BEST PRACTICES IN DEVELOPMENT CO-OPERATION SERIES

Funding civil society in partner countries

Toolkit for implementing the DAC Recommendation on Enabling Civil Society in Development Co-operation and Humanitarian Assistance

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Foreword

The OECD launched its civil society work stream in 2017 to support Development Assistance Committee (DAC) members in enabling civil society's contribution to the UN 2030 Agenda for Sustainable Development, and to protecting and strengthening democracy.

One milestone of this work is the Development Assistance Committee Recommendation on Enabling Civil Society in Development Co-operation and Humanitarian Assistance, adopted in July 2021. The Recommendation guides DAC members and other development co-operation and humanitarian assistance providers in addressing civic space and working with civil society actors, underscoring that these actors must enhance their effectiveness, transparency, and accountability.

The Recommendation contains 28 provisions outlining adherents' commitments to implement it over time. As many provisions are inter-linked and mutually reinforcing, the OECD clustered some of these around topics for toolkits to help DAC members translate the provisions of the Recommendation into practice. Toolkit topics and priorities were identified in consultation with the DAC Community of Practice (CoP) on Civil Society and informed by input from the DAC-CSO Reference Group (CSO RG).

This toolkit is part of the thematic cluster on supporting civil society in partner countries to strengthen local ownership and partner-country CSOs as independent development and humanitarian actors, as one aspect of a broader agenda of localising. A subsequent toolkit within this cluster on "Shifting power within partnerships" will address additional provisions of the Recommendation that speak to localising. The other thematic clusters focus on respecting, protecting, and promoting civic space in partner countries, and incentivising CSO effectiveness, accountability, and transparency.

This toolkit draws from desk research and a review of the literature, as well as various policies, reports, and evaluations. It benefited from peer-learning exchanges and sharing of practices, particularly with the CoP on Civil Society, including meetings in June and December 2022. The CoP assigned a sub-group (the Sounding Board) to this toolkit, which contributed evidence, shared knowledge and provided input throughout 2022. Consultations included a seminar with the CoP and the CSO RG in March 2022, a joint session with the CSO RG and Sounding Board in September 2022, and written input from the CSO RG.

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Table of contents

Foreword 3

Acknowledgements 4

Executive summary 7

1 The case for increased funding for civil society in partner countries 9

Localising support for civil society actors in partner countries enhances development effectiveness 9

Funding civil society actors in partner countries remains marginal 11

2 Guidance for funding civil society in partner countries 15

Values and principles 17

Funding target 18

Dedicated human resources 19

Funding channel 20

Funding modality 24

Identifying partners 27

Managing risk: Administrative and financial procedures and compliance requirements 29

Transparency 32

Monitoring progress towards localising 33

Complementary actions to enable funding civil society in partner countries 34

Annex A. Examples of funding practices 36

References 44

Notes 54

FIGURES

Figure 1.1 Official Development Assistance allocations by CSO type, 2020 11

TABLES

Table 1. Summary of guidance for funding civil society in partner countries 8

Table 2.1 Summary of guidance for funding civil society in partner countries 16

BOXES

Box 1.1 International frameworks, initiatives, and commitments that recognise the importance of localising support for civil society 10
Box 1.2 Examples of providers' recognition of the importance of localising support for partner-country civil society actors 12
Box 1.3 Challenges to providers funding partner-country civil society actors 13
Box 1.4 Challenges to partner-country civil society actors accessing and processing funds 14
Box 2.1 Examples of funding targets 19
Box 2.2 Examples of direct funding 21
Box 2.3 Examples of indirect funding 23
Box 2.4 Examples of flexible funding 26
Box 2.5 Examples of identifying partners 28
Box 2.6 Examples of simplified administrative and financial procedures and compliance requirements 30
Box 2.7 Examples of transparency about funding 32
Box 2.8 Examples of tools and frameworks to monitor and assess localising funding 33

Box A.1. Examples of seed grants, community-led financing, micro-grants, awards, and direct payments 36
Box A.2. Examples of innovation and thematic funds 38
Box A.3. Examples of pooled, multi-donor funds 39
Box A.4. Examples of funding through provider-country or international intermediaries 40
Box A.5. Examples of funding through partner-country intermediaries 41
Box A.6. Examples of support to strategic alliances, networks, platforms, and resource centres 42

Executive summary

Funding civil society actors in partner countries remains marginal despite recognition of the importance of localising support and international commitments to strengthening partner-country civil society actors' ownership. Only 7% of OECD Development Assistance Committee (DAC) members' civil society organisation (CSO) funding goes directly to partner-country CSOs.

For several reasons, development co-operation and humanitarian assistance providers (hereafter "providers") struggle to fund partner-country civil society actors adequately and in ways that advance local leadership, **and these actors struggle to access appropriate support**. Reasons include risk-aversion and mistrust of partner-country civil society actors; legislative or regulatory barriers; complex and burdensome administrative requirements; restrictive, earmarked, or directive funding; gaps in provider capacity; negative assumptions and narratives around partner-country civil society actors; and more.

In that context, **this toolkit offers providers guidance for funding civil society actors in partner countries**. It helps them deliver on the provisions of the OECD DAC Recommendation on Enabling Civil Society in Development Co-operation and Humanitarian Assistance related to funding:

- to strengthen local leadership and ownership, and foster strong, independent, diverse civil society
- by increasing the availability and accessibility of direct, flexible, and predictable support including core and/or programme-based support.

The guidance is structured around the main funding-related choices that providers need to make, highlighting the most effective options and mentioning additional considerations and mitigation approaches to avoid unintended consequences. In addition, the toolkit proposes complementary actions that contribute to an enabling environment for civil society. The table below offers a summary of the guidance.

Table 1. Summary of guidance for funding civil society in partner countries

FUNDING-RELATED CHOICE	MOST EFFECTIVE OPTIONS	ADDITIONAL CONSIDERATIONS
Values and principles to inform provider relations with civil society	Reflect on and articulate values and principles guiding the provider's actions Understand innate power imbalances and barriers Uphold the principle to "do no harm" Ensure policy coherence	Monitor values' and principles' continued relevance Ground-truth how well values and principles translate into policy and practice Communicate values and principles internally
Funding targets to support partner-country civil society	Set funding targets to illustrate commitment, and track and assess progress Report flows for civil society organisations (CSOs) to the OECD DAC Creditor Reporting System	Consider diverse funding targets and non-financial support, depending on the context Ensure targets are not set and strived for at the expense of quality
Human resources to manage direct funding of partner-country civil society	Dedicate adequate staff capacity and expertise Decentralise and streamline administrative processes and compliance requirements at partner-country level	Consider relying on intermediaries for partnership and administrative management Consider pooling multi-provider funds to share the human resource burden
Funding channel ("direct" or "indirect") to support partner-country civil society	Fund partner-country civil society directly to strengthen local ownership and leadership	Regularly conduct context analysis and needs assessment to determine most appropriate channel Consider that preference for indirect funding might arise (e.g., conflict situations, regulations)
Funding modality ("to" or "through") to support partner-country civil society	Fund civil society with core support to reinforce ownership and leadership Use multi-year/long-term funding to enable preparedness, predictability, and stability Provide flexible funding to allow adaptation Deliver targeted or responsive funding instead of call for proposals, to avoid competition between actors Pool multi-provider funding to increase support for a diversity of local civil society actors Cover a fair percentage of overhead (administrative/indirect) costs	Consider the design of both "to" and "through" funding Consider that support through civil society is often top-down and "provider-driven" vs. locally owned Consider that calls for proposals (competitive funding) can be burdensome for small and/or informal actors Tailor call-for-proposal requirements to local capacities and resources Consider the unintended consequences of multi-donor pooled funds and risk of displacing other modalities Mitigate risks with careful design, ongoing monitoring, and engagement
Civil society actors identified for support in partner countries	Have a defined, clear, and transparent process for identifying and selecting local partners Understand the range of interests and power dynamics at play Increase donor coordination and information-sharing Consider inclusion and diversity indicators	Consider to which degree civil society actors are anchored in and accountable to local populations Avoid using identical selection and compliance criteria Consider duty of care to the civil society ecosystem Regularly conduct context analysis and mapping of the civil society landscape
Managing risk: Administrative procedures and compliance requirements	Expedite approval processes Adopt flexible reporting requirements Streamline accounting procedures Establish clear criteria to assess financial risks Adjust fiduciary risk requirements to the context	Consider requirements and risks proportionate to the level and duration of funding and results Weigh fiduciary and management risks alongside programmatic, reputational, and other risks
Transparency applied to funding flows for civil society actors	Publish information about funding flows to partner-country civil society actors Support access to information about funding and enhance coordination with partners	Balance transparency against security and political risks for local actors in sensitive environments Build flexible requirements for local civil society actors where civic space is restricted
Monitoring to track and assess progress towards localising	Define what localising means in practice Set indicators with local civil society to assess progress and achievement of objectives Identify bottlenecks to adapt approaches over time	Apply a learning approach to monitoring and adaptive management
Complementary actions contributing to an enabling environment for civil society actors	Pursue systematic dialogue with partner-country civil society actors Invest in strengthening partner-country civil society actors and infrastructure organisations Strengthen partner-country civil society actors' capacities for financial management and fundraising Advocate for the respect, protection, and promotion of civic space Coordinate among providers to monitor civic space in partner countries Do no harm to civic space in partner countries Call for and support voluntary self-regulation by civil society actors Call for and support more equitable partnerships between civil society actors.	

1 The case for increased funding for civil society in partner countries

On 6 July 2021, the OECD Development Assistance Committee (DAC) adopted the DAC Recommendation on Enabling Civil Society in Development Co-operation and Humanitarian Assistance (OECD, 2021[1]). The Development Co-operation Directorate is now developing toolkits to offer the Recommendation's adherents guidance on what its provisions could look like in practice in consultation with the DAC Community of Practice (CoP) on Civil Society[1] and informed by input from the DAC-CSO Reference Group (CSO RG)[2]. Each toolkit addresses a cluster of related provisions in the DAC Recommendation. This toolkit is part of the thematic cluster on funding partner-country civil society actors, to strengthen local ownership and enable them as independent development and humanitarian actors in their own right.[3]

Localising support for civil society actors in partner countries enhances development effectiveness

Localising is not a new subject, but is gaining momentum and traction (Fellow and Paige, 2021[2]; Latif Khan, 2021[3]; Robillard, Atim and Maxwell, 2022[4]). Referred to also as *local leadership* or *local ownership*, *locally-led*, *localisation* or *localised*, localising has varied definitions yet to coalesce into common understanding by the international development and humanitarian community (Prieto, Hines and Wong, 2021[5]). For the purpose of this toolkit, localising is understood as a process of recognising, respecting, and strengthening the leadership, ownership, and capacity of partner-country civil society actors in development co-operation, humanitarian action, and peacebuilding (OECD, 2017[6]). It means distributing a greater share of resources to civil society actors in partner countries and giving them greater control over how these are spent (OECD, 2018[7]). Furthermore, it means ensuring they participate and have a say in the decision-making related to these resources, aligned with their roles, responsibilities, obligations, and capacities (Partos, 2022[8]; Social Impact Commons, 2021[9]).

Localising falls within broader notions of power-shifting and power-sharing, where development co-operation and humanitarian assistance providers (hereafter "providers"[4]) address power imbalances, and shift resources and decision-making for increased local ownership and responsiveness to local contexts. Shifting power to partner-country actors, including youth- and women-led civil society organisations (CSOs) and those that work with or represent people living in situations of poverty and marginalisation, is long-recognised as essential to empowerment and dignity in development. The aim is to give them a leadership role in planning and decision-making. While this toolkit focuses on funding civil society in partner countries, it recognises this as one aspect of a broader agenda for localising.

The importance of localising for development effectiveness and principled humanitarian action is recognised in multiple international frameworks, initiatives, and commitments (Box 1.1). Locally led development strengthens respect for and consideration of local contexts, vulnerabilities and capacities, and inclusive decision-making. It helps uphold the development-effectiveness principle of local ownership, and key humanitarian standards like local capacity and participation by, and accountability towards affected people (Kipfer-Didavi and Bitong, 2019[10]). It strengthens local anchorage through inclusion,

responsiveness, and accountability towards local populations in development and humanitarian contexts (Kipfer-Didavi and Bitong, 2019[10]; OECD, 2020[11]). Increasing local support strengthens partner-country civil society actors' capacity to apply these principles and standards while recognising and strengthening them as independent development and humanitarian actors (Kipfer-Didavi and Bitong, 2019[10]). Further, localisation can bring efficiencies by reducing the intermediaries between providers and the individuals, communities, and organisations that official development assistance (ODA) aims to reach.

Box 1.1 International frameworks, initiatives, and commitments that recognise the importance of localising support for civil society

- The Good Humanitarian Donorship Principles (2003)
- The Global Partnership for Effective Development Co-operation Effectiveness principles Indicator 2: Enabling environments for civil society, and outcome documents from Rome (2003), Paris (2005), Accra (2008), Busan (2011), Mexico (2014), Nairobi (2016), and Geneva (2022)
- Civil society organisation (CSO) standards and commitments, including the 2010 Istanbul Principles for CSO Development Effectiveness, the 2015 Charter for Change, and the 2022 Pledge for Change
- The Core Humanitarian Standard (CHS) (2014)
- The 2030 Agenda for Sustainable Development and leaving no one behind (UNGA Resolution A/RES/70/1) (2015)
- The World Humanitarian Summit (WHS) Agenda for Humanity (2016)
- The Grand Bargain (2016)
- The New Way of Working (2017)
- The Inter-Agency Standing Committee (IASC) Guidelines on Inclusion of Persons with Disabilities in Humanitarian Action (2019)
- The DAC Recommendation on Enabling Civil Society in Development Co-operation and Humanitarian Assistance (2021)
- The Donor Statement on Supporting Locally Led Development (2022)
- The SPHERE Standards

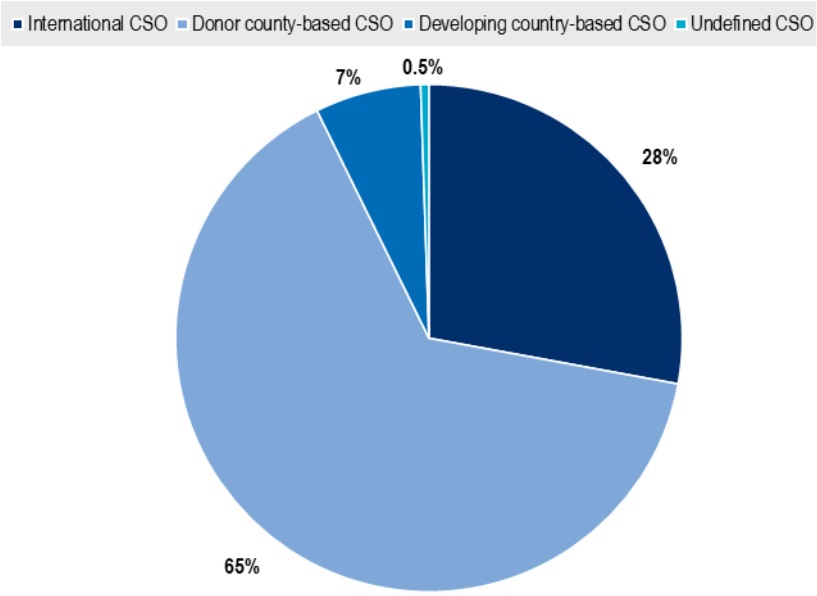
Partner-country civil society actors are key to promoting long-term social transformation and development. They are critical contributors to the UN 2030 Agenda for Sustainable Development and its pledge to leave no one behind via effective humanitarian assistance, peacebuilding, and protecting and strengthening democracy (OECD, 2021[1]). They often intervene as frontline responders in crisis situations, as illustrated during the COVID-19 pandemic, the conflict in Afghanistan, and Russia's invasion of Ukraine. When resourced and given freedom to operate, they are also key to recovery and long-term development, often being the first and last responders (Kipfer-Didavi and Bitong, 2019[10]). Moreover, partner-country civil society actors have unique value-added due to their understanding of the sensitivities and priorities of affected communities. This means they can increase preparedness for and resilience against future crises, respond to locally defined development needs, and give voice to affected communities. They also tend to demand accountability from their governments and others in relation to services and goods received (Prieto, Hines and Wong, 2021[5]). More generally, they lobby and advocate for the respect and realisation of human rights, and create alliances and partnerships at national, regional and global levels to push for policy change and justice (OECD, 2018[7]). They derive legitimacy in part from their connections to communities in partner countries. Further, providers can engage partner-country civil society actors even as regimes change, ensuring continuity.

That said, not all civil society holds or operates according to positive social and democratic values (OECD, 2020[11]). Civil society actors are diverse, represent a range of interests and beliefs, and play varied roles, from watchdogs, to advocates, experts, and service providers (OECD, 2016[12]; Sogge, 2019[13]). As such, they reflect the diversity, conditions, and challenges of their countries. While it is difficult to characterise civil society as having a common mandate, this toolkit focuses on actors "characterised by relationships of social solidarity with marginalised populations and concerns for social justice" (OECD, 2010[14])

Funding civil society actors in partner countries remains marginal

Despite increasing recognition of the importance of localising support, and international commitments to strengthen partner-country civil society actors' ownership – including pledges to increase funding (Box 1.2), and incremental changes in providers' funding practices (2Annex A) – major breakthroughs have yet to materialise. Sixty years into development co-operation, providers' funding-related choices do not favour partner-country civil society actors. Indeed, 93% of DAC members' CSO funding is received by DAC-country or international CSOs (ICSOs). Only 7% of DAC members' CSO funding is received directly by partner-country CSOs (Figure 1.1) (OECD, 2022[15]).[5] As described in Box 1.3 and Box 1.4, providers face obstacles to funding partner-country civil society actors and these, in turn, face several challenges accessing and processing those funds.

Figure 1.1 Official Development Assistance allocations by CSO type, 2020



Source: (OECD[16]) Statistics based on DAC Members' reporting to the Creditor Reporting System database (CRS), 2019-2020.

Box 1.2 Examples of providers' recognition of the importance of localising support for partner-country civil society actors

Norway's Agency for Development Cooperation (Norad) principles for supporting civil society

In 2018, Norad developed principles to guide and direct planning and support to civil society, and a context for dialogue. Importantly, one of these principles commits Norad to "explore methods for shifting more of the funding and the decision-making to the local or national level" (Norad, 2018[17]).

US Agency for International Development (USAID) New Vision for Global Development

In a speech delivered in November 2021, USAID Administrator Samantha Power outlined the agency's new vision for global development. This vision highlighted the importance of increasing support for and partnership with local organisations, as it allows them to manage and deliver results on a project while building local capacity for more sustainable impact over time (USAID, 2021[18]).

France's Programming Act on inclusive development and combating global inequalities

The 2021 Act allows CSOs in partner countries to tap the French Development Agency fund (more than EUR 100 million per year) that had been reserved for French CSOs (Légifrance, 2021[19]). The Act recognises that French and partner-country CSOs are both key to development and the fight against global inequalities, and the need to foster favourable conditions for their participation in building and implementing development programmes and projects funded by the State (French Ministry for Europe and Foreign Affairs, 2021[20]).

Italy's policies to foster local CSOs

In 2020, Italy approved a new Action Plan on Aid Effectiveness, referencing commitments to foster participation of local and international CSOs (AICS, n.d.[21]). The country also adopted a programming and policy-planning document for international development co-operation during 2021-23, which recognises CSOs as key implementers of humanitarian programmes. Through this document, the Italian government aims to support localising humanitarian aid by encouraging and promoting partnerships with several stakeholders, including local civil society actors for a "people-centred and needs-based approach" (Government of Italy, 2021[22]).

The United Kingdom's International Development Strategy

The United Kingdom's 2022 International Development Strategy states that "Those who benefit from our work must have a voice in what we do, and how we do it. The difficult reforms and good policies that drive progress must be locally owned. Our country partnerships will be anchored in our respect for the rights of our partners to self-determination. Our support will strengthen their sovereignty" (FCDO, 2022[23]).

Box 1.3 Challenges to providers funding partner-country civil society actors

- Risk aversion and mistrust of partner-country civil society actors, related to actual or perceived capacity gaps (including absorption capacity) and to financial or reputational risks, including in partner countries characterised by corruption and rule-of-law challenges; concerns around independence, political capture, and inclusiveness arise especially regarding smaller civil society actors in rural areas (SDC, 2022[24]).
- Providers' lack of political awareness or commitment to change the status quo, and limited advocates for change within providers' institutions. This is linked to providers' difficulties in agreeing to share and shift power, and switch to a partnership approach based on trust, as well as to fear of losing visibility and control over how funds are spent (Baguios et al., 2021[25]).
- Varying appetites for risk (real or perceived) in managing public funds across and within provider countries, incentivising reliance on relationships and organisations with track records.
- High administrative, fiduciary, and risk-management thresholds for domestic and international accountability; reporting requirements that favour short-term, concrete results over long-term transformational outcomes that can be difficult to measure.
- Support restricted to or earmarked for provider-country or international civil society actors as intermediaries or implementers, sometimes due to provider-country legislation or regulation. Such restrictions can be related to anti-money-laundering/countering the financing of terrorism (AML/CFT) and to sanctions in some cases (CIVICUS, 2015[26]).
- Legislative or regulatory barriers and other civic-space restrictions in partner countries, such as rules requiring prior government approval of foreign funding or that categorise partner-country civil society actors receiving foreign funding as "foreign agents" (ICNL, 2022[27]).
- Providers' lack of capacity to manage direct funding relationships with partner-country civil society actors, due to the transaction costs of funding a larger number of actors, which might be characterised as poor value for money (OECD, 2022[28]; Peace Direct and Kantowitz, 2020[29]; Tomlinson, 2013[30]).
- Negative assumptions and narratives around partner-country civil society actors grounded in unequal power dynamics, which several practitioners consulted in the preparation of this toolkit - echoing recent findings in the literature on aid (Fellow and Paige, 2021[2]) - found it could be in part a manifestation of structural racism.
- Difficulty in identifying local actors that align with notions of local anchorage, principled humanitarian action, and local ownership, particularly in conflict-affected areas, due to gaps in providers' contextual knowledge and limited reach beyond national capitals or major cities (Peace Direct and Kantowitz, 2020[29]).
- Resistance among provider-country or international civil society actors (Baguios et al., 2021[25]; OECD, 2022[31]), given their role in public engagement and building support for official development assistance (ODA) spending at home, as well as preference among provider-country citizens to see their nationals managing ODA in partner countries (OECD, 2020[11]).
- Socio-political contexts and decision-making cycles in provider countries that lead to short-termism and changes in ODA policies and programmes.

Box 1.4 Challenges to partner-country civil society actors accessing and processing funds

- Directive or heavily earmarked funding from providers, including to provider-country or international civil society; little to no flexibility in budget adaptations; short budget cycles; partial or no cover for indirect (e.g., administrative) costs; too-high co-funding amounts (Boyes-Watson and Bortcosh, 2022[32]; Patel and Brabant, 2018[33]).
- Legislative and other civic-space barriers in partner countries, such as registration requirements that are financially and logistically difficult for civil society actors to meet to receive funding (ICNL, 2022[27]). Partner-country governments have used anti-money laundering and countering the financing of terrorism measures to target civil society actors that receive funding, including prosecuting their leaders for alleged violations.
- Aversion to foreign funding driven by fear of losing independence, being seen as or associating with "foreign agents", or facing stigma, political backlash or repression (ICNL, 2022[27]).
- Competition for limited funding, either with provider-country or international civil society actors, or with other partner-country civil society actors; few donor initiatives to promote collaboration and partner-country civil society alliances, networks and platforms; power imbalances in alliances with provider-country or international civil society actors.
- Knowledge gaps about providers' policies and procedures; limited or no access to information about calls for proposals, available funds, and eligibility, which are often issued with short deadlines, in complex formats requiring extensive paperwork, and require use of a Western language (Baguios et al., 2021[25]).
- Capacities and resource limits, such as those to meet providers' administrative thresholds or their application, accountability, and financial management and reporting compliance requirements, procedures and processes (OECD, 2022[34]; UK DFID, 2016[35]).
- Not being trusted or regarded as having capacity to manage their own work and strategy without guidance from provider-country or international civil society actors.

2 Guidance for funding civil society in partner countries

This section guides development co-operation and humanitarian assistance providers that fund civil society actors in partner countries. It helps them deliver on the provisions of the DAC Recommendation on Enabling Civil Society related to funding to "promote and invest in leadership" of partner-country civil society actors, namely by "increasing the availability and accessibility of direct, flexible, and predictable support including core and/or programme-based support, to enhance their financial independence, sustainability, and local ownership" (OECD, 2021[1]). The aim is to engage with and support partner-country civil society as independent development and humanitarian actors. To this end, the guidance is structured around the main funding-related choices that providers need to make. Each choice is divided into three sections: (1) a description; (2) the most effective option(s); and (3) additional considerations and mitigation approaches to avoid unintended consequences. Table 2.1 offers a summary.

Table 2.1 Summary of guidance for funding civil society in partner countries

FUNDING-RELATED CHOICE	MOST EFFECTIVE OPTIONS	ADDITIONAL CONSIDERATIONS
Values and principles to inform provider relations with civil society	Reflect on and articulate values and principles guiding the provider's actions Understand innate power imbalances and barriers Uphold the principle to "do no harm" Ensure policy coherence	Monitor values' and principles' continued relevance Ground-truth how well values and principles translate into policy and practice Communicate values and principles internally
Funding targets to support partner-country civil society	Set funding targets to illustrate commitment, and track and assess progress Report flows for civil society organisations (CSOs) to the OECD DAC Creditor Reporting System	Consider diverse funding targets and non-financial support, depending on the context Ensure targets are not set and strived for at the expense of quality
Human resources to manage direct funding of partner-country civil society	Dedicate adequate staff capacity and expertise Decentralise and streamline administrative processes and compliance requirements at partner-country level	Consider relying on intermediaries for partnership and administrative management Consider pooling multi-provider funds to share the human resource burden
Funding channel ("direct" or "indirect") to support partner-country civil society	Fund partner-country civil society directly to strengthen local ownership and leadership	Regularly conduct context analysis and needs assessment to determine most appropriate channel Consider that preference for indirect funding might arise (e.g., conflict situations, regulations)
Funding modality ("to" or "through") to support partner-country civil society	Fund civil society with core support to reinforce ownership and leadership Use multi-year/long-term funding to enable preparedness, predictability, and stability Provide flexible funding to allow adaptation Deliver targeted or responsive funding instead of call for proposals, to avoid competition between actors Pool multi-provider funding to increase support for a diversity of local civil society actors Cover a fair percentage of overhead (administrative/indirect) costs	Consider the design of both "to" and "through" funding Consider that support through civil society is often top-down and "provider-driven" vs. locally owned Consider that calls for proposals (competitive funding) can be burdensome for small and/or informal actors Tailor call-for-proposal requirements to local capacities and resources Consider the unintended consequences of multi-donor pooled funds and risk of displacing other modalities Mitigate risks with careful design, ongoing monitoring, and engagement
Civil society actors identified for support in partner countries	Have a defined, clear, and transparent process for identifying and selecting local partners Understand the range of interests and power dynamics at play Increase donor coordination and information-sharing Consider inclusion and diversity indicators	Consider to which degree civil society actors are anchored in and accountable to local populations Avoid using identical selection and compliance criteria Consider duty of care to the civil society ecosystem Regularly conduct context analysis and mapping of the civil society landscape
Managing risk: Administrative procedures and compliance requirements	Expedite approval processes Adopt flexible reporting requirements Streamline accounting procedures Establish clear criteria to assess financial risks Adjust fiduciary risk requirements to the context	Consider requirements and risks proportionate to the level and duration of funding and results Weigh fiduciary and management risks alongside programmatic, reputational, and other risks
Transparency applied to funding flows for civil society actors	Publish information about funding flows to partner-country civil society actors Support access to information about funding and enhance coordination with partners	Balance transparency against security and political risks for local actors in sensitive environments Build flexible requirements for local civil society actors where civic space is restricted
Monitoring to track and assess progress towards localising	Define what localising means in practice Set indicators with local civil society to assess progress and achievement of objectives Identify bottlenecks to adapt approaches over time	Apply a learning approach to monitoring and adaptive management
Complementary actions contributing to an enabling environment for civil society actors	Pursue systematic dialogue with partner-country civil society actors Invest in strengthening partner-country civil society actors and infrastructure organisations Strengthen partner-country civil society actors' capacities for financial management and fundraising Advocate for the respect, protection, and promotion of civic space Coordinate among providers to monitor civic space in partner countries Do no harm to civic space in partner countries Call for and support voluntary self-regulation by civil society actors Call for and support more equitable partnerships between civil society actors.	

Values and principles

Description

Many providers operate without a clear articulation of the values and principles underpinning their efforts. This means they might operate based on negative assumptions and narratives around partner-country civil society actors.

The desk research and reviews conducted in preparation of this toolkit, as well as numerous consultations with the DAC Community of Practice on Civil Society and the DAC-CSO Reference Group, analyse the negative assumptions and narratives around partner-country civil society actors as, in part, a manifestation of structural racism (Acharya, 2022[36]; Barnett, 2020[37]; Currion, 2020[38]; Fellow and Paige, 2021[2]; International Development Committee, 2022[39]; Omlo et al., 2022[40]; The New Humanitarian, 2020[41]), a concept originating in the civic rights movement literature, which has been used since the turn of the decade by analysts of the development co-operation system to cast light, in particular, on the lasting impacts of colonial history (Bhavnani, Mirza and Meetoo, 2005[42]; Carmichael and Hamilton, 1992[43]). These considerations come at a moment of challenge and reflection for the development and humanitarian sector, as highlighted in the Development Co-operation Report 2023: Debating the Aid System (OECD, 2023[44]). While this toolkit does not seek to resolve the issue, it aims to reflect the considerations raised by the literature and development co-operation and humanitarian stakeholders as a potential impediment for funding civil society in partner countries.

Providers often assume that partner-country civil society actors must be closely overseen to get the expected results. This lack of trust informs many aspects of the relationship, including how programmes are developed, implemented, and assessed. These relationships disempower partner-country civil society, reducing them to implementers of externally pre-determined programmes in their own country.

Most effective options

Providers should reflect on and articulate the values and principles that guide their development co-operation and humanitarian assistance, including working with civil society. They need to be conscious of historical, inherent power imbalances, and barriers and compliance hurdles that partner-country civil society actors face when accessing funding, taking ownership of programmes, and accessing decision-making spaces. They must question whether their assumptions and narratives affect their ability to trust and respect partner-country civil society actors. Scrutinising values and principles can ensure an organisational shift in narrative, attitudes, and practices.

New narratives are needed about funding civil society actors in partner countries, which challenge existing power imbalances and shift behaviour and processes to sharing decision-making and leadership. These narratives should recognise the importance of local actors in sustainable change, the challenges they face, and the context-appropriate modalities needed to overcome them. Finally, they should prioritise strengthening civil society actors' capacity as an outcome, reflecting the role of a resilient sector in sustainable and inclusive development, human rights, and good governance.

Moreover, providers should uphold the overarching principle of "Do no harm" when funding partner-country civil society. This means understanding the partner-country context and civil society landscape, and reflecting on whether and what type of unintended consequences might result from funding civil society. Through ongoing, systematic dialogue, providers should seek partner-country civil society's views of their political context, needs, and priorities to identify appropriate forms of financial or other support.

In some cases, coaching and strategic support or collaboration in transmitting advocacy messages might be a high priority. In other cases, it might be the provision of basic services might be a higher priority, such as for civil society actors working with marginalised groups. In the case of informal partner-country civil

society, there could be a need to express solidarity through dialogue and other ways of recognising their legitimacy (Warburg and Skytte Jensen, 2021[45]).

Upholding the do-no-harm principle requires situating civil society support in the provider's broader development co-operation and foreign policy context to ensure policy coherence and consistency. Values and principles must be understood and owned across a provider's development co-operation and foreign policy institutions. Provider governments might need to revisit and reformulate their policy frameworks and strategies to ensure they are not embedded in negative assumptions and narratives or a "charitable-saviour" mentality.

Additional considerations

Values and principles tend to be aspirational in nature. They are generally not concrete with measurable targets. They need not be set in stone and can change over time as part of a learning process (Canadian Women's Foundation, Community Foundations of Canada and Equality Fund, 2020[46]). Providers can find ways to check on the continued relevance of their values and principles and ground-truth internally and check with civil society partners how values and principles are being translated into policy and practice. Providers could communicate them across their institutions to increase internal awareness.

Funding target

Description

Providers might choose to set a target or a minimum threshold for the level or percent of funding they will allocate to partner-country civil society. Common practice shows that providers do not necessarily set goals towards localising, nor systematically examine the level of funding to different types of civil society actors. As noted in Figure 1.1, OECD DAC statistics show that at present, only 7% of ODA allocations by DAC members are received by partner-country civil society.

Most effective options

Setting a target illustrates internally and externally that funding partner-country civil society actors is a strategic objective and allows providers to track and assess progress towards (ICVA and Humanitarian Leadership Academy, 2019[47]). For DAC members and other countries that report official development assistance (ODA) flows to the OECD, tracking can be done via annual reporting on flows for civil society organisations (CSOs) to the OECD DAC Creditor Reporting System (CRS), which includes reporting of funding by type of CSO – developing-country-based, DAC-country-based, or international (OECD, 2022[15]).

Additional considerations

Providers should consider different types of targets. Beyond a target for direct funding of partner-country civil society, providers could set a target for funding that strengthens partner-country civil society leadership and capacity, such as long-term, indirect core and flexible funding. Providers should ensure that meeting a funding target is not done at the expense of the quality of support offered, thus, avoiding compromises in defining and applying funding criteria (e.g., regarding what constitutes partner-country civil society). Funding targets alone are not enough to localise support for civil society and must be accompanied by adequate management resources and systems, and changes in values and principles to address problematic assumptions and mindsets. Finally, providers must consider whether non-financial support is more appropriate in certain contexts.

Box 2.1 Examples of funding targets

US Agency for International Development's (USAID) "New Vision for Global Development"

In the last decade, USAID made numerous efforts to increase direct funding to local civil society, with the total amount of USAID assistance to local partners increasing from 4% to 6%. In 2021, USAID revealed its intention to provide at least a quarter of all assistance directly to local partners over the course of 2022-26. USAID also intends to increase staff on the ground to administer localised funding (USAID, 2021[18]).

France's Inter-ministerial Committee for International Cooperation and Development (CICID)

In 2018, CICID, which is chaired by France's Prime Minister, set out the objective to double official development assistance to partner-country CSOs from EUR 310 million in 2017 to EUR 620 million in 2022 (CICID, 2018[48]). This is part of the objective to strengthen the role of CSOs, regional and local authorities, and all non-state actors in defining and implementing the development policy and international solidarity of France (Légifrance, 2021[19]).

Denmark's strategic partnerships with Danish civil society organisations

Denmark calls for its strategic partners to "transfer as high a proportion of the grant as possible to local partners; (...) and to use MFA (Ministry of Foreign Affairs) funds strategically towards co-financing, basket funds, joint programmes and match funding of local partners to enhance scale, influence and promote harmonisation in countries and regions. In the budget, partners are required to report on the level of transfers to local partners in the South" (MFA of Denmark and Danida, 2022[49]). Strategic partners must have a "Local Leadership Strategy" including five elements: (1) equitable partnerships; (2) transfer of financial resources and support; (3) capacity support, strengthening, and sharing; (4) participation and local leadership; and (5) promotion of local partners in coordination, policy, and advocacy. Furthermore, the MFA administrative guidelines for Strategic Partnerships provide for an administration fee for local partners and flexible, multi-year funding. Moreover, to ensure that funding reaches partner-country civil society, the MFA capped expenditures strategic partners can make in Denmark at 20%.

Dedicated human resources

Description

Providers often report that they lack adequate staff and expertise to manage direct funding relationships with partner-country civil society actors (OECD, 2022[34]). Increasing funding for partner-country civil society actors might require providers to revisit staffing levels.

Most effective options

Adequate, dedicated staff capacity and expertise enable providers to analyse potential channels, modalities and partners, and monitor funding. They are also beneficial for engaging in systematic dialogue with partner-country civil society, building relationships, and accessing local knowledge. In this way, providers' staff can be seen as the managers of transaction costs associated with civil society partnerships, and as investors in knowledge-building, networks, and solidarity. By allocating human resources capacity at partner-country level, providers might be able to decentralise and streamline administrative processes and compliance requirements for directly funding partner-country civil society.

Additional considerations

Providers not in a position to increase or reconfigure staff dedicated to funding partner-country civil society might need to rely on intermediaries[6] to manage the partnership agreements and administrative work (OECD, 2022[34]; Sida, 2019[50]). Funding through intermediaries can share risk and provide non-financial forms of support to partner-country civil society actors. So too can pooled, multi-provider funds, which add the advantage of sharing the human resource burden (see "Funding modality" for a description of pooled funds). However, relying on intermediaries or multi-provider funds ought not be providers' sole solution, as it bypasses but does not reduce direct-funding obstacles such as the need to invest human resources to manage and benefit from direct, provider–partner-country civil society relationships.

Funding channel

Description

Providers use two types of channels to fund partner-country civil society actors:

- **direct** channels, where the provider funds *partner*-country civil society actor(s), which can act as local intermediaries between the provider and other partner-country civil society actors
- **indirect** channels, where the provider funds *provider*-country intermediaries, including international CSOs or other actors that pass funding to partner-country civil society

The choice of the funding channel by providers has an impact on the level and quality of the funding received by partner-country civil society.

Most effective options

According to the DAC Recommendation on Enabling Civil Society and the commitments of the UN Office for the Coordination of Humanitarian Affairs (OCHA) Grand Bargain, direct funding is most conducive to enabling and strengthening local ownership by civil society actors in partner countries. Directly funding civil society in partner countries can bring efficiencies by reducing the number of links in the aid chain from providers to beneficiaries. It allows support to be grounded in local contexts, capacities, and needs. Partner-country civil society actors understand the local context and players better than provider-country or international civil society actors, increasing the likelihood of relevant, demand-driven programming. Partner-country civil society actors' local connectedness can also serve as an anchor for providers to broaden their reach to a greater diversity of actors, including those that are more politically controversial (McDonough and Rodríguez, 2020[51]). Direct funding can increase the ability of local actors to demand accountability from governments and, in turn, by governments from these actors. It allows local actors to be accountable to their constituencies and ensure that their mission, vision, and strategy is relevant, legitimate, and representative. Finally, providing direct funding can empower and enable partner-country civil society actors to build networks and coalitions with other actors in the country (Sida, 2019[50]).

Box 2.2 Examples of direct funding

Partnership Fund for a Resilient Ukraine (PFRU)

The PFRU is a pooled, multi-donor fund supporting reforms in conflict-affected areas of Ukraine through an integrated, humanitarian-development-peace approach. The fund supports the resilience of Ukraine's local civil society organisations (CSOs), government and communities, and the private sector during Russia's war against Ukraine. The PFRU unites Canada, Finland, Sweden, Switzerland, UK, and US as development partners, and is co-owned by the Government of Ukraine (UKRINFORM, 2021[52]).

Germany's Blue Action Fund and Legacy Landscapes Fund

German's Ministry for Economic Cooperation and Development (BMZ) set up two thematic funds totalling EUR 80 million, administered by the national development bank (KfW), through which civil society in partner countries can receive direct grants. The grants are made to local actors to expand activities aimed at conserving marine and terrestrial biological diversity (BMZ, n.d.[53]; BMZ, n.d.[54]).

French Ministry of Foreign Affairs and Agency for Development pilot initiative in the Mediterranean region

The initiative provides EUR 3 million over 2022-25 to a Tunisia-based CSO intermediary and a network of others to manage calls for proposals targeting partner-country civil society actors in the region. The initiative includes a co-financing plan of 90% of total budget (French MFA; and French CNDSI, 2021[55]; OECD, 2021[56]; OECD, 2022[31]).

Japan's Grant Assistance for Grass-Roots Human Security Projects (KUSANONE/GGP)

Through KUSANONE/GGP, the Japanese Ministry of Foreign Affairs supports economic and social development projects by local and international non-government organisations and local governments. Established in 1989 and given its current name in 2003, KUSANONE/GGP is Japan's sole programme to respond to the development needs of local communities, currently providing support in 141 countries (MFA, 2018[57]).

Italy's direct funding to Local CSOs' humanitarian aid projects

In July 2016, Italy approved legal procedures to make local CSOs eligible for direct funding when they already have general partnership agreements with CSOs registered in Italy (AICS, 2018[58]). This was possible due to Law n.125/2014, which reformed the Italian development co-operation system and provides for emergency relief interventions to be implemented by, "whenever possible, resorting to entities operating on-site" (Chamber of Deputies and the Senate of the Italian Republic, 2014[59]). For example, in Mali, the local CSO ARKDR received a grant of EUR 419 165 between August 2018 and August 2020 to strengthen the resilience of local communities, namely youth and women, building up their agricultural production and transformation skills (AICS, n.d.[21]).

Swiss Agency for Development and Cooperation (SDC) Civil Society Support Facility

The CHF 6 million Facility covers 2019-23 and supports partner-country CSOs to drive social change in North Macedonia, including a competitive grant scheme that supports institutional development and specific projects. Partner-country CSOs receive mentoring to strengthen relations with constituencies and build alliances. Mechanisms for better co-operation between state institutions and partner-country

CSOs are established and enable civil society's participation in policy and decision-making (SDC, n.d.[60]).

Swedish embassies direct funding grants

Many of Sweden's embassies provide trust-based, multi-year, flexible direct funding for partner-country civil society actors, including core, programme, or project support. The grants are of all sizes and the collaboration is managed the same way as partnerships with Swedish or international CSOs. Partners are chosen according to capacity, relevance, legitimacy, etc. Dialogue is continuous and systematic, and contributes to mutual learning. Some of the embassies' civil society partners are encouraged to be spokespeople for human rights and democracy at global-level political events and summits (OECD, 2022[34]).

Additional considerations

The effectiveness of the funding channel depends on a broad and sound understanding of the context in which civil society operates in a partner country. Regular context analysis, including of political economy and/or power balance, and needs-assessment help providers determine the most appropriate funding channel for the local operating environment.[7] In conflict regions, context analysis can ensure that local civil society receives funding only when it demonstrates that programming is neutral and impartial to conflicting parties (Kipfer-Didavi and Bitong, 2019[10]). More generally, context analysis can identify power imbalances and actual or perceived lack of neutrality when funding partner-country civil society.

Sometimes, direct funding of partner-country civil society actors might not be the best option. In situations of conflict, deep political division, or autocracy, partner-country civil society's service provision can be politicised to build legitimacy or support for a particular side. Conflicting parties might therefore view partner-country civil society actors as a threat and obstruct their work, harming local populations. A more effective option in such situations might be external civil society, whose assistance could be considered more neutral (Kipfer-Didavi and Bitong, 2019[10]).[8]

Providers and local civil society actors might prefer indirect funding for several reasons. Local actors might want to benefit from the expertise, network, and knowledge of provider-country or international civil society, or from their role in managing the administrative burden of providers. In other instances, partner-country civil society actors might want to avoid a visible link with providers. The latter could be the case when such links might heighten political sensitivities due to conflicts between the provider and the partner country, or sensitivities related to the actions or causes that civil society champion. Providers must be conscious of sensitivities and trade-offs when balancing funding partner-country civil society actors that could be critical of government with the need to maintain open communication channels with government.

Finally, providers might have regulations that restrict direct funding to partner-country civil society. In such cases, indirect funding through intermediaries might be needed, at least in the short-term. Because such regulations tend to originate outside of the agency or ministry providing official development assistance, changing them could require a whole-of-government process in which the providing entities must play a role. Sometimes regulatory restrictions might be related to anti-money-laundering or countering terrorism financing, or sanctions, which would also require a whole-of-government process to address.

Box 2.3 Examples of indirect funding

Provider-country or international intermediaries that fund partner-country civil society actors

Norwegian and German civil society organisation (CSO) intermediaries channel up to 80% of funds they receive to civil society partners in the Global South, many of which are their long-standing partners (OECD, 2022[34]).

Charter for Change CSO signatories commit to passing 20% of available funds to Global South CSOs (OECD, 2022[31]).

CSO members of the Dóchas association of Irish non-governmental development organisations have Guidelines on Partnerships with Southern CSOs, including funding partner-country civil society (Williams, 2013[61]).

Comic Relief in the United Kingdom is establishing community-led grant making panels, providing core funding to partner-country CSOs, and matching local income under a GBP 60 million programme partnership with the United Kingdom Foreign, Commonwealth and Development Office (FCDO, 2022[62]).

The Swedish international CSO Diakonia is shifting its strategy to "no growth" or even "de-growth" to create space for direct funding of partner-country CSOs (Swedish Strategic Partner Organisations, 2020[63]).

Providers that include criteria for funding partner-country civil society actors in partnerships with provider-country or international CSOs

The Neighbourhood, Development and International Cooperation Instrument (NDICI)-Global Europe instrument of the European Union prioritises funding CSOs and/or their associations from partner countries in all country allocations under the thematic programme on CSOs. European Union Delegations managing funds can broaden eligibility to international CSOs if considered more effective, but project proposals should be based on local initiatives and ensure involvement of CSOs from partner countries at all stages (European Commission, 2021[64]).

The Danish Ministry of Foreign Affairs partnered with the Danish association of CSOs on a more adaptive management framework to improve and vary formats and models to support and fund informal local actors and social movements. Danish CSOs provide seed funds and core support for informal civil society and social movements for training in campaigning and advocacy; human rights laws and conventions; short-term, rapid response funds; flexible funding to individuals; payments for specific activities, transport, equipment, venues, campaign materials, etc. (Warburg and Skytte Jensen, 2021[45]).

The Swedish International Development Cooperation Agency's (Sida) civil society strategy since the 1970's requires that Swedish CSOs partners with partner-country CSOs to be eligible for funding. Indirectly, more than 2 000 partner-country CSOs are funded under the strategy. However, the share of funding channelled by Swedish CSOs to their local partners is unknown and there is no requirement to report it. A recent mapping estimated it at only 50-60% (OECD, 2022[31]).

The Netherlands' Ministry of Foreign Affairs allocates additional points in call for proposals to Dutch CSOs who have associated with Southern-based CSOs (Government of the Netherlands, 2022[65]). This is part of the Policy Framework Strengthening Civil Society.

Funding modality

Description

Providers use two main modalities to fund civil society:

- **Funding *to* core contributions and programmes by CSOs** (OECD, 2022[15]). Funds are provided to CSOs for use at their discretion, for programmes and activities they develop and implement on their own authority (DAC Working Party on Development Finance Statistics, 2021[66]).
- **Funding *through* CSOs to implement donor-initiated projects (earmarked funding)** (OECD, 2022[15]). Funds are provided for CSOs to implement projects and programmes that providers develop, and for which they are ultimately responsible. This includes joint-financing schemes where providers and CSOs consult about activities, jointly approve them and/or share their funding (DAC Working Party on Development Finance Statistics, 2021[66]).

Both *to* and *through* funding can be multi-year/long-term (i.e., from three to five years) and flexible. While *to* funding is unearmarked by definition, the degree of provider earmarking in *through* funding varies. Some *through* support providers use a high degree of direction to align civil society partners with their priorities and project/programme design, while others are more responsive to civil society-defined criteria (Haynes, Ireland and Duke, 2019[67]; OECD, 2020[11]; Wood and Fällman, 2013[68]).

Both funding modalities can be targeted, responsive, or competitive. Targeted funding involves up-front due-diligence to identify local civil society partners and invite them to be the funding recipient (Peace Direct and Kantowitz, 2020[29]; Sida, 2019[50]). In responsive funding, providers are open to unsolicited proposals from civil society actors on a rolling basis. In competitive funding, providers call for proposals with specific criteria and parameters to which civil society applicants respond (Peace Direct and Kantowitz, 2020[29]).

The modality selected has implications for how partner-country civil society is enabled to use the funding received and the degree of local ownership and sustainability of the funding.

Most effective options

Funding *to* civil society as core support (also described as institutional, budget, strategic, unrestricted, or unearmarked (OECD, 2020[11])) is most conducive to strengthening independent, pluralist civil society in partner countries. Core support is “the most development-effective type of support, with advantages such as predictability, flexibility, sustainability, administrative efficiency, and significantly, ownership and accountability” (OECD, 2020[11]). Core support should be prioritised when possible as it reinforces partner-country civil society actors’ leadership by enabling them to articulate their needs and achieve their goals.

Providing core support *to* partner-country civil society actors can form a true partnership in which funds are granted on a basis of trust and solidarity, supporting them as independent development and humanitarian actors to realise their goals and mission (Boyes-Watson and Bortcosh, 2022[32]; Goris and Magendane, 2021[69]). Core funding can strengthen local ownership by giving recipients control over resource allocation and respecting their need to be accountable to their constituencies before their providers (McDonough and Rodríguez, 2020[51]). It can enhance sustainability by enabling civil society actors to invest in long-term planning and programming, including in institutional capacity and ongoing administrative costs, and in transformational development results without needing to deviate from mandates and strategic plans in order to match provider-defined priorities (OECD, 2020[11]). Core support allows partner-country civil society actors to invest in processes and networking from the local to international level. Moreover, according to a study carried out by the Swedish International Development Cooperation Agency (Sida) in 2020, core support tends to decrease the risk of corruption compared to project support (Karlstedt, 2020[70]).

Multi-year/long-term and flexible *to* and *through* funding are considered most conducive to helping partner-country civil society operate as development and humanitarian actors in their own right (Wood and Fällman, 2013[68]). Multi-year funding is important for predictability and long-term development outcomes as it enables partner-country civil society actors to retain staff and ensure greater programme and organisational preparedness and stability. Similarly, flexible funding allows partner-country civil society actors to change programming as circumstances change. The importance of this was illustrated during the COVID-19 pandemic, as needs shifted and partner-country actors had to ensure quick responses tailored to the situation (Goris and Magendane, 2021[69]). Flexible funding is usually better administered as core support whereby partner-country civil society actors are not locked into provider-defined programmes/projects. Both multi-year and flexible core funding make partner-country civil society actors more resilient in times of shrinking civic space, by letting them change activities or strategies when restrictions arise (Haynes, Ireland and Duke, 2019[67]).

Targeted or responsive funding should be prioritised over competitive funding, when possible, as it fosters collaboration between partner-country civil society actors instead of creating competition. Competitive funding also obliges partner-country civil society actors to invest resources in fundraising based on immediate-term success, which weakens them in the long-term (Peace Direct and Kantowitz, 2020[29]).

Among the modality options for funding (Annex A), pooled, multi-donor funding can help providers increase support for and broaden their reach to a greater diversity of partner-country civil society actors (OECD, 2020[11]). Further, pooled funds minimise the need for partner-country civil society actors to apply for funding across multiple donors, with participating providers harmonising their administrative requirements and procedures. They can also increase coordination among providers and with other development co-operation actors (Baguios et al., 2021[25]). Moreover, pooled funds let providers share the risks associated with direct support. Finally, in partner countries with restrictive civic space, pooled funds can demonstrate more collective solidarity for civil society than individually funded programmes (OECD, 2020[11]).

In deciding on a modality, providers must factor in the importance of covering overhead (administrative or indirect) costs, which are essential for partner-country civil society's institutional operations and financial stability. Many providers or intermediaries do not include them when funding partner-country civil society, contributing to a "starvation cycle" as the real costs of programme implementation are not covered (Boyes-Watson and Bortcosh, 2022[32]; IASC, 2022[71]). Sometimes overhead costs are replaced by an amount dedicated to strengthening the partner's capacity, but this undermines partner-country civil society actors' leadership and ability to decide how to invest funds. Although overhead costs vary depending on the status and capacity of partner-country civil society, providing a fair percentage is key for equal partnership, and supporting leadership and response capacities, as per the OCHA Grand Bargain commitments (IASC, 2022[72]; Metcalfe-Hough et al., 2021[73]). The Inter-Agency Standing Committee (IASC) guidance for local and national partners indicates good practice as "providing overheads as unrestricted funding, in addition to direct administrative and project support costs" (IASC, 2022[71]).

Additional considerations

Although core support *to* civil society actors is the most effective option, attention should be paid to design. The effectiveness of core support depends on how it is controlled and accounted for. This type of funding can also bring administrative challenges to partner-country civil society actors. Some civil society actors have express that they prefer project funding because required monitoring and reporting (including audits) are easier and less expensive.

Support *through* civil society is seen as top-down and designed to meet providers' pre-defined objectives. Such funding can damage the agility, local asset base, and domestic accountability of formal and informal partner-country civil society – the latter especially through processes that seek to formalise informal, un-organised actors such as grassroots movements and self-help initiatives (Baguios et al., 2021[25]).

Further, providers must consider that competitive funding through calls for proposals usually require extensive proposal packages that are labour-intensive and burdensome for small and/or informal partner-country actors who then do not compete on a "level playing-field" (OECD, 2022[34]). Open calls carry a probability that larger, more formal, and well-funded civil society actors win competitions to the detriment of smaller, and/or informal partner-country actors (Peace Direct and Kantowitz, 2020[29]). Instances have been reported by providers in which calls for proposals aimed at partner-country civil society actors ended up selecting provider-country and international civil society actors because the applications received from partner-country civil society actors were considered "not good enough" (OECD, 2022[34]).

If providers use calls for proposals, they should be mindful to not apply requirements or quality standards indiscriminately across provider-country/international versus partner-country civil society actors. They should consider revising and tailoring calls for proposals to account for partner-country civil society actors' capacities and resources, and/or find other solutions to assist with writing and submitting proposals. Providers could offer a financial contribution for civil society actors to contract external support (e.g., consultants) familiar with the provider's proposal template, requirements, and language (OECD, 2022[34]).

Providers need to be mindful that pooled, multi-donor funds are not innately accessible to all partner-country civil society. Moreover, pooled funds can eliminate direct relationships and opportunities for policy dialogue between partner-country civil society actors and providers. Other risks are that such funds displace alternative funding opportunities, can be overly based on provider-defined objectives, crowd out nascent civil society actors, and generate competition rather than collaboration among partner-country civil society actors. Further, when providers with varying interests need to agree on a fund's focus, lowest-common-denominator issues that easily get broad provider buy-in might be favoured while neglecting more complex or politically sensitive issues (McDonough and Rodríguez, 2020[51]). Many of these risks can be mitigated with design, ongoing monitoring and member engagement (OECD, 2020[11]), and by facilitating decisions on allocation to people and regions in need according to coordinated assessments that include partner-country actors (Kipfer-Didavi and Bitong, 2019[10]).

Box 2.4 Examples of flexible funding

United Kingdom Rapid Response Facility (RRF)

The United Kingdom introduced an RRF allocation of GBP 18 million for COVID-19 response. The RRF quickly channels funds through preapproved organisations during emergencies. International non-governmental organisation (NGO) partners must pass the same share of indirect costs they received to their downstream partners in-country (Metcalfe-Hough et al., 2021[73]).

Canada's Women's Voice and Leadership (WVL) programme

The WVL programme responds to the needs of local women's rights organisations (WROs) and lesbian, bisexual, transgender, queer, and intersex (LBTQI+) groups that advance the rights of women and girls in developing countries. It was launched in 2017 and commits USD 150 million over 2018-23 to support more than 400 WROs and LBTQI+ organisations. WVL has exceeded its initial target, with support to over 800 WROs in 2020/21. Implementing partners include international CSO country teams and partner-country WROs. The principles and characteristics of WVL projects are that they be: locally driven and designed; sustainable (multi-year) to secure long-term partnerships, including support for core administrative functions to sustainably resource WROs; offer rapid, responsive, and variable funding to foster timely and strategic responses to unforeseen events and pilot innovative ideas (Government of Canada, n.d.[74]).

INTERSOS and SV (Stichting Vluchteling) Localisation Strategic Initiative

The Initiative develops strategic partnerships with local actors, building long-term collaborations not strictly dependent on project-based funding. The partnerships involve mutual capacity-strengthening actions and attention to promoting organisational development through capacity assessments, joint goals, and funding for structural changes (Stichting Vluchteling, 2020[75]).

Identifying partners

Description

Identifying certain partner-country actors to fund and not others can create inequalities and exclusion. Providers' knowledge gaps and limited capacity and outreach at the local level can hinder their ability to identify which partner-country civil society actors to fund. As a consequence, funding tends to favour well-known, formal, large, and highly reputed partner-country civil society actors that can handle substantial resources and risk-management (Suárez and Gugerty, 2016[76]). Support might also overlook the varied types of partner-country civil society actors, such as traditional (e.g., faith-based, trade unions, professional associations, etc.), hybrid (including social enterprises), and informal, more fluid forms (OECD, 2020[11]; Sogge, 2019[13]).

Most effective options

Providers need a defined, clear, and transparent process for identifying and selecting local partners. First, it is crucial to understand the range of interests that civil society actors represent, and the power dynamics affected by funding decisions in partner countries, as well as relations with other stakeholders, particularly partner-country governments. Care should be taken to avoid transferring selection criteria and processes from provider-country/international civil society to partner-county civil society. As with selecting a funding channel, knowledge gaps can be addressed by mapping civil society and investing in regular context analysis to understand the political economy landscape, including informal actors and social movements (French MFA; and French CNDSI, 2021[55]; Peace Direct and Kantowitz, 2020[29]). Investments in relationships, and institutionalised and systematic dialogue for learning with partner-country civil society and other actors can increase providers' knowledge and the effectiveness of collaboration. Providers with limited capacity and human resource constraints can partner with regional or partner-country academia, research centres, or networks to conduct mappings and context analysis through a partner-country lens.

Increased donor coordination and information-sharing at partner-country level can inform selection by identifying which civil society actors receive support and which could contribute to change but are being left behind (OECD, 2017[6]). Such knowledge can ensure more inclusive partner identification beyond so-called "usual suspects", avoid funding duplication, and facilitate joint (or pooled) funding for individual civil society actors (OECD, 2022[34]). Quality-assessment indicators that gauge inclusivity and diversity can ensure that often-marginalised partner-country civil society actors – such as women's rights and women-led organisations – are included in funding (IFRC, 2020[77]).

When selecting provider-country/international civil society intermediaries, providers should consider and monitor compliance with approaches that avoid reinforcing power imbalances with civil society actors in partner countries. Such approaches avoid replicating burdensome procedures and requirements, and are based on local civil society partners' strategic plans and priorities, with provision of core support.

Additional considerations

To ensure impact, providers should consider to which degree civil society actors are anchored in and accountable towards local society. Providers should understand whether the civil society actor works in a participatory manner (involving the affected people or considering their needs) and can make decisions without state intervention (Kipfer-Didavi and Bitong, 2019[10]).

Providers also need to consider different types and mandates of civil society actors, how they are perceived, and their relations with other in-country stakeholders. Applying identical selection criteria and compliance requirements among varied partner-country civil society actors can cause unintended consequences, such as creating or reinforcing power imbalances, exclusion, and conflict due to competition among local actors. Providers must bear in mind that partner-country civil society actors specialising in advocacy, accountability, human rights, and governance could face political backlash (OECD, 2022[34]).

In addition, in selecting partners, providers should consider their duty of care to the civil society ecosystem. This includes considering impacts on the civil society sector's labour market, perceptions of over-/under-representation of certain social, racial, and religious groups, and the impact on civil society partners when funding ends (Avis, 2022[78]). Investments that mobilise local resources and strengthen supportive infrastructure might be desirable, and impact-monitoring should assess such "in-perpetuity" benefits in value-for-money calculations (Hicks, 2022[79]).

Finally, provider-country/international civil society actors' fundraising in partner countries competes with local civil society actors (Patel and Brabant, 2018[33]). Some provider-country/international civil society set up as local actors, such as with boards of partner-country representatives or headquarters shifted to the Global South. To mitigate the risk that partner identification is blind to or even favours this version of "local" civil society, mapping and context analysis of the civil society landscape in the partner country should be undertaken, including provider-country/international civil society (Humanitarian Leadership Academy and ICVA, 2019[80]; Innpactia and CIVICUS, 2019[81]; Patel and Brabant, 2018[33]).

Box 2.5 Examples of identifying partners

United States Agency for International Development (USAID) partner directory and co-creation mechanism

In November 2021, USAID launched a web-based directory to make it easier for civil society in partner countries to engage with and receive funding from USAID. Through this directory, partner-country organisations and actors can register and identify their mission locally. This helps USAID identify and fund initiatives originated and managed by partner-country actors. The site also helps potential partners access tools and resources to improve how they compete for funding (USAID, 2022[82]; USAID, n.d.[83]). In addition, USAID maintains a co-creation mechanism to bring potential partners together to find solutions to development challenges and foster local ownership while reducing competition among partner-country actors (USAID, n.d.[84]).

Kujalink

In 2022, Adeso, an African humanitarian and development civil society actor, launched Kujalink, an online platform that connects civil society actors in the Global South to providers around the world. The platform responds to barriers faced by partner-country civil society actors in accessing funding, due to "low visibility and lack of credible information about them and their work" (KujaLink, n.d.[85]). Objectives include increasing direct funding to partner-country civil society, and growing connections, visibility, and funding pathways.

European Union country roadmaps for engagement with civil society

Since 2014, the European Union elaborates roadmaps for engagement with civil society in partner countries. Each roadmap includes: context analysis; an assessment of existing engagement; priorities for European Union engagement with civil society; actions, ranging from research to policy dialogue and operational support; and a dashboard of outcome and process indicators to monitor progress (European Commission, n.d.[86]). Country roadmaps are elaborated in consultation with civil society for a three-to-five-year period. Importantly, the roadmaps give European Union providers political economy and context analysis to understand the challenges and needs of partner-country civil society actors prior to engagement – vital for donor coordination (European Commission, n.d.[87]).

Managing risk: Administrative and financial procedures and compliance requirements

Description

Onerous programme and financial management and reporting requirements, procedures, and processes prevail in the current development assistance system, representing a heavy burden. For providers, these raise transaction costs, which can be considered a disadvantage of working with civil society. For partner-country civil society, they take considerable time and human and financial resources to deliver proposals, applications, and reports. These procedures and requirements hinder partner-country civil society's effectiveness and present an obstacle to funding (OECD, 2020[11]). While some requirements are tied to legal, regulatory, and administrative requirements of provider countries, others stem from providers' own risk aversion (OECD, 2020[11]), even though risks are inherent to development work and all partnerships, especially in fragile contexts.

Most effective options

Providers can take several actions to lessen administrative and financial burdens. These include easing restrictions on funding eligibility, especially for partner-country civil society that might not have the infrastructure and human resources to deal with complex requirements (Baguios et al., 2021[25]), and adopting alternative and more flexible ways of reporting on results and expenditures. Providers could also expedite approval processes for partner-country civil society actors working in crisis-affected countries. Further, providers could streamline or harmonise accounting procedures among themselves (Patel and Brabant, 2018[33]). Decentralising procedures to partner-country level can be helpful, including decentralising authorisations to providers' staff in partner countries so that they play a larger role in awarding funds and managing relationships with partner-country civil society actors (USAID, 2021[18]). Providers could consider financial support for civil society actors to recruit external services to foster a level playing-field for administrative and financial procedures by smaller and grass-roots organisations. Providers should also ensure that their requirements are accessible to persons with disabilities, such as ensuring that online forms can be read by screen-readers. Providers should evaluate and consider alternatives to requiring local organisations to apply for and report on funding in English, as this requirement can exclude many organisations, especially those representing persons from marginalised groups.

Box 2.6 Examples of simplified administrative and financial procedures and compliance requirements

European Union (EU) Global Europe instrument for development co-operation financing

Under the EU Global Europe instrument for development co-operation financing, the Thematic Programme for Civil Society Organisations (CSOs) threshold for CSOs' co-financing contribution was lowered; other EU thematic programmes (notably on Human Rights and Democracy) accept justifications for 100% financing (European Commission, 2021[88]; OECD, 2022[31]).

United States Agency for International Development (USAID) two-phase applications

USAID is lowering barriers to funding for new and non-traditional partners by promoting two-phase applications so potential partners can submit a two-page concept note rather than a 50-page application, which reduces the workload and excessive time to apply for funding (USAID, 2022[82]).

Czech Urgent Assistance to Ukraine mechanism and other streamlined procedures

A new call for proposals called Urgent Assistance to Ukraine was set up by the Czech Ministry of Foreign Affairs (MFA) to support CSOs in the context of 2022 Ukraine crisis response. It targets Czech CSOs with partners in Ukraine and Moldova, and benefits from streamlined procedures. In addition to this mechanism, the Czech Republic has instruments allowing quick response for urgent assistance in co-operation with partner-country CSOs, including a system to fast-track endorsements of proposals. The MFA can facilitate direct financial donations to CSOs in Ukraine and Moldova, and is able to fund new or informal civil society. The MFA can adapt projects, timeframes, and reporting requirements (all via e-mail). These procedures were developed in long-term co-operations with CSOs in Myanmar (since 2008) and Ukraine (since 2014) (Ministry of Foreign Affairs of the Czech Republic, 2022[89]).

Denmark's Civil Society in Development (CISU)

CISU, an association of Danish CSOs serving as intermediaries, enables its civil society partners to report results through short videos. In the case of informal civil society in particular, a Danish study identified alternative methods of results and financial reporting, such as the use of encrypted messaging services to send one-to-one and group messages, which can include files, voice notes, images, and videos (Warburg and Skytte Jensen, 2021[45]).

The CIVICUS Solidarity Fund (CSF)

Founded in 2019, the CSF provides resources and support through flexible grants. Following consultations, the CSF made its application process participatory and inclusive by: (1) creating more specific, balanced and clearer eligibility criteria and requirements; (2) simplifying the application form; (3) providing support and guidance during the application process; (4) recognising people's time by providing compensation and feedback; and (5) implementing friendlier monitoring, reporting, and learning processes (CIVICUS, n.d.[90]).

Italy's results-based management approach

Results-based management procedures simplify workflow and cashflow for the Italian agency for development co-operation (AICS) and for the implementing partners of the CSOs that AICS supports. As a result, in the last call for proposals, the co-financing requested fell from 10% to 5% of total project budget (Government of Italy, 2021[22]).

Providers must acknowledge different risk appetites they might have in relation to funding civil society in partner countries versus funding actors such as government or the private sector, and different risk appetites for different funding modalities (e.g., “to” or “through”). Being conscious of and distinguishing actual from perceived financial risks can help providers put things in perspective (OECD, 2022[34]).

In that context, providers need a new narrative and approach for well-informed risks to change mindsets and overcome risk aversion (OECD, 2022[34]). By coming to terms with risks as inherent to development co-operation and with the biases that fuel risk perception versus reality, providers can develop pragmatic, informed, and balanced risk mitigation and management plans, and tools that are less burdensome for partner-country civil society. These can include:

- Establishing clear and distinct criteria to assess the actual risks of funding a partner-country civil society actor and their ability to deliver results, and achieve and sustain development outcomes.
- Investing in the financial, governance, accountability, and grant management capacities of partner-country civil society actors (Featherstone, 2019[91]; OECD, 2022[34]) and acknowledging that capacity-strengthening is not a one-time or linear effort, but fluctuates over time (OECD, 2022[34]).
- Conducting stakeholder analysis, and screening and assessing sensitive actors and activities that could bring reputational risks to providers (Warburg and Skytte Jensen, 2021[45]). The leadership, strategies, and development of social movements can be examined and assessed by monitoring their process towards change (Peace Direct and Kantowitz, 2020[29]; Tarrow, 2022[92]).
- Leveraging local accountability systems that involve the communities, networks, peers, and governments with which partner-country civil society actors have relationships, and which can be stronger than external, upward financial accountability (Corbett, Carstensen and Di Vicenz, 2021[93]; Peace Direct and Kantowitz, 2020[29]).
- Adjusting the level of due-diligence and authority required for making decisions about funding partner-country civil society actors (Global Affairs Canada, 2020[94]).
- Addressing and mitigating risks to providers and partner-country civil society actors by considering risk-sharing options and potentially extending the model of political risk insurance that applies to companies that operate in high-risk environments (OECD, 2022[34]).
- Adjusting fiduciary risk requirements to context-specific elements, such as by adapting risk analysis mitigation systems using an incremental approach to funding dependent on performance (Lever, Miller and Staszewska, 2020[95]) or by due-diligence requirements (Fellow and Paige, 2021[2]).

Additional considerations

Any disbursement of ODA will come with administrative and financial requirements, which are among the tools for accountability to provider-country governments, parliaments, and the public. To enable funding civil society in partner countries, providers need to consider whether requirements and the risk appetite they reflect are proportionate to the level and duration of funding, and the programmatic aims.

Risks associated with the capacity of partner-country civil society actors to manage grants and meet providers’ financial due-diligence requirements can be mistaken for risks related to the ability of local civil society actors to advance change and achieve development results (OECD, 2022[34]). Providers should be cautious to not mistake risk assessment for capability assessment (USAID, 2021[96]). Providers might consider making calculated risks and taking a holistic approach that weighs fiduciary and management risks alongside programmatic, reputational, and other risks. In some cases, it can be appropriate to accept a higher level of fiduciary risk in light of potential programmatic rewards (Sida, 2019[50]; USAID, 2021[96]). This might involve using a risk/reward ratio rather than simple risk assessment (OECD, 2022[34]).

Transparency

Description

National access-to-information obligations in provider countries often make information on aggregate funding to civil society available. However, detailed information on civil society partners and the programmes, sectors, and locations they work in is not readily accessible at partner-country level. This can be the case especially when partner-country civil society is supported indirectly, via provider-country/international civil society intermediaries. Overall, evidence points to a lack of information and transparency at partner-country level about the channels, modalities, partner identification, and administrative processes and requirements providers apply to funding civil society actors (OECD, 2020[11]).

Most effective options

Information on providers' funding flows to partner-country civil society actors should be made transparent. Enhanced transparency can safeguard the do-no-harm principle as per the guidelines of the OCHA Grand Bargain's Transparency Workstream, which calls for publishing timely, transparent, harmonised, and open, high-quality data on funding (IASC, n.d.[97]; Kipfer-Didavi and Bitong, 2019[10]). It can also avoid doing indirect harm to partner-country civil society's accountability relationships with partner-country governments and the public. As a complementary action, through accessible fora for civil-society–civil-society and civil-society–provider interaction, providers can support partner-country civil society's access to information on funding and enhance coordination among civil society partners.

Additional considerations

Failing to ensure transparency about funding for civil society is a long-standing critique by partner-country governments, and its absence can have negative consequences for partner-country civil society, harming their perceived legitimacy and accountability (OECD, 2020[11]). Providers need to use an appropriate level of accessibility to balance transparency about funding with security and political risks to funded civil society actors in sensitive environments. Where civic space is restricted, providers should build flexibility into the requirements they impose on civil society actors (e.g., on-site payments versus bank payments, oral versus written follow-up), allowing them to focus on their operations and security (OECD, 2020[11]).

Box 2.7 Examples of transparency about funding

The European Union (EU) Aid Explorer

The EU Aid Explorer is a one-stop-shop website for funding information from the EU. The Overview section includes maps and graphs that visualise EU funding in a user-friendly way. The Explorer section displays gross official development assistance disbursements for projects funded by the European Commission, the European Investment Bank, EU Trust Funds, and EU Member states as of 2007. The dataset can be explored from an aggregate perspective by donor, recipient countries or regions, sector of activity, and channel of delivery (e.g., recipient-country government, donor-country-based non-governmental organisation (NGO), international NGO).

Importantly, the data can be consulted at project level, with information on locations, sustainable development goals, implementing partners, and results. The level of detail published takes account of security concerns. For instance, details of Afghanistan projects are hidden. The platform recognises that project-level data is often missing or incomplete due to limited reporting by the publishers (European Commission, n.d.[98]).

Canada's Project Browser

The Project Browser is an online platform where users can search Global Affairs Canada's international projects. Created in 2004, the information follows the International Aid Transparency Initiative (IATI) standard and can be viewed at the project-level on a map or downloaded as open data files (in CSV and XML formats) (Government of Canada, n.d.[99]). Individual project profiles include data points like budget, status, start and end dates, and implementing partners (i.e., private firm, NGO, educational institution, association). Each partner has a profile with an updated list of implemented projects displayed with locations (Government of Canada, n.d.[100]).

Monitoring progress towards localising

Description

At present, there are no agreed-upon standards to assess providers' individual and collective efforts towards localising funding. Some international organisations, providers, civil society actors, research centres, and others are conducting work on how best to monitor progress.

Most effective options

Monitoring progress to strengthen support for partner-country civil society actors requires defining what localising means to the provider. Building from there, providers should set indicators defined by or with partner-country civil society actors to assess the progress and achievement of policy objectives against agreed localising criteria and/or targets, and identify implementation bottlenecks to adapt approaches.

Additional considerations

Monitoring is a way to learn what works and what does not in providers' approaches to funding civil society in partner countries, and adapting accordingly. However, as with target-setting, these lessons should avoid compromising the quality of support or the objective of funding civil society in partner countries.

Box 2.8 Examples of tools and frameworks to monitor and assess localising funding

OECD Development Assistance Committee (DAC) Aid for civil society organisations

The DAC publishes an annual paper on members' official spending on civil society organisations (CSOs) through the OECD Creditor Reporting System. The disaggregated data tracks allocations by type of CSO (i.e., international CSO, donor-country-based CSO, developing country-based CSO) (OECD, 2022[15]).

Christian Aid, CARE, Tearfund, ActionAid, CAFOD, and Oxfam results framework for an enabling environment for localisation of financial resources

This framework offers objectives, actions, results, and indicators to increase and track access to international and national funding for local/national humanitarian actors in partner countries (Schmalenbach, 2019[101]).

Network for Empowered Aid Response (NEAR) Localisation Performance Measurement System

This framework offers performance indicators, means of verification, and measurement strategies to monitor the quantity and quality of funding for local and national actors in partner countries (Featherstone, 2019[91]).

Overseas Development Institute (ODI) checklist for the dimensions of localisation

This checklist has questions to determine whether resources are sufficiently transferred to local actors (Baguios et al., 2021[25]).

Global Partnership for Effective Development Co-operation (GPEDC) monitoring

The monitoring exercise of the GPEDC aims to "track progress of partner countries, development partners and other actors in implementing their agreed commitments to more effective development co-operation" (GPEDC, n.d.[102]). In particular, the monitoring framework includes a section to assess the CSO enabling environment and development effectiveness, which touches upon funding of civil society in partner countries (GPEDC, 2023[103]).

Complementary actions to enable funding civil society in partner countries

While this toolkit focuses on funding civil society in partner countries, it acknowledges the importance of considering the most context-appropriate means of support, and the linkages between funding and other aspects of enabling civil society. These include dialogue and engagement, strengthening capacity, protecting and promoting civic space for partner-country civil society, and incentivising effectiveness and accountability in civil society. Ways these can be addressed pertinent to funding are:

Pursuing engagement and dialogue

- Pursuing systematic dialogue with partner-country civil society actors to enhance their engagement throughout providers' policy and programming cycles, including setting priorities, design, implementation, monitoring, and evaluation (European Commission, 2021[88]; OECD, 2021[1]).

Strengthening capacity

- Strengthening partner-country civil society actors in ways that respect their agency and accountability to constituencies by strengthening capacities defined by them or jointly with providers, rather than by providers to meet their own funding requirements (USAID, 2021[96]).
- Investing in partner-country civil society infrastructure organisations that provide services, membership and networking opportunities to civil society actors and facilitate collective functions such as advocacy (OECD, 2021[1]).
- Strengthening partner-country civil society's financial management and fundraising capacities internationally and in partner countries to avoid or reduce dependency on providers (Boyes-Watson and Bortcosh, 2022[32]). This could include:
  - Collaborating with partner-country governments on how national capacity for crisis preparedness and response, and achieving the Sustainable Development Goals can be financed from government revenue and private contributions to civil society.
  - Supporting partner-country civil society actors to set up income-generating activities or their own (legally independent) social enterprises as sources of funds. This might require working with partner-country governments to ensure the legal and regulatory environment is conducive to such activities (SDC, 2022[24]).

- Building the capacity of partner-country civil society actors to apply for financing from the private sector and international foundations (SDC, 2022[24]).

Protecting and promoting civic space

- Advocating for the respect, protection, and promotion of civic space (OECD, 2021[1]).
- Coordinating among providers to monitor opening and restriction of civic space in partner countries, and to foster stronger, more coherent, proactive and preventive measures (OECD, 2021[1]).
- Doing no harm to civic space in partner countries (OECD, 2021[1]).

Incentivising civil society actors' transparency and accountability

- Calling for and supporting voluntary self-regulation by civil society actors (OECD, 2021[1]).
- Calling for and supporting more equitable partnerships between provider-country/international civil society actors and partner-country civil society actors (OECD, 2021[1]).

Annex A. Examples of funding practices

This section features prevailing practices to fund partner-country civil society. It illustrates these and provides links to more detailed information. The practices listed below can be applied to funding partner-country civil society directly or indirectly, unless specified otherwise.

Seed grants, community-led financing, micro-grants, awards, and direct payments

Providers use a variety of funding modalities that are fixed amounts, time-bound, and/or discretionary. These funds or grants come in all sizes and are often provided by embassies or missions that have freedom to pursue locally led programming with partner-country civil society:

- **seed grants** kick-start and pilot activities with potential to be scaled up and catalyse additional funding
- **community-led financing** provides seed funding for community foundations or philanthropies
- **small and micro-grants** are modest grants of USD 50-15 000 (Peace Direct, 2021[104])
- **awards** are specific, fixed, and time-bound funds (USAID, 2021[96])
- **direct payments** can be to individuals or for specific activities, events, transport, equipment, venues, or campaign materials

Box A.1. Examples of seed grants, community-led financing, micro-grants, awards, and direct payments

Seed grants: United States Agency for International Development (USAID) Powered by the People initiative

USAID will provide up to USD 15 million to launch the Powered by the People initiative, which will help non-violent social movements increase coordination through seed grants (USAID, 2021[105]). USAID will help improve the efficacy of collective action by strengthening these movements' connections with each other and their access to expertise and resources from multilateral institutions, donors, researchers, and civic actors, including youth, women, and LGBTQI+-led movements and organisations (OECD, 2022[31]).

Small and micro-grants: Granted and administered by provider embassies in partner countries

Many countries provide direct grants through their embassies, including Finland, France, Germany, Luxembourg, the Netherlands, Norway, Slovakia, and Switzerland. Finland's local co-operation fund offers small-scale grants up to EUR 100 000 annually (MFA of Finland, 2017[106]). Germany's Federal Ministry of Economic Cooperation and Development (BMZ) grants up to EUR 100 000 for small projects targeting grassroots movements and informal associations. Swiss embassy grants can reach CHF 100 000. Luxembourg's embassies grant up to EUR 15 000 for partner-country civil society actors aligned with Luxembourg's country development programmes (OECD, 2022[34]).

Community-led financing: The Global Fund for Community Foundations (GFCF)

GFCF provides small grants and other support to foster the development of community philanthropy organisations. This includes immediate-relief grants to respond to the effects of the COVID-19 pandemic with the support of the EU under the CSOs and Local Authorities Programme (GFCF, n.d.[107]).

Micro-grants: Slovak and partner-country civil society

Slovakia has a small, bilateral co-operation budget. Its priorities include addressing the transaction cost for open calls and ensuring minimum funding for Slovak civil society. To engage in supporting partner-country civil society actors, Slovakia provides micro-grants up to EUR 10 000, managed by embassies (OECD, 2022[28]).

Awards: USAID

USAID awards have a fixed value agreed upon by USAID and its partners for a period of up to three years (renewable) and USD 1.5 million (USAID, 2022[82]). This type of award is suitable for activities using pay-for-results approaches in which USAID pays the recipient for completion of a milestone. Unlike traditional agreements, USAID does not have to verify whether the recipient has the proper accounting and reporting systems in place, and the recipient can avoid administrative-cost negotiations and incurred-cost audits. Under this funding modality, accountability is based on performance, with a focus on results (USAID, 2022[108]). Fixed-amount awards also transfer performance risk to recipients, encouraging innovation and a more effective use of USAID resources (OECD, 2022[34]).

Direct payments: USAID Local Works

USAID created Local Works, providing five-year discretionary funding for 32 USAID Missions (country offices) across the Global South to work directly with local and non-traditional partners. Local Works gives USAID Missions resources, tools, and opportunities to try development approaches that are more flexible, and locally responsive and sustainable (USAID, n.d.[109]).

Micro-grants: The French Facility for Global Environment (FFEM) Small-Scale Initiatives Program (PPI)

Over the past 12 years, the FFEM PPI provided micro-grants totalling EUR 7.8 million (i.e., an average EUR 650 000 per year) to 215 environment-related projects from 164 CSOs in 33 partner countries (28 in Central and West Africa, and Madagascar and Mozambique). The average allocation is EUR 35 000 per grant, with a maximum of EUR 50 000 (FFEM, n.d.[110]).

Innovation and other thematic funds

Providers set up funds dedicated to partner-country civil society initiatives that are either innovative or focus on specific themes. Such funding can support discrete, short-term, immediate needs or activities that were not initially allocated for. Alternatively it can support longer-term outcomes and organisational capacity-strengthening, and can benefit partner-country civil society actors that might not otherwise receive support (McDonough and Rodríguez, 2020[51]).

Box A.2. Examples of innovation and thematic funds

United Kingdom Department for International Development (DFID) Amplify Challenge Fund

The Fund focuses on developing ideas from small, community-based grantees that do not usually have access to funding from government donors. Each grantee was awarded GBP 100 000 and 18 months of technical support. Over the six years of the fund, GBP 10.1 million were disbursed (Calder et al., 2018[112]).

France's Fund for Innovation in Development (FID)

FID supports innovation in the fight against poverty and inequality. It allows innovators from all types of organisations, including partner-country civil society organisations (CSOs), to test ideas, experiment and demonstrate what works, based on scientific evaluation, and to scale the solutions with the most positive and lasting impact. FID offers flexible financing via staged grants from EUR 50 000 to EUR 4 million for emerging or growing innovations wishing to scale up. FID funded 190 projects through 2020, representing EUR 70 million. FID provides swift disbursements for locally led initiatives with strong impact and immediate benefits for local communities (FID, n.d.[113]). In Mauritania, FID funded 30 partner-country CSOs in 2018-20 through the Fajr Project, focusing on youth participation and civic space, education on environmental issues, and democratic process (OECD, 2022[34]).

The Netherlands' Civic Space Fund

Dutch embassies provide direct funding that prioritises capacity-strengthening in lobbying and advocacy by partner-country civil society. The Fund aims to create strong, independent, vibrant, and diverse civil society with space to undertake its mandate. Proposals undergo light assessment at the embassy level (Government of Netherlands, 2021[114]).

East Africa Sexual Health and Rights Initiative (UHAI)

UHAI is an indigenous feminist, activist, participatory fund supporting the human rights of sexual and gender minorities and sex-worker communities (UHAI, n.d.[115]). UHAI can support unregistered organisations but requests that they apply through a fiscal host they select themselves (Alffram, 2021[116]).

Pooled, multi-donor funds

Providers can make funding accessible to partner-country civil society actors through pooled, multi-donor funds – an increasingly popular funding modality (Sida, 2019[50]). In 2019, the Netherlands Ministry of Foreign Affairs reported that it had spent 25% of its budget for humanitarian aid on funding local and national partner-country organisations through pooled, country-based funds (Baguios et al., 2021[25]). These funds are generally managed or co-managed by multilateral institutions, CSOs, partner-country governments, or private sector actors (e.g., consulting firms). Some follow thematic areas, such as women's funds, which are often set up as public fundraising foundations and receive grants from a range of actors.

Box A.3. Examples of pooled, multi-donor funds

UN Office for the Coordination of Humanitarian Affairs (OCHA) Country-based Pooled Funds (CBPFs)

CBPFs let providers pool contributions into single, un-earmarked funds that support local humanitarian efforts. A five-year evaluation of the OCHA Grand Bargain found in 2020 that, "CBPFs were the largest channel of international [humanitarian] funding to local actors". A 2019 evaluation found that most CBPFs had "increased the funding share going to local actors, by two-thirds on average, since 2015" (Baguios et al., 2021[25]).

Local Initiative Fund in Turkey (LIFT)

The German Agency for International Cooperation (GIZ), financed by the German Ministry for Economic Cooperation and Development (BMZ), is managing the LIFT with the support of the EU as part of the broader Community Centres and Local Initiatives Project (CLIP) to address the refugee crisis from the Syrian conflict. The Fund supports over 20 big and small local NGOs that offer specific assistance and protection services to vulnerable persons. The LIFT targets exposed and at-risk groups, such as child labourers, seasonal migrants, and others and focuses on reaching underserved areas (GIZ, n.d.[120]).

Start Fund

The Start Fund was the first pooled, multi-donor fund managed exclusively by civil society organisations (CSOs) to respond to humanitarian needs. Projects are chosen within 72 hours of an alert by local committees made up of staff from Start Network members and their partners. This makes the Start Fund the fastest collectively owned, early-response mechanism in the world (Start Network, n.d.[121]).

Shared Aid Fund for Emergency Response (SAFER)

SAFER was established in the Philippines as a joint fundraising mechanism by a consortium of national non-government organisation networks to address financial gaps in emergencies and disasters. SAFER raises funds and channels donations to its members, who have local presence in all parts of the country. This enables SAFER to quickly fund emergency response everywhere, including remote and vulnerable communities (SAFER, n.d.[122]).

African Visionary Fund

The Fund lets providers finance local, African-led organisations without being hampered by logistics and financial hurdles. It gives direct, unrestricted funding to community-embedded organisations (African Visionary Fund, n.d.[123]).

Capacity Development Marketplace

In 2008, Pact/Ukraine launched the Capacity Development Marketplace, a platform that uses a market-based approach to offer local actors demand-driven capacity-strengthening services and collaboration opportunities across CSOs. The Marketplace consists of three components, including a pool of donor-funded vouchers local organisations can use to acquire capacity-development support. This approach coordinates the flow of donor funds to local organisations, transforming capacity-strengthening from a donor-driven to a CSO-led (i.e. market-driven) model. To ensure sustainability beyond the project timeline, Pact/Ukraine strengthened the capacity of a national CSO, ISAR Ednannia, to take over the management of the Marketplace. The Marketplace has operated independently since 2012 with over 1 000 service providers and 2 000 CSOs accessing it regularly (USAID, 2021[96]).

The Global Fund for Women

This pooled, multi-donor fund provides core, flexible funding and resources for feminist activists to drive gender equality around the world. To do so, the Fund allows feminist grassroots organisations to set their priorities to address their needs and challenges on their own terms (Global Fund for Women, n.d.[124]).

Indirect funding through provider-country or international intermediaries

This practise consists of funding provider-country or international intermediaries that pass funding on to partner-country civil society actors (i.e., cascade funding through sub-grants). The intermediaries are most often civil society, though they can be other types of actors (e.g., consulting firms), and use above-referenced practices, such as seed grants, community-led financing, micro-grants, etc. This practice is widely used among OECD DAC providers (OECD, 2022[34]).

Box A.4. Examples of funding through provider-country or international intermediaries

Germany's Right of Initiative civil society organisation funding

In 2022 around EUR 220 million of civil society funding supported by Germany was provided through North-South civil society organisation (CSO) partnerships where a Germany-based CSO was the formal applicant and forwarded the project's funding to a partner-country organisation. Germany usually provides 75% of the project costs, and the local organisation leads project design and implementation. The unique feature of Germany's financing philosophy is the Right of Initiative, meaning CSOs can propose projects in any Global South country and on any topic. This funding instrument is thus outside Germany's bilateral development co-operation and shielded from changes in partner countries and government funding priorities. This approach supports and fosters a web of strategic, long-term, international CSO partnerships involving many small, community-based organisations (German BMZ, 2016[125]).

The Netherlands' Voice grant facility managed by international civil society organisations

Voice is an initiative financed by the Netherlands Ministry of Foreign Affairs to support rights holders and groups facing marginalisation or discrimination. It is executed by a consortium of Oxfam Novib and Hivos in ten African and Asian countries. The fund represents EUR 86 million over 2016-24 and Oxfam Novib and Hivos country teams manage over 1 500 grants per year. Over EUR 60 million are channelled as grants to partner-country organisations representing marginalised and discriminated groups (VOICE, n.d.[126]).

Peace Direct Local Action Fund

The Fund is designed to offer small flexible grants to groups and organisations operating below the radar of most international funders and international non-governmental organisations (NGOs). It operates through a network of in-country re-granting organisations (known as hub organisations) that commit to strengthening and supporting their local civil society ecosystem (Peace Direct, n.d.[127]). Hub organisation help local groups learn from each other, grow, and experiment, and they fund projects and initiatives developed by local groups in collaboration with their communities and constituencies. Bureaucracy is minimised, including eligibility requirements to register as a community-based organisation or NGO. In 2021, the Fund supported over 250 local groups in seven conflict-affected countries worldwide (UNGA, 2022[128]).

Japan Platform (JPF)

JPF provides a framework for emergency humanitarian aid, connecting stakeholders in Japanese society – including NGOs, the business community, and the government – which participate as equal partners. To prepare for massive refugee crises and large-scale natural disasters, JPF creates aid plans and stocks aid goods. JPF uses its know-how and resources as an intermediary support organisation helping member NGOs in Japan that do not have capacity to deliver quick and comprehensive aid. JPF has supported aid activities of more than 40 NGOs and delivered humanitarian assistance to over 1 900 projects in 60 nations and regions, totaling JPY 76 billion (Japan Platform, n.d.[129]).

International Federation of Red Cross and Red Crescent Societies (IFRC) Disaster Relief Emergency Fund (DREF)

The IFRC channels funding to national Red Cross and Red Crescent Societies before and immediately after a crisis, enabling them to deliver fast and effective local humanitarian action. In 2022, the DREF Council was set up as an independent body comprising high-level representatives from major donor governments, their corresponding national Society, and experts who advise on the Fund's development and make sure it remains relevant to donors and the people it supports (IFRC, n.d.[130]).

Direct funding through partner-country intermediaries

Partner-country intermediaries pass funding to or partner with other partner-country civil society actors as co-applicants (i.e., cascade funding). These are often but not exclusively civil society actors themselves.

Box A.5. Examples of funding through partner-country intermediaries

Bangladesh's Manusher Jonno Foundation

The Foundation has been allocating grants to over 150 partner-country organisations with funds it receives from the United Kingdom Foreign, Commonwealth and Development Office, the US Agency for International Development, the World Bank, the Swedish International Development Cooperation Agency (Sida) and others (Patel and Brabant, 2018[33]).

Kosovar Civil Society Foundation (KCSF)

The KCSF is an independent, non-profit organisation that supports civil society organisations (CSOs) and initiatives that promote a democratic culture and respond to the socio-economic needs of Kosovo, focused on integration with the EU (KCSF, n.d.[131]). It has contributed significantly to building stronger CSOs in Kosovo since 2015, including through its fair, independent, and efficient grant-making schemes, including institutional grants and project grants to partner-country CSOs. It received funding from Sida (Pedersen and Rusi, 2019[132]).

Thousand Currents

Through its alliance approach to grant-making, Thousand Currents partners with grassroots groups and movements led by women, youth, and Indigenous Peoples in the Global South who are creating lasting solutions to global challenges. Once a partnership is formed, Thousand Currents provides flexible, unrestricted, long-term support (Thousand Currents, n.d.[133]).

Funding to strategic alliances, networks, platforms, and resource centres

These types of support target recipients at the national, regional, or international levels, some of which cascade the funding to civil society in partner countries. These can be sector- or thematic-based and serve to fund partner-country civil society actors and other purposes, such as exchange of practices, capacity-development, and services to support the sector.

Box A.6. Examples of support to strategic alliances, networks, platforms, and resource centres

Kosovar Civil Society Resource Centre

This Swedish International Development Cooperation Agency (Sida)-funded local centre contributes to strengthening other civil society organisations (CSOs) in Kosovo by conducting regular training modules in internal governance, advocacy and lobbying, participation in policy-making, conceptualisation of interventions, project management, and financial management and reporting (Pedersen and Rusi, 2019[132]).

Leading from the South (LfS)

LfS is a feminist philanthropic fund and alliance conceptualised and managed by four women's funds: African Women's Development Fund (AWDF), Fondo de Mujeres del Sur (FMS), International Indigenous Women's Forum (FIMI) / AYNI Fund (AYNI), and Women's Fund Asia (WFA). LfS supports women's rights activism and lobbying by organisations, movements, and networks at the regional, national, and grassroots levels in the Global South. It is financed through a EUR 40 million fund from the Netherlands Ministry of Foreign Affairs (MFA) over four years and provides funding in the form of innovative and flexible grants to women's organisations and change agents. It invests in technical and financial resources to strengthen the capacities of change agents. It also promotes advocacy by supporting women's movements and networks in the Global South. Finally, it builds partnerships through strategic regional and global alliances and provides critical spaces for South-South learning and advancing the human rights of women and girls (Leading from the South, n.d.[134]).

Dutch Relief Alliance (DRA)

Funded by the Netherlands MFA, the DRA is a coalition of 14 Dutch CSOs directed at operationalising the UN Office for the Coordination of Humanitarian Affairs Grand Bargain and the Core Humanitarian Standards (CHS), such as localisation and multi-year funding (Dutch Relief Alliance, n.d.[135]). DRA reported allocating 21% of its funding to partner-country actors to finance humanitarian responses in line with the Grand Bargain and CHS together as an alliance (Baguios et al., 2021[25]).

Share Trust's Local Coalition Accelerator (LCA)

LCA is a platform to bridge bilateral, multilateral, philanthropic, and local actors and change the way international assistance is designed and delivered. The LCA provides local coalitions in the Global South with intensive packages of financial and technical support over two to three years. It also provides financing for coalitions to develop, test, and pilot strategies to align and coordinate their services (The Share Trust, n.d.[136]).

Civic Tech Fund Africa

The Fund supports initiatives that use civic technology and digital engagement to facilitate inclusive public decision-making and strengthen democratic governance across Africa. It is hosted by the African Union, managed by the European Partnership for Democracy, and financially supported by German Agency for International Cooperation (GIZ) on behalf of the German Ministry for Economic Cooperation

and Development (BMZ). Funding goes to a consortium of six African and European organisations that implement the project, including AfricTivistes (a pan-African union of bloggers and web-activists), Code for Africa (the continent's largest federation of data journalism and civic technology laboratories with a presence across Africa), the Democracy Works Foundation (a regional democracy support organisation with multiple offices across Southern Africa), and the Gorée Institute (a pan-African organisation located in Senegal). The Fund awards grants between EUR 10 000 and 32 000 to kick-start or scale up the projects and initiatives of youth- and women-led civil society actors (CivicTech Fund Africa, n.d.[137]).

The Interagency Protection from Sexual Exploitation and Abuse (PSEA) Community Outreach and Communication Fund

Run by the International Council of Voluntary Agencies (ICVA) and the UN High Commissioner for Refugees (UNHCR) since 2020, the Fund benefited from the support of the German government in 2021 and from the United Kingdom's Foreign, Commonwealth and Development Office (FCDO) in 2022, in addition to seed funding from UNHCR. The Fund provides small, rapid grants to local CSO projects on communication and outreach on PSEA. This funding allows the communities to create projects that centre on community needs and result in context-specific and culturally appropriate materials. Selected CSOs consult with the communities and have freedom to come up with the best products for the context in which they operate (ICVA, n.d.[138]). All products developed through the projects are made available through a Deliverables Database in editable formats, for sustainability and to benefit the entire sector.

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Notes

[1] The DAC CoP on Civil Society comprises technical experts and leads on civil society in development co-operation and humanitarian assistance from DAC members' headquarters. It was created in 2019 to facilitate peer learning, exchange, and evidence-gathering among DAC members. It helped develop the 2020 DAC Members and Civil Society study and spearheaded the 2021 DAC Recommendation on Enabling Civil Society. It serves as the primary forum for peer-learning and mutual, practical support to DAC member and other adherents' efforts to implement the DAC Recommendation.

[2] The CSO RG is an open platform that facilitates CSO engagement with the DAC and DCD (OECD, n.d.[140]).

[3] In this toolkit, partner-country civil society refers to uncoerced association or interaction based in partner countries by which people implement individual or collective action to address shared needs, ideas, interests, values, faith, and beliefs identified in common; and the formal, semi- or non-formal associations and the individuals involved in them at partner-country level. Partner-country civil society actors are distinct from states, private for-profit enterprises, and family. Provider-country or international civil society actors based in provider or other Global North countries that operate in partner countries are not considered as partner-country civil society actors.

[4] Providers of official development assistance (ODA), also known as donors.

[5] For the purpose of this toolkit, partner-country civil society organisations (CSOs) are an organisational representation that include all not-for-profit, non-state, non-partisan, non-violent, and self-governing organisations outside of the family, in which people come together to pursue shared needs, ideas, interests, values, faith, and beliefs, including formal, legally registered organisations and informal associations without legal status but with a structure and activities based in partner countries. Provider-country or international CSOs from the Global North that are either based in provider or other Global North countries or have branches or bases in partner countries are not considered as partner-country CSOs, even if they operate in partner countries. To note, the interventions of partner-country civil society actors and CSOs are not limited to actions within partner countries. For example, they can engage in international advocacy, or South-South and Triangular Co-operation initiatives.

[6] Intermediaries can be provider-country, international, or partner-country actors (including civil society actors) that pass funding to or partner with partner-country civil society actors.

[7] Guidance on conducting such analyses is available from sources such as *Institutional and Context Analysis for the Sustainable Development Goals* (Melim-Mcleod, 2017[139]) and *Power Analysis: A practical guide* (Sida, 2013[141]).

[8] While Kipfer-Didavi and Bitong's 2019 writing focuses on humanitarian assistance, the potential politicisation of civil society's programming applies to development co-operation as well.