

# Localisation in practice

Facilitating  
equitable partnership  
in humanitarian  
project management  
with findings from  
conversations in  
Germany, Bangladesh  
and South Sudan

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February 2023

**CHA**

CENTRE FOR  
HUMANITARIAN  
ACTION



This paper is a result of the project component **Identifying and overcoming localisation barriers in the area of project management and risk transfer**, which is part of the project **“Strengthening Programme and Policy Relevant Capacities of Humanitarian Actors in Germany” (SPreAD)**, funded by the German Federal Foreign Office.

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## Abbreviations

|                |  |
|----------------|--|
| <b>CB</b>      | Cox's Bazar (Bangladesh)   |
| <b>CBOs</b>    | Community based organisations                                      |
| <b>COM-B</b>   | Capability-Opportunity-Motivation-Behaviour system                 |
| <b>GINGO</b>   | Germany-based INGO   |
| <b>INGO</b>    | International non-government organisation                          |
| <b>IOs</b>     | International organisations  |
| <b>LNGO</b>    | Local non-government organisation                                  |
| <b>MOCHA</b>   | Manager, Owner, Consultant, Helper, Approver                       |
| <b>PCM</b>     | Project Cycle Management   |
| <b>SSD</b>     | South Sudan  |
| <b>UN</b>      | United Nations   |
| <b>UN OCHA</b> | United Nations Office for the Coordination of Humanitarian Affairs |
| <b>WS</b>      | Workshop   |

## Acknowledgements

This paper has been produced with funds from the German Federal Foreign Office as part of the project “Stärkung der Programm- und Policy relevanten Fähigkeiten humanitärer Akteure in Deutschland” (SPreAD) at Centre for Humanitarian Action. It strongly builds on the open and honest inputs of its informants, all being humanitarian practitioners from local and international organisations in Germany, Cox’s Bazar (Bangladesh), and South Sudan.

The South Sudan NGO Forum hosted the researcher in June 2022 and assisted in the facilitation of workshops and interviews conducted in Juba, South Sudan. Special thanks to Dr. Pius Ojara, Yasmin Maydhane and Paul Doctor in that regard. NAHAB played a similar multiplier function in the context of Cox’s Bazar as they connected the researcher to her online workshop co-facilitator Arifur Rahman (YPSA) and further informants from the region. In addition, Deeplina Banerjee, Kamran Pranto, Nahian Salsabeel, and Tonmoy Chowdhury supported the facilitation of the online workshops with their language skills and background knowledge. Kathryn Cassibry, Arif Dewan (from the ToGETHER Bangladesh programme) and the Lingo Shack team helped with proofreading and translations.

This research paper is truly a team effort of the whole CHA team, including Raphael Bodewig, Josephine Jüde, Goda Milasiute, and Berit Reich who organised and assisted in the facilitation of workshop sessions in Berlin (onsite) and Cox’s Bazar (online); Jana Degebrodt who helped with travel arrangements; Johanna Fipp who assisted in data gathering and analysis; and Andrea Düchting, Goda Milasiute and Ralf Südhoff who commented on earlier versions of this paper. The layout, graphics and communication were done by Anne Tritschler, Micha Knispel and Prinz+Partner.

Thanks to all for their patience and committed support!

# Executive Summary

Notwithstanding remaining criticisms and continued debates on definitions, a consensus emerged that humanitarian action should be “as local as possible” (Grand Bargain) and local responders should get “greater support [for their] leadership, delivery and capacity” (Grand Bargain 2.0). Still, voices from operational humanitarian contexts point to a slow implementation of these commitments in practice. Especially the area of equitable partnership still lags behind. This paper addresses humanitarian Project Cycles Management as one structural barrier behind the lack of progress in equitable partnership between international and local organisations, specifically. While pointing to options to overcome this barrier, the paper also discusses agile management as an alternative management model potentially better suited to facilitate equitable partnership in humanitarian action.

## Key Findings

This paper defines equitable partnership through three components:

- equality (each partner having equal value, notwithstanding their contribution to the joint project),
- mutuality (including a mutual understanding, participation, commitment, trust, accountability, respect and benefit) and
- transparency (open and honest communication).

### **Which management models can facilitate equitable partnership?**

Conversations with humanitarian practitioners in South Sudan, Bangladesh and Germany revealed that all three components are compromised in contemporary humanitarian Project Cycle Management (PCM). While PCM contains equal, mutual and transparent structures in the dialogue and project design phases, these are rarely used in humanitarian practice. In addition, cooperation agreements that are introduced in the project formulation phase of PCM build hierarchies between the humanitarian partners. These strongly dominate the later phases of the project cycle as well and structurally impede equality between the humanitarian partners. In addition, they entail a limitation of relationships and thus prevent mutuality and transparency.

The discussions with humanitarian practitioners identified a wealth of practical solutions to address these impediments to equitable partnership in PCM. While many are already known and incorporated in numerous localisation frameworks, they are only quick fixes. A change to agile management offers the potential to embed equitable partnership principles in project management mechanisms. Its flexible, iterative “sprint” setup facilitates constant transparent communication between all project partners. Additionally, agile Scrum roles reduce hierarchies. A “project team” approach promotes equality among local and international humanitarian partners while the newly introduced role of “project owners” provides affected communities with a clear leadership role.

The conversations conducted for this paper confirmed the potential positive impact of this management approach for equitable partnership. Some informants have already piloted aspects of it. However, participants have also raised various challenges that agile project management may face in practice. To implement agile management, donors and international organisations must be willing to become ordinary team members. They must have the courage and capacities to actively engage in flexible and equitable project processes as well as the patience to deal with more complex decision making. Project owner representatives must carefully consider possible divisions within affected communities and serve as reliable partners. Local organisations and affected communities must be encouraged to take active leadership roles and related responsibilities. All this makes agile projects more complex and less timely. In addition, new approaches always come with uncertainty and risks.

**To implement agile management, donors and international organisations must be willing to become ordinary team members**

Acknowledging these challenges, while not giving up a promising approach for more equitable partnerships, this paper suggests using hybrid models and sandbox setups that are supported by external supervision and research to explore agile management models in selected humanitarian contexts.

## Methods in brief

The paper is based on a literature review and evidence collected in a total of 10 workshops with 13 Germany based international NGOs, 31 local and 10 international NGOs working in South Sudan, and 12 local and two international organisations working in Cox's Bazar, Bangladesh. Evidence was further qualified in 29 interviews with key informants from seven international and 22 local organisations and three management experts from Germany, Bangladesh and South Sudan.

## Key Considerations

1. Equitable partnership involves equality, mutuality and transparency.
2. Project Cycle Management contains practices and structures that impede the three components of equitable partnership.
3. While there are practical solutions to address these impediments, agile management models are better suited to structurally anchor equitable partnership in daily practices.
4. To apply agile management:
  - Jointly define overall objectives (outcomes) but refrain from predefining project outputs and activities whenever possible.
  - Introduce the role of a “project owner” for local community representatives.
  - Introduce the understanding of local and international organisations and donors as being part of one “project team”, all carrying equal value and power.
  - Introduce platforms of regular mutual and transparent exchange for the project team to discuss and jointly agree on next steps to reach the overall project objective(s).
  - Introduce the role of project facilitators, responsible for enabling good communication between project owners and project teams and capacitating the project team to fulfil their tasks.
5. Since the implementation of agile management comes with a variety of practical challenges, it should first be tested in sandbox setups in favourable humanitarian contexts. In less favourable context, hybrid approaches can build on the strengths of both models.

# 1. Introduction

At the latest since the World Humanitarian Summit in 2016, the humanitarian sector has been actively pursuing the goal of strengthening the role of “local actors” in international humanitarian action in its so called “localisation agenda”. This effort was further driven by the Black Lives Matter movement (e.g. Osofisan 2020), decolonisation aspirations (e.g. Barter and Sumlut 2022; Baguios 2022) and Covid-19 (e.g. Easton-Calabria 2022). Despite ongoing criticisms from multiple sides (e.g. Geoffroy and Grunewald 2017; Schenkenberg 2016, 2020) and persistent disagreements over terminologies (Robillard, Atim, and Maxwell 2021; Roepstorff 2020; Fast 2019), the debate has now shifted towards more practical considerations, embracing the broad consensus that humanitarian action should indeed be “as local as possible and as international as necessary” (Grand Bargain, 5) and that the international community should provide “greater support [...] for the leadership, delivery and capacity of local responders [...]” (Grand Bargain 2.0, 4).

Various guidelines and frameworks have since been developed to demonstrate how donors and international organisations, including UN organisations and international NGOs (INGOs), could translate the localisation

agenda into practice (e.g. Patel and van Brabant 2018; J. J. Osborne et al. 2019; Christian Aid et al. 2019; NEAR 2020b; Save the Children 2020; Grand Bargain Localisation Workstream 2021). These guidelines and frameworks outline a range of working areas, referred to as “localisation components” or “localisation dimensions”, and suggest specific actions and indicators for each (see table 1 at page 10).

Despite this detailed guidance, however, reports show that progress remains slow (e.g. Metcalfe-Hough et al. 2022, 54–64; Wijewickrama et al. 2022) and largely centred around technical localisation components such as funding (for example Country-based Pooled Funding and the Start Fund; Featherstone and Mowjee 2020) and capacity strengthening (see for example the STRIDE<sup>2</sup> and ToGETHER<sup>3</sup> Projects; Wake and Barbelet 2019, Caritas Germany et al. 2020). “Softer” localisation components such as locally led coordination, local influence on international policies, participation and equitable partnership remain even less worked on (Fast and Bennett 2020, 18; Wijewickrama et al. 2022).

**Reports show that progress remains slow**

## 1.1. Objectives and outline of this paper

Beyond this background, this paper focusses on the localisation component of equitable partnership as one area most seriously lacking practical implementation. Doing so, chapter 2 first defines “equitable partnership” before mapping common barriers to its implementation. Among others, it identifies established processes and procedures of humanitarian response planning, management and implementation as critical structural barriers. Chapter 3.1 takes up this finding as it analyses how contemporary humanitarian Project Cycle Management (PCM), specifically, hinders equitable partnership and identifies ways to overcome these obstacles. However, as these are only makeshift solutions, chapter 3.2 discusses a more fundamental shift from PCM towards agile management to better facilitate equitable partnership in

humanitarian management structures. The discussion also includes a feasibility check, taking up the considerations of various humanitarian practitioners on the applicability of agile management to the humanitarian context. This shows that agile management comes with its own challenges. Hence chapter 3.3 proposes sandbox setups to first test the practical performance of agile management models under ideal conditions. In cases where humanitarian contexts are less favourable, the paper suggests hybrid approaches to allow more equitable partnership while building on the strengths of both management models. Chapter 4 summarises these findings and reintegrates them into the broader debate on strengthening local actors in humanitarian action.



**Van Brabant & Patel (2018)**  
**Seven Dimensions of Localisation**

Seven dimensions:

- Relationship quality and partnership
- Participation revolution
- Funding and financing
- Capacity enhancement
- Coordination, task forces & collaborative capacities
- Visibility
- Disaster & humanitarian policies, standards & plans

**Humanitarian Advisory Group (2019)**  
**Measuring localisation: Framework and Tools**

Seven areas of localisation:

- Partnerships
- Leadership
- Coordination and complementarity
- Participation
- Policy influence and advocacy
- Capacity

**Christian Aid, CARE, Tearfund, ActionAid, CAFOD, Oxfam (2019)**  
**Accelerating Localisation through Partnerships**

- Added value which agencies bring to partnerships for humanitarian response:
- L/NGOs
  - HR management
  - Advocacy
  - Identifying capacity strengthening needs
- Both L/NGOs & International agencies
  - Project design, planning and management
  - MEAL
  - Financial management & reporting
  - Coordination (at different levels)
- International agencies
  - Fundraising
  - Technical expertise
- Providing capacity strengthening support

**Near (2019)**  
**Localisation Performance Measurement**

Six localisation components:

- Partnerships
- Funding
- Capacity
- Coordination and complementarity
- Policy, influence and visibility
- Participation

**Movement for Community Led Development (2020)**  
**CLD Assessment Tool**

Dimensions of Community led development:

- Participation, inclusion and voice
- Local resources and knowledge
- Exit strategy linked to sustainability
- Accountability mechanisms
- Responsiveness to context specific dynamics
- Collaboration within and amongst communities
- CLD linked to sub national governments
- Monitoring and evaluation practices support CLD

**Grand Bargain Localisation Workstream (2021)**  
**Country level dialogue on localisation Resource Kit**

Main themes/ topics of localisation:

- Partnership
- Financing
- Capacity strengthening
- Coordination
- Gender
- Donors and intermediaries' arrangements

Table 1: Overview of Localisation Frameworks

## 1.2. Methodology and limitations

The paper is based on a **literature review** including reports, studies and academic publications in the fields of humanitarian action, organisational sociology and management theory. It further builds on consultations with Germany-based international NGOs and local and international NGOs working in South Sudan and Bangladesh (Cox Bazar). The humanitarian contexts of Bangladesh (Cox's Bazar) and South Sudan have been selected to inform this paper based on a most different qualitative case study design. Although this captures most diverse experiences from a wide variety of sources, it is not a representative study design.

The paper involved **focus group discussions** (following Chatham House Rule) and interviews with key informants. Focus group discussions included one full day session in Berlin with 13 INGOs based in Germany, three consecutive 90-minutes online sessions with twelve local and two international organisations working in Cox's Bazar, Bangladesh and six half-day sessions with 31 local and ten international organisations in Juba, South Sudan. These insights were verified through 29 semi-structured interviews with key informants from seven international and 22 local organisations from Germany, South Sudan and Cox's Bazar, and three experts on agile project management.

To guarantee a safe and open dialogue, none of the focus group discussions and only a limited number of interviews were recorded. Instead, research assistants and the author created anonymised notes with changed names. These were analysed using deductive content analysis based on the literature review.

Unfortunately, consultations in Cox's Bazar did not reach the same coverage and depth as those in Germany and South Sudan. This is due to a sudden shift from in-person to online focus group discussions following a change in Covid-19 regulations in February 2022. This change resulted in the withdrawal of many discussants and negatively affected the atmosphere of trust among the remaining participants.

Furthermore, while partnerships in humanitarian action include many more relevant stakeholders, especially on the side of local actors (Roepstorff 2020, 7), **the partnerships discussed in this paper involve only affected communities, local organisations, international organisations and their country offices, and donors.** This is to reduce complexity and enable clear arguments. At the same time, the paper can only build on information gained through conversations with local organisations, INGOs and their country offices. Hence, also the perspective on these partnerships is limited.

## 1.3. A note on terminology

For the INGOs consulted for this paper, "local partners" referred to both their INGO country offices and independent local and national NGOs and community-based organisations (CBOs) routed in and originating from operating areas. Both have been involved in the discussions in Cox's Bazar (Bangladesh) and Juba (South Sudan). When country offices and local and national organisa-

tions referred to their direct "international partners", this included UN organisations and INGOs at both country- and headquarter level. To prevent misunderstandings, therefore **this paper uses the specific terms to distinguish between the different actors** whenever possible. For a definition of classification terms, please see figure 1 below:



Figure 1: Important terms

## 2. The hard way towards equitable partnership

### 2.1. A definition

While “equitable partnership” is a component of many localisation frameworks, it is often not clearly defined. This paper therefore starts with a defining “partnership” as (any kind of) working relationships between two or more entities in humanitarian action. This potentially involves a large variety of actors. However, due to its methodological limitations, this paper largely focusses its analysis on partnerships between local and international organisations, while occasionally also pointing to the role of donors and affected communities.

Recognizing the varying nature of working relationships between local and international organisations, ranging from competition, to complementary, cooperation and collaboration, the paper specifically examines cases, where international organisations directly collaborate with local organisations in a specific operational project. These collaborations may range from exploitative and utilitarian to informative, participative or even completely equitable.

“Equitable” partnerships involve three components (own definition, based on Dodson 2017; Zaman et al. 2020; Price, Snijder, and Apgar 2020):

- **equality** (each partner having equal value and decision-making power, notwithstanding their contribution to the joint project);
- **mutuality** (including a mutual understanding – also of differences –, mutual participation, commitment, trust, accountability, respect and benefit);
- **transparency** (open and honest communication).

The use of the term “equitable” instead of “equal” acknowledges the differences between the partners (Rethinking Research Collaborative 2018, 3), taking into account their different contextual backgrounds, hierarchical position and power, as well as their individual interests, priorities and capacities (Price, Snijder, and Apgar 2020, 3).

### 2.2. Common barriers

Many studies (e.g. Christian Aid et al. 2019; Robillard, Howe, and Rosenstock 2020; Rights Co Lab 2021; Harrison 2020) and reports from NGO networks (A4eP 2021, 2022; Charta for Change 2022, 2021) indicate that equitable partnerships are not often put into practice. To

#### **Obstacles to forming equitable partnerships can be categorised in actor-specific, structural, and social barriers**

and South Sudan, this paper has identified three types of barriers to achieving equitable partnership: actor specific, structural, and social barriers. These are briefly described in the following.

#### **Actor specific barriers**

Actor-specific barriers involve the vested interests and fears of international organisations and their staff, as well as the organisational culture that results from these.

address this issue, the humanitarian research and practice community has analysed potential reasons behind this. Based on a review of the related literature and consultations in Germany, Bangladesh

#### **Interests and fears of international organisations**

Organisational interests and fears include the concerns of individual international organisations that equitable partnership approaches may “diminish their role and increase competition over scarce funding [and staff]” (Barbelet, Bryant, and Willits-King (2020, 6); Elias, Jonna – LNGO SSD). In addition, international organisations hesitate to take reputational, compliance and accountability risks. Many international organisations, including their country offices, view the performances and capacities of local organisations to comply with the norms and regulations of the formal international humanitarian system as “questionable, to say the least” (Craig, INGO SSD). Partnering with local organisations presents the challenge of dealing with these performances while, at the same time, compromising their direct control mechanisms (SSD WS1, INGOs). Additionally, international organisations worry that any resulting shortcomings and complaints would primarily reflect on them, rather than on their local partners (Slim

#### **International organisations hesitate to take reputational, compliance and accountability risks**

2021; GINGO WS), thus jeopardising their reputation and potentially affecting their future funding prospects.

### Individual interests and fears of staff members

A VENRO<sup>4</sup> paper revealed that many staff members of INGOs based in Germany are afraid of rendering their organisations, and thus their jobs, redundant (VENRO 2020, 6). This fear is shared by their colleagues in INGO country offices (GINGO WS) which is particularly concerning since it is primarily the staff in INGO country offices who are responsible for the establishment of partnerships with local organisations.

Furthermore, many staff members of international organisations express their concern about the added workload of building partnerships with local organisations that are unfamiliar with the formal international humanitarian system (VENRO 2020, 6). They report not having the resources, nor the time, knowledge, or capacity to fulfil this task. As a result, if they do engage in local partnerships at all, they tend to lean towards “readymade” local organisations that are already fully integrated into the formal international system (GINGO WS).

### Organisational culture

Finally, even if an international organisation and its staff are willing to relinquish their own interests and overcome their fears, for those “without a long or traditional approach of working with local partners, cultural and institutional shifts are needed” (Barbelet 2020, 2). Feedback from local NGO representatives from Cox’s Bazar indicates that many international partners still lack this cultural shift (CB WS3, Group 2). However, the workshop with Germany-based INGOs in Berlin showed that, for those not already having a long history of working with local organisations, this culture is starting to emerge in motivated INGO staff (GINGO WS).

As a national NGO informant from Cox’s Bazar explains, supportive organisational policies, missions, visions, and committed leaderships can play a crucial role in fostering such developments: “I think the organisational mission and philosophy of the [international] NGO founders are

**Organisational policies, missions, visions, and committed leaderships can support individual staff**

very important to partnerships. [...] The leadership within the [international] partners [...] determines the level and stage of the engagement [with local organisations].” (CB WS, Chat).

However, representatives from LNGOs in South Sudan feel that such policies are only effectively implemented at INGO headquarter level, yet: “There is still a lack of channelling these policies through the structures of INGOs from the headquarter to the country offices” (Grace – LNGO SSD). In country offices, cultural

change still mainly depends on the actions of individual staff. As one CBO representative explains: “[At country level], the personality counts a lot. For example [I know an international organisation’s] field person that is very supportive and others that are not.” (Paul, LNGO SSD).

### Structural barriers

Structural barriers to equitable partnerships in humanitarian action are often referred to as ‘the system’ and comprise established processes and procedures of humanitarian response planning, management and implementation. As many studies find, these seem to be stuck in an “inaccessible, exclusive, and top-down nature” (e.g. Fast and Bennett 2020, 17; Robillard et al. 2020, 16; Lough and O’Callaghan 2021) that is replicated over and over again (Geoffroy and Grunewald 2017, 5) and makes it hard for international actors to fulfil their localisation commitments.

Marquis and Tilcsik (2013) refer to such mechanisms as **imprinting**: based on certain external conditions, an organization or a cooperation establishes a certain process or modes of action (so called “imprint”) which cannot be easily changed later, despite changed external conditions and/or incentives might push to do otherwise. Consultations with humanitarian practitioners in Germany, Bangladesh and South Sudan confirmed that such imprints also exist within the formal humanitarian system. Despite detailed guidance to reform humanitarian ways of working, humanitarian imprints such as using English as main working language as well as technical terminologies and procedures prevail. Instead of adapting local organisations’ ways of working, international organisations often impose their own imprints on their local partners (SSD WS, LNGOs; CB WS1, LNGOs). This also leads to the exclusion of local organisations who cannot (or do not want to) comply from international funding (SSD WS1, LNGOs; Isaiah, LNGO SSD; CB WS3, Group 2).

**Instead of adapting local organisations’ ways of working, international organisations often impose their own imprints on their local partners**

### Social barriers

Social barriers are barriers that emerge in the interaction between local and international actors, whether they are individuals or humanitarian entities. They include power imbalances and a lack of trust.

### Power imbalances

Power is intertwined with both actor specific and structural barriers. Powerful international actors such as donors, UN organisations and INGOs have an actor specific vested interest in retaining their power (Fast and Bennett 2020, 23). As these actors also dominate the formal international humanitarian system, they can create struc-

tural barriers (Fast and Bennett 2020, 16), i.e. imprints, that give them an advantage over other actors. Local organisations in South Sudan describe, for example, that “national NGO leaderships are side-lined by long-standing INGO peers [in humanitarian clusters],” (LNGO SSD). However, there are also positive developments as “now INGO people realize that local NGOs are getting power and have a momentum.” (Grace, LNGO SSD).

## A lack of trust

Local actors often repeat that “trust and respect [...] [are] critical to partnerships” (Tearfund et al. 2019, 6; see also Howe and Stites 2019). However, all groups consulted for this paper confirmed that “trust is an issue” (Elias, Jonna, LNGO SSD). Three major mechanisms impacting trust have been identified.

Firstly, social psychology literature points to trust being affected by **similarity and mimicry**, meaning that more similar persons and persons mimicking our own behaviour are trusted more easily (Clerke and Heerey 2021). Local organisations that do not follow the imprinted standards and procedures of their international partners – and are hence less similar to them – may therefore be faced with less trust (GINGO WS). Racism and stereotyping (Osofisan 2020; Slim 2021; START Network 2022) can also be considered with the help of the similarity/mimicry theory: people that look, speak and work differently are faced with more scepticism.

Secondly, through the consultations made for this paper, **reliability and experience** were identified as factors that also impact trust. INGOs based in Germany and South Sudan reported for example that they struggle with the “low performance of local organisations” (GINGO WS) against jointly agreed objectives and that “this low performance reduces trust” (GINGO WS). Negative experiences can leave international actors with “burnt hands” (Patrick, INGO SSD), resulting in local organisations needing to work hard to regain trust (Rebecca, LNGO SSD).

Thirdly, trust seems to be impacted by the **frequency and consistency of interaction**. As one informant put it: “People prefer to work with people they already know” (Grace, LNGO SSD; SSD WS1, INGOs). In this sense, the high staff turnover in some local organisations can be considered one major factor inhibiting trusted relationships (GINGO WS). Additionally, the fact that staff from INGO country offices and UN organisations often frequent similar places (compounds, hotels, restaurants etc.) where they meet and build private relationships has been mentioned as “affecting the business” as well (Taylor, LNGO SSD). This leaves local actors, limited to professional contact only, in a disadvantaged position in building trust.



## Local partnership experiences in Cox's Bazar (Bangladesh)

**NGO landscape in country:** Very diverse. Includes country offices of INGOs and UN agencies, as well as local organisations that vary from big organisations, originating and still working in Bangladesh but now also working as INGOs abroad, and comparatively new, small community-based and refugee-led organisations, working within their own communities in Cox's Bazar only. Terminologies like national NGO, regional NGO, local NGO, CBO and refugee-led NGO become of utmost importance to distinguish between the actors. There is competition surrounding who is a “real” local organisation and should be supported by the localisation agenda accordingly. INGO country offices are often referred to as “international partners” or “donors” by local organisations.

**Localisation strategies:** Most INGOs are finishing their “localisation strategies” for Cox's Bazar. They range from prioritising the work with local organisations to not working with them at all. International organisations that decided to do the former select and support “their” local partners. This provides a few local organisations with chances to profit from the localisation agenda while excluding those not selected.

**Partnership models:** Most international organisations working in Cox's Bazar have a “hybrid” approach to implementing projects themselves, conducting more equitable long-term co-operations with selected local partners and/or sub-contracting smaller local organisations, including CBOs and refugee-led organisations, to conduct project activities.

**Quality of partnership:** Self-implementation of projects by international organisations creates unhealthy competition with local organisations for funding and qualified staff. Sub-contracting between international and local organisations is most common but inequitable and creates competition among local organisations. Joint, equitable project development, planning and implementation between international and local organisations are more and more piloted but typically involve only bigger national NGOs. Capacity strengthening is demanded by local organisations and perceived as improvable. Local organisations additionally mentioned international organisations’ practices to influence local government, “e.g., on protection and legal matters”, as “inappropriate”.

# 3. Addressing a structural barrier to equitable partnership – a management approach

This paper now expands on the analysis of common barriers to equitable partnership, by exclusively focussing on structural barriers. The previous analysis found that while several international actors are indeed *motivated* to overcome their actor-specific blockages and implement

**It is important to address the opportunities and capabilities that drive inequitable humanitarian practices**

equitable partnership, they often lack the *capability* and *opportunity* to consistently do so in practice. However, the *COM-B model* introduced to the humanitarian context by Lees et al. (2021)<sup>5</sup>, states that all conditions – capability, opportunity and motivation – need to come together to change human behaviour. Without strong capability and opportunity, even high motivation may not result a desired behaviour. Thus, to advance equitable partnership, it seems particularly important to address the “everyday physical triggers” (opportunities) and “tools and approaches” (capabilities) that drive humanitarian practices (Lees et al. 2021, 12–14).

Humanitarian Project Cycle Management – i.e., the default way of how humanitarian projects are designed, implemented, monitored and assessed – can be considered as one of these “everyday physical triggers” and “tools and approaches” that have been described as “structural barriers” in the previous chapter. It subsumes all the “reporting models, monitoring and evaluation requirements, timelines, log frames and standards of operation” that 86% of the local organisations participating in a Right Co Lab study described as “significantly impact[ing] their work” (Rights Co Lab 2021, 13).

Against this background, the remainder of this paper takes a twofold approach: first, it examines how contemporary humanitarian Project Cycle Management impedes equitable partnership (chapter 3.1). This also points to opportunities to address the identified impediments. Secondly, it evaluates the potential of agile management as an alternative to Project Cycle Management, exploring if this entails management structures that are better suited to facilitate equitable partnership (chapter 3.2). Chapter 3.3. then discusses findings and suggests feasible ways to implement equitable management structures in the humanitarian context.

## 3.1 Equitable partnership in Humanitarian Project Cycle Management

Humanitarian projects are commonly managed using the humanitarian project cycle (see figure 2). The cycle usually begins with a comprehensive project preparation, consisting of a dialogue (see step 1. in figure 2) and

a design phase (2.). During these phases, all relevant stakeholders – donors, international and local organisations, local communities, governments and other local and international actors – are meant to come together to jointly assess, negotiate and coordinate their interests, capacities and needs. If applicable, they additionally review and integrate learnings from previous projects. On that basis, they are meant to jointly develop a project design that includes specific objectives and activities, timeframes and budgets. In the project formulation phase (3.), this project design is then further formalised through a series of cooperation agreements between donors and international organisations, as well as between international organisations and local actors, including country offices, local organisations, local governments, vendors and affected communities. The cooperation agreements clearly define individual roles and responsibilities, also considering budgets, accountabilities and liabilities. This guidance helps the partners navigate the implementation and monitoring phase (4.), where plans are put into action. The feedback phase (1.) finally assesses whether this was suc-

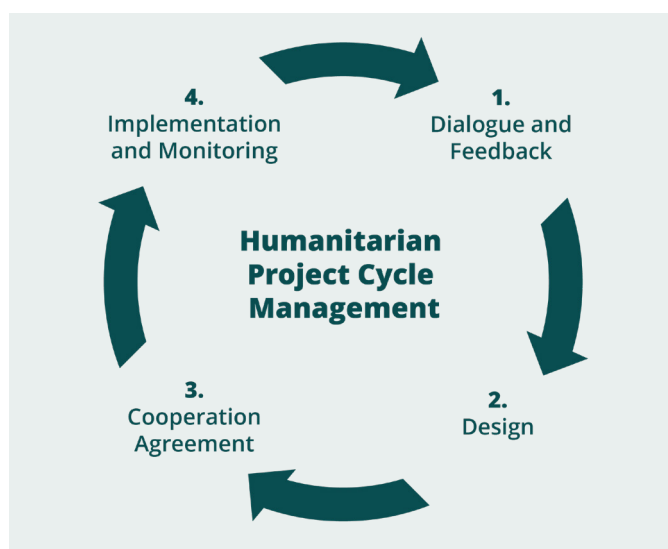


Figure 2: Project cycle model of humanitarian project management

successful and revisits common strengths and weaknesses of the collaboration. These learnings can serve as a starting point for future initiatives.

This management model has three key structural features that affect equitable partnership:

- equal, mutual, and transparent dialogue and design phases
- hierarchical roles and responsibilities, and
- missing links and bridging positions.

While the latter two are established in the project formulation phase, they strongly shape later project cycle phases as well.

The following discussion will illustrate with the help of insights from consultations in Germany, Bangladesh, and South Sudan, how these features play out in practice and affect the three components of equitable partnership (equality, mutuality, and transparency).

### Equitable but ineffective dialogue and design phases

Firstly, as the introduction above already suggests, the dialogue and design phases of PCM provide a good structural foundation to facilitate equitable partnership.

#### **The dialogue and design phases of PCM provide a good structural foundation for equitable partnerships, but are compromised in practice**

They provide the space for all actors to come together on equal terms, transparently discussing their interests, and finding common grounds for their mutual engagement. However, the consultations in Germany, Bangladesh and South Sudan revealed that this is rarely the case in practice.

In practice, humanitarian dialogues are often initiated and strongly shaped by donor strategies and calls, based on Humanitarian Response Plans and high-profile (UN) reports (CB WS2, Group 1). While relying on so-called *joint* assessments, these assessments are often “coordinated by UN OCHA and other UN agencies” (SSD WS, LNGOs) who determine methodology and methods of data gathering and play a major role in data processing, analysis and interpretation. Local communities, local organisations and even INGOs are often left with data collection only (SSD WS1, LNGOs). INGOs based in Germany explain that this is mainly “because usually there is no money for [our own] needs assessments and analyses” (GINGO WS).

Influencing and participating more meaningfully in such high-profile assessments and reports can be achieved by actively participating in humanitarian clusters. However, in South Sudan those “are clearly dominated by interna-

tional actors” (SSD WS, LNGOs) and “heavily biased” towards Western ways of thinking (SSD WS1, LNGOs). This leaves only limited room for equal participation of local organisations.

In addition to donor calls and high-profile assessments and reports, many Germany-based INGOs develop own country plans or strategies. In such country plans or strategies INGOs analyse where their own organisational interests and capacities could be best realised in different humanitarian contexts. While sometimes based on direct inputs from local communities, the analyses of the humanitarian contexts, however, often again heavily rely on the previously mentioned high profile assessments and reports, and strongly consider anticipated donor funding (GINGO WS).

In the project design phase, these country plans and strategies are then matched with donor calls. Due to legal limitations this can only be done by INGOs who are eligible to submit concept notes and project proposals to international donors. To be successful, they must strictly respect donor focus areas, selection criteria and frameworks. This points to a clearly unequal relationship between INGOs and donors, with donors strongly dominating the project design phase.

#### **Donors dominate the project design phase**

In absence of direct cooperation modalities with donors, local organisations need to collaborate with international organisations when seeking international donor funding. Hence, they must not only respect donor priorities and frameworks, but also the country plans and strategies of international organisations (GINGO WS). This further limits the policy setting agency of local organisations in the project design phases compared to international organisations (see also chapter “Hierarchical roles and responsibilities”, below).

Some international organisations attempt to counteract these dynamics that prevent the equal engagement of local organisations and other local actors in the project design phase through enabling their local partners to engage on equal terms, at least in their bilateral cooperation. For example, one INGO based in Germany (GINGO WS) only informs its local partners about funding opportunities and related regulations and leaves the decision whether and how they want to apply with their partners. If met with local interest, the INGO drafts concept notes jointly with their local partners, for example, in joint proposal or concept note development workshops. These may even include feedback rounds with local communities and consultations with the local government. In other collaborations, INGOs only provide inputs on donor requirements and frameworks, while their local partner takes the exclusive lead in defining project activities, required technical knowhow and budgets (GINGO WS; CB WS, Group 2).

## “A good [international] partner guides you through the theory and good project implementation but is not so much involved in changing your approach”

Paul, LNGO SSD

Thus, while donor calls for proposals may still come with donor priorities (and the humanitarian partnership hence remains clearly donor dominated), responses are developed in an equal, mutual and transparent manner, between international and local organisations at least.

What hampers these more equitable approaches in the project design phase, however, are the “very tight time-frames from [donors]” (SSD WS1, LNGOs; GINGO WS). While many Germany-based INGOs attempt to let local actors participate in project development, project designs often need to be drafted by their country offices in overnight or weekend sessions, allowing for only little participation of other local actors, if any (GINGO WS).

Some local organisations have reported that they tried to circumvent restrictions in the project design phase by introducing project ideas to international organisations outside donor calls, Humanitarian Response Plans and country strategies. However, they often face rejections or no responses to such initiatives (Rebecca, LNGO SSD). This leads to a danger of self-censorship on the side of local organisations (Susanna, INGO SSD). They may limit themselves to only proposing project designs that fit into their international partners’ agendas, instead of introducing relevant new ideas from local communities. As one local NGO representative from South Sudan put it: “[most colleagues] just deliver towards the [donor] template they are applying for [and do no longer think beyond]” (Paul, INGO SSD).

Furthermore, even the most equitable involvement of local partners in the dialogue and design phase is often compromised when the project proposal is further developed. INGOs from Germany explain: “As soon as the concept note or project proposal is handed in by the local partner, it is further developed by [us] in consultation with the donor in several feedback loops where local partners do not participate”. In this way, the final project logic may considerably change (CB WS, Plenum), even “to the extent that sometimes the whole project looks completely different at the end” (GINGO WS; CB WS, Group 1).

In general, experiences with equitable participation of local organisations in the dialogue and design phase largely depend on their role in the broader project set up. INGOs from Germany acknowledge that local NGOs often only come in as suppliers in the later implementation stage of the project cycle, and thus are not always a deliberate part of project preparation (GINGO WS; CB-WS 2, Group 2).

### Hierarchical roles and responsibilities

In the project formulation phase, Project Cycle Management introduces a series of cooperation agreements between the humanitarian stakeholders. The structurally equal, mutual and transparent dialogue and design phases are thus replaced by separated, untransparent relationships, following a top-down approach that introduces upwards accountability and inequality (GINGO WS; CB WS; SSD WS). Donors typically contract international organisations or funding mechanisms that in turn contract local actors, including INGO country offices, local organisations and others. These then work together with local communities (see figure 3).

This hierarchy first and foremost violates the equality component of equitable partnership. As local NGOs from Cox’s Bazar explain, “although we [LNGO] are an independent entity, when we [legally] enter a partnership,



Figure 3: Network model of humanitarian actors’ relations in PCM



## Options for equal, mutual, and transparent dialogue and design phases

**Increase the visibility of local organisations on the global policy level** where key humanitarian strategies and responses are discussed and designed. Encourage strong local voices in decision-making such as humanitarian clusters (Ashley, LNGO SSD) and other coordination mechanisms as well as in Advisory Boards for Humanitarian Funds, and “on the big panels in global events” (Grace, LNGO SSD; CB WS2, Group 1). Support local NGO networks for good coordination and strong advocacy of local organisations (CB WS2, Group 1; Grace, LNGO SSD).

Donors  
IOs

**Establish more equitable funding mechanisms**, like the UN Partnership Portal (Gabriel, INGO SSD), that reverse the proposal system by providing a platform where local organisations can post their project ideas and concepts independently from donor calls and international organisations’ country strategies.

Donors  
IOs

**Increase transparency on existing partnerships between international and local organisations and on open opportunities for cooperation** (Elias, Jonna – LNGO SSD). Stay open for new partnerships because these might bring innovations (CB WS, Group 2).

IOs

**Involve local organisations, local communities, and other local actors in the dialogue and design phases as much as possible from the very beginning** (SSD WS, LNGOs; CB WS, Group 2), including joint needs assessments and joint drafting and processing of concept notes. Involve local organisations in donor feedback loops and allow inputs outside pre-defined surveys, proposal formats or categories. This pays off, as one INGO representative reports: “It is hard to let all relevant stakeholders participate in the project planning and design. But we should try to include as many as possible. Everybody must have a clear concept [...] what we are going to do and who are the targeted communities. So, the planning must be more transparent, for all relevant people to chip in when they want to. If the planning and design are clear to everybody, then the implementation will be easy.” (CB WS3, Group 1).

Donors  
IOs

**Allow local partners to write their own concept notes and proposals** in response to donor calls without interference, whenever possible. Function as on-demand consultants for quality check, information, and feedback, and provide the legal hub that is needed to place proposals with donors (GINGO WS). This limited IO-involvement reduces the number of contributors in the dialogue and design phase and places decision-making power (but also associated risks) with local organisations.

IOs

**Respect the way of thinking and working of local partners**, including working processes and frameworks, language, structure, and documentation style as much as possible. Provide the service to translate these into donor formats and vice versa (SSD WS1, INGOs).

IOs

**Extend timeframes** for submission, coordination, and feedback, whenever possible, for example, in protracted crises.

Donors  
IOs

our role [...] becomes to be a recipient of grants. This hampers our equitable relationship” (CB WS3, Group 2).

While the specific contract formulation, ultimately defining the working relations between the contracting parties, predominantly lies with the respective higher-level partner (CB WS3, Group 2; GINGO WS), INGOs from Germany highlight that “everything [i.e., the whole contractual cascade] is very donor driven” (GINGO WS). Donors reside at the top of the cascade, channelling funds, risks, responsibilities, and liabilities downwards (GINGO WS). This puts them in a position to set the tone and basis for any cooperation further down the contractual cascade. If they fail to establish equitable partnerships with their

### **Donors are in a position to set the basis for any cooperation further down the cascade**

direct international partners (international organisations or funding mechanisms), it negatively affects the whole cascade, regardless of how equitable other bilateral cooperations down the line might be (Pellowska 2022). Germany-based INGOs, however, only comment this with a shrug: “Who has the money calls the shots” (GINGO WS).

Notwithstanding this crucial donor role, local organisations and other local actors still heavily depend on their direct higher-level partners, i.e., international organisations, may it be UN organisations or international NGOs. It is primarily these international partners who decide how they want to handle donor provisions and whether and how they translate these into cooperations with their local partners. While some international organisations have reportedly used this position to establish equal working relationships with their local partners (CB WS, also see “Equitable but ineffective dialogue and design phases”, above), consultations in South Sudan showed that many INGOs are still hesitant to do so, rather **opting for clear top-down relationships** (Ashley, LNGO SSD). Many INGOs working in South Sudan confessed that, if they work with local organisations at all, they deliberately “use them” for their own advantage (Gabriel – INGO SSD), for example:

- to improve their own operational performance (Craig, INGO SSD; Susanna, INGO SSD; Gabriel, INGO SSD; Doris, INGO SSD; SSD WS1, INGOs);
- to “reduce operational costs” (SSD WS1, INGOs) and save their own resources (SSD WS1, INGOs);
- to “free up space to be able to concentrate on quality and guidance” (SSD WS1, INGOs); or
- to transfer operational and security risks (SSD WS1, INGOs; Ray, LNGO SSD).

In South Sudan, the experiences of local organisations with partnerships with international organisations often go beyond such utilisation for “added value”, trending towards deliberative exploitation. For example, one local NGO reports: “We developed a project idea and put it to [an INGO]. Then they got the money to fund the proj-

ect idea. But they did not put it into our hands. Only a small portion of the activities with the most work would end with us or other national NGOs. [The INGO] would remain with the lion’s share and the easier project activities, like food distribution, where you can get the most money from. So, [we] opened the gate for them, but they only rushed through and left their South Sudanese partners outside” (Sara, LNGO SSD). Even kickbacks have been frequently mentioned as one practice to exploit the weaker negotiating position of local organisations at the lower end of the contracting line (Andrew, LNGO SSD).

This rent-seeking, sometimes **exploitative approach** of international organisations towards local organisations in South Sudan, also shows in the formulations of their cooperation agreements. Local organisations in South Sudan often receive only annual contracts while their international partners may have secured “multi-year projects with their donors themselves” (Andrew, LNGO SSD). Furthermore, inadequately funded budget lines and budget shares that favour international partners (Craig, INGO SSD; Gabriel, INGO SSD; Paul, LNGO SSD; Tom, LNGO SSD) result in low salaries or only incentives for local staff (Gat – CBO) and lower overhead cost shares for local organisations (SSD WS, LNGOs; GINGO WS; CB WS, Group 2). This is compounded by untransparent budget allocations (SSD WS1, LNGOs). As one INGO informant confesses: “The budgets that we [INGO] give to local NGOs are usually reduced compared to the budgets that we show to the donors. The savings are used for example to fund needs assessments” (SSD WS2, INGOs).

The hierarchical relationship between international and local organisations is also expressed during the project implementation phase where international organisations exercise a control function towards their local partners in the project implementation phase (Taylor, LNGO SSD). Many local organisations feel that they are under constant surveillance with regular (monthly) project monitoring activities and (quarterly) evaluations at the organisational level (Taylor (2), LNGO SSD). Some INGOs organise these monitoring and evaluation activities as opportunities for constructive feedback from both sides of the partnership. Other, however “will simply knock you out” (Taylor, LNGO SSD) “if they find any [shortcomings]” (Andrew, LNGO SSD).

In the eyes of international NGOs, tight supervision and control are necessary to reduce risks occurring from the limited capacity and performance that they see on the side of local organisations with regards to project implementation and organisational structures. Doing so, they often intensify the accountability and control functions that they themselves receive from their donors (SSD WS2, INGOs). INGOs from Germany justify: “Our fear that project implementation does not run according to donor requirements leads to tight controls”. In this sense, “do-

### **Donor compliance beats localisation**

## How workshop participants perceive their partners

In all workshops, participants were asked to describe their relationships with their humanitarian partners with a symbol. This is what they chose:



### Local organisations on their relationship to international partners – Cox's Bazar:

Cloud (Meaning: Uneasy, intransparent access to funding as it is not easy to get solid information about (direct) funding opportunities from international partners.)



### Local organisations on their relationship to international partners – South Sudan:

a cross on the top of a mountain beyond blue sky with lines attached to the cross to secure it. (Meaning: Local organisations as invisible supporters of their international partners who shine brightly); a big eye (Meaning: "It stands for the eye that the internationals have on us" (SSD WS 2 - LNGOs).)



**INGOs on their relationship to their local partners – South Sudan:**  
equal parts of the same apple; people sitting together and looking at the same direction; big brothers, reaching their hand to assist their little brothers; someone helping seeds to grow; someone, guiding a kite to the good winds so that it may rise.



### Local organisations on their relationship to international partners – Cox's Bazar:

a smiley face, a handshake or a growing tree.



While the positions of other actors were debated, they agreed that donors and the UN would sit on the driver's seats because "they decide what to do and where to go with the money". Affected communities, would be rather passive passengers who are "taken to the destination decided by the driver" (WS - INGOs and LNGOs).

In one of the workshops in South Sudan, INGOs and LNGOs were asked to situate humanitarian stakeholders in an imaginary vehicle.

nor compliance beats localisation: As far as donors insist on strict compliance with their regulations, localisation is abandoned" (GINGO WS).

For many smaller local organisations in South Sudan, cooperation with international organisations is often only a "take it or leave it negotiation" (SSD WS, LNGOs). However, bigger organisations from Cox's Bazar find: "The size of the [local] organisation determines [their] relationship with international partners. Small organisations depend on the funds of international partners and hence are in a weak negotiating position and accept everything that is imposed on them. Bigger organisations are more in the position to negotiate [and often achieve more equitable partnership conditions]." (CB WS1). Indeed, bigger local organisations are often well integrated in the formal international humanitarian system. For this reason, they are expected not to struggle with corresponding structural barriers, including accountability, but also PCM processes and procedures (see also above on "structural barriers"). This also leads to international organisations placing more trust in them (see "lack of trust" above). Consequently, the few existing big and well-integrated local organisations are often overwhelmed with cooperation requests from their international colleagues. They can pick and select those with the best partnership conditions.

### Missing links and bridging positions

Finally, as figure 3 above shows, the hierarchy established by the series of cooperation agreements prevents direct links between some humanitarian partners, thereby diluting mutuality and transparency. In mutual relationships, every actor has access to all others (see figure 3). However, with the cascade of cooperation agreements, this is no longer the case. Instead, some actors – so called "intermediaries" – function as connectors, linking actors that are otherwise not connected to each other. This "bridging" position (Burt 2004) is very powerful as it enables intermediaries to influence the relationships that run through them (including funding and information flows) according to their own interests and needs.

**"Bridging" positions are very powerful**

During the Berlin workshop, Germany-based INGOs problematised the bridging function of their local partners, connecting local communities and international organisations: "We [INGOs] only get feedback from [aid] recipients through the local partner. That is a difficulty for us because it allows [the local partner] to report what they want. It doesn't necessarily have to be the actual feedback of the recipients. We would not realise if that was the case." At the same time, INGOs fear that using monitoring apps or alternative remote feedback mechanisms to create a direct link between themselves and affected communities would negatively affect their relationship with their local partners because "they would feel controlled" (GINGO WS).

Furthermore, INGOs in Germany highlight that they are not always comfortable with their own bridging position, connecting local organisations with donors as they find that there is "some confusion of roles between [affected communities], duty bearers [i.e., local organisations and INGO country offices] and rights holders [i.e., international organisations]" (GINGO WS). Additionally, they are not comfortable with their intermediary position because "if something happens [e.g., a misbehaviour of a local partner], [The INGO is] pilloried by the donors because [they] are in between" (GINGO WS). This is also mirrored by

**"There is no risk sharing between donors and international NGOs"**

INGO country office colleagues in South Sudan who find that "just a few donors want to touch local NGOs because of accountability issues. [...] Hence donors transfer these accountability risks to us. This is a problem because there is no risk sharing between donors and international NGOs" (Craig, INGO SSD).

Similarly, local organisations criticise the bridging role of international organisations. In both Bangladesh and South Sudan, they would prefer to establish direct links to donors and consider their lack of access to direct funding (SSD WS, LNGOs) and the resulting long funding flows as problematic (SSD WS, LNGOs). Additionally, local organisations complain that all communication with donors must go through international organisations, who are not always interested to voice and respect local organisations' perspectives. One local NGO representative from South Sudan expressed his frustration: "I cannot work very well because I am blocked by all the stakeholders between me and the donors" (Elias, Jonna, LNGO SSD). Hence, local organisations in South Sudan seriously look for direct donor contacts "to talk to them about our problems with the international organisations. [...] There is no way that you can trust an intermediary [...] doing a good job in localisation" (Terence, LNGO SSD).

Finally, the hierarchical PCM structures suffer from missing links and a wide distance between donors and aid recipients. As information must travel a long path through multiple other actors, donors are inhibited to quickly respond to changing humanitarian needs and unforeseen challenges faced by first responders. One local organisation from South Sudan, therefore, concludes: "If the donors are serious when they say that their main interest is with the beneficiary, all other structures in between the donor and the beneficiary are bureaucracy and need to be reduced" (Elias, Jonna, LNGO SSD). INGOs from Germany agree that local communities have little or no direct access to donors and point to a lack of direct complaint mechanisms specifically. They also highlight that a limitation of direct contact between donors and affected communities leads to a lack of contextual knowledge by donors (GINGO WS).

## Options to overcome hierarchies (and enhance equality):

**Create contracts involving as many stakeholders as possible** (no sub-contracting but co-contracting) to avoid the series of cooperation agreements which subdivides humanitarian project stakeholders and introduces a hierarchy between them.

Donors  
IOs

**Include partnership principles and objectives for strengthening local partners in cooperation agreements with international actors** (Gabriel, INGO SSD).

Donors

**In international organisation – local organisation partnerships, “the top-down approach needs to be changed”** (Ashley, LNGO SSD) so that the partnership allows local organisations to equally influence the cooperation (Elias, Jonna, LNGO SSD; CB WS, Group 2) rather than international partners “just impos[ing] things” on local organisations (Ashley, LNGO SSD). To do so, international organisations should:

IOs

- **Prioritize local leadership** over international leadership and provide local partners with support when requested (CB WS, Group 1). Where this is not possible, at least “consult local partners for any decisions made at all stages of a project.” (CB WS 1).
- **Create opportunities for local partners to voice their interests, capacities and needs and encourage them to do so.**
- **Jointly formulate contracts, especially budgets** (SSD WS 2 – INGOs) with local organisations and include principles and minimum objectives for strengthening them in cooperation agreements (Terence, LNGO SSD; CB WS, Group 2).
- **Provide annual budget allocations detached from operational projects** to local organisations to enable them to fund stable organisational and operational structures (CB WS, Group 2).
- **Ensure that activity costs and budget shares are calculated fairly and transparently**, including for assets and staff (SSD WS1, INGOs), because “if, in a partnership, resources are not balanced, then the whole partnership is not balanced” (CB WS 3, Group 1). Do not assume that local NGOs can always work cheaper (Craig – INGO SSD) and make budgets transparent to all stakeholders.
- **Allow higher overhead costs** (for example the NEAR maximum of 15%) for local organisations to enable them to build up their organisational capacities (Robert, LNGO SSD), and consider additional in-kind support (Craig, INGO SSD).
- **Add capacity building and procurement budget lines to the budget share of local organisations** instead of including them to the budget share of international organisations. This increases local organisations’ overall budget and hence their overhead costs (SSD WS2, INGOs).
- **Minimise the impact of strict donor regulations** by reducing and simplifying them whenever possible (Jonathan, GINGO, Pos. 21). Link non-institutional funding to fewer rigid regulations, especially when starting partnerships with local organisations that are new to the international humanitarian system (Elias, Jonna, LNGO SSD; Paul, LNGO SSD). NEAR regulations can provide a good orientation for regulations considered to be “low enough” for local organisations to be able to comply with them (Robert, LNGO SSD).

- **Allow that things are done differently** by local organisations (Susanna, LNGO SSD) as much as possible.
- **Make monitoring and evaluation processes simple** (Tom, LNGO SSD) **and less top down oriented**, for example through inter-agency monitoring or peer monitoring (GINGO WS), possibly also involving local NGOs (Terence, LNGO SSD). Monitoring and evaluation should be part of the project period (GINGO WS). Mechanisms need to be rigid but at the same time “leave [Local NGOs] free to do [their] work” (Ashley (2), LNGO SSD). They should be in a flexible format, tailored to the local partner, to absorb different types of information and methods, including storytelling (SSD WS, LNGOs; SSD WS2, INGOs). Jointly formulate success criteria and indicators, also together with local communities. In cases of conflict, avoid “confrontation, judgement, or engag[ing] in a blame game,” but constructively work things out together (SSD WS).
- **Revise capacity strengthening approaches:**
  - Acknowledge the capacity – funding link (Andrew, LNGO SSD).
  - Think and work on each other’s capacity mutually (Doris, INGOSSD; Debbie, INGO SSD).
  - Decouple capacity strengthening activities from operational projects.
  - Have an enabling view of the partner. First, ask what they are capable of and not what they are not capable of and then build up the partnership on that basis (GINGO WS).
  - Use partner self-assessments as a prerequisite for mutually agreed activities (Samuel, INGO SSD; Doris, INGO SSD).
- **Facilitate constant dialogue and mutual engagement** (CB WS2 – Chat) because “listening, support and actually working with our team leads to an understanding of the challenges that we face and also how to address them together” (Paul, LNGO SSD). Such dialogues could include regular and mutual partnership reviews, feedback and exchange meetings, annual partnership conferences and/or partnership feedback surveys (CB WS2, Group 1), reviewing each other’s performances and capacities. They should be **followed by mutually agreed action** (Paul, LNGO SSD).
- **Intensify communication** (GINGO WS) through frequent calls, field visits, secondments and/or the establishment of partnership coordinator roles in international organisations that form liaisons between the partners (SSD WS 2, INGOs). It helps if international partners have “a [strong] presence in the field, too” (SSD WS1, LNGOs). Technical support through integrated experts from international organisations who accompany the project and reside with local organisations are also highly appreciated by local organisations (CB WS, Group 2; GINGO WS). Instead of ad hoc, short-term monitoring and training this establishes longer-term tandems.
- **Be patient** (CB WS, Group 2).

#### Local Organisations should refrain to enter partnerships in which:

- international partners apply regulations that local organisations consider as too strict (SSD WS 2, INGOs).
- international organisations “only want [local organisations] to deliver what they want” (Ashley (2), LNGO SSD) and local organisations “cannot introduce what [they] need, [...]” (Grace, LNGO SSD).
- “the voices of the affected populations are not heard” (Grace, LNGO SSD).

Local organisations, in contrast, acknowledge that there is occasional engagement between donors and affected communities, for example on monitoring visits. However, according to their experiences, these engagements are sporadic and often scripted by intermediaries, including international and local organisations who plan and manage such visits (SSD WS, LNGOs).

Apart from monitoring visits, the only possibilities for affected communities to introduce their perspectives to international actors is compliance and feedback mechanisms that usually lie with international organisations and their local partners. However, these mechanisms are usually activated only during project implementation and hence only allow feedback on already planned/implemented activities. In this way, “humanitarian assistance becomes a mere service delivery to the community” (SSD WS, LNGOs) whereby **the community cannot influence the service before it is provided to them**. Local organisations in Cox’s Bazar share this view: “Most of the time, the host community or the local community wants to present their stories and what they are actually going through. But their thoughts and opinions are not represented at the national level or to the donor properly”

(CB WS2, Group 1). Hence the links between the local community and donors are not only limited but also directed in the sense that information does mostly flow top down and hardly bottom up.

**Information does mostly flow top down and hardly bottom up**

Local NGOs in South Sudan criticize this as well, especially as they see that donor pressure is often passed down through their international partners. They appreciate partners who rather form a barrier and protect them from donor pressure, while at the same time advocating for the uptake of local project ideas and needs (SSD WS, LNGOs). However, on the contrary, they mostly experience a “dictatorship” of international partners: “Everything is dictated to us: the budgets, the scope of a project, the [too short] time frames and even the project location” (SSD WS, LNGOs). According to the observation of one local NGO representative in South Sudan, this even applies to the relationship between INGOs and their country offices: “Even in international NGOs, the decisions are often taken at the headquarters somewhere in Europe” (Sara – LNGO SSD).

### 3.2. Alternative project management models – going agile

As the previous chapter has shown, humanitarian Project Cycle Management entails three main features that impede the three components of equitable partnership equality, mutuality and transparency:

- equal, mutual and transparent dialogue and design phases that are, however, compromised in practice;
- a hierarchical distribution of roles and responsibilities introduced by a series of cooperation agreements that structurally impedes equality;
- a limitation of links between humanitarian partners that prevents mutuality and transparency.

Management structures that are better suited to facilitate equitable partnership entail flattened hierarchies and additional connections between the humanitarian partners as shown in figure 4. One management model complying with these requirements is agile management.

#### Flattened hierarchies and additional connections between the humanitarian partners

This model shall be briefly presented below. After a detailed discussion of its potential implications on roles, responsibilities and links between humanitarian stakeholders, these theoretical considerations are met with a feasibility check, critically questioning the applicability of agile management to the humanitarian context.

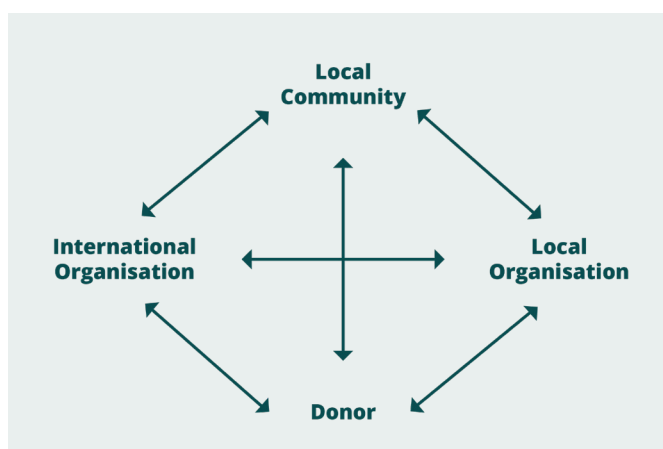


Figure 4: Network Model of humanitarian actors’ relations in agile management

#### A brief introduction to agile management

Project Cycle Management can be understood as a **waterfall management** approach. Waterfall management models follow a linear process with a set sequence of steps: first dialogue, then design, formulation, implementation and evaluation (see figure 5). This process can only flow in one direction, making it difficult to restart dialogue and revisit design under project implementation and often involving quite lengthy dialogue and design phases.

## Options for additional links (enhanced mutuality and transparency):

**Create direct links between humanitarian partners where they are missing.** This will increase mutuality and transparency.

Donors  
IOs

**Establish direct communication channels** to local organisations, not necessarily involving INGO country offices.

IOs

**Involve local organisations in the communication with donors and other international partners** such as the media (SSD WS2, INGOs).

IOs

**Introduce remote community monitoring mechanisms**, like mobile apps, to allow affected communities to issue anonymous complaints directly to entities that are not on present in the operating areas. This would address the missing links between local communities and international partners and donors. These can be added by **meetings of donors and international organisations with local communities** (CB WS, Group 2) and **strong direct relations of donors to host governments**. As an INGO working in South Sudan underlines: “We [as INGO] need to have a local engagement with CBOs, but there needs to be an engagement of [international] donors at national policy level [...] as well, so that the empowerment [of the civil society] that we are working on is not cut off by national politicians” (Debbie, INGO SSD).

Donors  
IOs

**Strengthen relationships with local organisations though direct funds** (Ashley (2), LNGO SSD). Work directly with local organisations and “just ask[ing] international NGOs to mentor [local organisations]” (Susanna, INGO SSD). While this entails a difficult reform of the legal frameworks of humanitarian cooperation (GINGO WS), it would also lift the risks that international organisations currently face as intermediaries (Susanna, INGO SSD). Where international organisations are still needed as a legal bridge between donors and local organisations, there should be **complaint mechanisms** in place that allow local organisations to anonymously complain about their international partners to donors (Paul, LNGO SSD). As one South Sudanese representative of a local organisation puts it: “Donors should be concerned with what the international organisations are doing with regards to localisation” (Elias, Jonna, LNGO SSD).

Donors

In contrast, agile management offers a “more holistic process where action, amplification and change in the humanitarian environment are seen as mutually reinforcing and take place simultaneously” (Knox-Clarke et al. (2020, 81). It replaces the dialogue and design phases of waterfall management with an iterative approach. Doing so, it does not develop nor respond to fixed end products or outputs. Instead, it uses an undefined number of smaller consultations, design, execution and learning cycles (so-called *sprints*) to produce a range of interim outputs that are not pre-determined but subsequently build up on each other until they reach a previously only broadly defined overall objective (see figure 6).

In agile management, everything – including the final output – is fluid and adjustable. Next steps (or interim outputs) are discussed and agreed upon anew for each sprint. In the industrial sector, this allows for higher-quality products. This can be achieved as every single task, from design to implementation, becomes the result of intense communication and collaboration that involves all relevant stakeholders. The smaller cycles of consultation, implementation and learning can easily respond to changing conditions and requirements. If any obstacles emerge on the way, it is always possible to revert to the previous stage. (Häusling 2020)



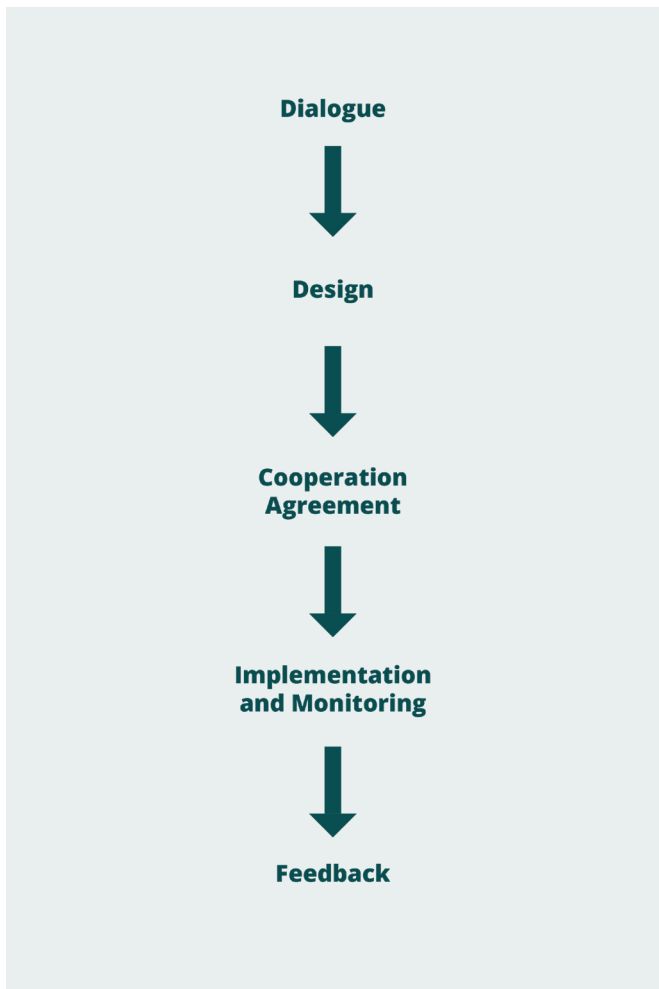


Figure 5: Waterfall Model of humanitarian project management

With this approach, agile management entails a reversal of the traditional planning process (see figure 7): in traditional waterfall management-based Project Cycle Management, a certain set of outputs (contributing to an overall objective) are predefined and budgets and timeframes are then developed accordingly (see left triangle in figure 7). Agile management, in contrast, typically starts with the definition of a certain timeframe and budget and then explores how these could be used to reach

a certain objective, using a step-by-step approach (see right triangle in figure 7).

Indeed, some donors have already adopted approaches similar to sprints by subdividing their projects into several smaller parts that build up on each other. However, these projects include so-called “**milestones**” (interim outputs) that are pre-defined at the beginning of a project. This approach largely follows the waterfall management scheme, as shown on the left side of figure 7. “What is missing is the reflection and redefinition of the remaining milestones after completion [of a milestone] and the open final output.” (SSD WS, INGOs and LNGOs).

Both, local and international organisations, would find it very useful to only agree on upcoming “results and activities [... with...] each milestone as you go” (SSD WS, INGOs and LNGOs). They recommend having quarterly sprints at operational level, as well as on an annual basis, then involving a broader group of stakeholders (SSD WS, INGOs and LNGOs). This viewpoint is supported by staff of Germany-based INGOs who participated in the workshop in Berlin. However, they fear that especially donors may not have the capacity to engage in such frequent reviews and discussions (GINGO WS).

### Redefining roles and responsibilities, introducing additional links

As it operates differently from waterfall management, agile management entails a redefinition of roles. In waterfall project management, hierarchical structures of top-down accountability make sure that the workflow is followed and all activities and outputs are delivered as agreed. Due to the absent pre-agreed outputs, this structure becomes obsolete in agile management. In contrast, agile management mainly capitalises on a highly self-organised team that fulfils tasks on its own.

The concrete setup of this team, however, varies across the various agile management models that have developed over time. One of the most widely used models is **Scrum**. Originally developed by Takeuchi and Nonaka

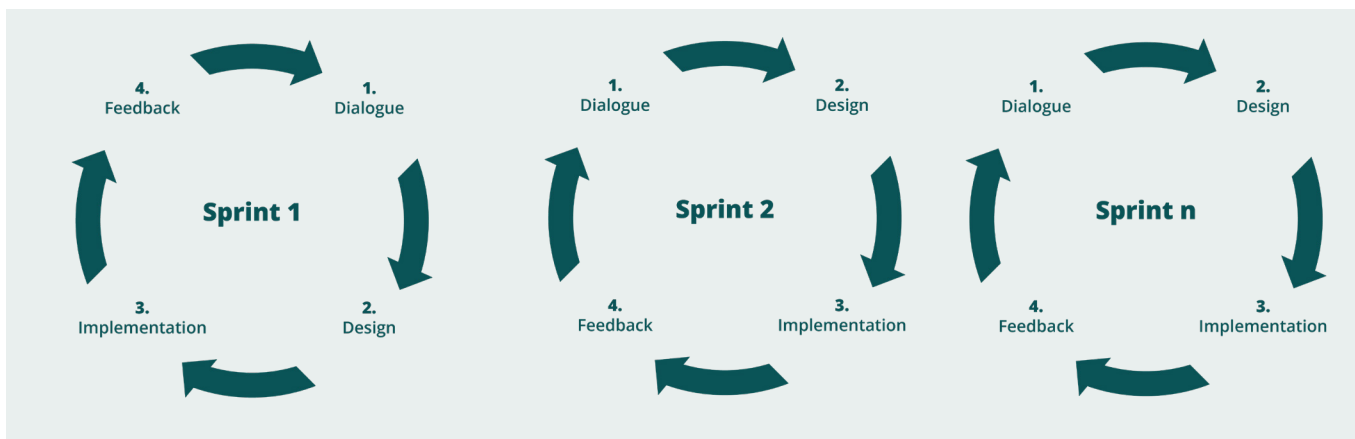


Figure 6: Agile model of humanitarian project management

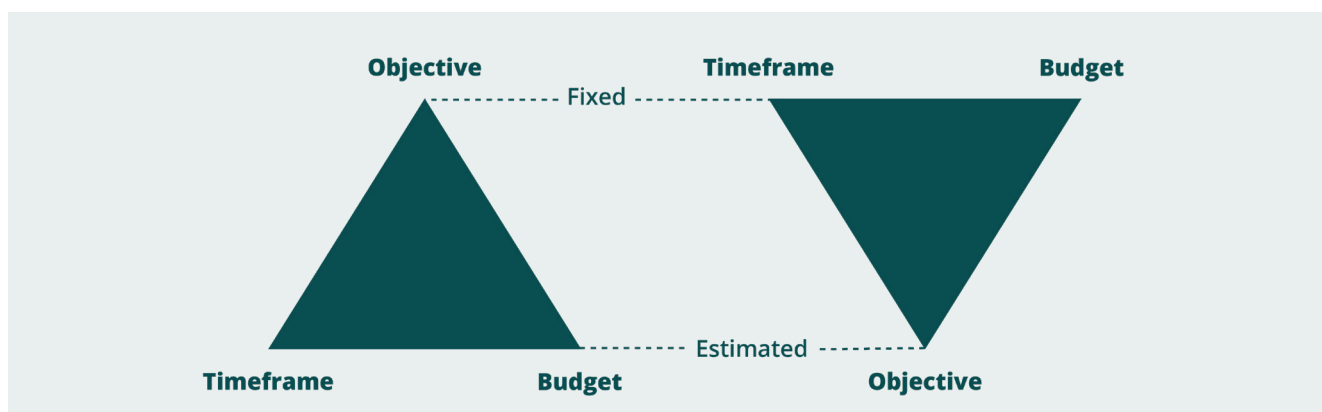


Figure 7: Traditional versus agile iron triangle (adapted from <https://www.visual-paradigm.com/scrum/classical-vs-agile-project-management/>)

(1986), it was first applied in the software industry (Beedle et al. 2001). However, as it provides a lightweight model of project management that performs well in all kinds of quickly changing uncertain environments, Scrum has been applied throughout several industries, from technology to marketing.

According to Mundra, Misra, and Dhawale (2013) and as figure 8 shows, Scrum projects are led by a “project owner” (Bass et al. 2018) who defines the overall project objective and has a vision of the final project output (still a *vision*, not a clear picture). It is first and foremost the project owner who decides whether a certain sprint is completed successfully and whether the team can move on to the next set of tasks. In humanitarian action, this role could be taken over by representatives of affected communities such as Project Management Committees. This would ensure local leadership and turn the hierarchies of humanitarian PCM upside down as it has been often demanded (e.g. Bennett, Foley, and Pantuliano 2016, 11; Participatory Revolution Workstream 2017; Auswärtiges Amt 2019, 10; Os-ofisan 2020; Rejali 2020; Roepstorff 2021, 287).

**Local leadership and reversed PCM hierarchies**

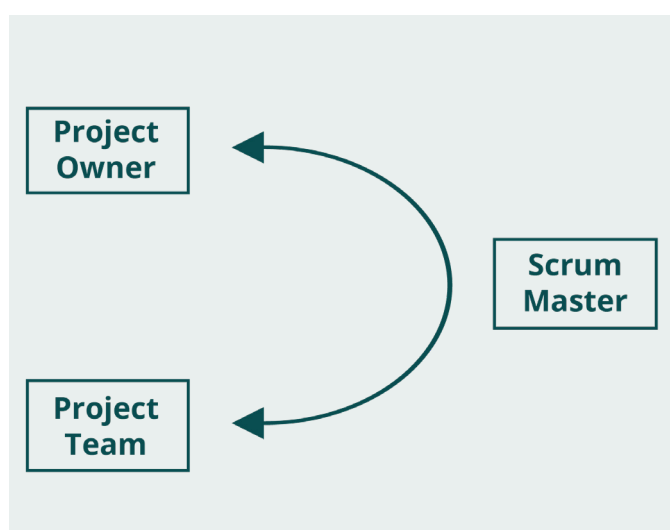


Figure 8: Project management roles in Scrum

Following Scrum, project owners can rely on the expertise and work of a whole “project team” – a group of experts working on the delivery of the owner’s vision. In the humanitarian sector, this team would typically include technical experts such as WASH and nutrition specialists, logistics, security advisors, etc., and administrative capacities like accounting, and monitoring and evaluation specialists. Depending on the humanitarian context, these could be situated in local and international organisations or a mix of the two.

Due to the limited capacity of donors to directly fund a project team made up exclusively by one or more local organisation(s), these teams would – at least in the medium term – require the involvement of at least one international organisation or mechanism, functioning as a legal hub and linking local teams to donors. However, in a ground-breaking departure from traditional PCM the international hub and funding (i.e., the donor) functions are not excluded but integrated into a joint project team. Following this logic, donors would contribute their funding capacities to the overall team capacities. They would participate in regular sprint meetings, ensuring that the current project owners’ needs and requirements are in line with the pre-agreed budget and timeframe. Donors could express their accountability requirements in these sprint meetings in the same way as any other team member, for example, in the form of a **user story**: “as a [donor], I need [certain accountability reports], so that I can [transfer the next tranche of funding].” This allows donor needs to be translated into corresponding tasks for other team members. These tasks would then be added to a **task list** where all tasks of the team are collected, jointly discussed and prioritized before being completed. The participation of donors in these team structures would not totally abandon accountability towards donors but reframe it as one among several team members needs to work against the owner’s vision. This would make monitoring and evaluation more “customer” (i.e., affected community) centred. At the same time, it would keep donors closely informed about the overall project progress. Apps and online platforms could help to facilitate

this mutual communication, linking different time zones and breaking down meetings to simple chat/click communication.

As donors, international organisations and local organisations would all be part of the same project team, equality is indeed a key feature of such an agile management structure. In addition, agile management introduces

### **Agile structures facilitate equity, mutuality and transparency**

structures promoting mutuality and transparency. All stakeholders would (virtually) come together regularly in sprint meetings (or on online platforms)

to present their needs and interim deliverables. This enables mutual and transparent access to one another. In this way, agile management breaks down the contractual hierarchy and erases the powerful bridging functions of local and international organisations of PCM. Instead, equally distributed links between all project team members emerge (see figure 4).



### **Local partnership experiences in Germany**

**NGO landscape in country:** INGO network members and INGOs originating from Germany.

**Localisation strategies:** Most INGOs are currently developing their localisation strategies. Many start to develop their own local partnership networks, whereby “readymade”, fully capacitated local organisations are preferred. INGOs in Germany are mostly ill-equipped to engage in strengthening smaller local organisations that are new to the international humanitarian system and challenged by strong governments and weak civil societies in their countries. Additional workloads, costs, and risks that are associated with partnerships with local organisations are seldom fully covered in operational cooperations. For this reason, INGOs often find that “there is a lack of matching local organisations to partner with” (GINGO WS). Thus, they often opt to rather not work with local organisations at all.

**Partnership models:** Range from working exclusively with local organisations, to not working with them at all, only with own country offices. Special capacity strengthening projects remain the exception.

**Quality of partnership:** For many INGOs in Germany, it is a challenge to implement equitable partnership, even with their own country offices. However, they have started to work on that recently. INGOs that already exclusively working with/through local organisations take a lead in equitable partnership approaches.

Informants from South Sudan, however, emphasised that local and national governments should also be part of the project team. They should be considered as primary project team members. Local and international organisations (financed by foreign donors) should only step in if local and national governments are unable to fulfil this role (SSD WS).

As the needs and discussions among team members can be highly complex and prone to conflicts, Scrum introduces the additional role of the “**Scrum master**” (Bass 2014; Shastri, Hoda, and Amor 2021), who focusses solely on processes and communication. This role facilitates productive and constructive exchange among all team members and between the team and the project owner and ensures that everyone has the necessary information and tools to fulfil their tasks. This involves the facilitation of meetings and trainings, resolving conflicts of interest as needed, reporting (interim) outputs to the project owner and coming back with feedback to the team. Through this role, the function of facilitating a project is decoupled from technical, organisational and administrative capacities and the overall project vision (Georg, AC).

The Scrum master role is best situated with actors that can effectively communicate technical requirements and questions between the team and the project owner and understands the technical implications of the owner’s requirements for the team. Depending on the humanitarian context, this could possibly be local or international organisations, or a combination of the two. Local organisations with a presence in local communities could effectively facilitate communication between project owners and project teams, while international organisations are typically better equipped to coordinate trainings, needs, and tasks within the team.

This means that in Scrum, international organisations could be part of the project team (e.g., providing funding, technical consultancy, and quality assurance), but at the same time also act as Scrum masters (involved in mentoring and capacity strengthening of the team). This complies with demands for international organisations to move away from project implementation towards more of a facilitating role in humanitarian projects (Caritas international 2021, 3; Rights Co Lab 2021, 14; Bennett, Foley, and Pantuliano 2016, 11). Local organisations, for their part, could also be part of the technical and administrative project team, while serving as Scrum masters (linking the team to project owners) as well. This would ensure locally led humanitarian action.

### **Agile management ensures local leadership**

As a comparison between figure 3 and figure 8 shows, an application of agile management roles not only ensures local leadership and reverses humanitarian hierarchies like often demanded. It also considerably flattens

## Options to introduce agile management

**Jointly define overall objectives (outcomes)** but refrain from predefining project outputs and activities whenever possible.

Donors  
IOs  
LNGOs

**Introduce the role of the “project owner”** to regularly check the project against overall objective(s). This role is best suited for affected community representatives.

Donors  
IOs  
LNGOs

**Introduce the understanding of local and international organisations and donors as part of one project team**, all having equal value.

Donors  
IOs  
LNGOs

**Introduce platforms of regular equal, mutual and transparent exchange between project team members that:**

Donors  
IOs  
LNGOs

- capture regular feedback from the project owner;
- allow transparent discussions and joint agreements within the project team on next steps and interim outputs on an equal basis;
- collect the needs of all project team members to accomplish the next steps and allow to jointly prioritise tasks.

**Introduce a facilitator role** responsible for a smooth and transparent communication between the project owner and the project team and for capacitating the project team to effectively fulfil their tasks. This decouples accountability towards affected populations and capacity-strengthening activities from project operations.

Donors  
IOs  
LNGOs

hierarchies. The four-layered agent-principal line of waterfall management (figure 3) collapses to a two-layered structure between project owners and project teams that is complemented by the facilitator role of Scrum masters who assist with smooth communication between the two (figure 8).

Besides the project owner (deciding upon a sprint failure or success), the Scrum master is arguably the most powerful position in this management structure (Georg, AC). Scrum masters decide which capacities are needed in a project team to achieve the owner’s objective and bear the responsibility to establish a well-working and well-capacitated teams. Beyond this, their linking function between project owners and the project team, entitles them to lead the two through the project process.

### A feasibility check

The combination of continued engagement in transparent communication, a flattened hierarchy with affected communities at the top, and an equal distribution of links between the humanitarian stakeholders characterise Scrum as management model highly suitable facilitate equitable partnership. It would clearly address local organisations’ concern of “a lack of dignity, equity, and space to make their voices heard in their engagements with international humanitarian actors” (Robillard et al. 2020b, p. 36). However, whether agile management structures can withhold the complex realities of humanitarian action remains to be shown. Nevertheless, in the consultations made for this paper, representatives from local and international organisations in Germany, Bangladesh and South Sudan made some suggestions. These shall be presented below.

## Ideal organigram of the relations between key humanitarian stakeholders according to workshop participants in South Sudan

In one of the workshops in South Sudan, INGOs and LNGOs were asked to design an ideal organigram of the relations between key humanitarian stakeholders. They came up with these two alternatives.

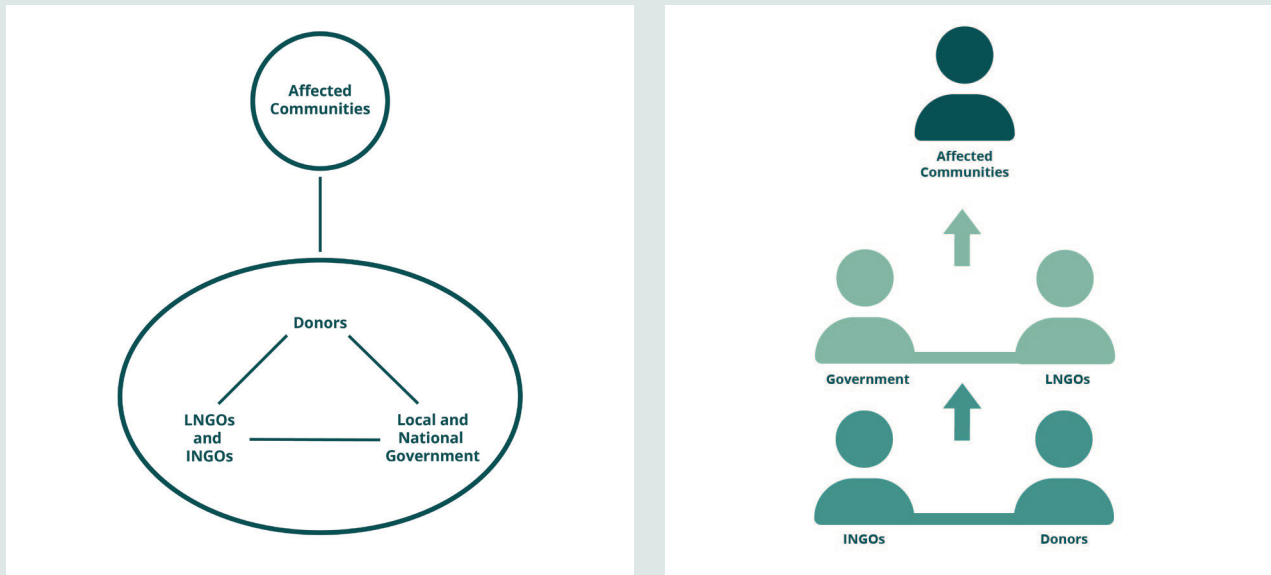


Figure 9 + 10: Ideal organigrams of the relations between key humanitarian stakeholders by South Sudanese workshop participants

### General support

Indeed, agile management resonates well with the needs and wishes of local organisations in South Sudan. They emphasised that Scrum could “produce more transparency and accountability towards local organisations and affected populations” (SSD WS, INGOs and LNGOs) and “empower beneficiaries” (SSD WS, INGOs and LNGOs), among others through an “owner” centred monitoring (SSD WS, INGOs and LNGOs) and project set up. They hope that agile management could address their challenges with donor compliance, i.e. all “the rules and procedures and all the nitty gritty correctness with which these rules and procedures have to be followed.” (Adrian, LNGO SSD). They problematise that “in the eyes of many internationals [this compliance] define[s] the success of a project” (Adrian, LNGO SSD). But “this is hard for national NGOs who wish that aid recipients would define a success” (SSD WS, INGOs and LNGOs). With agile management, “there is the hope that, when donors’ needs [are] integrated into task lists of a team, these would still be addressed but lose their project defining significance. This would make projects more relevant.” (SSD WS, INGOs and LNGOs). Hence, local organisations in South Sudan are keen to try out the new approach and ask in full excitement, but also sceptically: “Realistically speaking, when could we have that?” (SSD WS, INGOs and LNGOs).

**Local organisations are keen to try out the new approach**

Other informants from South Sudan and Bangladesh highlighted that the agile approach is not entirely foreign to them. In their more equitable partnerships, they are already experimenting with a re-organisation of existing roles. Although this does not involve agile, flexible outputs, they have reported positive experiences with providing affected communities with a leadership role and integrating international and local organisations in equal project teams: “The ownership [of local actors] is really there and joint decision making is really there. We actually feel it now. That is how trustful equitable partnership is developed. We call everybody a partner. Even the beneficiaries are our partners in the program. We need to [further] think in that way” (CB WS3, Group 1). Germany-based INGOs agree that flattened hierarchies and humanitarian action, re-centring with the needs of affected populations, is desirable (GINGO WS). At times this is already piloted, for example in refugee-led projects.

Some Germany-based INGOs have even experiences with more flexible output approaches (GINGO WS). In their 2021 flood response in Germany, they gradually defined outputs step by step in close cooperation with affected communities under running project implementation. According to their experiences this did not only produce more relevant outputs and strengthened local ownership. It also provided the flexibility to integrate additional or alternative humanitarian sectors in running projects and enabled a Triple Nexus approach of interrelated humanitarian, development and peace programming.

## Practical challenges

### Are donors willing to give up their powerful position and become ordinary team members?

As became clear in the conversations conducted for this paper, agile management, however, also entails a variety of practical challenges. Local organisations in South Sudan note, for example, that the agile management set up “only works if international NGOs, donors and local NGOs become a team” (SSD WS, INGOs and LNGOs). INGOs in Germany agree that this would be a major challenge and question whether donors, in particular, would be willing to give up their powerful position and become ordinary team members (GINGO WS). They further doubt that donors would be willing to provide funding for projects with only vaguely fixed outputs and without clear activities and plans. If so, Germany-based INGOs worry that vague project outlines could encourage mismanagement and inefficiency (GINGO WS).

A representative of an INGO in Germany added that Scrum roles might clash, for example, if a project owner or a Scrum master requested deliverables that contradict the identity, interests, or capacities of other team members, especially donors (Jacob, INGO G). In addition, Germany-based INGOs see potential conflicts if project owners are divided among themselves, have too many needs, have unacceptable success criteria, or are continuously changing their views on outputs (GINGO WS). This also points to the crucial but volatile question of who/which group exactly could be suited to take over a project owner role. Already posing this question might cause harm in some contexts, especially in highly divided conflict affected communities and in authoritarian and patriarchal societies. Hence, there seems to be an inherent challenge to introducing flexibility and equity while also keeping predictability, accountability and planning in humanitarian project management.

Adding to this, local organisations in South Sudan shared that it would be “interesting to see if there is indeed active engagement and a real commitment by the beneficiaries and the government” (SSD WS, INGOs and LNGOs). In South Sudan, both are seen to be stuck in a rather passive attitude, comfortable with being mere receivers of international donations. Hence, in South Sudan, the model can only work, “if the community can change their perspective around NGO work really: Opposed to [NGOs] be[ing] a charitable entity that gives donations [without community involvement]. No! [The community] must be involved in terms of what are their needs and how we [NGOs] can customise our interventions to them. [...This ...] calls for a lot of social resetting in terms of how the beneficiaries really think about [NGO] interventions and being really involved.” (Patrick, INGO SSD).

An INGO colleague from Cox’s Bazar, who already practices an alternative project management approach and



## Local partnership experiences in South Sudan

**NGO landscape in country:** Mainly country offices of INGOs and UN agencies with strong presences, plus an emerging sector of small, relatively new local organisations that are hardly aware of the localisation agenda. All are often led by or strongly rely on foreign staff.

**Localisation strategies:** International organisations often limit their localisation strategies to careful nationalisation of their own structures, local procurement, and a better interlock of their projects with initiatives of local communities and the (local) government. They do not necessarily aim for more (equitable) cooperation with local organisations. This is due a variety of reasons, including a) a weak civil society that has a difficult relationship with its government(s); b) a weak (local) government and legal system; c) ethnic and regional conflict lines that hinder some local organisations to work in certain areas; d) a lack of trust of international organisations and local communities in local organisations as they are rooted in a corrupt society; and e) a lack of higher education qualification of staff. International organisations see themselves as better equipped to handle such challenges using their own structures rather than investing in partnerships that are harder to control. However, as the pressure from donors and the South Sudanese government increases, some are starting to develop partnership strategies and are hiring partnership coordinators to map the local NGO landscape and create partner selection criteria.

**Partnership models:** Most international organisations implement project themselves, through their own structures. Sub-contracting is slowly increasing. Eye-level partnerships are rare. Some international organisations have started capacity strengthening activities for selected local organisations.

**Quality of partnership:** If existing at all, partnerships between local and international organisations are project-based subcontracting cooperations, often including on-the-job capacity strengthening activities. Thus, many local organisations advocate for more subcontracting, not even thinking or speaking of equitable partnership. In doing so, they argue with (cost) efficiency and effectiveness, rather than normative arguments.

holds a role similar to that of a Scrum master, agrees: Restructuring humanitarian roles “takes a lot of time and mentoring effort.” (CB WS3, Group 1). Besides the challenge of motivating affected communities to take on a leadership role, he reports that the project team mindset is not easy to digest for local and national NGOs in Bangladesh either: “Whenever I came up with – ‘we need to have

this different governance structure; we [should] have a joint decision-making procedure; we have to review in every quarter what we want to do next...’, [LNGOs] could not understand because they think that they are only service delivery organisations. They do not think beyond that. It took more than one year for our [local] partners to be a bit there. I used to say: ‘I’m only here to facilitate. I’m not here to do anything [else beyond that].’ [...] It has been messy. But that’s because when you do new things, it is always messy. It was really tough for me.” (CB WS3, Group 1). INGOs based in Germany support this view and admit that they fear the burden of the anticipated additional workload as well as the uncertain risks when trying out new approaches.

**When you do new things, it is always messy**

Another challenge connected with the necessary intense mentoring to implement agile management roles is “changes between individuals [i.e., staff], because the whole learning collapses if individual staff leave during the project. [...] That person’s mentoring is then lost, and we need to start anew” (CB WS3, Group 1).

Further elaborating on the “mindset issue”, INGOs from Germany highlight that the agile model only works on the **basic prerequisites of trust and respect**. They also anticipate that cultural aspects may have some influence as

well. Eye-level approaches might for example be hard to implement in paternalistic, hierarchically organised societies.

Switching from the discussion of mindsets to more tangible challenges, INGO colleagues in Cox’s Bazar find: “If everyone is to contribute to decision making, then this makes things more difficult [and time intense]” (CB WS3, Group 1). For this reason, if they are to produce timely results, agile consultation and participation processes needed to be simplified (CB WS3, Group 1). INGOs based in Germany share this view and ask: “How can a project be effective if you are always meeting and discussing? [...] It just makes decision-making more complicated and lengthier, [...] especially if different time zones needed to be integrated. [...] It would increase costs, including climate costs, as projects would proceed more slowly and involve a lot of calls and travel to move everyone to the same table.” (GINGO WS). They also point to donors, specifically, who might not have the capacity (staff, funds, structures) to engage in frequent in-person meetings, especially if they have to travel far to do so. All these efficiency-related considerations led to overall scepticism in Germany-based INGOs, asking: “How does a participative approach like this bring us forward at all? What is the added value? Is it better needs assessments? Lower administrative costs? Localisation? And is localisation an added value in itself?” (GINGO WS)

### 3.3. Discussion of findings

First of all, to answer the final question of the previous chapter and to reconnect the analysis with the beginning of this paper, “localisation” is indeed a value in itself. It is not only about increased effectiveness, but also about self-determination of affected communities and decolonisation (Osofisan 2020; Slim 2021; Baguios et al. 2021; Barter and Sumlut 2022; Baguios 2022). Beyond this background the international humanitarian community agreed that,

**Equitable partnership should be implemented in humanitarian practice, even if this proves to be challenging**

as part of the localisation agenda, equitable partnership should be implemented in humanitarian practice, even if this proves to be challenging. As chapter 2 showed, such challenges involve a range of actor-specific, structural and social barriers. One structural barrier is the integration of equitable partnership into the dominating structures of the formal international humanitarian system. As these structures also include project management mechanisms, chapter 3.1 pointed to options to facilitate equitable partnership in contemporary humanitarian Project Cycle Management. However, chapter 3.2 showed that equitable partnership is much better anchored in agile management models such as Scrum.

The feasibility check revealed that agile management is not completely new to the humanitarian sector. Some humanitarian actors are already experimenting with more equal roles and flexible project outputs. However, **applying agile models to the humanitarian context comes with a wealth of undeniable challenges**. To implement agile management, donors and international organisations must be willing become ordinary team members. They must have the courage and capacities to actively engage in flexible and equitable project processes as well as the patience to deal with more complex decision making. Project owner representatives must carefully consider possible divides within affected communities and serve as reliable partners. Local organisations and affected communities must be encouraged to take active leadership roles and related responsibilities. All this makes projects more complex and less timely. In addition, new approaches always come with uncertainty and risks.

While acknowledging these challenges, it would be beneficial not to abandon a promising approach to integrate equitable partnership structures in humanitarian project management. Doing so, humanitarian partners could first test agile management models in sandbox setups under favourable conditions to see whether and how anticipated challenges indeed arise in practice, before expanding

them to less favourable contexts. In less favourable contexts, humanitarian partners could also take a reverse approach and first experiment with hybrid approaches, before gradually shifting these towards more and more agile models as the specific humanitarian contexts allow.

## Sandbox testing

Sandbox setups are environments in which innovative approaches can be tested in a controlled context, while minimising risks. A sandbox environment to test agile management in humanitarian action could be for example a slow onset or protracted crises, where timeliness is not the first priority. This would account for the more complex discussion and coordination processes that come with more equal, mutual and transparent approaches. To reduce risks for donors, the agile approach could be tested in a project with only limited scope and volume and comparably simple and clear anticipated outcomes. However, to allow a potentially “messy” start-up phase where stakeholders adjust to their new roles and relationships, project duration should be at least 2-3 years. For a smooth cooperation, the project should be situated in a comparably strong, undivided civil society that is interested to play a strong and active role as project owners. The project team should have successfully worked together before and know, respect and trust each other. Hence, especially local and international organisations that already describe themselves as equitable partners would be best suited. In addition, the project team needs to involve donors with a comparably strong local presence and the capacities to be closely involved in regular project management processes. To further ease the cooperation within the team, sprint meetings could be moved to an online platform with equal access for all team members. Such an agile platform could partially translate potentially lengthy meetings into one-click inputs on online canvasses and/or chat functions. The platform could include (or be linked with) an online reporting tool, where accountability documents are transparently filed. This would address fears of increased misconduct in agile projects with only vaguely pre-defined project outputs. Finally, to account for unforeseen teething troubles and document learnings, the project should be accompanied by agile management experts and researchers.

## Hybrid models

Another approach, especially suitable for less favourable humanitarian environments, would be to gradually introduce agile management through hybrid approaches, combining agile and waterfall management aspects. For example, while keeping PCM structures, a project could involve agile management setups in certain PCM phases or steps, such as needs assessments or project designs (Jonathan, INGO G). Another option would be to jointly revisit the project flow, analyse where hierarchies produce “good decisions” and build up on these while

replacing hierarchies with flatter agile management approaches where this is not the case (Georg, AC). As one agile management expert explained, most importantly, equitable partnership involves good decisions (Georg, AC). “Good decisions” are “made in the interest of the group as opposed to the interests of individuals” (Georg, AC) and are “based on good information” (Georg, AC). “Good information” includes the perspectives of a variety of stakeholders. It is important that voices are heard and equitably incorporated in the decision making, and that information on the background and nature of decisions is communicated back to the informants (Georg, AC).

Thus, equitable decision making does not always involve a *joint* process. When complying with the determinants of good decision making, central decisions made in hierarchies can be equitable as well, while at the same time being timelier and less complex. Allowing such “good” hierarchies next to agile niches would hence address concerns of too high complexity and a loss of timeliness in agile humanitarian project management while at the same time increasing participation and local ownership where feasible.

In hybrid frameworks, however, it is important to link the different management structures effectively (Georg, AC). **MOCHA** (Manager, Owner, Consultant, Helper, Approver), an application of Scrum does so by introducing the additional role of the “manager”, next to project owners (therein named “approvers”), Scrum masters (therein “owners”) and project teams (therein “helpers” and “consultants”). A “manager” issues agile projects within traditional hierarchical structures and hands them over to Scrum masters (“owners” in the MOCHA model) for facilitation. These then build and manage agile project teams in compliance with project owners’ visions. In doing so, “managers” define the framework within which the agile team can work, including budget and timeframe. However, they do not engage in operational decision-making or steering.

**Link the different management structures effectively**



# Conclusion

This paper began by defining equitable partnership through three determinants: equality, mutuality and transparency. Based on a brief review of common barriers to the implementation of equitable partnership, it analysed contemporary humanitarian Project Cycle

## **Project Cycle Management introduces hierarchical approaches that impede equality**

Management as a structural barrier. This analysis revealed that, from a structural perspective, humanitarian Project Cycle Management facilitates equal, mutual and transparent cooperation in the dialogue and design phase. In the project formulation phase, however, it introduces hierarchical approaches that impede equality and (through a limitation of links between the humanitarian partners) also mutuality and transparency. Consultations with international and local organisations in Germany, Bangladesh and South Sudan revealed practices that manipulate the structurally equitable dialogue and design phase towards more inequitable cooperation. However, they also pointed to options of addressing these practices and softening the negative effects of the hierarchies introduced later in the project formulation phase.

As these options only provide quick fixes, the paper continued to explore the potential of a change in management approaches. It discussed agile management as a management model that is structurally better suited to facilitate equitable partnership. As has been shown, in comparison with the traditional “waterfall management” approach of humanitarian Project Cycle Management, agile management flattens hierarchies and turns them upside down. It removes contractual burdens and intermediary positions, thus enabling humanitarian partners to be more equal and have mutual access to transparent information and leading to flexible and relevant outcomes.

However, while potentially drastically transforming the way of how international organisations, donors and local and national organisations work together, applying agile management in humanitarian action comes with a multitude of practical challenges. Acknowledging these, the paper proposed to first test agile management models in sandbox setups under favourable conditions, before expanding them to less favourable

contexts, humanitarian partners could also take a reverse approach and first experiment with hybrid approaches, before gradually shifting these towards more and more agile models as the specific humanitarian contexts allow. In any case, it would be interesting to further explore the potential of agile approaches in humanitarian action.

With this analysis, this paper responded to repeated critiques of “the top-down orientation of the humanitarian system, viewed as a ‘multi-layered and sometimes overbearing delivery system for resources and expertise from wealthier people and countries to poorer people and countries’, turning beneficiaries as objects of assistance rather than subjects of their recovery and resilience” (Harris and Tuladhar 2019, 36). It recognised that “localisation requires a shift in power relations between actors, both in terms of strategic decision making and control of resources” (Geoffroy and Grunewald 2017, 4) and pointed to a tool to handle this change in power relations as it provides an “equitable ecosystem which [...] recognises complementarities and allows for more open and transparent communication” (NEAR 2020a, 2).

## Endnotes

- 1 For definitions, please refer to chapter 1.4 “A note on terminology” below.
- 2 “Strengthening Response Capacity and Institutional Development for Excellence”-Project. <https://annualreport.islamic-relief.org/2021/portfolio/strengthening-local-response/>
- 3 “Strengthening capacities of local actors in humanitarian response, preparedness, coordination and advocacy”-Project. <https://together-for-localisation.org/>
- 4 VENRO is a German umbrella organisation uniting 140 development and humanitarian non-governmental organisations (NGOs) in Germany. It represents its member organisations’ interests vis-à-vis the German government and works towards a strengthening of the role of NGOs and civil society in development cooperation and humanitarian aid and a sharpening of public awareness of related themes (see: <https://venro.org/english>).
- 5 The Capability-Opportunity-Motivation-Behaviour system (COM-B) is part of the *behaviour change wheel* developed by Michie, van Stralen, and West (2011). Lees et al. (2021) introduced it to the humanitarian context.

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## Imprint

@ Centre for Humanitarian Action, February 2023

This paper is a result of the project component **Identifying and overcoming localisation barriers in the area of project management and risk transfer**, which is part of the project **“Strengthening the Programme and Policy Relevant Capabilities of Humanitarian Actors in Germany” (SPreAD)**, funded by the German Federal Foreign Office.



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## Suggested citation

Pellowska, Darina 2023: “Localisation in practice – facilitating equitable partnership in humanitarian project management”. Berlin, Centre for Humanitarian Action.

## Other CHA Publications

CHA, and GELI. 2023. Leadership and humanitarian change – why more collaboration and transformation is needed. Berlin: Centre for Humanitarian Action.

Hövelmann, Sonja. 2022. With nine months on the clock: Where does the Grand Bargain 2.0 stand and what role is Germany taking on? Berlin: Centre for Humanitarian Action  
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February 2023