



COUNTRY-LEVEL DIALOGUE ON LOCALISATION

RESOURCE KIT

Grand Bargain Localisation Workstream

This Resource Kit is developed by and for the Grand Bargain Localisation Workstream led by its co-conveners, Swiss Agency for Development Cooperation (SDC) and the International Federation of Red Cross and Red Crescent Societies (IFRC).

For more information visit the Localisation Workstream website:

http://media.ifrc.org/grand_bargain_localisation/

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INTRODUCTION

In 2018-2019, the Grand Bargain Localisation Workstream conducted demonstrator country missions to Bangladesh, Iraq and Nigeria and held a series of regional workshops to promote better understanding and support the implementation of the localisation commitments. One of the most consistent areas of feedback shared in the missions and regional workshops was the lack of sustained discussion or momentum around the Grand Bargain at the country level. Many field level representatives of signatories as well as local actors reported a lack of clarity as to their own roles and opportunities related to the Grand Bargain's localisation commitments. Workstream members therefore agreed to prompt dialogue at country level and this was identified as one of the key activities/outputs in the Workstream workplan (2020-2021).

Given its nature as voluntary grouping of mostly headquarter-based representatives of signatory organisations and invited local actors, Workstream members acknowledged that it was neither feasible nor desirable for the workstream to try and lead these dialogues at the country level. Its role would instead be catalytic, relying on the interest and active engagement of those based in country, facilitate exchange and learnings among the countries selected. These dialogues would be aimed:

1. To promote wider understanding and implementation of Grand Bargain commitments on localisation at country level
2. To catalyse collaboration between Grand Bargain signatories and other relevant stakeholders at country level on implementation of localisation commitments while – when possible – exploring synergies and linkages with existing humanitarian coordination mechanisms (such as Humanitarian Country Teams and Clusters), donor coordination mechanisms and platforms as well as civil society networks
3. To support in-country counterparts to identify their context-specific opportunities, challenges and specificities when it comes to localisation and develop their own plans or solutions
4. To learn lessons that will inform discussion and strategic direction in relation to the next phase of the Grand Bargain beyond June 2021.

Dialogues will be organised by country-based facilitators, who will determine the substantive focus and method for their respective country dialogues, develop a plan in consultation with country level stakeholders, share the finalised plan with GB Workstream on Localisation (indicating any specific requests for support they may need), organise and manage the dialogue/s, and share a short outcome report on the dialogue. The Workstream will provide support and follow-up on dialogue processes and this will include advice to country-based facilitators in the development of the dialogue process, provision of background and guidance materials, support and facilitation of south to south learning and exchange, and periodic feedback information teleconferences to discuss emerging findings and lessons learnt.

Requirements of the dialogue processes

Bearing in mind the Workstream's limited role, the following are the only requirements for a dialogue process to be selected as a Workstream-affiliated process:

- It must be co-facilitated by at least three actors, including at least one local actor, and one signatory donor or signatory agency
- The dialogue process must be open and inclusive of Grand Bargain signatories and local actors
- It must build upon, rather than seek to replace or alter, the existing Grand Bargain commitments on localisation
- A short progress report from the co-facilitators should be submitted to the Workstream no later than the end of May 2021

CONTENT AND AUDIENCE OF THE RESOURCE KIT

This resource kit has been developed for the Grand Bargain Localisation Workstream and is a compilation of Workstream guidance products as well as reference materials on localisation produced by Workstream member agencies and independent consultants and research groups. It is intended to be used primarily as background and guidance materials by local actors and Grand Bargain signatories in the GB Localisation Workstream-facilitated country level dialogues.

This kit contains the following sections and sub-sections:

1. The Grand Bargain and Localisation Commitment

- a. What is the Grand Bargain?
- b. Grand Bargain Localisation Commitments
- c. Localisation Workstream

2. What is Localisation?

3. Glossary of Localisation terms

4. Localisation Guidance Notes

- a. Partnership practices for localisation
- b. Humanitarian financing for local actors
- c. Capacity strengthening for localisation
- d. Participation of local actors in humanitarian coordination groups
- e. Gender-responsive localisation
- f. Arrangements between donors and intermediaries

5. IASC Interim Guidance on Localisation and the Covid 19 Response

6. Other Localisation Resources

- a. Localisation Measurement Tools
 - i. Localisation Performance Measurement Framework, NEAR
 - ii. Measuring Localisation: Framework and Tools, HAG and PIANGO
- b. WS2 Guidance Note related researches
 - i. Pathways to Localisation: locally-led humanitarian action
 - ii. Country-level financing solutions for local actors
 - iii. Re-thinking capacity and complementarity for more local humanitarian action
 - iv. Gender-responsive localisation in humanitarian action
- c. Desk Review on Enhancing the Potential of Pooled Funds for Localisation
- d. Sample Localisation Roadmaps and Framework
 - i. Operational Framework for Localisation in Nigeria
 - ii. NAHAB Accountability Framework and Localisation Roadmap
 - iii. NHN Partnership Framework and Guidelines

THE GRAND BARGAIN AND LOCALISATION COMMITMENTS

What is the Grand Bargain?¹

The 'Grand Bargain', launched during the World Humanitarian Summit (WHS) in Istanbul in May 2016, is a unique agreement between some of the largest donors and humanitarian organisations who have committed to get more means into the hands of people in need and to improve the effectiveness and efficiency of the humanitarian action. The Grand Bargain now includes 63 signatories (25 donor States, 11 UN agencies, 5 international organisations (including IFRC and ICRC) and 22 NGOs).

The signatories are working across eight workstreams to implement the commitments:

1. Greater transparency
2. More support and funding tools to local and national responders
3. Increase the use and coordination of cash-based programming
4. Reduce duplication and management costs with periodic functional reviews
5. Improve joint and impartial needs assessments
6. A Participation Revolution: include people receiving aid in making the decisions that affect their lives
7. & 8. Increase collaborative humanitarian multi-year planning and funding & reduce the earmarking of donor contributions (now organised into a single grouping)
8. Harmonise and simplify reporting requirements

The tenth workstream, *Enhance engagement between humanitarian and development actors*, has been closed as an independent workstream and it has been mainstreamed as a cross-cutting commitment.

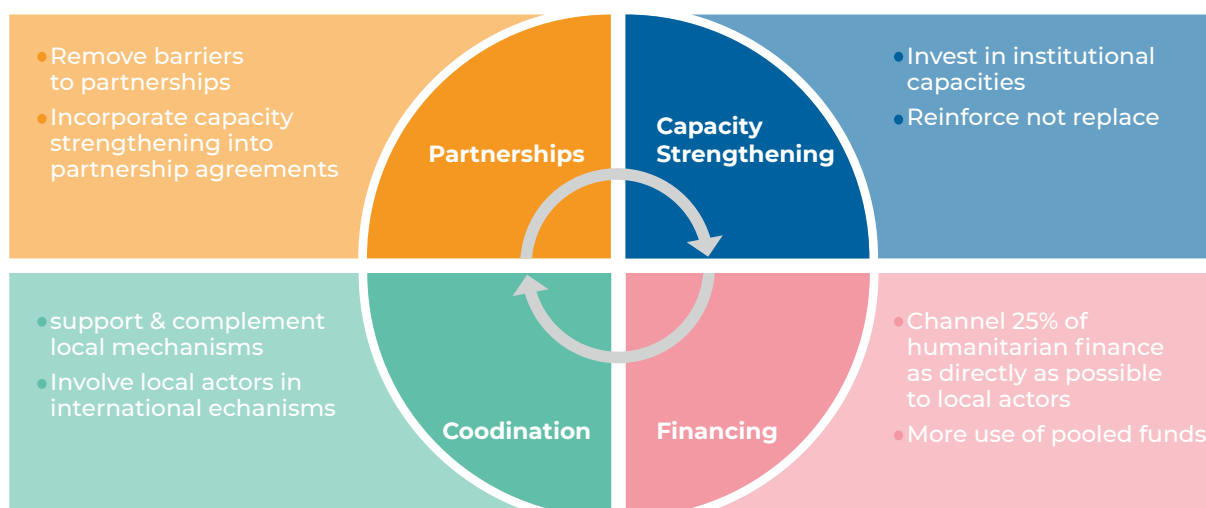
More information is available on the [Grand Bargain webpage](https://interagencystandingcommittee.org/about-the-grand-bargain)

1. Grand Bargain website <https://interagencystandingcommittee.org/about-the-grand-bargain>

The Grand Bargain's Commitments on Localisation

1. Increase and support multi-year investment in the institutional capacities of local and national responders, including preparedness, response and coordination capacities, especially in fragile contexts and where communities are vulnerable to armed conflicts, disasters, recurrent outbreaks and the effects of climate change. We should achieve this through collaboration with development partners and incorporate capacity strengthening in partnership agreements.
2. Understand better and work to remove or reduce barriers that prevent organisations and donors from partnering with local and national responders in order to lessen their administrative burden.
3. Support and complement national coordination mechanisms where they exist and include local and national responders in international coordination mechanisms as appropriate and in keeping with humanitarian principles.
4. Achieve by 2020 a global, aggregated target of at least 25% of humanitarian funding to local and national responders as directly as possible to improve outcomes for affected people and reduce transactional costs.
5. Develop, with the Inter-Agency Standing Committee (IASC), and apply a 'localisation' marker to measure direct and indirect funding to local and national responders.
6. Make greater use of funding tools which increase and improve assistance delivered by local and national responders, such as the UN-led country-based pooled funds (CBPF), IFRC Disaster Relief Emergency Fund (DREF) and NGO-led and other pooled funds.

The above commitments can be summarised into four inter-related areas/components: (1) partnership; (2) capacity strengthening; (3) financing and; (4) coordination (illustrated in Figure 1, below).



The Grand Bargain Localisation Workstream

The Localisation Workstream includes signatories to the Grand Bargain as well as an invited group of local actors. It is intended to build momentum and support for all signatories to meet their commitments on the localisation of aid. A small group convenes regularly to develop joint projects and plans in order to share good practices, find ways to overcome barriers, develop tools and disseminate information. The group has developed a [workplan for Jan 2020-June 2021](#) to guide its efforts. Public webinars and events are also organised periodically to bring in more voices, share ideas and information.

The International Federation of Red Cross and Red Crescent Societies (IFRC) and the Government of Switzerland currently serve as co-conveners of the Localisation Workstream.

Visit the [Localisation Workstream website](#) for more information and resources.

WHAT IS LOCALISATION?

The Grand Bargain has brought localisation to the forefront of policy discussions between stakeholders in international humanitarian action, though the notion of empowering local responders is not particularly new.² Still, there is no single agreed definition of the term.

In the context of the Grand Bargain, “localisation” has mainly been used to refer to increasing international investment in the capacity, delivery and leadership of local responders. The text of the Grand Bargain calls for ‘making principled action as local as possible and as international as necessary’ while continuing to recognise the vital role of international actors, in particular in situations of armed conflict.

Local actors in the Pacific (government, national societies and local and national NGOs) developed their own definition of localisation as ‘a process of recognising, respecting and strengthening the independence of leadership and decision making by national actors in humanitarian action, in order to better address the needs of the affected population.’³ The global NGO network ICVA, defines localisation as the ‘process through which a diverse range of humanitarian actors are attempting, each in their own way, to ensure local and national actors are better engaged in the planning, delivery and accountability of humanitarian action, while still ensuring humanitarian needs can be met swiftly, effectively and in a principled manner.’⁴

In a narrow sense, localisation can be seen as strengthening the role of local actors in the context of international aid, with the goal of reducing costs and increasing the reach of humanitarian action. In a broader sense, it can be viewed as a way of re-conceiving of the humanitarian sector from the bottom up; recognizing that the overwhelming majority of humanitarian assistance is already provided by local actors.

2. For example, the 2013 [Missed Opportunities](#) report built the case for strengthening national and local partnership-based humanitarian responses and called for ‘a more balanced humanitarian system where local actors take their place alongside international actors, with a shift of power towards locally-owned and led response.’ Key initiatives that followed which support localisation include Charter for Change, INGO Accountability Charter, UN’s New Way of Working, and the Less Paper More Aid.

3. Australian Red Cross, [Going Local: Achieving a more appropriate and fit-for-purpose humanitarian ecosystem in the Pacific](https://www.redcross.org.au/getmedia/fa37f8eb-51e7-4ecd-ba2f-d1587574d6d5/ARC-Localisation-report-Electronic-301017.pdf.aspx), <https://www.redcross.org.au/getmedia/fa37f8eb-51e7-4ecd-ba2f-d1587574d6d5/ARC-Localisation-report-Electronic-301017.pdf.aspx>, October 2017

4. Localisation Examined: An ICVA Briefing Paper, September 2018 http://media.ifrc.org/grand_bargain_localisation/wp-content/uploads/sites/12/2019/03/ICVA-Localization-Explained-Briefing-Paper.pdf

GLOSSARY OF LOCALISATION TERMS

Capacity strengthening – a deliberate process that supports the ability of organisations and networks to institutionalise new or improved systems and structures, and individuals and groups to acquire or improve knowledge, skills, or attitudes, which are necessary to function effectively, achieve goals, and work towards sustainability and self-reliance⁵

Complementarity – an outcome where all capacities at all levels – local, national, regional, international – are harnessed and combined in such a way to support the best humanitarian outcomes for affected communities⁶

Direct funding – For donor governments, funding may be counted as “direct” if it channelled directly to local actors for their humanitarian programming. For international humanitarian organisations, funding can be counted as “direct” if it is sourced from private donations (not from donor governments) and then channelled directly to local actors⁷

‘Direct as possible’ funding – signatories committed to an aggregate goal of 25% of international humanitarian financing to be channelled directly or “as directly as possible” to local actors. It was agreed that the following could be included in measuring this: (1) funding channelled through a pooled fund that is directly accessed by local and national actors; (2) funding channelled through a single international aid organisation that reaches local and national actor directly from that one intermediary⁸

Grand Bargain – an agreement between some of the largest donors and humanitarian organisations who have committed to get more means into the hands of people in need and to improve the effectiveness and efficiency of the humanitarian action.

Local actors – the governmental authorities at the national and local levels of a crisis-affected country as well as non-governmental ‘organisations engaged in relief that are headquartered and operating in their own aid recipient country and which are not affiliated to an international NGO.’⁹

Women-led organisation – an organisation with a humanitarian mandate/mission that is (1) governed or directed by women or ; (2) whose leadership is principally made up of women¹⁰

Women’s rights organisation – an organisation that self-identifies as a women’s organisation with primary focus on advancing gender equality, women’s empowerment and human rights; or (2) an organisation that has, as part of its mission statement, the advancement of women/girls’ interests and rights; or (3) an organisation that has as part of its mission statement or objectives, to challenge and transform gender inequalities, unequal power relations and promoting positive social norms¹¹

5. Definition recommended by the Localisation Workstream for the Core Commitment Indicators and Target Results

6. Rethinking capacity and complementarity for more local humanitarian action, V. Barbelet, ODI-HPG October 2019

7. Definition as agreed by Grand Bargain signatories, [Identified categories for tracking funding flows](#)

8. Ibid.

9. Ibid. “A local actor is not considered to be affiliated merely because it is part of a network, confederation or alliance wherein it maintains independent fundraising and governance systems.

10. Definition recommended by the Localisation Workstream for the Core Commitment Indicators and Target Results

11. Definition recommended by the Localisation Workstream for the Core Commitment Indicators and Target Results

LOCALISATION GUIDANCE NOTES

The Grand Bargain Localisation Workstream issued a series of guidance notes in May 2020 covering the main themes/components of localisation: (1) partnership; (2) financing; (3) capacity strengthening; (4) coordination; (5) gender and; (6) donors and intermediaries arrangements. The guidance notes draw from existing and bespoke research projects, findings from the 'demonstrator country' missions, and discussions with Grand Bargain signatories and local actors in a series of regional and global conferences in 2018-2019. These very brief notes set out priority findings, recommendations and considerations that signatories are encouraged to consider as they implement their localisation commitments as set out in the Grand Bargain.

1 / **PARTNERSHIP**

2 / **FINANCING**

3 / **CAPACITY STRENGTHENING**

4 / **COORDINATION**

5 / **GENDER**

6 / **DONORS AND INTERMEDIARIES ARRANGEMENTS**

GUIDANCE NOTE ON PARTNERSHIP PRACTICES FOR LOCALISATION

More than 400 humanitarian agencies contributed to identifying the priority partnership practices for localisation; approximately 85% of them were local/national actors. The basis of the guidance note is the findings of the research conducted in Myanmar, Nepal, Nigeria and South Sudan in 2018 as part of the *Accelerating Localisation through Partnerships programme*¹². It was further reviewed by participants of the regional and global Grand Bargain Localisation Workstream conferences in 2019 and Localisation Workstream members. This guidance note is a product of the Grand Bargain Localisation Workstream but does not necessarily represent the official position of Workstream members and co-conveners.

'Local actors/partners' refers to the full diversity of local and national government, NGOs, CSOs, CBOs, women-led organisations, youth groups and more. 'International actors/partners' refers to the full diversity of international NGOs and UN agencies. 'Humanitarian actors' refers to all those engaged in humanitarian action.

Project and financial management

- 1 Local actors design projects and budgets or co-design with international actors who provide technical expertise on proposal writing and technical issues, including conducting joint needs assessments, where needed.
- 2 Local actors are treated as equal partners, not as sub-contractors presented with already agreed projects and budgets. Partnership agreements include roles and responsibilities of both parties, risks are shared, and mitigation measures are mutually agreed, including to ensure safeguarding is addressed.
- 3 Partners conduct joint monitoring visits to beneficiaries, providing opportunities for joint reflection on progress, obstacles and required modifications. Local partners maintain relationships with local communities, and international partners and donor agencies visit communities in agreement with, or when accompanied by, local actors when appropriate.
- 4 International actors and donors are open to discussions on findings from local partner monitoring and allow flexibility to adapt programmes and budgets in response to evidence of changing needs and community feedback as much as is practicable.
- 5 Project budgets include funds for local partners, relevant to the context and needs, for: 1) overheads including set-up costs; 2) indirect costs (as % of project budget); 3) assets vital for project implementation, safety and/or organisational financial sustainability; and 4) organisational strengthening. Budgets should clearly show core funding allocations.
- 6 All humanitarian actors follow ethical recruitment practices. International actors attempt to keep salaries/benefits within as close a range as practicable to local actors. Local actors strive to support staff to do their job effectively and treat them fairly and equitably.

12. Funded by ECHO. For more about Accelerating Localisation through Partnerships visit: <http://caid.org.uk/54>

- 7 All actors support the active participation of crisis-affected people in project design, monitoring, implementation and evaluation with particular focus on involving marginalised, minority and groups in vulnerable situations such as women, children, young people, and persons with disability.
- 8 All humanitarian actors identify their added value in any partnership and work on the basis of complementarity. International actors provide support to local partners based on demand (rather than supply) and ideally through longer-term strategic partnerships tailored to partner needs, with complementarity identified before crises.
- 9 International actors highlight the role their local partners play in external communications and media.

Capacity strengthening and sharing – see also capacity guidance note [here](#).

- 10 Capacity assessments are conducted jointly for both local and international partners. Strengths are recognised, and gaps used to develop tailored, long-term, capacity strengthening/sharing plans which are shared with other partners to coordinate effective support and investment.
- 11 Capacity strengthening/sharing plans are contextualised, mutually agreed, long-term, based on project and institutional needs, and identify a range of training and mentoring approaches, such as secondments, shadowing, peer exchanges and on the job training, with follow up monitoring.
- 12 International actors and donors include/allow capacity strengthening and organisational development budget line(s) in all projects and partnership agreements. Ideally an explicit % of budgets and/or specific funds are earmarked for this. Local actors commit time and other resources to invest in their own capacity and organisational development.
- 13 International actors assess their capacity strengthening skills, and address gaps by either strengthening staff skills or investing in local training providers and accompaniers.
- 14 International actors articulate plans to adopt an advisory, backstopping or secondary role once adequate local capacity exists from the outset, including review and partner 'graduation' strategies.

Financing – see also humanitarian financing guidance note [here](#).

- 15 International actors and donors support local actors to build their sustainability (including retention of key staff) by providing multi-year funds, allowing core funds in project budgets, and supporting local actors in income-generating activities or generating local funds.
- 16 Local actors actively participate in meetings, communication and coordination with donor agencies to support relationship building, facilitated by international actors if needed.

17 International actors credit the role of their local partners in communications with supporters and donors, recognising the positive impact narratives on reframing perceptions of local leadership of humanitarian response.

18 Donor agencies coordinate to identify minimum standards for accountability and compliance, reforming processes where necessary. International actors and donors support local partners to meet these minimum standards, mitigate risks, and ensure safeguarding. Local organisations invest in meeting these standards.

Coordination – see also coordination guidance note [here](#).

19 International actors, particularly UN and cluster coordinators, promote and facilitate active participation of local partners and other local actors in relevant coordination fora, and ensure a diversity of organisations represented, including women and youth led organisations.

20 International actors highlight the role their local partners play in partnership-based/joint humanitarian response at cluster and other humanitarian coordination fora meetings.

Safety and security

21 Training, advice and timely information on security and risk management, and safeguarding is provided to local actors for operations in high-risk areas. Donors and international actors allocate funds/budget to establish and maintain sustainable national provision of such services.

22 Local actors are involved in decision-making about security risk management with their international partners, with adaptations made for local context as advised by local actors.

Advocacy

23 International agencies support local actors to engage with relevant governments, when requested and appropriate, to influence humanitarian response decisions to ensure effectiveness.

24 Local actors are facilitated to connect crisis-affected people with relevant international actors and government authorities for advocacy related to the humanitarian response, including safety of local aid workers.

For the *Accelerating Localisation through Partnerships* research reports, and global paper Pathways to Localisation, visit the webpage: caid.org.uk/54. Refer also to: [Principles of Partnership](#) (Equality, Transparency, Results-Oriented Approach, Responsibility, and Complementarity); [Charter 4 Change](#); [NEAR Localisation Performance Measurement Framework](#) (Section 1: Partnerships); and [Core Humanitarian Standard on Quality and Accountability](#) (CHS).

GUIDANCE NOTE ON HUMANITARIAN FINANCING FOR LOCAL ACTORS

This guidance note draws on best practices identified in consultations in three regional conferences on localisation conducted by the Grand Bargain Localisation Workstream in 2019, as well as from a research project commissioned by the IFRC with support from ECHO, consisting of a literature review and key informant interviews and country case studies in three country case studies (Colombia, Ukraine, and Ethiopia).¹³ This guidance note is a product of the Grand Bargain Localisation Workstream but does not necessarily represent the official position of workstream members and Co-Conveners.

Better quality financing for local actors¹⁴

- 1** Donors are encouraged to draw on lessons specifically around addressing compliance issues and administrative burden from the development context in order to increase their direct funding to local actors. Recognising that many local civil society actors are both development and humanitarian actors, they are also encouraged to explore how project funding streams might be brought together to more flexibly support these two areas of work. Special attention should be paid to ensuring funding opportunities for women's rights organisations and women-led organisations working on humanitarian response.
- 2** International actors should consider consortium arrangements with local actors, with joint reporting. They are encouraged to develop and/or expand rapid response fund facilities for local actors. Local actors are also encouraged to consider consortia with each other.
- 3** Donors and international actors should ensure that adequate overhead/indirect allowances are provided to local actors receiving funding for humanitarian project delivery. At the minimum, there should be transparency on the criteria for and or the percentage of overhead/indirect funding for both international and local actors. This overhead/indirect funding should adequately cover costs of risk management and compliance requirements for both international and local actors (partners).
- 4** International actors' project budgets for local actors should also include assets vital for project implementation, safety and/or organisational financial sustainability (e.g., laptops, vehicles, salaries for interim periods, insurance for staff and volunteers) and organisational strengthening (e.g., staff training, development of policies). These budgets should be transparent in showing what international partners receive to support the project (e.g., % admin fees).
- 5** Donors and international actors are encouraged to move beyond short-term project funding for local actors towards longer-term arrangements that also include support for capacity strengthening, as needed, with an eye to future sustainability. The viability of developing multi- year Humanitarian Response Plans should be analysed as and when appropriate. International partners receiving multi-year funding for humanitarian work in a particular setting should seek to pass along multi-year funding arrangements to their local partners.

13. The full research report, *Country-level Financing Solutions for Local actors*, can be found [here](#) and the three case studies [here](#).

14. This guidance note uses the term "local actors" to refer to responders with a national or sub-national scope.

6

Local actors should take the necessary steps to ensure their capacity to transparently and accountably manage and report on donated funds, requesting outside capacity strengthening support as needed. They are encouraged to fully explore domestic resource mobilisation opportunities including with the private sector in order to reduce reliance on international support.

Strengthening the impact of pooled funds for meeting localisation goals

7

Pooled funds, including the UN's Country-Based Pooled Funds (UN CBPFs), have a proven potential for supporting localisation goals. In order to strengthen this potential, the following steps are recommended:

- ➔ Ensure proactive outreach and effective communications with local actors, especially women-led/women rights organisations, including providing adequate application guidance in local languages
- ➔ Consider budget flexibility as to the proportion of allowable staff costs, with an eye to organisational sustainability
- ➔ Ensure that adequate indirect/overhead costs are passed on to local actors, including those acting as sub-grantees. UN CBPFs should continue to allow local actors to use up to 7% project support costs when they receive funding directly. In the case of subgrant arrangements, UN CBPFs should promote fair distribution of project support costs proportional to the budget or activity they implement.
- ➔ Reserve a minimum number of seats for local actors in advisory boards, strategic review committees and strategic advisory groups
- ➔ Encourage local actors to design/co-design funding proposals around strategic humanitarian needs in a specific crisis rather than ad hoc funding proposals
- ➔ Take a long-term perspective and include exit strategies, in targeting and programming as and when appropriate

Managing and sharing risks

8

Donors and international actors are encouraged to develop a common assessment review process for local actors at the country level, including, at minimum, arrangements for assessments conducted by one of them to be accepted by as many others as possible. This may include a tiered due diligence model related to various levels of support and or framework for strengthening compliance and quality assurance.

9

Donors, international actors and local actors are encouraged to hold regular conversations at the country level about how fiduciary risks are being managed and shared with regard to humanitarian funding, without neglecting other risks such as security, compliance, quality assurance and reputational risks. Management risk in all of its dimensions should be embedded in the programme design, implementation and reporting.

10

Donor and affected state governments are encouraged to examine legal or policy barriers that may hamper international funding for local humanitarian responders (such as rules on the impact of sanctions on banking, counter-terrorism, nationality preferences for receipt of funds, and currency rules and regulations) with an eye to potential exceptions or reforms.

11

Donors and international actors are encouraged to explore greater flexibility in terms of reporting requirements for local actors (e.g., more flexible deadlines, simplifying language in proposals and reporting templates, potentially through use of the Grand Bargain Reporting Workstream's "8+3" reporting template).

GUIDANCE NOTE ON CAPACITY STRENGTHENING FOR LOCALISATION

This guidance note collates recommendations on capacity strengthening drawing from three regional workshops conducted by the Grand Bargain Localisation Workstream in 2019, including representatives of local and national NGOs, international NGOs, government and regional donors, and UN agencies. It also draws on key findings from a research project carried out by the Humanitarian Policy Group of ODI between 2017 and 2019 that explored the issue of capacity and complementarity between local¹⁵ and international actors, including how capacity could be better understood and applied to support more collaborative responses¹⁶.

This guidance note is a product of the Grand Bargain Localisation Workstream but does not necessarily represent the official position of Workstream members and co-conveners.

Understanding capacity

- 1 The capacity needed to alleviate human suffering includes respect for humanitarian principles, the ability to prepare for, anticipate and deliver timely and cost-effective humanitarian services of appropriate quality, and to strengthen the resilience of affected population and transparent and accountable management of resources. Just as important, however, are understanding of the context, the ability to understand and relate effectively to affected persons and other stakeholders, and the ability to bridge humanitarian and development activities, among others. Moreover, capacity should be understood in relation to specific contexts and crises.
- 2 It is helpful for all relevant stakeholders to seek shared understandings of what capacity means in a particular context through an inclusive process that involves local actors through meaningful engagement.
- 3 Terminology matters. Capacity is usually defined as 'lacking' and needing to be 'built'. Instead, the terms 'capacity strengthening' or 'capacity exchange' or 'capacity sharing' acknowledge existing skills and assets that can be supported and shared.

Assessing capacity

- 4 The current process by which different organisations consider the respective contributions and value of others is largely limited to that of international organisations assessing local organisations for the purpose of funding and partnerships. A context-wide mapping of existing capacities could inform the extent to which humanitarian action can be local and how gaps in local capacity could be addressed.
- 5 Each organisation's 'capacity' is dynamic and evolving, and often dependent upon individuals and context. For example, an organisation that has capacity to respond to flooding, may not have the capacities needed to respond to an influx of refugees. It should also be recognised that every organisation requires investment to grow in a sustainable manner.

15. This guidance note uses the term "local actors" to refer both to local responders with a national or sub-national scope.

16. The project drew upon case study findings from the conflict in South Kivu and Kasai Central in the [Democratic Republic of the Congo](#) (DRC) and the Rohingya refugee crisis in Bangladesh, as well as a literature review.

Overall recommendations:

- 6** Capacity strengthening between international and local actors should be a two-way process, whereby international actors also take the opportunity to learn from local actors, including technical skills, operational considerations and a better understanding of the political, social and cultural context.
- 7** Local actors should set the priorities for and take full “ownership” of, any capacity-strengthening support they receive with an eye both to immediate delivery and long-term sustainability.
- 8** Moreover, actors involved in capacity strengthening initiatives and local actors should share information and explore a joint vision for context-wide capacity goals in order to promote synergies in their efforts.
- 9** Ideally, donors and international actors should opt for long-term approaches to capacity strengthening supported by multi-year, predictable and flexible funding. Context wide capacity support could target groups or network or local actors or national entities. Strategically, such investments should also cover early warning systems, contingency plans, government institutional capacities or support to regional entities. All actors are encouraged to explore innovative and non-traditional capacity strengthening methodologies, such as shadowing and mentoring initiatives that allow a more organic process of peer- to-peer learning, and secondments including in donor institutions where possible that could allow more two-way learning as an alternative to emergency surge teams in times of crises.
- 10** As far as possible, capacity strengthening should be an activity conducted in advance rather than following a crisis.

Recommendations for key actors

- 11** **Donors and other international actors**
 - ➔ Donors should make strengthening local capacities – particularly long-term institutional capacities –, as needed, an express goal of their support to humanitarian contexts. Investments should build on existing good practices and funding arrangements be made as flexible and long-term as possible, in order to facilitate approaches that are appropriately tailored to each local actor.
 - ➔ International actors should critically interrogate their own ability to strengthen the capacity of local organisations and prioritise the use of domestically-available expertise and resources for imparting knowledge and skills.
 - ➔ Where donors and international actors require a risk or capacity gap assessment to be conducted in order to provide funding and work in partnership, investment should be secured to address any gaps identified. This assessment should ideally build upon any assessments that the local actor has already undertaken.
 - ➔ International actors should partner with local actors to document best practices and develop consensus models for capacity strengthening to build donor confidence to invest in scale-up.
- 12** **Local actors**
 - ➔ Prior to seeking partnerships, local actors should assess their own organisational capacity strengths and weaknesses. This will encourage ownership of their capacity gaps and how to address them.
 - ➔ Local actors should also use the power of networks and peer review exchange to share knowledge and increase their collective voice in advocating for more equitable partnerships and capacity strengthening¹⁷.

17. One example that uses this approach is Oxfam's *Empowering Local and National Humanitarian Actors* (ELNHA) programme which assesses capacities at the level of 'networks' of organisations in a given context and conducts joint discussions on capacity gaps and existing expertise available across these groups. Other examples of effective capacity strengthening approaches to further more localised humanitarian responses can be found in section 3.2 of the [Grand Bargain annual independent report 2019](#).

GUIDANCE NOTE ON PARTICIPATION OF LOCAL ACTORS IN HUMANITARIAN COORDINATION GROUPS

This note builds on work done by ALNAP in 2016 on improving humanitarian coordination and the Global Protection Cluster and Global Education Cluster's work on localisation. The note further draws on the regional workshops carried out by the Grand Bargain Localisation Workstream in 2019, which included representatives from local and national NGOs, international NGOs, governments, donors and UN agencies. The guidance is predominantly focused on non-governmental actors, however much may also be relevant for engagement of national and local government authorities, depending on context.¹⁸

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Practicalities

Substantial engagement of local actors¹⁹ is critical for effective humanitarian coordination. Many of the barriers inhibiting local actors from more meaningfully and more frequently participating in coordination mechanisms are rooted in practical obstacles. Those facilitating coordination groups should take steps to understand the barriers for local actors' participation in coordination by proactively reaching out to key actors, such as local NGO forums and networks, development actors involved in response, academia, diaspora, women-led, private sector, and faith-based organisations, and taking appropriate steps to address the issues. A list of the most common barriers and the pragmatic solutions that can make a significant and positive impact include:

Membership: It is often not clear to local actors who is invited to coordination meetings and how membership of groups is determined. When reaching out to local actors and sharing information about the coordination groups and any membership criteria, guidance on the different ways in which organisations can engage, and the benefits of participation should be systematically provided.

Language: Coordination Leads should ensure that language does not constitute a barrier to participation in coordination. Translation and interpretation services should be considered as a routine operational cost. Use of jargon should be avoided. Ad hoc translation support from group members should be voluntary, rotational, and temporary. If the majority of members speak a common language, consider providing translation to the international members who may not speak the majority language.

Logistics: Coordination Leads should ask local actors the best way for them to access information and communicate; whatsapp, skype, facebook or zoom may be more suitable than slow or hard-to-navigate websites, for example. Sending critical information or meeting locations, dates, and times through several channels may mean the messages reach key actors who may not be on an email list yet. When deciding the location for meetings, coordinators should consider convenience, access (e.g. visa requirements), and safety of all actors. Consider rotating the location of meetings so that different groups can attend, and dial-in options, where suitable, for actors who cannot attend in person. As local actors have fewer staff available to cover simultaneous meetings, careful scheduling across sectors is key.

18. Other Localisation Workstream guidance notes on related topics are available [here](#).

19. This guidance note uses the term "local actors" to refer both to local responders with a national and sub-national scope.

Processes

Local actors are an integral part of the humanitarian response across all contexts. Their engagement in needs analysis, strategic prioritization and decision making is essential. The quality, accountability and coherence of a humanitarian response will be strengthened if local actors are involved in all stages of the Humanitarian Programme Cycle.

Needs Assessment and Analysis: Make certain that local actors are part of the development of Humanitarian Needs Overview, including inputting into Secondary Data Reviews, coordinated assessments and are part of any validation processes. Analysis is an area traditionally dominated by international actors; so extra efforts should be made to ensure local actors play a role in data analysis. Coordination Leads should consider the institutional and technical capacity needs of local actors and reflect collective priorities in the Humanitarian Needs Overview.

Strategic Response Planning: Facilitate local actors' preparation and participation in HRP planning workshops and ensure they are involved in the discussion of response priorities. This could include funding of travel from sub- national locations to a national-level workshop. Coordination Leads should ensure institutional and technical capacity building priorities are reflected in the HRP and in sector response plans.

Resource Mobilization: Coordination Leads are often responsible for advocating for and coordinating pooled funding allocation processes, and thus have a key role to play in supporting local actors accessing direct funding, including to cover the costs of taking on coordination leadership roles. Create opportunities for local actors to interact with in-country donors to increase visibility.

Implementation and Monitoring: Coordination Leads should ensure that 5Ws (or other response tracking databases) collect data that can be disaggregated to all levels of actors involved in the delivery of the response (donors, project owners, reporting agencies, implementing partners) as well as by types of organisation (UN agency, INGO, NNGO, etc). This data should be analysed to better understand the role of local actors, the locations in which they are working, and who is receiving funding.

Peer Review and Evaluation: In advance of annual planning processes gather available data and annually document the complementary roles of local and international actors in the response. Actively seek out good practice from local actors who might be supported to scale up in future response plans. A culture of [principled partnership](#) should be modelled and monitored by coordination leads.

Leadership and representation

Leadership groups in the formal humanitarian coordination system should include representation from national and local organisations. Local actors bring contextual understanding and expertise that complements international capacity and is essential for effective decision-making in crisis.

Humanitarian Country Teams: The [Standard Terms of Reference for Humanitarian Country Teams](#) (2017) state "Representation from national NGOs should be particularly encouraged and supported", and note that HCT's are governed by the [Principles of Partnership](#). International actors should advocate for representation of local actors on HCTs if this is not already the case.

Cluster Strategic Advisory Groups and Advisory Boards: Cluster Strategic Advisory Group's should be representative, with a membership that reflects the complementary role all actors play in the response. Local actors should be encouraged and supported to participate in these advisory bodies. All Advisory Boards and Review Committees of Pooled Funds have representation of national actors, keeping in mind a gender balance.

Coordination Leadership – Sub-National Level: Local actors participate in cluster leadership at the sub-national level. However, sub-national coordination (including sector-specific, area based etc) is often poorly resourced, with programme staff taking on coordination responsibilities. Advocate for capacity support and funding for dedicated staff time for coordination at the sub-national level. Sub-national coordination groups are vital for engagement of local actors and should therefore be well represented in national level planning and decision-making processes.

Coordination Leadership – National Level: The [IASC Reference Module for Cluster Coordination](#) promotes shared cluster leadership, and, particularly in protracted crisis, national NGOs have taken on leadership roles at the national level. This approach should be further encouraged.

GUIDANCE NOTE ON GENDER-RESPONSIVE LOCALISATION

This note builds on work done by ALNAP in 2016 on improving humanitarian coordination and the Global Protection Cluster and Global Education Cluster's work on localisation. The note further draws on the regional workshops carried out by the Grand Bargain Localisation Workstream in 2019, which included representatives from local and national NGOs, international NGOs, governments, donors and UN agencies. The guidance is predominantly focused on non-governmental actors, however much may also be relevant for engagement of national and local government authorities, depending on context.¹⁸

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Access to financing

- 1 Ensure increased, specific, global and national allocation of funds - including unearmarked and core funding - to WROs and WLOs.
- 2 Determine a dedicated percentage of local funds in support of institutional strengthening of WROs and WLOs, networks and movements.
- 3 Increase access to humanitarian funding, ensure its sustainability and support the capacity for self-sustaining fundraising of local WROs and WLOs, prioritizing multi-year, flexible and sustainable funds.
- 4 Streamline funding application procedures and criteria for local organisations addressing specific challenges and capacity gaps faced by WLOs and WROs at country level.
- 5 Increase investments through funding mechanisms (for example, the Women's Peace and Humanitarian Fund) that target WLOs/WROs directly and address the needs of crisis affected women and girls in line with existing IASC commitments²¹.
- 6 Identify opportunities and modalities for further strengthening partnerships and increasing funding for local WROs through the Country-Based Pooled Funds.
- 7 Consider funding WLOs/WROs in order to address gender equality and women's rights in line with existing IASC commitments²², including through promoting WLOs/WROs in Advisory Board and Review Committees of Country-Based Pooled Funds.

20.

21. [IASC Policy on gender equality and empowerment of women and girls in humanitarian action \(2018\)](#), at page 6: "All IASC Members and Standing Invitees to make financial provision to fully resource GEEWG programming for both mainstreaming and targeted action, creating specific budget lines for the purpose. Include GEEWG requirements in all formats used by IASC-led coordination and pooled funding mechanisms to apply for, and report on, funding for humanitarian action."

22. See note 21.

Towards more equitable partnerships and institutional strengthening

- 8** Adopt and invest in multi-year and sustainable approaches to institutional capacity strengthening for WROs and WLOs, focusing on their needs, priorities, value, and contribution as first and local responders in humanitarian settings.
- 9** Establish long-term partnerships, allowing for growth, accountability and transparency, knowledge sharing and sustainable management, including in view of the necessary long-term engagement of WLOs and WROs on gender equality, empowerment of women and girls and addressing the needs of women and girls in humanitarian settings and more broadly along the humanitarian-peace-development nexus.
- 10** Provide alternative means of partnership/collaboration by supporting coordination hubs, training, consortia and peer support, focusing on strengthening the capacities of WLOs and WROs.

Humanitarian coordination/humanitarian needs assessment and planning

- 11** Engage with relevant IASC bodies in a discussion on the creation of an enabling environment for women's leadership and decision-making and develop standards and guidance on enhanced representation of WLOs/WROs in humanitarian coordination structures drawing on promising practices, data and analysis of challenges and opportunities emerging from the field.
- 12** Ensure that WLOs and WROs are part of the development of the Humanitarian Needs Overview, including inputting into Secondary Data Reviews and humanitarian assessments and are part of any validation processes.
- 13** Tangibly promote the meaningful and safe participation, transformative leadership, and collective action of women and girls of all backgrounds at all stages of humanitarian action, also reinforcing similar efforts in conflict prevention, peace building and state building².
- 14** Invest in alliance building to increase WLO and WRO influence, visibility and resource base, and to ensure the specific needs of women and girls are met, their human rights are promoted and protected, and gender inequalities are redressed in line with existing IASC commitments
- 15** Disseminate good examples on WRO and WLO engagement in humanitarian coordination mechanisms, ensure that relevant inter-cluster coordination and sub-groups integrate a gender perspective.
- 16** Enhance coordination between UN, national and local governments, INGOs, and local WROs and WLOs in support of the gender transformative localisation agenda.

Women's leadership

- 17** / Support humanitarian networks and consortia of WLOs and WROs to enable exchange of information, access to resources, and knowledge building.
- 18** / Advocate for and support individual women leaders, as part of comprehensive leadership programs, to build support for women's leadership in communities and organisations and enhance women's self-organisation and dialogue between WROs and WLOs and humanitarian actors.
- 19** / Enhance and expand women's leadership and build on existing cultural notions of women's leadership, drawing on the specificities of each country and social context.
- 20** / Expand localisation to include women's grassroots groups and self-organized groups of crisis affected women and girls.
- 21** / Create an enabling environment in global spaces for the participation and engagement of local WLOs, WROs and networks.
- 22** / Promote progressive social norms on women's leadership, inclusion and gender equality while addressing unpaid work and overlapping types of marginalisation through advocacy and programmatic interventions.

GUIDANCE NOTE ON ARRANGEMENTS BETWEEN DONORS AND INTERMEDIARIES

This guidance note is intended to provide guidance as to how arrangements²³ between donors, and UN agencies, INGOs and other international humanitarian organisations (referred to here as “international intermediaries”), can further the Grand Bargain’s localisation goals in cases where direct arrangements between donors and local actors²⁴ are not practicable.

It arises from the awareness that, even upon success with the Grand Bargain’s goal to significantly increase direct funding to local actors, much of the international funding available to them in the medium term will still be channelled through at least one intermediary. It collates ideas and best practice that have arisen from the Grand Bargain Localisation Workstream’s “demonstrator country missions” in 2018-19, regional conferences in Africa, the Middle East and Asia Pacific held in 2019, and recent localisation research projects.

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What is the role of local actors in the arrangement?

- 1 Have consortia proposals been considered?**
 - ➔ Where direct funding to local actors only (or to consortia entirely made up of local actors) is not practicable, donors should promote, and intermediary agencies should present, consortium proposals involving both international and local actors as full parties to a funding agreement.
- 2 Are the mutual expectations of the international intermediary’s role consistent with localisation goals?**
 - ➔ To the degree practicable, arrangements should be structured so that the international intermediary’s role is mutually understood to be one of supporting, nurturing and overseeing local partners, so the latter can deliver the most effective results.
 - ➔ The intermediary may also be asked to identify and report on learning it plans to gain from the local partner to encourage a “capacity sharing” approach.
- 3 Has communication between intermediaries’ local partners and donors been promoted?**
 - ➔ Even where local actors are not parties to an agreement between a donor and international intermediary, the intermediary should be asked to organise periodic opportunities for its local partners to communicate with its donors about project progress and challenges.
 - ➔ This might alternatively be accomplished through larger-group discussions involving networks of local actors, donors and intermediaries.

23. or purposes of this note, the term “arrangements”, refers to the entirety of the understandings between donors and intermediaries. These will include their contractual agreements but also the less formal engagements and expectations on both sides. It is acknowledged that, particularly for UN agencies and other multilateral intermediaries, some aspects of these arrangements may be determined, or strongly influenced, by formal oversight or advisory committees.

24. This guidance note uses the term “local actors” to refer both to local responders with a national or sub- national scope. The term “local partners” is used to refer to local actors that receive funding from an international intermediary.

Do the arrangements ensure effective and sufficient financing for local actors?

4

Does the arrangement promote coverage of the reasonable costs of local partners?

- Donors and international intermediaries should agree to cover reasonable costs (both direct and indirect) of the intermediary's local partners engaged in delivery of humanitarian services.
- Where indirect (or "overhead") coverage is provided in the arrangement by way of a percentage of direct costs, the rate passed on to local actors by the international intermediary should ideally be no less than the rate it receives for the same funds.

5

Are multi-year and flexible funding approaches passed on to local partners?

- Donors and international intermediaries should articulate and track how they can transfer the benefits of multi-year and flexible funding to local partners.

6

Is there adequate funding for the security needs of local partners?

- Specific budget line items should be included for local partners' security-related needs (with flexibility to consider needs as identified by the local partner).

7

Is adequate funding included for mutually-agreed capacity strengthening?

- Arrangements should provide for funding for strengthening the capacities of local actors, with the types of capacity to be strengthened, and the ways in which it is to be accomplished, to be mutually agreed between the intermediary and its local partner, within budgetary limits.

What is the impact of the arrangement on local actors?

8

Is an inclusive approach to partnering with local actors promoted?

- Arrangements should consider an inclusive approach to partnering with local actors, including partnerships with organisations which represent vulnerable groups, in particular women's rights organisations, women-led organisations, as well those related to disabled persons, displaced persons elderly and youth (with exceptions, as appropriate, for membership-based international networks whose local partners are pre-determined).

9

Are opportunities to reduce duplicative aspects of capacity assessment seized?

- Arrangements should allow for the international intermediary to accept relevant factual findings from capacity assessment processes of local actors carried out by other international actors, as agreed with the donor and with the consent of the local actor. This may be easiest to develop through a country-specific arrangement.

10

Is adequate visibility ensured for the work of local partners?

- Arrangements should include commitments to ensure the visibility for the work of local partners in project outcomes, both in reporting to the donor, in communications materials, and in discussions about the projects within the sector.

11

Is any potential harm to local actors from the arrangement mitigated?

- Arrangements should include an understanding that international intermediaries will take appropriate actions to mitigate harm to local civil society organisations and governmental bodies whose staff they recruit.
- They should also articulate expectations as to the international intermediary's role in promoting the security of the staff and volunteers for local partners.

IASC INTERIM GUIDANCE ON LOCALISATION AND COVID 19 RESPONSE

Introduction

This interim guidance note has been developed in response to the outbreak of COVID-19 and its likely impact on humanitarian operations around the world, building on work done by the Grand Bargain Localisation Workstream²⁵. It provides guidance as to how the international humanitarian community can adapt its delivery modalities in response to COVID-19 consistent with existing commitments on localisation of aid,²⁶ strengthening partnerships with local and national actors, and operating effectively in an environment affected by COVID-19. It is relevant to all countries covered by the COVID- 19 Global Humanitarian Response Plan (GHRP).

Purpose & context

Local actors,²⁷ including civil society organisations, government, and the private sector, as well as communities themselves (including displaced communities), are **critical in every humanitarian operation**, and even more so in the current context that is shaped by restrictions on travel and movement because of COVID-19. Those actors include not only local NGOs, but also local government, women's networks, youth organisations, indigenous groups, faith-based organisations, human rights organisations, trade unions, and other specific-interest groups needed to ensure a complete response that reaches the most vulnerable people and considers the gender impact of the emergency²⁸. International travel and movement restrictions are impeding the international community to surge international staff and supplies at the usual scale and speed to provide expertise, capacity and support to staff and partners that are already working on the ground. While local actors are also affected by preventative measures, they retain a comparatively greater possibility to maintain and potentially scale up operations, provided they are given the means to do so. Localisation is therefore both a necessity and an opportunity for effectively meeting humanitarian needs and recovery efforts post COVID-19.

25. See Grand Bargain, Localisation Workstream Guidance Notes at http://media.ifrc.org/grand_bargain_localisation/

26. The Grand Bargain includes commitments by major donors and international organisations to increase the amount of funding that is channelled as directly as possible to national and local organisations, support multi-year investment in their capacities, remove barriers to equal partnerships, and promote local leadership and local voices in coordination and decision-making. <https://interagencystandingcommittee.org/grand-bargain>

27. For purposes of brevity and unless otherwise indicated, the note uses the term "local" to refer to national and sub- national entities in affected countries. The term "local actor" refers collectively to national and sub-national NGOs and CSOs, national and local government, National Red Cross and Red Crescent Societies and their branches and domestic private sector entities.

28. IASC Reference Group for Gender in Humanitarian Action, "IASC Interim Guidance: Gender Alert for COVID-19 Outbreak", <https://interagencystandingcommittee.org/interim-guidance-gender-alert-covid-19-outbreak-developed-iasc-reference-group-gender-humanitarian>

Acknowledging the advantages of direct funding to local actors, this note recognises that the GHRP that frames the response for existing humanitarian operations that are affected by COVID-19 does not currently offer an effective conduit for this modality. Consequently, this guidance note focuses on **responsible partnership practices** that can be undertaken in the coming months between international organisations and local actors. Such practices should be based on a principle of equality, a duty of care, risk-sharing, local leadership and meaningful participation (with regard as well to inclusivity and diversity) in coordination mechanisms, the transparent and accountable role of pooled funds, community engagement and accountability to affected people, as well as connections to public authorities, community groups, faith leaders and other local representative structures. Where possible, effective partnerships with local governments should also be negotiated²⁹.

Key messages

- The **safety and well-being** of the staff and volunteers of local actors is just as important as that of international organisations' own personnel. We have a responsibility to ensure that our partnerships do not encourage unnecessary risks to be passed on to partners and they adhere to 'do no harm' principles. Practices focusing on safety and wellbeing should be in place, accessible and enforced.
- Responsible partnership is based on equality, mutual respect, mutual accountability, trust and understanding, and a sharing of capacities and information (rather than a one-way flow). The COVID-19 context also requires additional flexibility due to the difficulties of operating environments.
- Humanitarian principles remain at the core of our action. We will support principled local humanitarian actors. We will also proactively partner with non-humanitarian actors (including local government) in appropriate ways.
- Support local leadership, enable systematic local participation and active engagement in coordination mechanisms and decision-making processes at national and sub-national levels, especially regarding the regular country level contributions to the GHRP revision.
- Flexible and simplified funding will be essential to continue the mobilization of front-line local actors to deliver assistance rapidly and effectively and should be provided as directly as possible. It will help to re-programme existing funding, where needed, and ensure fast-track provisions that support programme activities and delivery.
- Visibility must be given to sub-national and national responders, and their names, work and innovations explicitly acknowledged in reporting to donors and in all public communications.
- COVID-19 is an opportunity to "build back better" and implement the humanitarian, development and peace nexus through **meaningful partnerships**.

29. In line with the IASC Principals agreement of 5 December 2019 to develop a framework of engagement with local governments and the draft protocol developed by the Global Alliance for Urban Crisis <http://urbancrises.org/wp-content/uploads/2019/02/5.-GUIDANCE-NOTE-Protocol-of-Engagement-Documents-JD-060219.pdf>

Duty of care & health risks

In responding simultaneously to a global health emergency and existing complex humanitarian settings, it will be impossible to avoid all risks. International organisations owe a duty of care to their own personnel, both international and local. Whilst they don't owe a legal duty of care, in parallel they should invest appropriately in the safety of local partners and mitigate against shifting their own risks as much as possible.

International organisations and their partners should work together to **identify, mitigate, manage and communicate risks** to which local actors are likely to be exposed. Partnership agreements should, include **dedicated actions** for security risk management and health care support. Where possible, and in line with WHO guidance, these should include supporting the access of relevant personnel, including all frontline emergency programme staff, to personal protective equipment (**PPE**) and medical supplies.

International organisations should ensure that security management systems, measures, policies and guidelines enable programme delivery by, and protect, local partners wherever possible. They should proactively **share security, protection, and health risk information** and consider training and systems that will help to keep people healthy and safe. International organisations should, where feasible, provide local partners with funding to contribute to their provision of insurance and **coverage of medical needs** for their personnel in the event of illness, injury, or death in the line of their humanitarian work, as appropriate this may be included in suitably increased allowances for indirect costs.

Responsible and flexible partnership agreements for the covid-19 context

The increased need for localisation in the context of COVID-19 provides an opportunity to review and adjust existing partnership agreements with local actors and ensure they, and new ones, are based on a spirit of equality and the Principles of Partnership³⁰ with local actors given an effective voice in assessment, programme design, budgeting, implementation and monitoring. These Principles are also critical given the increased likelihood of remote partnerships and corresponding attention needs to be applied to the process of remote partnering rather than just remote project management.

IASC members are reminded of the commitment made in the IASC Interim Key Messages on Flexible Funding³¹ to pass on flexibility and simplification to all partners (including local partners). With regard to **existing agreements**, international organisations should exercise flexibility on overall programme delivery, the need for potentially rapid re-programming, as well as simplified requirements for no cost extensions⁸ when possible as well as cascading any flexibilities afforded by donors as per the Key Messages around budget flexibility and cost eligibility. International organisations should advocate with donors to allow this approach and ensure regular feedback and communication to local and national actors for full transparency.

30. The "Principles of Partnership" were adopted in 2007 by the Global Humanitarian Platform (GHP), including more than 40 humanitarian organisations from NGOs, UN agencies, the World Bank, and the Red Cross and Red Crescent Movement. More information on the principles of equality, transparency, results-oriented approach, responsibility and complementarity together with guidance on implementation can be found here: <https://www.icvanetwork.org/principles-partnership-statement-commitment>

31. *ibid*

New partnership agreements: given that the effects of COVID-19 will continue in the near future, new partnership agreements should integrate similar elements of flexibility and seek to maximise un-earmarked and multi-year funding opportunities so as to allow sustainability for local actors. They should also include provisions for core direct costs and overheads to be covered, share risk more equitably and also stress the importance of mutual accountability whereby both partners to an agreement are equally accountable to each other, adapting programmes in active consultation with each other and based on regular and systematic feedback from communities, where possible.

Local actors and international organisations should collaborate in strategy development, advocacy, communication, and coordination. Mutual expectations should be clear, including conditions imposed by donors, and where feasible, local actors should be supported to engage directly with donors. Partnership agreements should also include provisions for establishing processes for needs assessments, monitoring engagement with and participation of crisis-affected populations in response decisions and local actions, consistent with national COVID-19 response protocols.

While acknowledging that both international organisations and local actors have varying capacities, the former should offer COVID-19 – sensitive, sustainable capacity-strengthening investment and support based on local actors' self-identified needs and long-term institutional capacities.

Localisation & leadership

The GHRP confirms that humanitarian operations will continue to utilise existing response mechanisms and coordination structures in countries where the humanitarian architecture is already established. It will complement and support existing national and local government systems, response plans and partnerships. Humanitarian leadership must be inclusive and work to support the entire humanitarian community and not only UN agencies and international NGOs which tend to be more visible.³²

Humanitarian Coordinators should take steps to include local actors in HCTs **on an equal basis**³³. Clear and transparent criteria and selection processes should apply equally to local, national and international organisations, based on operational relevance and demonstrable adherence to humanitarian principles. Humanitarian Coordinators should actively ensure local actors are offered and afforded the same space as international actors to contribute to and engage in strategic discussions and decision-making. A gender lens should be applied when integrating local and national actors into decision-making and coordination structures to ensure that the voices of women are included and women's leadership supported.

Localisation & coordination

An increased reliance on local and national actors should be complemented by an increase in the active engagement of these actors in coordination mechanisms. Humanitarian leadership should support the consistent, **meaningful and active participation and inclusion** of local actors in cluster/ sector coordination groups, strategic advisory groups and/or other response planning teams and working groups at national and sub-national level. This will require taking concrete steps to create an environment where meetings will be more inclusive and language sensitive, local organisations able to meaningfully contribute to discussions and decision-making with support and resources available to take on national or sub-national co-leadership roles, where appropriate.

32. ICVA COVID-19 and localisation paper <https://www.icvanetwork.org/resources/localization-covid-19-humanitarian-response>

33. This is in line with the "Principle of partnership" equality which requires mutual respect between members of the partnership irrespective of size and power. The participants, in this case HCTs, must respect each other's mandates including local actors mandate, obligations and independence and recognize each other's constraints and commitments. <https://www.icvanetwork.org/system/files/versions/Principles%20of%20Partnership%20English.pdf>

Humanitarian Coordinators, HCTs, Heads of Agencies, Cluster/sector coordinators should be particularly encouraged to recognize barriers to full participation including language, jargon, disability, and a lack of sufficient sharing of information pre-meetings. Interpretation for meetings, even in the virtual environment where this is possible, should be encouraged to facilitate a more comfortable setting for local organisations to actively participate. This will include ensuring that the **language** of the meetings is accessible to local actors of cluster/sectors; reducing and identifying obstacles that might hinder meaningful participation from women's groups, minority groups, youth groups people with disability; organising virtual meetings with widely accessible applications that allow local organisations to join on-line calls; consulting local actors in agenda setting; and organising meetings where local (and not just international) actors are based when in-person meetings are permitted.

Re-orienting international surge capacity

Many international organisations maintain a surge roster of international expertise that can be complemented by standby partner deployable capacity. This surge mechanism provides timely and expert capacity to respond to crises, including in the event of a system-wide scale-up (formerly a L3 declaration). In light of the travel and movement restrictions associated with COVID-19, consideration should be given to the possibility of adjusting and re-orienting some of these mechanisms toward a more innovative supportive function from a distance to local actors, rather than traditional surge staff leading and coordinating direct response efforts³⁴.

On the other hand, the scale and complexity of the crisis requires international solidarity to support local actors with the expertise and means to deliver what people need, in a timely and safe manner. Local alternatives, including strengthening in-country humanitarian surge mechanisms should be explored as a priority, drawing lessons from previous work undertaken by the Start Network.³⁵ Consideration should also be given to the recruitment of more national staff, in particular senior national staff, as an alternative to surge deployments by international staff while ensuring that such recruitments do not lead to an incapacitation of local actors but instead complements and reinforces their capacity to respond to COVID-19 needs.

Funding

Pooled funds, including both the UN's Country Based Pooled Funds (CBPFs), as well as those operated by other partners, have been identified as important tools for allowing local actors to design proposals and obtain flexible funding. Pooled fund mechanisms have also been effective in encouraging local actors to engage more substantially in clusters and international coordination architecture. A number of individual CBPFs have demonstrated good practices, such as un-earmarked funding, improved financial risk management, peer mentoring support, and improving partnerships. These could be shared and built upon in other contexts.

Humanitarian leadership should advocate for local and national NGOs, including **women's rights and women-led local organisations**³⁶ and **other marginalized groups of CSOs**, to be fully included in balanced and impartial pooled funding **decisions** on allocations, evidence suggests that they are often left out of the process. Women led groups may also reach out to the Women's Peace and Humanitarian Fund³⁷ that is designed for women's organisations and to address the needs of women and girls in crisis settings. Their importance should be recognised as a significant contributor to the COVID-19 response.

34. CHS Future of Humanitarian Surge report, 2018 (pp. 21) indicates that such initiatives have found that re-orientating surge in this manner maximises the social value of local and national actors, based on a shared vision with the disaster affected persons, enabling local actors to connect most effectively with local authorities.

35. Refer to START network transforming surge capacity available on <https://startnetwork.org/start-engage/transforming-surge-capacity>

36. Gender Based Violence Area of Responsibility (GBV AoR) Localisation Task Force, "Humanitarian Transformation or Maintaining the Status Quo? A Global Study on GBV Localisation Through Country-Level GBV Sub-Clusters", December 2019

37. <https://wphfund.org/>

The COVID-19 response may be an opportunity to bolster **other pooled funding platforms**, such as the START Fund, locally-led SAFER in the Philippines or the IFRC's Disaster Response Emergency Fund (DREF) and the Red Cross Red Crescent Movement's National Society Investment Alliance, or to propose new funds where needed. Similarly, efforts are needed to channel funds directly to local government institutions so their contributions can be strengthened in their frontline role.

Supporting wider forms of local engagement

Other forms of local community and local government leadership should also be recognized and supported, in an approach that spans the humanitarian-development-peace nexus, particularly the role of **mayors, village elders, faith leaders, camp or community leaders (men and women)**, as well as youth, human rights organisations, organisations of people with disability or representing other vulnerable groups such as the marginalised and displaced population at the community level. Although these are not traditionally recognised as humanitarian actors, humanitarian principles must shape the nature of partnership with these actors.

In many cases these existing leaders may be relied on by governments to be focal points for management of the COVID-19 response within their communities. In situations where government movement restrictions are very strict, communities themselves may be the only responders, for example, local faith institutions often play a significant role in public health service provision in areas that government and other actors are not present. Local faith institutions also play a role in less tangible but very essential matters like countering stigmatization, providing psychological and spiritual support, transforming dangerous beliefs and behaviours due to the authority and trust given to them by local communities.

As they seek to engage remotely or with limited access, humanitarian agencies will need to build new models of support to strengthen relationships with community workers and volunteers and engage with emerging leaders within the populations they are supporting. In line with the IASC Gender Alert interim guidance note, humanitarian agencies must continue to support and **strengthen women's leadership**, including through relevant women's organisations or networks, recognizing the role women play in providing essential (and often unpaid) care services in their families and in their communities. Women also make up 70 per cent of workers in the health sector³⁸, including doctors, nurses, midwives, and other health professionals. GBV actors (predominantly women) who are responding to Intimate Partner Violence, in what has been referred to as the "Shadow Pandemic", need to be classified as "essential service" providers and provided with adequate PPE.

The local private sector, including individual companies and business networks can also play a pivotal role in responding to public health emergencies and also if natural disasters occur during periods of restricted movement. For example, during the ebola epidemic in West Africa in 2014, the private sector was an important ally³⁹ as is also being currently seen in Vanuatu in response to Tropical Cyclone Harold⁴⁰. Active engagement with existing business networks that abide by agencies' principles, the UN's due diligence requirements⁴¹ and guiding principles on business and human rights⁴², demonstrate respect for humanitarian principles and are willing to support humanitarian action is encouraged. Where possible, local procurement should be utilised and encouraged to reinvigorate local economies and overcome supply chain delays as well as potential importation challenges such as in the local procurement of PPE.

38. https://www.ilo.org/global/about-the-ilo/newsroom/news/WCMS_741060/lang-en/index.htm

39. <https://www.oxfam.org/en/research/ebola-and-private-sector>

40. <https://www.connectingbusiness.org/harold-vanuatu-appeal>

41. <https://www.unglobalcompact.org/library/3431>

42. https://www.ohchr.org/Documents/Publications/GuidingPrinciplesBusinessHR_EN.pdf

Assessing information needs as well as preferred and culturally appropriate and gender-sensitive communication channels of the population and its vulnerable sub-groups is critical. Where face-to-face approaches cannot be applied, digital and radio means have an important role to play in ensuring proximity to the population; however, their appropriateness and technical feasibility must be assessed with the participation of local actors. Local actors should also be supported to find adapted ways to address the protection needs of different population groups (e.g. women and girls, children, youth, persons with disabilities, minorities, older persons etc.), especially those most vulnerable and excluded, when in-person approaches are untenable.

Both local and international that are involved in responding to humanitarian crises, there is a need to bring different and effective Risk Communication and Community Engagement strategies together in a **coordinated manner within the emergency health, humanitarian and development sectors**. This includes the need to address widespread lack of information and misunderstandings about the disease and coordinate social and behavioral change approaches to containing the disease's spread.

For further information or assistance, please contact: IFRC: Victoria Stodart victoria.stodart@ifrc.org; UNICEF: Philimon Majwa pmajwa@unicef.org

OTHER LEARNING RESOURCES

(SHORT DESCRIPTION AND LINKS)

Measurement framework and tools

Localisation has been explored in various studies and conferences and adapted in or informed numerous projects, programmes and initiatives since the World Humanitarian Summit. While debates still linger, the humanitarian sector has started to track what actors are doing and where and to measure the progress to which the Grand Bargain Localisation commitments are being implemented. A few measurement frameworks and tools have also recently been developed to measure evidence of the impact of localisation or what does a shift to a more localised humanitarian action mean in policy and practice. The NEAR Localisation Measurement Framework and the Humanitarian Advisory Group's Measuring Localisation: Framework and Tools are two of these.

Measuring progress on localisation is currently documented in several different ways:

- Self-reporting at the WHS commitment progress at the organisational and initiative level (e.g., Charter for Change Progress Report)
- Independent reporting on WHS collective commitment progress and individual WHS commitments (e.g., Global Public Policy Institute's Independent Grand Bargain Report)
- Independent research on sector-wide thematic localisation priorities (e.g., Ground Truth Solutions' report World Humanitarian Summit: Perspectives from the Field)
- Project, programme, organisational or donor level research reporting and evaluation frameworks (eg., Start Network's Shifting the Power project)

Source: Intention to Impact: Measuring Localisation, Humanitarian Advisory Group, February 2018

NEAR Localisation Performance Measurement Framework

The purpose of this Localisation Performance Measurement Framework (LPMF) is to evidence progress made towards achieving localisation commitments. While its focus is on local and national actors, it is anticipated that it will also be relevant to international NGOs, UN agencies and donors as well as research and academic institutions that are studying or evaluating localisation.

The development of the LPMF has been guided by the aspiration to offer an approach that is clear, practical, and that can assist in strengthening the evidence base for localisation and advance a common understanding of the progress that is being made towards achieving this, as well as identifying areas of weakness. While it has been conceived and structured in a particular way, it is anticipated that those using the LPMF will use the parts of it that are most relevant to them, or adapt it to meet their specific needs. The aim is to encourage measurement and research as a means of promoting localisation rather than tying users to one specific approach.

Below are key sections of the framework. The full document can be accessed using this [link](#). Translated versions of the LPMF can be found here for [Arabic](#), here for [French](#) and here for [Spanish](#).

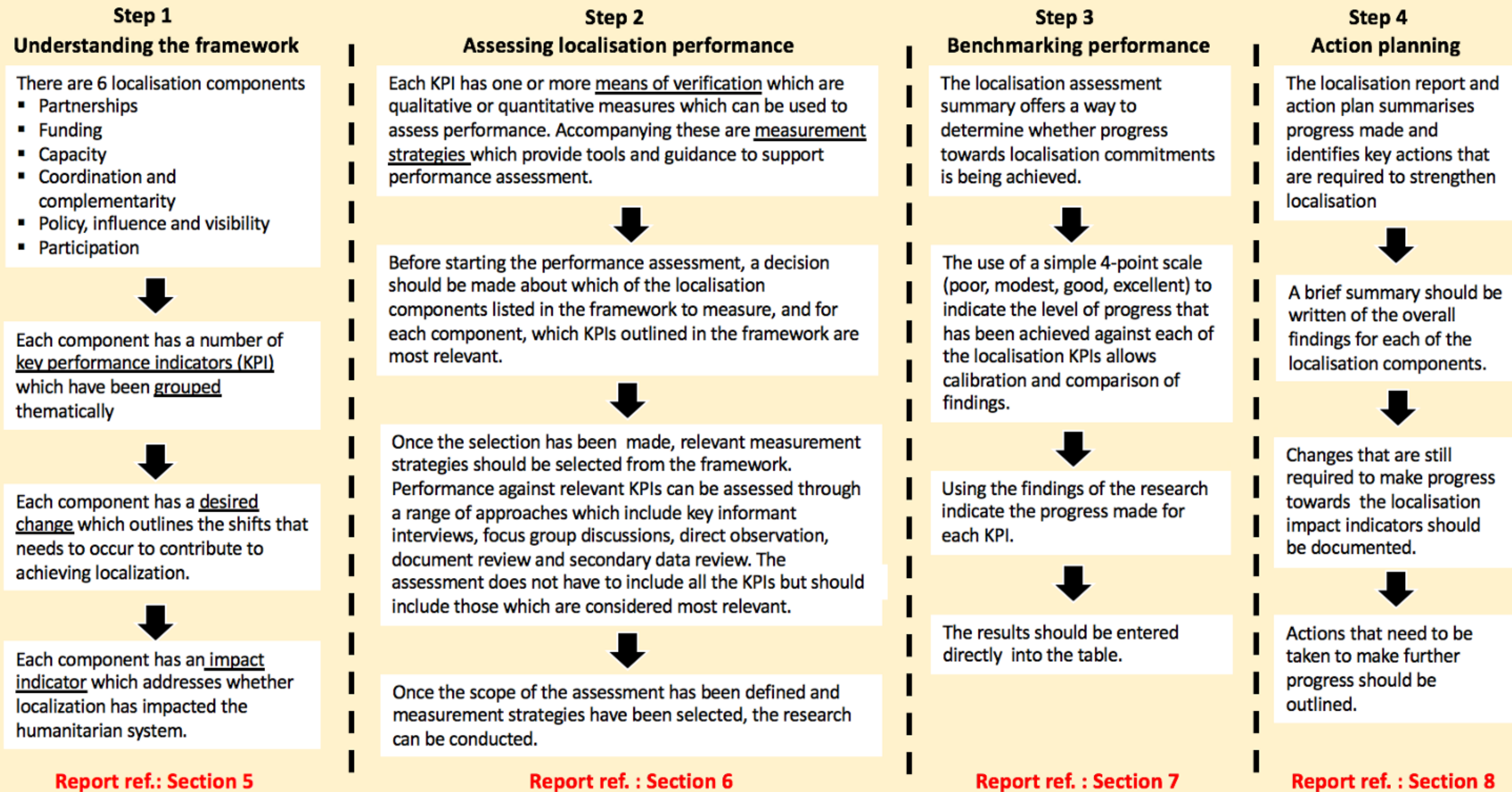
Summary of the localisation performance measurement framework LPMF

The table below provides a summary of each localisation component included in the LPMF. It outlines the desired change that is anticipated, provides an impact indicator and summarises the key performance indicators.

Guidance notes: Six colour-coded localisation **components** are listed below. Each component has a **desired change** which outlines the shifts that needs to occur to contribute to achieving localisation; each has a number of **key performance indicators (KPI)** which are grouped thematically (e.g. quantity of funding, quality of funding etc.); each has an **impact indicator** which addresses whether localisation has impacted the humanitarian system.

1. Partnerships	
Desired change	More genuine and equitable partnerships, and less sub-contracting
Impact indicator KPIs	Equitable and complementary partnerships between L/NA and INGOs/UN to facilitate the delivery of timely, and effective humanitarian response (1.1) Quality in relationships, (1.2) Shift from project-based to strategic partnerships, (1.3) Engagement of partners throughout the project cycle
2. Funding	
Desired change	Improvements in the quantity and quality of funding for local and national actors (L/NA)
Impact indicator	Increased number of L/NA describing financial independence that allows them to respond more efficiently to humanitarian response
KPIs	(2.1) Quantity of funding, (2.2) Quality of funding, (2.3) Access to 'direct' funding (2.4) management of risk

3. Capacity	
Desired change Impact indicator	More effective support for strong and sustainable institutional capacities for L/NA, and less undermining of those capacities by INGOs/UN
	L/NA are able to respond effectively and efficiently to humanitarian crises, and have targeted and relevant support from INGOs/UN
KPIs	(3.1) Performance management, (3.2) Organisational development (3.3) Quality standards, (3.4) Recruitment and surge
4. Coordination and complementarity	
Desired change	Greater leadership, presence and influence of L/NA in humanitarian leadership and coordination mechanisms
Impact indicator	Strong national humanitarian leadership and coordination mechanisms exist but where they do not, that L/NA participate in international coordination mechanisms as equal partners and in keeping with humanitarian principles
KPIs	(4.1) Humanitarian leadership, (4.2) Humanitarian coordination (4.3) Collaborative and complimentary response
5. Policy, influence and visibility	
Desired change	Increased presence of L/NA in international policy discussions and greater public recognition and visibility for their contribution to humanitarian response
Impact indicator	L/NA shape humanitarian priorities and receive recognition for this in reporting
KPIs	(5.1) Influence in policy, advocacy and standard-setting, (5.2) Visibility in reporting and communications
6. Participation	
Desired change	Fuller and more influential involvement of crisis-affected people in what relief is provided to them, and how
Impact indicator	Affected people fully shape and participate in humanitarian response
KPIs	(6.1) Participation of communities in humanitarian response, (6.2) Engagement of communities in humanitarian policy development and standard-setting



Measuring Localisation: Framework and Tools, Humanitarian Advisory Group (HAG) and Pacific Islands Association of Non-Governmental Organisations (PIANGO)

This document outlines an approach, including a framework and some tools, that can be used to measure progress and impact of localised humanitarian action in a wholistic way. These were jointly developed by HAG and PIANGO together with national CSO umbrella bodies, when collaborating to design and undertake a localisation baselining process in four Pacific countries: [Fiji](#), [Solomon Islands](#), [Tonga](#) and [Vanuatu](#). This framework and set of tools provide a starting point that other humanitarian actors can adapt for their own organisational purposes, during a response or at a country level. It is intended to be contextualised as needed – not all components of the framework may be relevant in all contexts.

Measuring localisation framework

This framework provides a method for actors to measure progress on localisation in a holistic way. It is intended to be contextualised as needed – not all components may be relevant in all contexts. It is divided into seven areas. Each area has an impact indicator and a short set of progress indicators which cover both quantitative and qualitative aspects. For the entire framework, including means of verification, see Appendix 1.

Partnerships		
	Partnerships	
	Impact indicator	Equitable and complementary partnerships between local, national and international actors
	Progress indicators	<ol style="list-style-type: none"> 1. Partnerships are based on equitable and ethical partnership practices 2. Longer-term strategic partnerships exist that aim to build systems and processes mirroring the ambition and goals of the local or national partner 3. Increased power and decision-making of local and national actors within partnerships
Leadership		
	Leadership	
	Impact indicator	National actors define and lead on humanitarian action
	Progress indicators	<ol style="list-style-type: none"> 1. International actors support and strengthen national leadership 2. Local and national actors lead response and dominate decision-making 3. International actors work with and respect in-country leadership structures and mechanisms



Coordination and Complementarity



Impact indicator

Application of and respect for commonly agreed approaches to 'as local as possible and as international as necessary'



Progress indicators

1. National representation and engagement in coordination forums and meetings
2. Clearly defined parameters for international actors complementing local and national actors in humanitarian response
3. National civil society coordination mechanisms are funded and have technical capacity to operate in humanitarian response
4. Humanitarian response is delivered in a way that is collaborative and complementary (i.e. based on an analysis of the specific strengths/weaknesses of different humanitarian actors)



Participation



Impact indicator

Communities lead and participate in humanitarian response



Progress indicators

1. Community/contextualised standards exist for all actors working in that context
2. Communities have increased opportunities to shape programming, including evaluating international actor programs



Policy Influence and Advocacy







Impact indicator

Humanitarian action reflects the priorities of affected communities and national actors



Progress indicators

1. Policies are informed by local and national voice including communities
2. National actors are recognised as key stakeholders in national debates about policies and standards that may have significant impact on them
3. Local and national actors have influence

Capacity		
	Impact indicator	Local and national organisations are able to respond effectively and efficiently, and have targeted and relevant support from international actors
	Progress indicators	<ol style="list-style-type: none"> 1. Use of local, national and regional surge capacity over international expertise 2. Actors do not undermine the capacity of national actors in emergency response 3. Contextualised humanitarian standards, tools and policies are available 4. Legislation and plans are in place to support national response capacity
Funding		
	Impact indicator	Increased number of national and local organisations describing financial independence that allows them to respond more efficiently
	Progress indicators	<ol style="list-style-type: none"> 1. Local and national actors have access to direct funding with limited or no barriers 2. Increase in the amount of humanitarian funding to local and national actors 3. Local and national actors have increased decision-making over financial matters

The full document can be accessed using this [link](#) . Additional reports for reference on contextualising the framework for different countries and contexts:

- [Two steps forward, one step back: Assessing the implications of COVID-19 on locally-led humanitarian response in Myanmar](#) (December 2020) – our most recent publication looking at how COVID-19 has impacted localisation in Myanmar.
- [Elevating Evidence: Localisation in the 2019 Bangladesh Flood Response](#) (April 2020) – a review of Bangladesh’s response to 2019 flooding from a localisation perspective.

Localisation Workstream Guidance Note related research

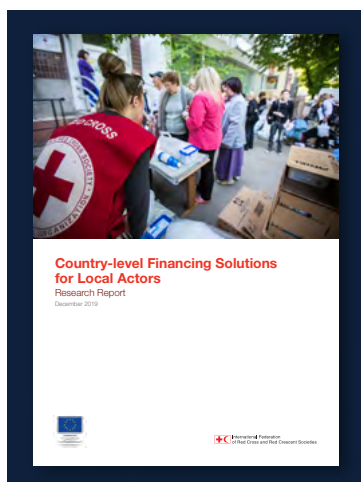
Accelerating Localisation through Partnerships



Recommendations for operational practices that strengthen leadership of national and local actors in partnership-based humanitarian action globally

This research was commissioned by the Accelerating Localisation through Partnerships programme – a multi-agency consortium programme funded by the European Commission's Civil Protection and Humanitarian Aid department (ECHO) – to establish what operational elements of partnership between local, national and international NGOs are most likely to foster localisation of humanitarian action. It was conducted in the four countries – Nepal, Myanmar, South Sudan, and Nigeria – reflecting experiences of local and national NGOs.

Country level financing solutions for local actors



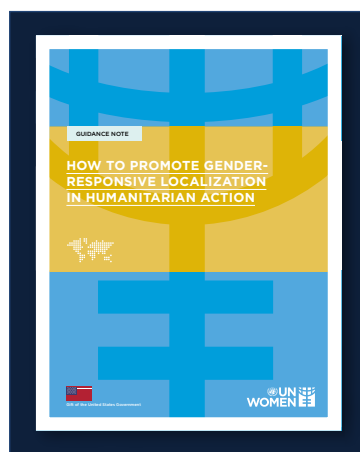
This document is the final report for a research project on “Country-level financing solutions for local actors” commissioned by the International Federation of Red Cross and Red Crescent Societies (IFRC) with funding from ECHO and carried out by Owl RE research and evaluation consultancy. It is complemented by case studies on three countries, Colombia, Ethiopia and Ukraine and a literature review.

Re-thinking capacity and complementarity for more local humanitarian action



To better inform humanitarian action that is as local as possible and as international as necessary, the Humanitarian Policy Group at Overseas Development Institute launched a two-year research project on capacity and complementarity in 2017. This report draws on research conducted during the project, including an initial paper reviewing literature and practice; a case study on the response to the Rohingya refugee crisis in Bangladesh and a case study on the humanitarian response to conflicts in South Kivu and Kasai Central in Democratic Republic of Congo.

How to promote gender-responsive localisation in humanitarian action



The guidelines were developed to provide hands-on, practical guidance on how to promote gender-responsive localisation at the country level, drawing on relevant Grand Bargain commitments and global discussions in the context of the Grand Bargain Friends of Gender Group and beyond. The guidelines address key issues and entry points to advance gender-responsive localisation at the operational level with focus on funding, coordination and partnerships.

Desk Review on Enhancing the Potential of Pooled Funds for Localisation

- [Desk Review on Enhancing the Potential of Pooled Funds for Localisation](#)

This study was commissioned by Oxfam for the Grand Bargain Localisation Workstream and authored by Andy Featherstone and Tasneem Mowjee (September 2020). The objective of the study is to inform GB signatories of how pooled funds can better support localisation outcomes committed within the Grand Bargain.

Sample Localisation Framework and Roadmaps

Operational Framework for Localisation in Nigeria

- [Pathways to Localisation](#), a framework towards locally-led humanitarian response in partnership-based action
- [Nigerian National Localisation Framework](#)

NAHAB Accountability Framework and Localisation Roadmap

- National Alliance of Humanitarian Actors in Bangladesh (NAHAB) [Localisation Road Map](#)

Partnership Framework and Guidelines

- National Humanitarian Network (NHN) Pakistan [Localisation Charter of Commitments](#)

Localisation in Practice

- [Localisation Seven Dimensions of Localisation – Emerging Indicators i Practical Recommendations](#)

Commissioned by the Disasters and Emergencies Preparedness Programme Learning Project, this report builds on, and further develops, the Seven Dimensions of Localisation Framework that was developed by Global Mentoring Initiative [GMI].