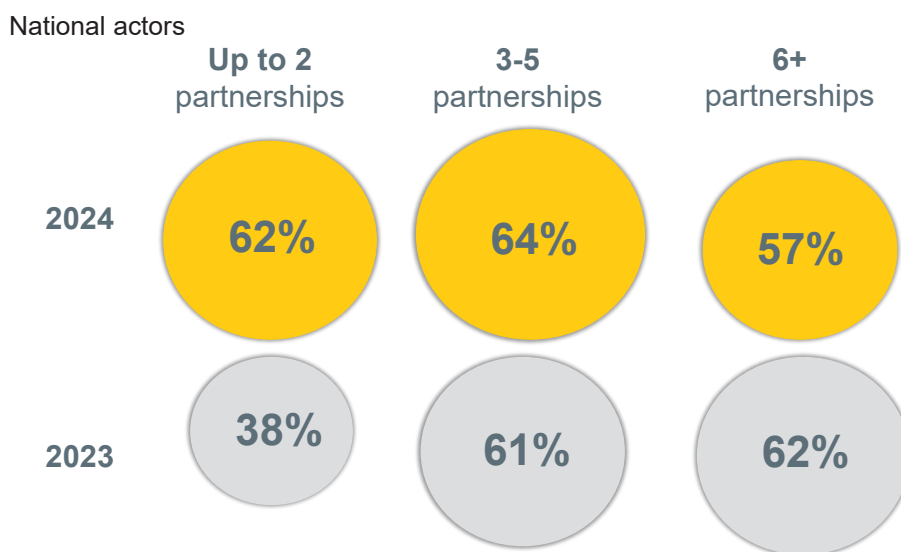
Figure 21. Participation in the forums

Your (or your organization's) ideas and suggestions were heard in the coordination forums.

Figure 22: Participation in forums (National actors by number of partnerships % of «Always» and «Mostly» answers)

*Your (or your organization's) ideas and suggestions were heard in the coordination forums.*

In general, both national and international actors agreed that international organizations acknowledge the role of their local partners when sharing information about project activities and results in communication with donors and in coordination with other actors, in reports, on social media, and so on. However, most respondents chose the answer «mostly», while recognizing that the role of local partners should be a regular practice in reporting and communications. Interestingly, representatives of international organizations were more critical of themselves: over one quarter chose the options «sometimes» or «rarely», while only about a fifth of respondents from national organizations did so.

Figure 23. International organizations recognize the role of their local partners

International actors credit the role of their local partners when sharing information about project activities and results in communication with the donors and during coordination with other actors, reports, on social media, etc.

	International actors	National actors
All the time	25%	23%
Mostly	48%	57%
Sometimes	25%	15%
Rarely	2%	5%
Never		1%
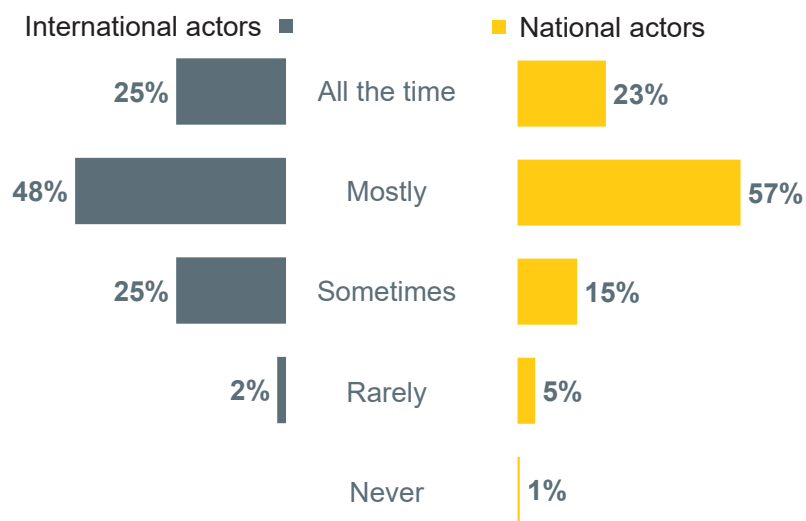
Key informants provided strong evidence about the general understanding of the complementarity of roles. However, critical feedback was also received, suggesting that donors should prioritize communication with local partners and the regions where assistance is received.

Photo provided by East SOS

Photo provided by Proliska

Question: Do you think local, national, and international actors have the same understanding of complementary roles?

IDI 7: «There are international organizations that perceive themselves as super-experts and carriers of civilization for the world they came to help. And sometimes, Ukrainian organizations have an inferiority complex and do not understand how important they are. Without them, this international organization would not have happened and would not be here. This is the aspect of the communication gap that we need to work on and explain to small organizations. They have more rights than they realize».

International actor

IDI 19: «Probably not. At the moment, in the clusters, the national actors are only participants, and they are not yet in the actual coordinator's position of that cluster ... I think that's an area where national actors can take a more leadership role. We need to have national cluster coordinators».

International actor

IDI 1: «Their understanding of what we need is in direct proportion to the amount of time they spend with us. A donor offering a grant program, for which we propose a project, where we jointly decide on activities, most likely communicates with other grantees in the same way, and therefore, he understands all the communities he works with and all the problems that exist because there is constant and direct communication. A donor that does not prioritize communication with grantees and communication with the region that receives assistance will provide grant programs suggesting support for LGBT people in the occupied territories. I think that if donors don't have any analysis of needs, they won't know exactly what people need».

National actor
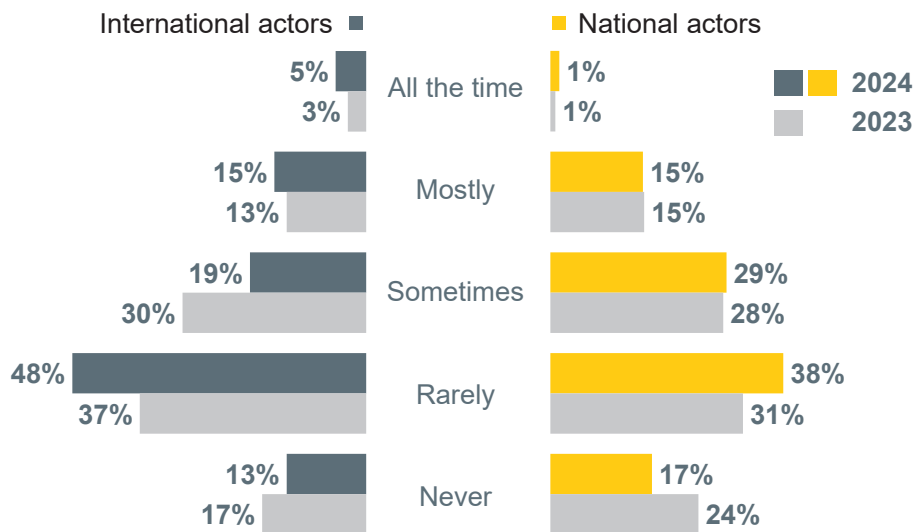
💰 FUNDING

0.9

KEY FINDING:

The overall localization score in finance remained at the level of 2023 (0.9–1.1[17]; limited evidence).

Progress indicators	Evidence level	
	2023	2024
Local and national actors have access to direct funding with limited or no barriers	0.0	0.3
Increase in the amount of humanitarian funding to local and national actors	1.8	1.7
Local and national actors have increased decision-making over financial matters	1.0	1.2

Evidence points to a minor increase in the localization of funding, while overall, it remains a weak domain that holds back effective localization efforts and locally led response. As indicated previously, there is a strong link between funding and leadership, and thereby, progress within each area is dependent on the other. Power and agency, and thereby the ability of individual organizations to play a vital leadership role within the Ukrainian response, are often linked to access to funding. Quality of funding remains as important as the quantity of funding.

Figure 24. Fairness of funding

I feel that local and national actors receive a fair proportion of funding[18] compared to international/foreign actors in humanitarian response.

International actors ■   National actors ■
■ 2024   ■ 2023

	International actors 2024	International actors 2023	National actors 2024	National actors 2023
All the time	5%	3%	1%	1%
Mostly	15%	13%	15%	15%
Sometimes	19%	30%	29%	28%
Rarely	48%	37%	38%	31%
Never	13%	17%	17%	24%

Within the humanitarian response, local and national organizations have slightly easier access to direct funding with or without limited obstacles, but as in 2023, this remains a weak area. Funding distribution remains unbalanced in favor of international organizations, and many perceive it as unfair. Furthermore, inadequate financial systems hinder accurate tracking and reporting of funds

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[17] 0 = no evidence; 1 = limited evidence; 2 = some evidence; 3 = significant evidence.
[18] In 2023, the question used the wording «fair and proportional funding».

to local and national actors'[19], which results in gaps in overall transparency and makes adequate analysis difficult.

Few national and international organizations believe the current funding situation can be perceived as fair, and no significant change has occurred since the 2023 Humanitarian Localization Baseline. In particular, the proportions of respondents who assessed the funding process as «mostly» or «always» fair and proportional changed little between 2023 and 2024 (Figure 24).

The distribution of funding sources for national actors remains very similar to that in 2023. In analyzing financial stability across sectors, only actors in Camp Coordination and Management stand out as more financially stable.

Figure 25. Sources of funding

Approximately how many different sources of funding does your organization have for humanitarian activities?
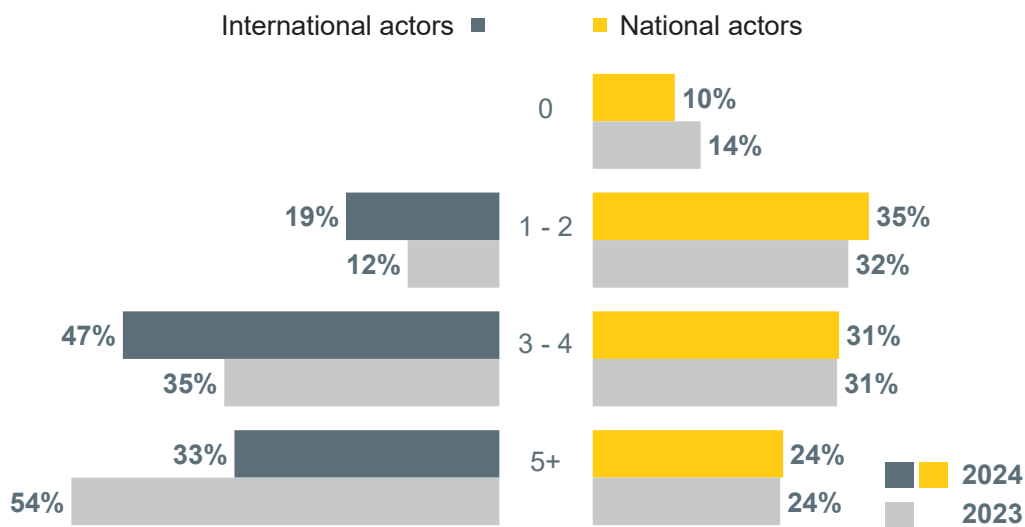
The situation for international organizations continues to be significantly better in 2024 than 2023, with most of them reporting multiple funding sources. However, the proportion of respondents with more than five funding sources decreased from 54% to 33%, while the proportion with 3–4 sources increased from 35% to 47%.

As noted earlier, the funding distribution within the humanitarian response is perceived as unfair, and key informants confirmed the need for more transparent progress in this area.

Question: Do you think that national actors receive a fair share of funding compared to international actors?

IDI 1: «I know of cases when international actors take more for their administration than the share of actual assistance. That is, for example, seventy per cent of the real amount is spent on the administration of this whole project, and thirty per cent is actual assistance».

National actor

IDI 11: «The international community has committed to the grand bargain, which says twenty-five per cent should be going to local and national organizations, and we are very far from that».

International actor

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[19] IASC (2024) Localisation learning space: progressing towards 25% direct funding to local and national actors.

Photo provided by Swiss Agency for Development and Cooperation

Some respondents stressed that fair funding is only available theoretically, and securing it is a long process.
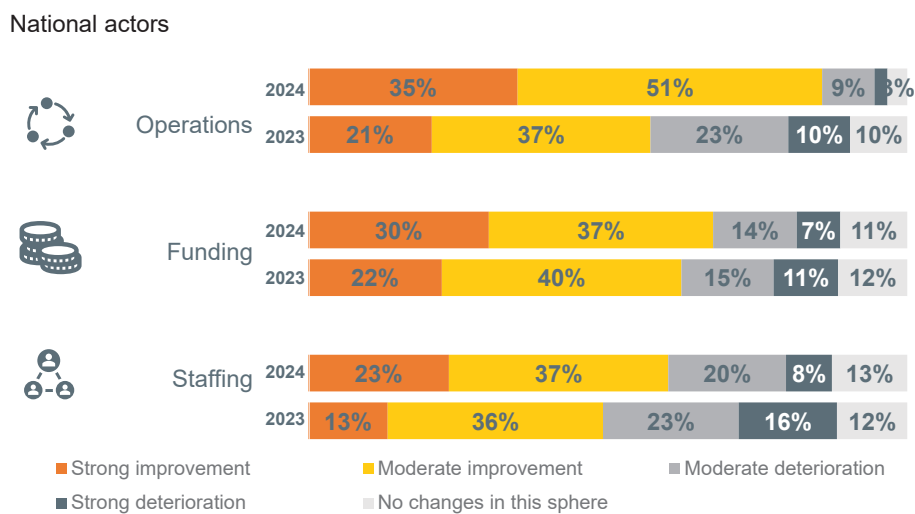

IDI 1: «In theory, we can, but we don't get it now. If we scale up and perfectly submit our reports and build friendly relations ... We will become a "Prytula" Foundation[20], for example. Then we can do it. Maybe we need to reach a certain level».

National actor

Nevertheless, the actual amount of funding for most national organizations increased between 2023 and 2024, while the percentage of national organizations reporting improved funding rose slightly (Figure 26).

Figure 26: Organizational changes since the full-scale invasion (National actors)

*What changes did you have? Please estimate each sphere:*

National actors

	Strong improvement	Moderate improvement	Moderate deterioration	Strong deterioration	No changes in this sphere
Operations 2024	35%	51%	9%	3%	
Operations 2023	21%	37%	23%	10%	10%
Funding 2024	30%	37%	14%	7%	11%
Funding 2023	22%	40%	15%	11%	12%
Staffing 2024	23%	37%	20%	8%	13%
Staffing 2023	13%	36%	23%	16%	12%

- Strong improvement
- Moderate improvement
- Moderate deterioration
- Strong deterioration
- No changes in this sphere

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[20] Prytula Foundation: A prominent Ukrainian charitable organization founded by Serhiy Prytula, which gained widespread recognition for its large-scale fundraising efforts and humanitarian initiatives, especially during the ongoing war.

The proportion of international organizations making project budgets and financial reports available to their partners decreased over 2023–24 (Figure 27).

Figure 27. Sharing project budgets and financial reports

National actors: Our international/foreign partners share full project proposals, including the budget and financial reports, with our organization
International actors: We share full project proposals, including the budget and financial reports, with our local/national partners
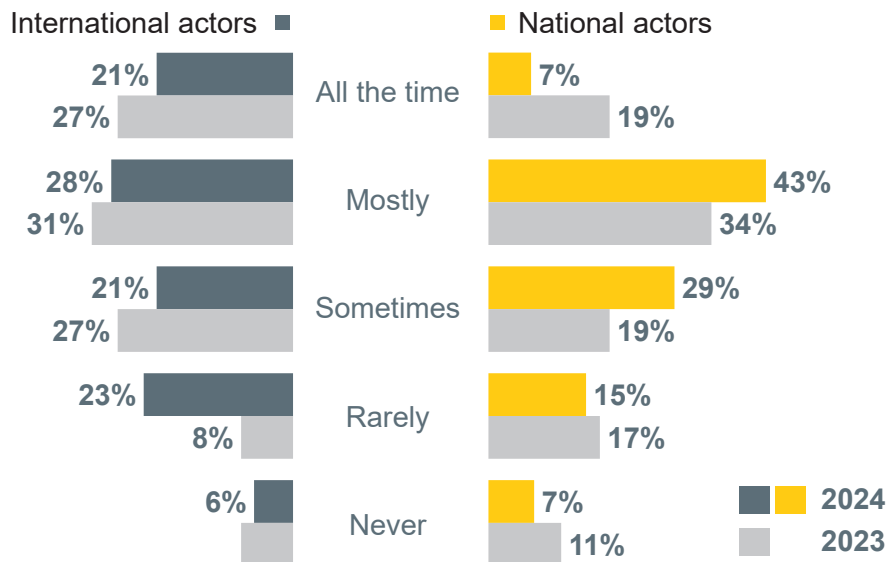
Key informants confirmed the data from the quantitative survey, noting that budget data and reports are often available only upon special request. Thus, opportunities for national partners to influence decisions on financial issues remain scarce.

Question: Do your international partners provide your organization with access to project budgets and financial reports?

IDI 6: «No, we have not had that. They provide reports on their activities, and they also provide reports on their partners and what projects they are implementing, but they don't provide us with information about internal information, salaries, and so on. We did not make such requests».

National actor

IDI 9: «Only upon request. Since we are an international humanitarian organization, our international website contains information about our financial situation. The Ukrainian branch does not have a website, and such information is not publicly available. We can provide such information upon request. We conduct an annual external audit, and the report can be provided upon request. We provide the same documents upon request of our donors when we are undergoing accreditation».

International actor

IDI 12: «No, because the reports that we receive, it's basically several people assisted and money that they transfer to them. This information is accessible to everyone. You can go to the working group dashboard, filter by your organization, and see the number of people. And the amount that they disperse. More than that, we don't collect any information».

International actor

A negative trend among international organizations was observed in the self-assessment of financial stability. In 2023, almost all survey participants reported their organizations were financially stable; in 2024, the share of positive responses decreased markedly (Figure 28).

National organizational financial stability assessments remained unchanged, with only half of respondents saying their organizations were financially stable.

Figure 28. Perceived financial stability

I feel that my organization is financially stable
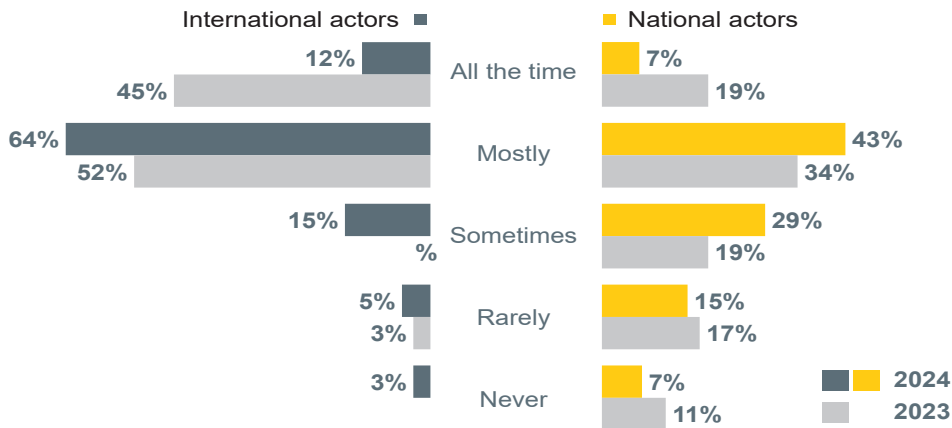
The financial stability of national organizations is correlated with their number of partnership agreements. National organizations with more partnerships feel more confident in financial matters (Figure 29). Note that the confidence level of national organizations with 1–2 partnerships increased between 2023 and 2024, but decreased among organizations with 3–5 and 6 or more partnerships. Many larger organizations have grown quickly within the last two years in terms of funding, partnerships, staffing, and exploring new sectors outside their core competencies, which has proved difficult to sustain.

Figure 29. Financial stability – national actors by number of partnerships, % of «always» and «mostly» answers

Do you feel that your organization is financially stable?
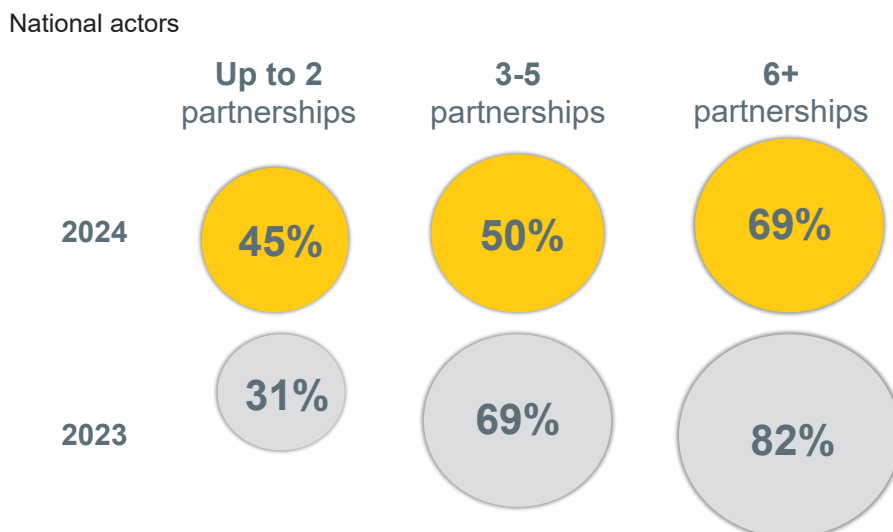
Interestingly, national organizations are often optimistic in assessing their financial stability. For example, while only one in five stated that they «definitely» have an operating budget in the bank for at least three months, one in two believe themselves to be financially stable (Figure 30). While having a budget for three months makes many national NGOs consider themselves financially stable, the situation is markedly different among international organizations: although over four fifths have an operational budget for the next quarter, fewer of them consider their organizations financially stable. This reflects the different situations and perspectives of international and national organizations. Still, the fact that over a third of national organizations are unsure how to cover their costs beyond three months should concern all actors in the humanitarian response in Ukraine.

Figure 30: Operating budget

Do you think your organization has an operational budget in the bank for at least 3 months?
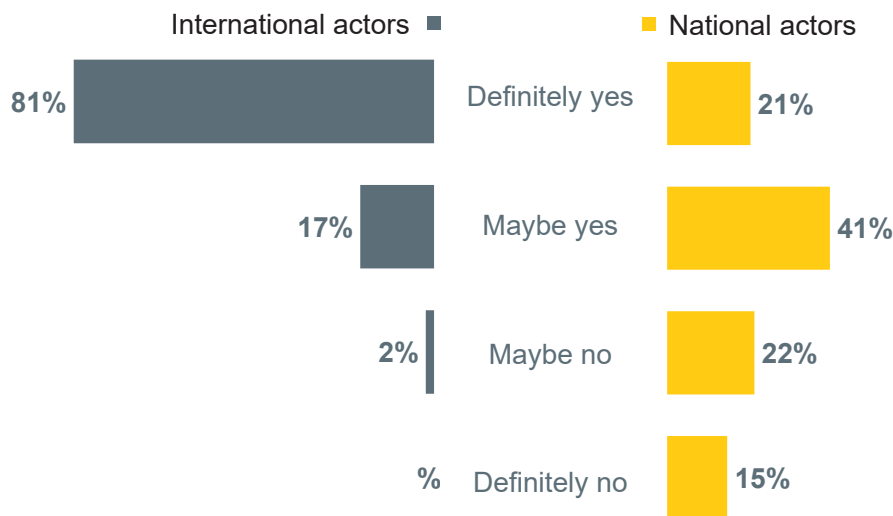
Small organizations are among the least financially secure, with almost half of organizations with 1–2 partnerships answering negatively to a question about operating budget availability (Table 7). Financial stability increases with the size of the organization and broader geographical scope.

Table 7. Availability of at least three months of operational budget by national organization profile

	By number of partnerships			By number of regions of operation			By number of employees (size)		
	≤2	3–5	≥6	1	2–3	≥4	≤5	6–50	>50
Definitely yes	13%	29%	33%	11%	20%	33%	17%	39%	53%
Rather yes	40%	47%	50%	37%	39%	48%	31%	39%	42%
Rather no	27%	19%	15%	26%	30%	12%	27%	16%	5%
Definitely no	21%	4%	2%	26%	11%	7%	24%	6%	0%

✕ CAPACITY

2.3 **KEY FINDING:**

The overall localization score in the capacity area was stable at 2.322[1].

Progress indicators	Evidence level	
	2023	**2024**
Increased use of local, national, and regional capacity over international expertise	3.0	2.5
International actors do not undermine the capacity of national actors in emergency response	1.7	2.0

Most national and international organizations indicated that the needs of local and national organizations are jointly determined. The responses did not shift markedly from the 2023 baseline responses (Figure 31).

Figure 31: Capacity needs

Who defines the capacity needs of local and national actors?
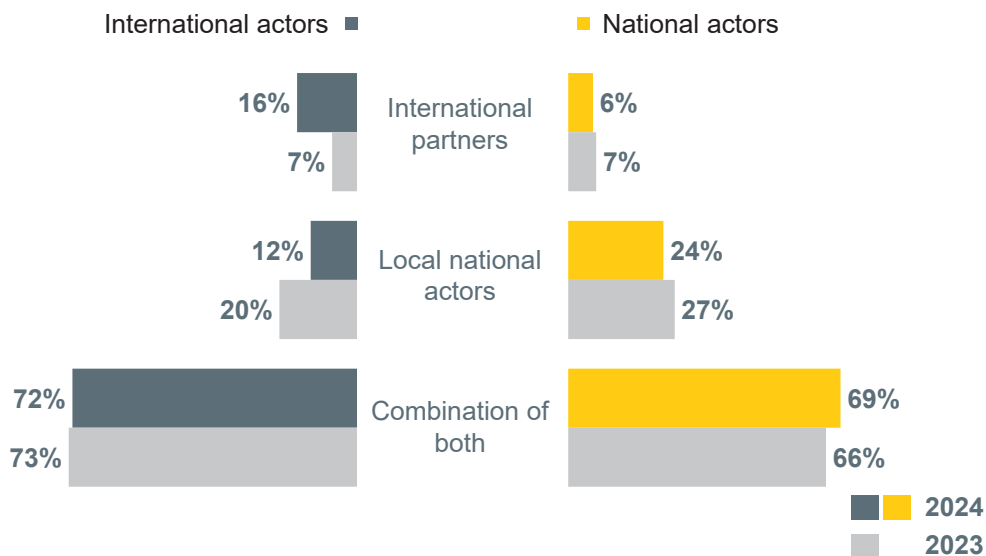
Key informants confirmed the findings of the quantitative survey. In particular, the respondents noted that they used assessment methods to identify needs and provide support in this area.

Seventy per cent of national organizations who responded to the survey indicated that international actors generally focus on the areas of capacity strengthening their Ukrainian counterparts required (Figure 32). A higher proportion of international organizations than in the 2023 Humanitarian Localization Baseline stated that they prioritize the desired areas of national partners» capacity building, which is a positive change. Nonetheless, paradoxically, the numbers for international and national respondents moved in opposite directions, which could indicate a difference in perception about the need for capacity strengthening.

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[21] 0 = no evidence; 1 = limited evidence; 2 = some evidence; 3 = significant evidence.
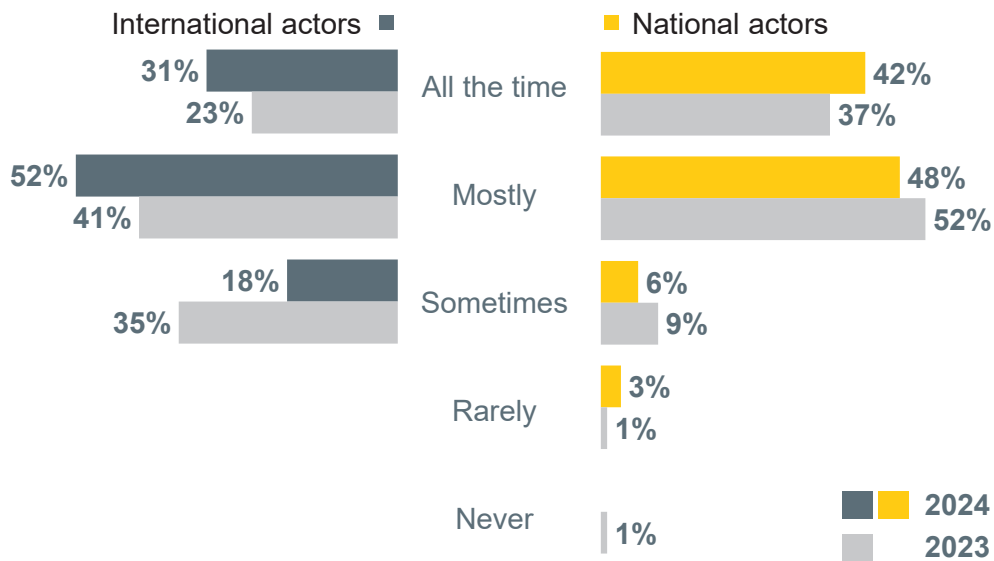
Figure 32: Capacity strengthening

Do international/foreign actors focus on the areas of capacity strengthening requested by local and national actors?
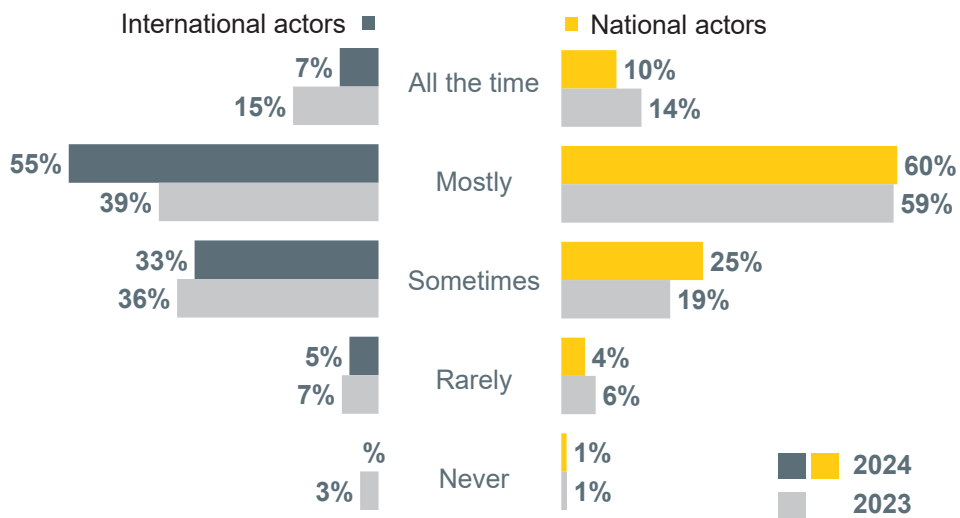
International organizations assessed the value of the support they received as higher in 2024 than at the first Localization Baseline measurement. In 2023, only 64% said that the capacity of local partners was improving «mostly» or «all the time», compared to 83% in 2024 (Figure 33). The proportion of national organizations that believed that their capacity was strengthened («mostly» or «all the time») due to the support of international partners was 89% in 2023 and 90% in 2024.

Figure 33. Capacity support

Do you feel that the capacity of local and national actors and organizations is strengthened by international/ foreign support?

International actors ■   ■ National actors

	International actors		National actors	
All the time	31%		42%	
	23%		37%	
Mostly	52%		48%	
	41%		52%	
Sometimes	18%		6%	
	35%		9%	
Rarely			3%	
			1%	
Never			1%	

2024
2023

Despite these overall positive results, key informants emphasized that negative aspects of international support for local and national actors' capacity strengthening must be highlighted and corrected. These included:

- Inability to provide targeted knowledge and skills to support specific capacity strengthening for larger developed national organizations.

- Short project timeframes, which mean national organizations have insufficient time to use support to strengthen capacity.

- Avoiding repetitive training. Some donors and intermediaries have standardized requirements and do not recognise certification from other organizations, so require local and national actors to repeat their training. National actors learning the same training content repeatedly has led to questions such as «When do we graduate?».

Question: Do you think your organization's capacity is strengthened by international support?

IDI 4: «There are donors who are great in helping to develop a plan and train us. The only problem is that no staff would often give this training at the needed level. There are a lot of specialists, great training, and programs for beginners. For more developed organizations, this is a real problem. Finding a great trainer who would answer our questions already clearly formulated is a real challenge!'

National actor

IDI 6: «There are not enough sustainable projects for six months to a year. So that teams don't have to think about where to find funding during this time».

National actor

📝 POLICY INFLUENCE

2.3

KEY FINDING:

The overall localization score in policy influence slightly increased from 0.7 to 0.8 (limited evidence)[22].

Progress indicators	The level of evidence	
	2023	2024
Policies are informed by local and national voices, including communities	1.0	0.5
National actors are recognized as key stakeholders in national debates about policies and standards that may have a significant impact on them[23]	1.0	1.0
Local and national actors have an influence on donor priorities in-country, including program design and implementation	0.0	1.0

The proportion of respondents who stated that they can always or mostly influence humanitarian policy decreased slightly among both international and national actors (Figure 34). The decline was more profound among international actors, but their influence on the development and planning of humanitarian policy in Ukraine was perceived as significantly higher than that of national actors overall.

Figure 34. Involvement in policy development

How much are you or your organization involved in influencing/feeding ideas into developing humanitarian policies and planning processes in Ukraine?
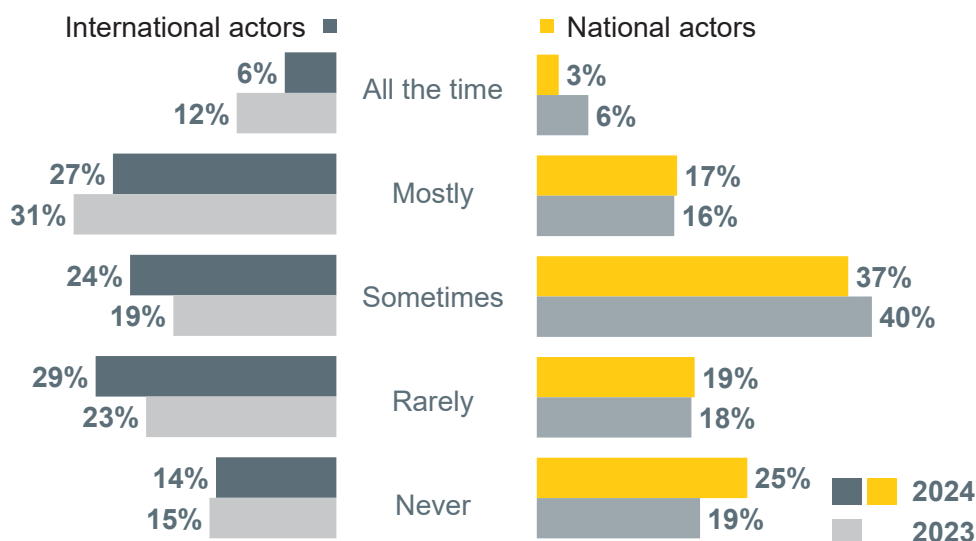

Significantly, 98% of respondents who represented national actors and perceived themselves as having no or little influence on the development of humanitarian policy (those who answered «sometimes», «rarely», or «never») stated that they would like to be more involved in these processes. A large majority chose the option «definitely yes» (Figure 35), which indicates national organizations untapped potential and motivation.

Figure 35. Willingness to be involved in policy influence

Would you like to be [more] involved in influencing/feeding ideas into developing humanitarian policies and planning processes for Ukraine? (for those who didn't answer «all the time» or «mostly» to the previous question)

■ National actors

Definitely yes	73%
Partially	24%
Definitely no	3%

■ 2024
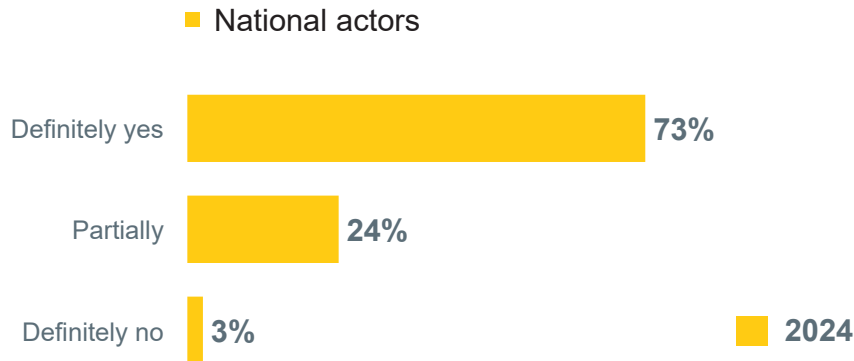
Key informants representing international actors noted that they could have involved national actors more in policy influence processes. There is limited evidence that the national qualitative survey respondents have had significant influence on policy.

Question: How much are you or your organization involved in influencing/feeding ideas into the development of humanitarian policies and planning processes in Ukraine?

IDI 16: «We fund research, and we fund assessments and we fund advocacy briefs and data analysis and things like that. That can be used to try to influence. Almost all of our work is designed to ensure that marginalized groups are included in response and recovery planning processes. So that's why we invest in the creation of philanthropy in Ukraine and the Alliance of Ukrainian CSOs».

International actor

Many national organizations have minimal communication with institutional donors, reducing their ability to influence policy. Those national actors who reported an established dialogue with donor organizations perceived that they had some influence on policy development, but remained mindful of the difficulty of effecting policy change.

Question: Do you feel that you can influence donor policies?

IDI 2: «Well, you see, it is much harder to influence donor policy because, quite often, the representatives who are here, with whom we communicate, are not the people who shape humanitarian policy. They often receive specific instructions from their headquarters on how it should look like».

National actor

IDI 4: «We can work with donors, and we do it very actively, and we always involve everyone in this process, and we say that we do not have to agree with everything; we have to understand that we already have expertise, knowledge, and experience, and we have to talk about them openly».

National actor

PARTICIPATION

2.3

KEY FINDING:

**The overall localization score
in the area of participation increased from 2.3 to 2.5[24].**

Progress indicators	Evidence level	
	2023	2024
Community/contextualized standards exist for all actors working in that context	3.0	2.0
Communities have increased opportunities to shape programming, including evaluating international actor programs[25]	1.5	3.0

The participation domain remains strong, and progress has been made. Local and national organizations provide valuable comprehension of local challenges, contexts and potential solutions. They are often able to mobilize local networks and communities and offer greater access to affected populations than their international counterparts.

Most respondents believed that the needs of the affected population are considered in the development and implementation of humanitarian programs, and this share increased among national actors compared to 2023. In 2023, 88% of national actors stated that they considered affected people's opinions («mostly» or «all the time») when designing and implementing programs in Ukraine; in 2024, this proportion increased to 98%. Moreover, 80% of national actors answered that they «always» do so (an increase of 12 percentage points compared to 2023), compared to 53% for international actors (Figure 36).

Figure 36. Accountability to affected people

Does your organization consider affected people's opinions during the design and implementation of programs in Ukraine?

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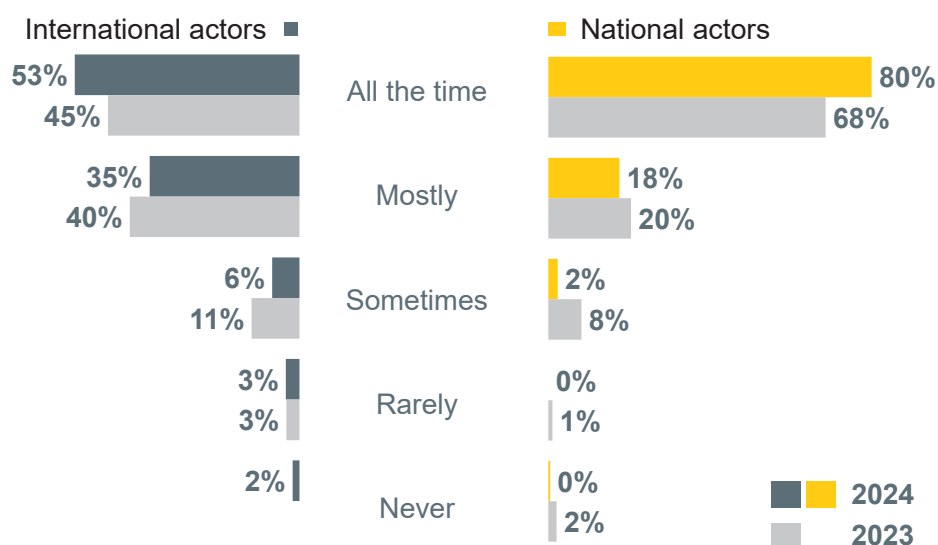
[24] 0 = no evidence; 1 = limited evidence; 2 = some evidence; 3 = significant evidence

[25] The indicator was assessed using a qualitative survey of key informants.

A higher proportion of representatives of international organizations also gave positive responses to the question of whether the needs of the affected population were considered. However, while the progress was smaller than for national actors, the proportion of affirmative answers increased from 85% in 2023 to 88% in 2024. A gap remains between international and national organizations in terms of considering the needs of the affected population. The explanation may lie in the closeness of national organizations to communities and their better understanding of context and preferences.

Donors, international organizations and national actors strengthen communities capacity to develop and tailor programs to their needs. International organizations rely primarily on coordination mechanisms and greater involvement of national partners. National actors, mainly large ones, have begun to allow themselves to select donors for cooperation based on donors public voice and the voices of affected communities.

Question: Do humanitarian organizations have the flexibility to adjust their projects and programs when conditions change/based on needs articulated by the affected population?

IDI 3: «I don't know, probably fifty-fifty. I can say for myself that we have become selective in choosing donors. We don't work with everyone. For example, we simply stopped working with those who stubbornly distributed blankets in July».

National actor

While national organizations can (and do) maintain direct contact with local communities, international organizations primarily keep contact through their local partners. However, donors often approach this issue systematically and build direct communication with affected communities into the project design.

Question: How do communities shape your programming in humanitarian response?

IDI 16: «So because we are a donor, we make sure that in the design of the programs, we always focus on what their outreach strategy is. How are they measuring the satisfaction of their services and programs? To include the local community, not just the ones who are receiving the services, but broader than that, the people who are not receiving services. So we do that through ensuring that the program design incorporates collection and analysis of that data and that it feeds back into the program design».

International actor

Photo provided by NGORC

| UKRAINE'S LOCALIZATION PROGRESS IN THE CONTEXT OF GLOBAL TRENDS

The localization of humanitarian response is a global humanitarian priority, but presents unique challenges and opportunities based on country and regional contexts. While localization research is undertaken across a wide range of countries, measurement of localization progress at a country or response level using a standardized methodology and framework is less common. PIANGO and HAG's Localisation Measurement Framework has been one of the few tools to date used across multiple contexts – the Pacific (Fiji, Solomon Islands, Tonga, and Vanuatu), Bangladesh, Yemen and Ukraine[26] – and provides a basis for comparison across contexts using baseline and progress report data. Figure 37 below shows how Ukraine's Localization Baseline and progress report data compares to data from the Pacific, Yemen and Bangladesh.

Figure 37. Comparison of Ukraine Localization Baseline and progress data against other selected studies

UA – Ukraine
B - Bangladesh
P – Pacific (combined)
Y – Yemen

	None (0)	Limited (1)	Some (2)	Strong (3)
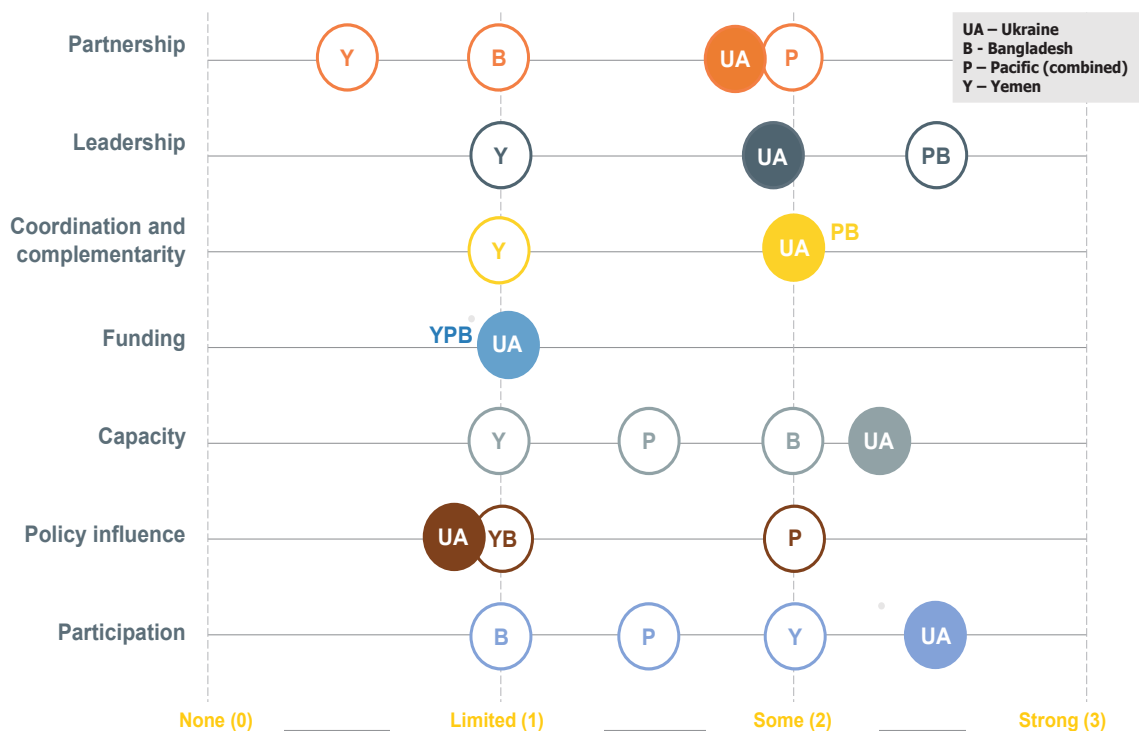
The contexts here vary considerably by type of crisis (Ukraine and Yemen – conflict, Pacific and Bangladesh – natural disasters), resourcing availability (Ukraine is relatively well resourced), existing capacity and engagement of civil society (Ukraine, Pacific and Bangladesh have strong practices), role of government, scale of international actors (the Pacific has a relatively small UN presence), and political interest (Ukraine ranks highest). This section presents an overall reflection on how the localization context in Ukraine compares with contexts in other selected countries or regions, identifying the differentiators and commonalities that shape the localization landscape in Ukraine and more broadly.

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[26] Also used in Iraq, Myanmar, Afghanistan and Pakistan.

Key localization considerations for Ukraine

- **Rapid scaling of local actors and integration of new actors.** One of the most notable attributes of the humanitarian response in Ukraine has been the rapid scaling up of local actors after the full-scale invasion, including NGOs and CSOs which were previously engaged within other spheres, including development assistance. Many of these organizations had little to no humanitarian experience but expanded their activities rapidly to meet the growing needs of affected populations[27]. This level of rapid adaptation and scaling is less common in other contexts, where local actors often have more established roles and experience in humanitarian response. The response in Ukraine has also seen the integration of new actors, including from diaspora communities and the private sector. These actors bring additional resources and capabilities but also require coordination and alignment with traditional humanitarian actors. This trend of integrating diverse actors is more pronounced in Ukraine than in other contexts.

- **Impact on humanitarian actors.** As seen in other humanitarian contexts, particularly in crisis settings (such as Afghanistan in the aftermath of the Taliban takeover and in Myanmar after the military coup), the impact created on humanitarian actors, including through the displacement of staff, reduces the ability of humanitarian actors to respond effectively. In Ukraine, this has, in particular, affected local organizations based in frontline communities. As seen in recent years[28], including in the conflicts in the occupied Palestinian territories and Lebanon, local humanitarian workers are the most likely to be injured and killed in humanitarian contexts.

- **High level of international support.** Ukraine has received strong international support, both in terms of funding and operational assistance, compared to most other humanitarian crises. This has enabled a robust response, but the high level of international involvement is a double-edged sword, providing necessary resources but overshadowing local leadership[29]. With increased funding for the response in Ukraine, more international agencies who previously had no presence in the country entered an already congested space, and those on the ground expanded their presence (including bringing in more international staff). These developments exacerbate challenges for national actors by increasing staff movement to international actors (through recruitment or poaching).

- **The comparative advantage of local actors.** Local and national actors tend to operate in the challenging humanitarian contexts, where most international actors are unable to operate safely and effectively in line with their operational requirements[30]. This is often due to local and national actors better access through their connections with communities. This provides a strong argument for the importance of progressing localization, as seen in the context of Ukraine.

- **Complex contexts that fuel risk averseness.** The ongoing conflict in Ukraine is a considerable challenge for localization, especially for donors, who are innately risk averse. Despite the access and operational capabilities of local and national actors, the security

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[27] ACAPS (2023) Ukraine: Perceptions of localisation in the humanitarian response.

[28] Humanitarian Outcomes (2024) Aid Worker Security Report 2024. Balancing advocacy and security in humanitarian action.

[29] NGORC, Infosapiens, ICVA and HAG (2023) A Humanitarian Localisation Baseline for Ukraine.

[30] HAG (2023) Challenges and Ways Forward in Supporting Local Leadership of Crisis Response in Afghanistan; HAG, inSights, GLOW Consultants and Australian Red Cross (2023) Localisation in protracted crises and fragile settings.

context in Ukraine[31] increases the likelihood of risk-averse donors choosing to default to funding UN agencies and other international actors as a means of managing their own risks[32]. This reduces the opportunities for local and national actors to directly access funding. As localization baseline research in Yemen has shown[33], conflict and insecure settings reduce the space for localization to progress, compared to more stable environments. In Ukraine, donors and international actors have expressed concerns about local and national actors neutrality and capacity for procedural compliance (over capacity to deliver), and made sweeping generalizations about the (mostly unproven) corruption[34].

- **Increasing interest and engagement from government:** There has been growing interest from the Ukrainian government in elevating local leadership in the response and ensuring that the international response model falls in line with domestic (government-led) structures. While there are often gaps in how state and non-state actors engage with each other and work to meet the needs of the affected communities, government involvement can be a major catalyst of the localization agenda in Ukraine, as seen in Bangladesh (which has a government-led cluster system)[35], Indonesia (the government places conditions on international actors who partner with and work through local and national actors)[36] and Vanuatu (donors must match the funds given to international actors and government response)[37].

- **Emphasis on accountability and strategic tools:** There has been strong emphasis on building evidence, evaluating impact and developing strategic tools to facilitate practical approaches to local leadership and quality humanitarian response in Ukraine. This process has largely been driven by local and national actors, but also international research actors and think tanks. This focus on accountability and strategic planning is crucial for ensuring that localization efforts are effective and sustainable.

Photo provided by Ukrainian Red Cross Society

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[31] UN OCHA (2024) Ukraine: Summary of the Humanitarian Needs and Response Plan and the Regional Refugee Response Plan (January 2024).

[32] HAG, inSights, GLOW Consultants and Australian Red Cross (2023) Localisation in protracted crises and fragile settings.

[33] Tamdeen Youth Foundation, ITAR for Social Development, ICVA and HAG (2022) Measuring humanitarian localisation in Yemen: Baseline Report.

[34] Slim H (2021) Corruption and the localisation of humanitarian action.

[35] NIRAPAD and HAG (2020) Elevating evidence: Localisation in the 2019 Bangladesh flood response.

[36] HAG and Pujino Centre (2019) Charting the New Norm? Local Leadership in the First 100 Days of the Sulawesi Earthquake Response.

[37] HAG and VANGO (2020) No Turning Back: Local leadership in Vanuatu's response to Tropical Cyclone Harold.

Reflections for progressing localization in Ukraine from other humanitarian contexts

While Ukraine's humanitarian context has many unique features, commonalities and lessons from other humanitarian contexts can support further refinement of its approach to localization.

- **Strengthen local leadership and participation.** Empowering local actors to take on leadership roles is crucial for effective localization. In Myanmar, the COVID-19 pandemic and post-coup response highlighted the critical role of local actors, especially in regions with little international presence. Similarly, in Yemen and Afghanistan, local actors have been essential in delivering aid amidst severe access constraints[38]. While not a crisis context, the Pacific region has continued to demonstrate how community-driven approaches and strong cultural ties help reinforce local leadership. In Ukraine, the 2024 progress report shows no improvements in local leadership, consequently there is room for growth by providing local and national non-state actors with more decision-making authority and leadership roles in coordination mechanisms.

- **Enhance coordination and complementarity.** Effective coordination between local and international actors is essential for a cohesive response. In Bangladesh, the Humanitarian Coordination Task Team has proactively fostered coordination between local and international actors. In Yemen, while coordination has been challenged by security issues, efforts to integrate local actors into broader frameworks have shown positive results – particularly since the localization baseline report published in 2022. One of the unique trends in the Pacific region is the role that regional networks like PIANGO play in collective advocacy and coordination. This 2024 progress report for Ukraine highlights improvements in inclusivity and greater participation of local and national actors, but further action is needed to ensure equitable participation of local actors in decision-making processes to enhance the effectiveness of the response.

- **Secure direct funding for local actors.** Direct funding to local organizations enhances their operational capacities and sustainability. In contexts like Afghanistan, Myanmar and Yemen, the bulk of response funding was channeled through international partners, with local organizations often engaged as downstream partners or service providers. This was driven by the risk-averse nature of donors, including as a means to work around sanctions in some countries. In most of these contexts, local organizations receive little direct support, directly affecting their sustainability and ability to effectively support communities. While funding to local organizations in Ukraine is increasing, the quality of funding (including overheads and indirect costs) remains a significant hurdle.

- **Build sustainable capacities.** Long-term capacity strengthening is essential for sustainability. In Bangladesh and the Pacific, significant investments have been made in the training and development of local actors, focusing on disaster preparedness and response, which has seen both state and non-state actors playing a stronger role in driving response. In contexts such as Afghanistan, Yemen and Syria, where capacity strengthening is hindered by conflict and access, there have also been efforts to maintain existing capacities (including due loss

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[38] Tamdeen Youth Foundation, ITAR for Social Development, ICVA and HAG (2022) Measuring humanitarian localisation in Yemen: Baseline Report; HAG (2023) Challenges and Ways Forward in Supporting Local Leadership of Crisis Response in Afghanistan.

of skilled staff through staff poaching and migration[39]). While this 2024 localization progress report for Ukraine highlights increased interest in building sustainable local capacities, it also shows the importance of considering actual and contextualized organizational needs and avoiding repetitive and standardized approaches.

- **Leveraging technology and innovation.** Technology and innovative approaches can enhance the efficiency and reach of humanitarian responses. In Ukraine, the use of digital platforms for coordination, remote management and monitoring has been a key feature. This trend is also seen in other contexts, where technology has been used to overcome access and communication problems – a practice that came to prominence during the COVID pandemic, which restricted access and movement[40]. Continuing to leverage technology for coordination, data collection and communication can improve the efficiency of the response and greater autonomy for local and national actors.

- **Foster community-driven initiatives.** Engaging local communities in the response process ensures that aid is tailored to their specific needs. In country contexts such as Myanmar, where the military junta restricts access, community-driven initiatives continue to be important, with local actors engaging communities in planning and response efforts. Responses in the Pacific have continued to prioritize community participation, with a strong focus on cultural relevance and community ownership. This 2024 localization progress report indicated an improvement in meaningful community participation in the Ukraine response, but considerable gaps remain.

- **Ensure accountability and strategic planning.** Building evidence, evaluating impact and developing strategic tools are essential for effective localization. In Ukraine, there has been some emphasis on accountability and strategic planning to facilitate practical approaches to local leadership. This focus is crucial for making localization efforts effective and sustainable, as well as for sharing data, practices, and recommendations between humanitarian contexts. Building evidence, evaluating impact and developing strategic tools can enhance the effectiveness of localization efforts within a given context and providing important lessons for broader application. New resources, such as the recently published approach to defining and measuring localization impact for communities, can be useful in supporting humanitarian actors to integrate community-centered localization plans into intervention designs. The Ukraine Localization Baseline and this progress report (and further annual reports) will form a key part of the process of ensuring accountability in meeting the commitment to localization.

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[39] HAG, InSights and Pujiono Centre (2023) Respectful Recruitment in Humanitarian Response: Why we need it and how to do it; Harrison L, Kondratenko D and Korenkova K (2022) Options for supporting and strengthening local humanitarian action in Ukraine: a scoping exercise report.

[40] HAG, Myanmar Development Network, Trócaire and Irish Aid (2020) Two steps forward, one step back: Assessing the implications of COVID-19 on locally-led humanitarian response in Myanmar; HAG, GLOW Consultants and HPG (2021) Covid-19: Implications for localisation A case study of Afghanistan and Pakistan.

CONCLUSION

Localization is the process of achieving a locally led humanitarian response. This report notes some progress within five localization domains in Ukraine:

- Partnership
- Coordination and complementarity
- Funding
- Policy influence
- Participation.

While these changes should be viewed positively, they are limited in scope. There is an immediate need to accelerate progress towards a locally led response. Four of the seven areas have no or limited evidence of localization; the Funding and Policy influence domains have the least. In addition, it is concerning that local leadership is not advancing, because this is a key area for progress towards a locally led response and is intrinsically linked to progress within other domains.

Photo provided by National Network of Local Philanthropy Development

Analyzing the strengths and weaknesses of localization processes in different contexts offers valuable opportunities, not just for comparison, but also for gaining important practical lessons as to what leads to progress in specific areas.

We intend this report to function as an essential tool for decision-makers and donors, as well as implementing partners. Increased effort must be made to implement tangible action within weaker domains. Positive progress has been seen in areas where donors can more easily affect a change by prioritizing funding focus through intermediaries. In contrast, those areas that require a rebalancing of power, innovation in tools, and fundamental shifts in thinking and working remain weak or see less progress. Sustained efforts to measure progress will remain a priority, helping to enhance accountability and catalyze tangible improvement in the locally led response in Ukraine.

In 2023, we wrote, «Only through knowing where we are can we establish the direction we need to go to reach an objective». This progress report indicates that we are moving slowly towards this objective. Even if we sometimes get lost on the road, we have not lost our overall direction as a humanitarian community.

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