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HUMANITARIAN ACTION



A HUMANITARIAN LOCALIZATION BASELINE FOR UKRAINE: PROGRESS REPORT 2025



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FOREWORD

While progress on localization in Ukraine remains uneven and incremental, it has been an encouraging year, with key areas such as policy influence, funding, and leadership showing significant and continued positive orientation towards local ownership, albeit from low levels. This hopefully indicates a change of mindset and culture. It is encouraging to see that transparency, quality partnership, and giving credit when credit is due have become a recipe for success, or at least financial stability, among international actors.

The positive development reflects a gradual increase in national actors' agency as well as a behavioral shift among international partners. Over the past few years, national organizations have strengthened their institutional capacities, diversified funding sources, and gained visibility within coordination and advocacy platforms, allowing them to claim a more active role in shaping priorities and be more selective in partnerships. At the same time, many international actors are responding to localization commitments and donor expectations by adopting more inclusive partnership models, integrating co-creation practices, and involving local partners in strategic planning.

Together, these dynamics suggest a gradual rebalancing of influence, where national organizations are no longer viewed solely as implementers, but increasingly as equal contributors to joint decision-making. While this shift is not yet uniform among all actors, it signals a meaningful move toward shared ownership and accountability within the humanitarian system.

Reform and reset were important terms in 2025, but they have been heard with regular intervals for at least the last 20 years, without the humanitarian community noting much of a difference in practice. It still remains uncertain if we can build something new on the rickety foundation we currently stand on, or if a complete rebuild is a better option to meet the humanitarian challenges of the future. A humanitarian system created by international actors for international actors will not transform itself if we ask the same actors to change the system. Reform in practice requires genuine, broad consultations with local, national, and international practitioners, and for them to be heard, not just listened to. At a minimum, we need to demand that the international system uphold its promises of gradually shifting power to local and national actors, preferably at a steady pace. Based on past experience, it would be prudent to at least question the effectiveness of top-down and self-reform approaches.

While a single, universal solution is often a fashionable way to promote the localization agenda, it is not enough to make it happen. While in 2024 it was capacity strengthening, in 2025 it has been pooled funds. A pooled fund can work as an extremely effective tool, but it is not a miracle localization medicine. A humanitarian and donor community marching full speed ahead with tunnel vision and blinders risks going off a cliff sooner or later, to no one's benefit. It was also fashionable in 2025 to advocate for adopting exit strategies. Hopefully, we will see a shift in 2026 from these discussions towards one that focuses more on complementary strategies while promoting local leadership.

Complementarity between actors will be crucial for a more effective and efficient humanitarian response globally, particularly in a time of resets, funding shortages, and rising humanitarian needs. Complementarity also means that international and national actors are increasingly committed to quality and principled partnerships based on equity and transparency, enabling them to fully leverage joint strengths, such as resources, expertise, and networks. Furthermore, it requires a willingness to honestly recognize your own strengths and weaknesses within a partnership, to provide the best possible support, and to effectively mobilize joint resources to the benefit of beneficiaries, donors, and their own organizations, thereby building trust in the process.

While overall funding has declined in Ukraine, some national and local actors are experiencing relatively expanded operations and financial stability. The trend highlights a different funding landscape, efforts to replace funding, more direct funding mechanisms, and donor strategies that increasingly prioritize national needs and capacities. The declining funding has led both international and national organizations to expand their engagement into broader geographical areas, work across more sectors, and collaborate with a wider range of partners. The results from this year's baseline are encouraging in many fields, but they seem to promote an evolution towards large, generalist organizations rather than specialists within the humanitarian community. The question is whether this is really the best way forward? Will this increase the quality of the response? And how does support for community-based organizations fit into this equation?

For national leadership within the humanitarian response to work, we need to lead by example and commit to the same principles we require from others, not only in words but in practice. National actors that act as intermediaries are significantly less likely to provide, for example, cost related to overhead, administrative costs, and Duty of Care. We must lead from the front, not behind the backs of others, saying one thing and doing another; we must not compromise on our values and principles. Humanitarian efforts should not be funded solely because they are local, but because local actors are best placed to provide assistance that is principled, efficient, effective, and relevant.

The humanitarian community in Ukraine appears to have transitioned from a theoretical consensus to actual practice, with a long and winding road still ahead, promoting a slow yet ongoing cultural and mindset shift that is actually improving systems and ways of working to the benefit of people in need. Still, the journey is far from complete, and we need to recognize that our objective will be reached through many small steps on a daily basis, and not the occasional giant leap.

Fredric Larsson
Director
NGO Resource Center

ACRONYMS

ABC	Area-Based Coordination
CAFOD	Catholic Agency for Overseas Development
CATI	Computer-Assisted Telephone Interviewing
CAWI	Computer-Assisted Web Interviewing
CSO	Civil Society Organization
GFFO	German Federal Foreign Office
HAG	Humanitarian Advisory Group
HCT	Humanitarian Country Team
HLF	Help Localization Facility
HOCCG	Humanitarian Operation Coordination Group
IASC	Inter-Agency Standing Committee
ICVA	International Council of Voluntary Agencies
IDP	Internally Displaced Person
IFRC	International Federation of Red Cross and Red Crescent Societies
INSO	International NGO Safety Organization
KII	Key Informant Interview
NGO	Non-Governmental Organization
NGORC	NGO Resource Center
OCHA	UN Office for the Coordination of Humanitarian Affairs
PIANGO	Pacific Islands Association of Non-Government Organizations
SHE	Safety, Health, and Environment
U.S.	United States of America
UHF	Ukraine Humanitarian Fund
UK	United Kingdom
UN	United Nations
USAID	United States Agency for International Development

EXECUTIVE SUMMARY

About the initiative

Each year, this initiative takes stock of how localization moves from words to action in Ukraine's humanitarian response - identifying progress, gaps, and opportunities for deeper change.

The third phase of the research was carried out by the NGO Resource Center (NGORC) in partnership with InfoSapiens and the Humanitarian Advisory Group (HAG), with financial support from ActionAid, CAFOD, Christian Aid, and Helvetas, as well as self-funding from NGORC.

The study applies a contextualized localization measurement approach and framework, originally developed by HAG and the Pacific Islands Association of Non-Governmental Organizations (PIANGO), as a universal method for tracking localization progress at country and regional levels.

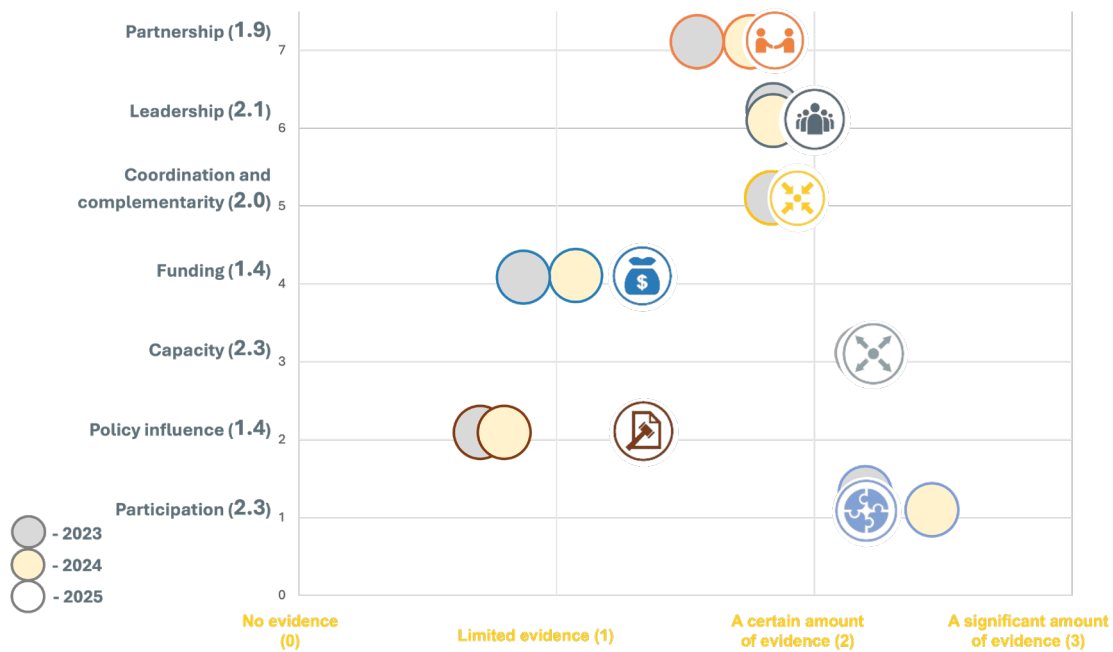
In 2025, the research included a survey of 318 representatives of national and international NGOs, 20 in-depth interviews with key informants, and an analysis of policy and strategic documents. This methodological framework has been applied in multiple humanitarian contexts worldwide, ensuring comparability and reliability of findings.

The study presents a comparative analysis of localization progress in Ukraine across seven domains, using key indicators that provide an evidence base for stakeholders to assess and monitor changes over time. Its findings offer practical insights for international and national actors, donors, and government partners to track localization commitments, identify systemic barriers, and guide collective action. While comprehensive recommendations fall beyond the scope of this initiative, the evidence gathered serves as a strong foundation for accountability, advocacy, and policy dialogue.

KEY FINDINGS

The Localization Baseline study analyzed seven key domains supporting the localization of the humanitarian response in Ukraine. Comparative analysis provides evidence of changes within several domains, identifying trends in progress towards a localized response.

Figure 1. Level of localization evidence: progress 2023-2025



Across the seven domains, there is positive progress on localization in Ukraine, although it remains uneven and incremental. Gains are most visible in policy influence and access to funding, signaling a shift from participation to influence and modest improvements in financial equity. Leadership and partnerships show gradual strengthening, yet systemic power imbalances persist, with smaller actors often excluded from decision-making spaces. Coordination and capacity have plateaued, reflecting structural constraints and dependency loops, while participation, though still strong, faces challenges in maintaining community engagement at scale.

PARTNERSHIPS

The overall assessment of localization evidence in the partnerships domain remains as Limited Evidence (1.9 points), with only a small increase compared to the 2024 progress review (1.8 points).

Localization evidence in partnerships remains modest, showing little change from 2024. While ethical practices and power-sharing show some improvement, structural imbalances persist. National organizations now hold as many formal partnerships as international actors, and those with more than 10 partnerships doubled, driven by donor localization priorities and funding diversification. Inclusion in decision-making is growing, with 60% of national NGOs reporting being mostly or always involved, but gaps remain, as international actors often overestimate local influence. Increases in the number of partnerships do not automatically lead to stronger influence within those partnerships, as the nature of engagement often matters more than its scale. Influence is becoming more distributed as more actors participate in decision-making. More partnerships are associated with broader operations, larger teams, and increased participation. Financial equity is improving, with overhead and administrative cost coverage increasing; yet many smaller organizations remain vulnerable, and Duty of Care funding remains rare.

LEADERSHIP

The overall assessment of localization evidence in the leadership domain remains as Some Evidence (2.1 points), slightly improved from the 2024 progress review (1.9 points).

Localization evidence in leadership improved in 2025, mainly due to stronger support from international actors for national leadership. However, perceptions of national NGOs leading decision-making declined, signaling persistent barriers to genuine leadership transfer. Local leadership is deepening among current actors, though it is not broadening to bring in new ones. Engagement with donors increased, particularly for larger NGOs, but smaller actors remain less visible, risking consolidation of influence among well-connected organizations. Respect for state leadership structures grew, yet civil society actors remain underrepresented. Overall, leadership progress is deepening for a few but not broadening across the sector, raising concerns about equity and systemic inclusion.

COORDINATION AND COMPLEMENTARITY

The overall assessment of localization evidence in the coordination and complementarity domain remains as Some Evidence (2.0 points), with no change from the 2024 progress review (2.0 points).

Localization evidence in coordination remains static, with no quantitative progress since 2024, though qualitative shifts are noted. Efforts to reform overly centralized models through area-based and blended approaches have begun, but their impact is yet to be seen. National NGO participation in coordination forums is increasing and becoming more institutionalized, yet influence remains uneven and largely capacity-dependent, favoring larger organizations. Representation without influence remains a significant challenge, as language barriers and persistent power asymmetries hinder meaningful engagement.

FUNDING

The overall assessment of localization evidence in the funding domain improved to Limited-Some Evidence (1.4 points), a visible improvement from the 2024 progress review (Limited Evidence, 1.1 points).

Localization evidence in funding improved in 2025, driven by greater access to direct funding channels and diversified sources, though overall humanitarian funding continues to decline. Despite progress, most resources still flow through international intermediaries, and only a small share of actors view funding as fair or proportionate to their needs. Financial stability among national NGOs increased to 59%, largely for those with multiple partnerships, while smaller organizations remain vulnerable. Overhead and operational cost coverage is improving but remains inconsistent, limiting liquidity and resilience. Persistent structural barriers and compliance requirements continue to constrain equitable funding.

CAPACITY

The overall assessment of localization evidence in the capacity domain remains as Some Evidence (2.3 points), with no change from the 2024 progress review (2.3 points).

Localization evidence in capacity remains unchanged. While most actors report jointly defining capacity needs, genuine local leadership in setting priorities is limited, with international frameworks and approaches continuing to dominate. Capacity support is also largely short-term and project-based, focusing on operational compliance rather than institutional autonomy, which risks reinforcing dependency while repetitive donor-driven trainings persist. National NGOs increasingly benefit from training and resources, yet only 24% can fully meet their capacity needs. Overall, capacity strengthening remains consultative rather than transformative, constraining progress toward sustainable localization.

POLICY INFLUENCE

The overall assessment of localization evidence in the policy influence domain improved to Limited-Some Evidence (1.4 points), a considerable improvement from the 2024 progress review (Limited Evidence, 0.8 points).

Localization evidence in policy influence improved markedly, reflecting greater engagement of Ukrainian actors in humanitarian policy discussions and donor consultations. This indicates a potential shift from participation to influence, though full co-ownership remains elusive. National NGOs are increasingly recognized for contextual expertise, yet structural power imbalances persist, with donor priorities still largely set by international institutions. Transparency in sharing budgets and proposals remains limited, constraining informed dialogue and equitable decision-making. Overall, progress is significant but uneven, underscoring the need to integrate more local leadership into policy processes.

PARTICIPATION

The overall assessment of localization evidence in the participation domain regressed to Some Evidence (2.3 points), a decline from the 2024 progress review (Some-Substantial Evidence, 2.5 points)

Localization evidence in participation declined slightly in 2025 compared to the 2024 progress review, returning to 2023 levels. While it remains one of the strongest domains, progress is uneven: communities and local actors continue to shape programming through consultations and feedback, but influence is mostly confined to local initiatives rather than systemic decision-making. National NGOs report reduced ability to maintain close ties with communities as their geographic scope expands, while international actors show modest improvement in considering local needs. Flexibility to adapt programs remains constrained by donor requirements, creating delays and limiting responsiveness to evolving community priorities.

These trends across the seven domains underscore that localization is progressing to a degree; however, it is happening without deeper reforms in governance, financing, and accountability. As a result, progress risks remaining fragmented and concentrated among a few well-connected actors.

INTRODUCTION

As we approach another year of Russia’s full-scale invasion of Ukraine, the Russian Federation has increased its targeting of civilians through drone attacks and intensified bombings of residential districts and other civilian infrastructure. Despite diplomatic efforts, Russia has intensified its effort to depopulate large parts of the country, underscoring the systematic nature of Russian war crimes in Ukraine, resulting in 3.69 million internally displaced persons (IDPs) as of September 2025¹, fresh waves of refugees, and a 27% rise in civilian casualties in January-October 2025 compared to the same period last year².

The purposeful targeting of humanitarian workers, humanitarian infrastructure, and resources further exacerbates the situation: the number of security incidents that involve humanitarian workers increased by 50% during the first half of 2025³. Even though humanitarian law protects humanitarian personnel, the attacks are becoming more frequent and blatant.

The ongoing war is evolving, and these challenges occur amid funding shortages. As of November, only 46.2% of the \$2.63 billion planned for the 2025 Humanitarian Response Plan had been received, resulting in a significant reduction in much-needed aid to essential programs, despite the current rising needs⁴.

Even though the humanitarian engagement in Ukraine predates the full-scale invasion, the ongoing war has fundamentally reshaped the scope, priorities, and coordination of the response. Ukrainian civil society and non-governmental organizations (NGOs) continue to serve as first responders, maintaining access to affected populations where international actors sometimes face limitations. Despite continued funding shortages, infrastructure damage, and capacity strains, local responders have demonstrated remarkable agility and resilience, sustaining critical operations amid volatile conditions and prolonged displacement.

The U.S. Government announced the cancellation of more than 80% of all United States Agency for International Development (USAID) programs globally on March 25, 2025. U.S. funding covered around 30% of all coordinated humanitarian funding plans in Ukraine in 2022, 2023, and 2024. Correspondingly, the cuts had a drastic impact on the possibility of fully covering humanitarian needs in 2025⁵.

A Humanitarian Reset was called in response to the deepening humanitarian funding crisis, in what has been referred to as “... a defining moment for the humanitarian community.”⁶ The Inter-Agency Standing Committee (IASC), under the leadership of Tom Fletcher, is tasked with developing a humanitarian system that operates more effectively and efficiently. Part of the “reset” involves managerial efforts: burden busting, breaking down silos, and better integrating work across United Nations (UN) agencies. Another significant aspect of the effort is directly related to localization.

¹ International Organization for Migration (IOM), Oct 17 2025. DTM Ukraine - Internal Displacement Report - General Population Survey Round 21 (October 2025). IOM, Ukraine

² Office of the United Nations High Commissioner for Human Rights (OHCHR) - Protection of Civilians in Armed Conflict - October 2025

³ [International NGO Safety Organization \(INSO\) Safety Access Review Q2 2025](#)

⁴ Ukraine Humanitarian Needs and Response Plan 2025 / Part 2: Humanitarian Response

⁵ [Implications of the U.S. foreign aid cuts on humanitarian, development, and government-led programmes, ACAPS, 2025](#)

⁶ [Message from Emergency Relief Coordinator Tom Fletcher to the humanitarian community New York, 10 March 2025](#)

Humanitarian reset is committed to “do much more at a local level, close to the communities we serve.” The Humanitarian Reset could potentially develop into a significant step towards meeting future humanitarian challenges and creating a humanitarian system that is capable, effective, and efficient, but equally, it might be watered down and become yet another reform on paper only.

Since the release of the Ukrainian Humanitarian Localization Baseline (2023) and its second wave in 2024, the humanitarian system in Ukraine has entered a phase of consolidation and institutional adaptation, while simultaneously experimenting with new coordination and funding mechanisms. Development since 2024 has indicated a sustained focus on localization by implementing actors as well as institutions alike, underscoring that localization is increasingly viewed as a strategic necessity for the relevance, efficiency, and legitimacy of humanitarian action in Ukraine. In 2025, there were several milestones with a potentially significant positive impact on localization efforts:

- The 3rd Annual Ukrainian Aid Leadership Conference brought together 700 representatives of local and national civil society organizations (CSOs), volunteer networks, international NGOs, UN agencies, donors, the Ukrainian government, and the private sector in Kyiv to discuss Ukrainian leadership within the humanitarian response, with an additional 600 joining online. In 2025, it expanded its member base and launched new joint initiatives to amplify the voice of regional CSOs in humanitarian policy and recovery dialogues.

- Since January 2025, Alliance UA CSO, a civil society think tank with 26 members, has been serving on the National Reference Group for the Grand Bargain in Ukraine, at the invitation of the Grand Bargain Secretariat. The first meeting of the National Reference Group took place in July 2025.

- In 2024, the Ukraine Humanitarian Fund (UHF) supported 25 national NGOs (UHF partners) with a total funding amount of \$74,757,411. To date in 2025, the number of supported organizations has increased to 30 national NGOs, with total funding reaching \$80,435,306. UHF expects to allocate an additional \$40 million to national NGOs before the end of the year. This represents a 20% increase in the number of national NGOs supported and a 7.6% growth in overall funding compared to the previous year. Equally important, UHF has taken a significant step to institutionalize Duty of Care within its funding, which is now regulated through a contractual arrangement. This is a positive step and a locally-driven change within a global system, born out of the recommendations from reviewing small grants and adopted into the UHF localization strategy.

- Beyond UHF, 2025 was a significant year in terms of developing pooled fund facilities, increasing access to direct funding by national actors. Several initiatives emerged, such as the Mental Health Pooled Fund (supported by philanthropic donors), the Askold and Dir Fund (backed by Norway and Sweden), piloting the Ukrainian Pooled Fund, and launching the Help Localization Facility (HLF), funded by the German Federal Foreign Office (GFFO).

● The United Kingdom (UK), Switzerland, and Denmark developed a guidance note, in collaboration with Australia, Canada, Germany, Ireland, Jersey, Luxembourg, the Netherlands, Norway, and Sweden, with support from the Global Resilience Fund, the International Council for Voluntary Agencies (ICVA) and the International Federation of Red Cross and Red Crescent Societies (IFRC) Disaster Response Emergency Fund, intended to inform how humanitarian donors operationalize their reform commitments to promote more inclusive and locally-led action through humanitarian pooled funds. This marks a significant and tangible step to guide donors in their engagement with pooled funds towards localization, as funding partners and as board members⁷.

● Humanitarian NGO Platform in Ukraine, comprising 130 organizations (including 53 national NGOs), and its Due Diligence Taskforce (DDTF) published results culminating from a 1.5-year-long coordination and research process. The study highlights the similarities in the due diligence process among various stakeholders, emphasizing the importance of greater transparency and improved communication among them. It recommends formalizing passporting (particularly for smaller networks) and simplifying processes for smaller or community-based organizations.

● Humanitarian actors made systemic efforts towards adaptive and more decentralized area-based coordination structures in 2025 through Humanitarian Operation Coordination Groups (HOCGs) and Area-Based Coordination (ABC), intended to move power closer to those most affected.

The findings in this report are based on comprehensive data collection and analysis, which combine quantitative survey results with in-depth qualitative interviews conducted among a diverse range of national and international humanitarian actors. The 2025 report provides an updated and detailed picture of how localization is progressing in Ukraine, identifying both areas of measurable advancement and aspects that still require targeted support and systemic change.

This assessment seeks to strengthen the evidence base for a more localized and sustainable humanitarian response in Ukraine. It aims to ensure that all actors, from local organizations to donors and international partners, remain accountable to their localization commitments while further empowering Ukrainian institutions and responders to lead the delivery of humanitarian assistance.

⁷ [Donor guidance on promoting inclusive and locally-led action through humanitarian pooled funds](#)

METHODOLOGY

The 2023-2025 studies used the Localization Measurement Framework and Methods, a globally recognized approach that enables a comprehensive assessment of progress in localization. Researchers have widely applied this framework across various humanitarian contexts, including Fiji, Vanuatu, Tonga, the Solomon Islands, Myanmar, Bangladesh, Pakistan, Afghanistan, and Yemen, as well as in several regional initiatives, ensuring comparability and methodological consistency.

The study followed a partnership-based approach. NGO Resource Center (NGORC) served as the lead implementer, working in close collaboration with InfoSapiens and Humanitarian Advisory Group (HAG) at every stage of the process, from tool adaptation and data collection to analysis and validation.

The research benefited from the guidance of an Advisory Group that brought together representatives from donors, UN agencies, international NGOs, the private sector, and local and national NGOs. This inclusive structure helped ensure both methodological rigor and alignment with the broader localization agenda in Ukraine.

USE OF THE LOCALIZATION MEASUREMENT FRAMEWORK

Figure 2. Localization Measurement Framework



The Localization Measurement Framework encompasses seven domains that together offer a comprehensive overview of progress toward localization: Partnership, Leadership, Coordination and Complementarity, Funding, Capacity, Policy Influence, and Participation. Each domain includes one performance indicator and several progress indicators, allowing for the combination of quantitative and qualitative data to facilitate a balanced analysis. These domains are interrelated: advancement or decline in one area often influences others, reflecting the systemic nature of localization.

To ensure contextual relevance, the methodology was explicitly adapted for Ukraine. The adaptation process established alignment with the local operational environment while maintaining consistency with global measurement standards. Cases where comparability between years may be limited are clearly noted throughout the report (e.g., due to modifications in question wording).

The study assessed the strength of evidence across all seven domains, classifying findings into four categories: "no evidence", "limited evidence", "some evidence", and "substantial evidence". This structured approach enables a nuanced understanding of both the extent and quality of localization progress over time.

DATA COLLECTION

The study applied a mixed-methods approach, combining quantitative surveys with qualitative in-depth interviews to ensure both breadth and depth of analysis (Figure 3).

The researchers conducted the survey in July-August 2025 using computer-assisted telephone interviewing (CATI) and computer-assisted web interviewing (CAWI) methods. A total of 318 respondents participated, the majority representing Ukrainian organizations. All respondents had at least six months of experience in the humanitarian sector and occupied management-level positions. In terms of professional background, 33% worked in the sector for 3-5 years, 22% for 6-10 years, and 30% for over 10 years, indicating a highly experienced respondent pool.

Additionally, the researchers conducted 20 in-depth interviews with representatives of national and international NGOs, UN agencies, and donor organizations: six national actors and 14 international actors (six international NGOs, four UN agencies, and four donors). All interviewees were heads or senior managers within their respective organizations, offering valuable insights into strategic decision-making processes and localization practices.

Since the 2023 baseline study, the number of respondents has increased steadily each year, thereby strengthening the robustness and representativeness of the dataset (Figure 4).

Figure 3. Data sources

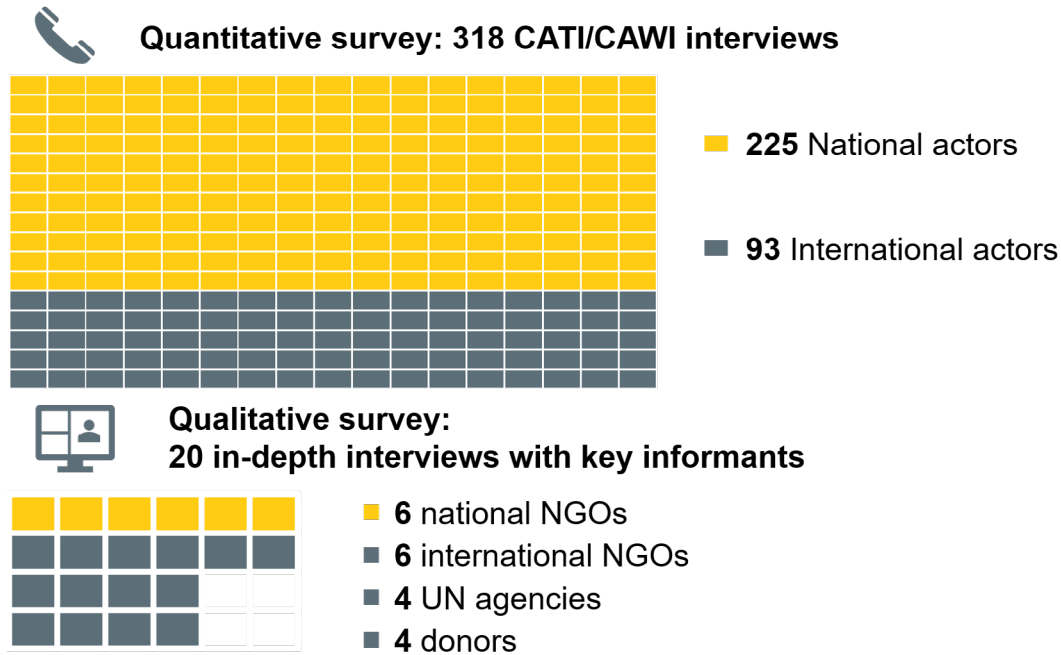
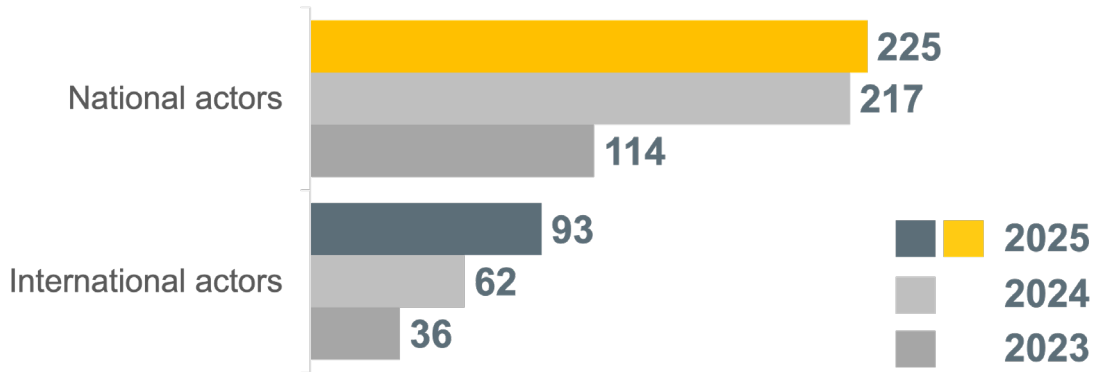


Figure 4. Number of participants



LIMITATIONS

Several limitations should be considered when interpreting the study findings.

- Interpretation bias: Differences in how respondents understood certain key terms used in the survey may have influenced responses and, consequently, the overall interpretation of the data.

- Level of evidence: When indicators are assessed as having "no" or "limited evidence", this does not necessarily indicate that progress has not occurred; rather, it may suggest that such progress was not captured through the available data or methods.

- Scope of analysis: The report offers a high-level assessment of the localization of the humanitarian response in Ukraine. It is not intended to evaluate the effectiveness of the overall humanitarian response or to provide a detailed operational analysis.

- Geographic representation: While national respondents were drawn from various regions of Ukraine, the sample may not fully represent the country's geographic diversity. Moreover, the study was confined to territories under Ukrainian control at the time of data collection.

- Sampling and selection bias: The sampling frame was based on various networks of stakeholder organizations, including a broad range of actors engaged in humanitarian response in Ukraine. Although participation in the study was not restricted and the survey was shared beyond these channels, some degree of selection bias may still be present. Organizations that are more active on coordination platforms, more visible within the sector, or engaged in stakeholder events may be more likely to respond. As a result, smaller community-based organizations or those less connected to formal coordination or networking spaces may be underrepresented in the sample.

RESEARCH PARTICIPANTS

NATIONAL ACTORS

Among the national organizations surveyed, the majority (63%) operated in four or more regions of Ukraine, 19% - in two or three, and another 19% - within the single region. The distribution by years of activity is relatively balanced: 28% were operating for up to two years, 35% for 3-5 years, and 37% for more than six years.

In terms of organizational size, the sample is almost evenly divided: 32% employed up to five staff members, 34% had 6-50 employees, and 34% had over 50 employees.

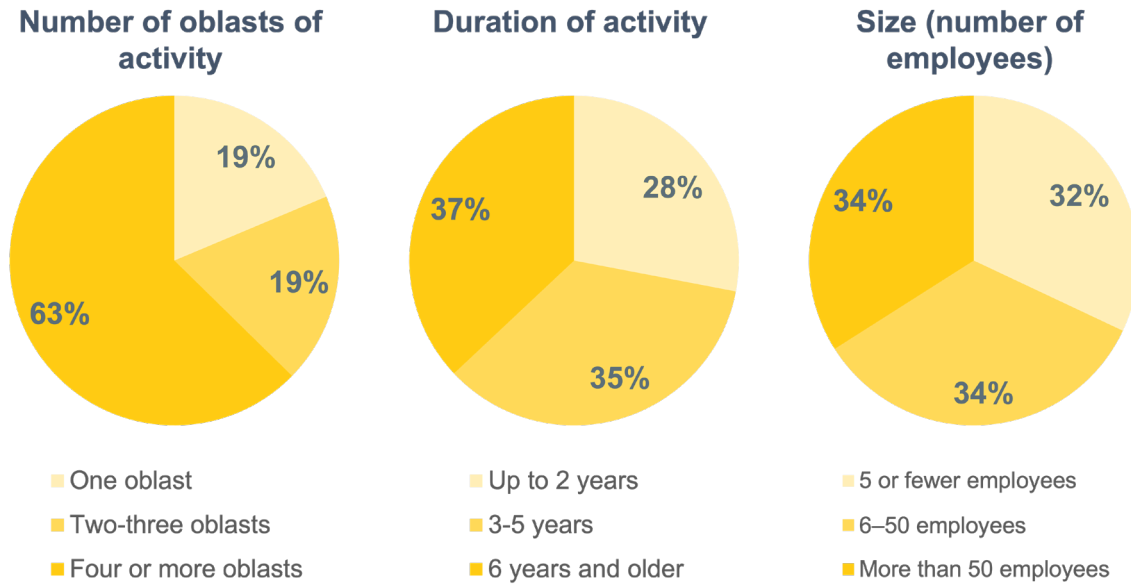
These figures reflect notable shifts in both staffing levels and geographic reach compared to previous years. Such changes align with broader trends in the national NGO sector, driven by factors like expanded access to funding opportunities, the evolving nature of partnerships, the growing professionalization of local humanitarian actors, and a downward trend of overall humanitarian funding available.

Figure 5. Study participants (national actors)

How many oblasts of Ukraine do your activities cover?

How long has your current organization worked in the humanitarian field in Ukraine?

How many full-time employees does your organization have for now in Ukraine?



Participating national organizations were typically engaged simultaneously in multiple humanitarian sectors. The most common areas of operation included Food Security and Livelihoods (61%), Health (56%), and Protection (51%).

In 2024, only 11% of national actors were active across six or more sectors; by 2025, this had more than doubled to 23%, showing the sector’s growing diversification.

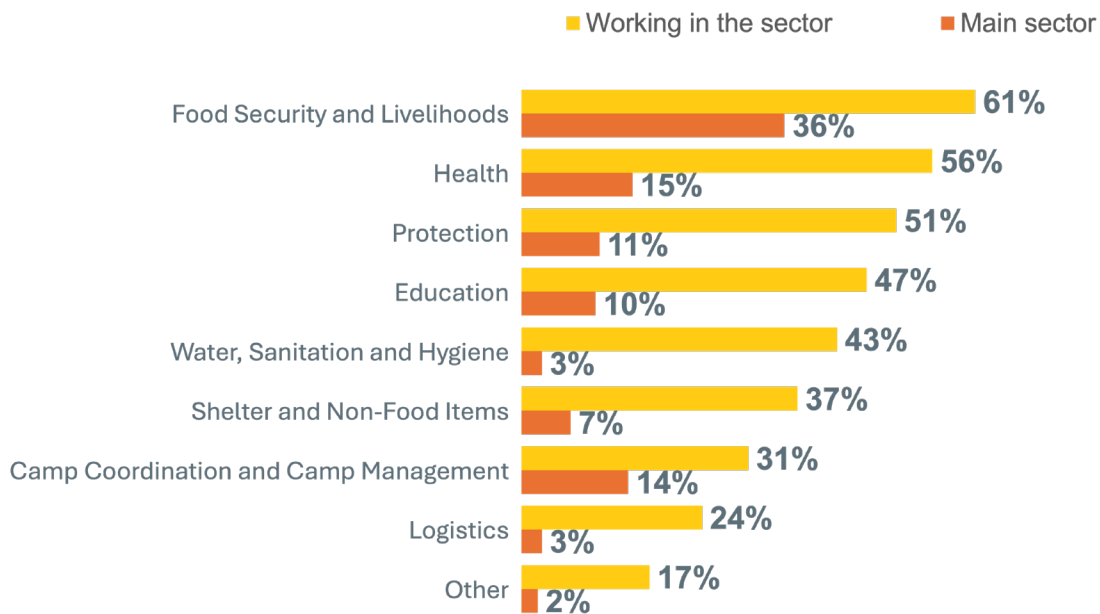


Photo provided by the NGO Resource Centre / Kharkiv Charitable Foundation “Blago”

Figure 6. Sector of activity for participating national organizations

Which cluster/sector do you work for?

What is the main sector of activity?



Organizations operating in more than four sectors reported a significant increase in the number of employees compared to 2022.

Like all larger organizations, organizations operating in more than four sectors had a greater number of agreements with both international and local organizations. They had more financial resources and were more likely to have a more stable operating budget. Such actors were also more likely to finance their national partners' expenses, including overhead.

In cooperation with international organizations, national organizations operating in more than four sectors often practice the principles of equality. They frequently provided their international partners with recommendations on how to improve their activities and were more likely to participate in international forums and act as coordinators of such forums. They were also more likely to have the opportunity to express their opinions in coordination mechanisms, such as clusters.

Organizations working in more than four sectors were more often involved in developing humanitarian policy and planning processes in Ukraine; if not, they were more likely to express interest in getting involved.

Organizations working in 1-3 sectors more often determined local needs themselves, while multi-sectoral organizations were more often assisted by international partners in determining specific needs.

With regard to Duty of Care, organizations working in 4+ sectors more often received assistance from international partners (physical protection, insurance, psychological support programs, and assistance in cases of damage, injury, or destruction during humanitarian activities).

INTERNATIONAL ORGANIZATIONS

Of the 93 international organizations surveyed, the respondents were all senior and middle management, evenly divided between the two groups. The most common sectors of activity for international organizations were Protection (66%), Health (42%), and Food Security and Livelihood Security (41%).

While 28% of international organizations have been operating in Ukraine for less than two years, the majority have been operating for three years or longer. International organizations in Ukraine are larger than national ones, with more than half (55%) employing more than 50 staff, which is more than twice the number found among national organizations (24%). At the same time, 49% of international organizations reported that the number of full-time employees increased significantly compared to 2022, and 19% reported a slight increase. Among Ukrainian organizations, these figures are 35% and 27%, respectively. Compared to 2024, the share of international organizations reporting staff growth decreased significantly (from 86% to 68%), while among Ukrainian organizations it increased (from 51% to 62%).

Figure 7. Full-time employees turnover dynamics

	2025		2024	
	Ukrainian	International	Ukrainian	International
Significantly increased	35%	49%	31%	69%
Somewhat increased	27%	19%	20%	17%
No changes	28%	11%	38%	7%
Somewhat decreased	5%	11%	6%	7%
Significantly decreased	4%	9%	5%	0%

FINDINGS

This section presents the study’s findings on localization progress in Ukraine compared to the baseline survey and the second wave in 2024. The data enable tracking progress and facilitate comparative analysis at the country level. The following section summarizes the results across the seven domains, each of which is examined and analyzed in detail.

Figure 8. Domains’ dynamics

Areas	Level of evidence on a scale from 0 to 3		
	2023	2024	2025
Partnerships	1.6	1.8	1.9
Leadership	1.9	1.9	2.1
Coordination and Complementarity	1.9	2.0	2.0
Funding	0.9	1.1	1.4
Capacity	2.3	2.3	2.3
Policy Influence	0.7	0.8	1.4
Participation	2.3	2.5	2.3

On a 4-point scale, where 0 = no evidence; 1 = limited evidence; 2 = some evidence; 3 = substantial evidence⁸.



Photo provided by Depaul Ukraine

⁸ According to the methodology, “no evidence” means up to 30% positive responses to an indicative question, “limited evidence” means 31-50% positive responses, “some evidence” means 51-75% positive responses, and “significant evidence” means more than 75% positive responses.



PARTNERSHIPS

KEY FINDINGS

The overall assessment of localization evidence in the partnerships domain remains Some Evidence (1.9 points), with only a small increase compared to the 2024 progress review (1.8 points).

Progress indicators	Level of evidence		
	2023	2024	2025
Partnerships are based on equitable and ethical partnership practices	1.0	1.8	2.0
Longer-term strategic partnerships exist that aim to build systems and processes mirroring the ambitions and goals of the local or national partner	2.0	2.0	2.0
Increased power and decision-making of local and national actors within partnerships	1.7	1.7	1.8

“Partnerships are purposeful relationships based on mutual trust, equality and learning — engaging the complementary strengths of the actors involved to collaborate in ways that achieve greater impact than they could achieve alone.”

— CARE International, *Definition of Partnership 2025*

Strong, qualitative, and equitable partnerships between international and local humanitarian organizations are critical to advancing any humanitarian response and localization. This involves international and national actors committing to principled partnerships based on equity to enhance overall efficiency and effectiveness through leveraging complementary strengths. The number of partnership agreements with international organizations has a strong statistical correlation with indicators of the “health” of national organizations, such as financial stability and staff expansion.

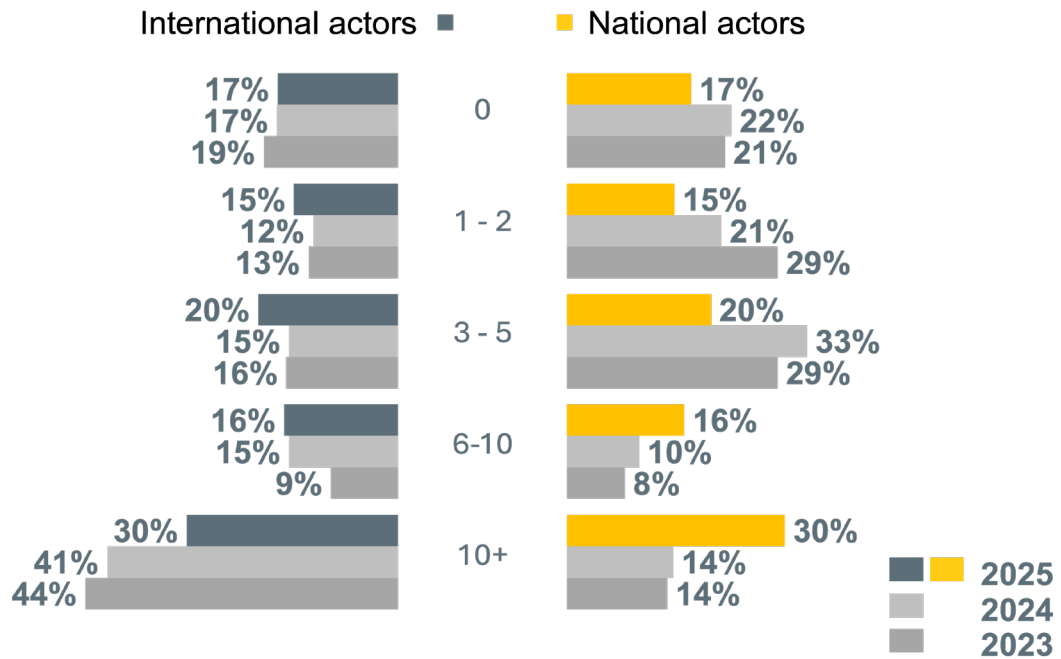
The quality of partnerships remains a key factor in developing localization and is directly linked to positive change within other domains. The gradual progress in the partnership domain continued for the second consecutive year, with improvements in ethical partnerships as well as power-sharing, albeit to a lesser extent.

In 2025, national organizations’ formal partnerships equaled that of international actors (Figure 9). Almost half (46%) of responding organizations had more than six partnership agreements. Organizations with more than 10 partnerships showed a differentiated trend for international actors compared to the national ones. The share of international organizations with more than 10 partnerships decreased from 41% to 30%, while the share of national actors with more than 10 partnerships doubled, from 14% to 30%. This change reflects several external factors, including a donor’s strategic focus on localization-related programming, the need for diversification, increased access to direct funding for national NGOs, and declining overall funding levels.

Figure 9. Number of partnership agreements

National actors: How many partnership agreements do you have with international/foreign actors?

International actors: How many partnership agreements do you have with local/national actors?



Adherence to the principle of equality in partnerships is crucial. Over the past three years, a noticeable difference has emerged in the perception of the level of involvement between international and national organizations (Figure 10).

In 2023, 22% of international and 15% of national organizations emphasized that national actors were always involved in decision-making processes. By 2025, this increased to 34% of international and 22% of national organizations. The share of national NGOs that believe national actors are always or mostly involved in the decision-making process is also steadily growing among national organizations: 43% in 2023, 50% in 2024, and 60% in 2025.

This steady growth reflects both the increasing agency of national actors and a gradual shift in behavior among international partners. Over the past few years, national organizations have strengthened their institutional capacities, diversified funding sources, and gained greater visibility and credibility within coordination and advocacy platforms, allowing them to claim a more active role in shaping priorities.

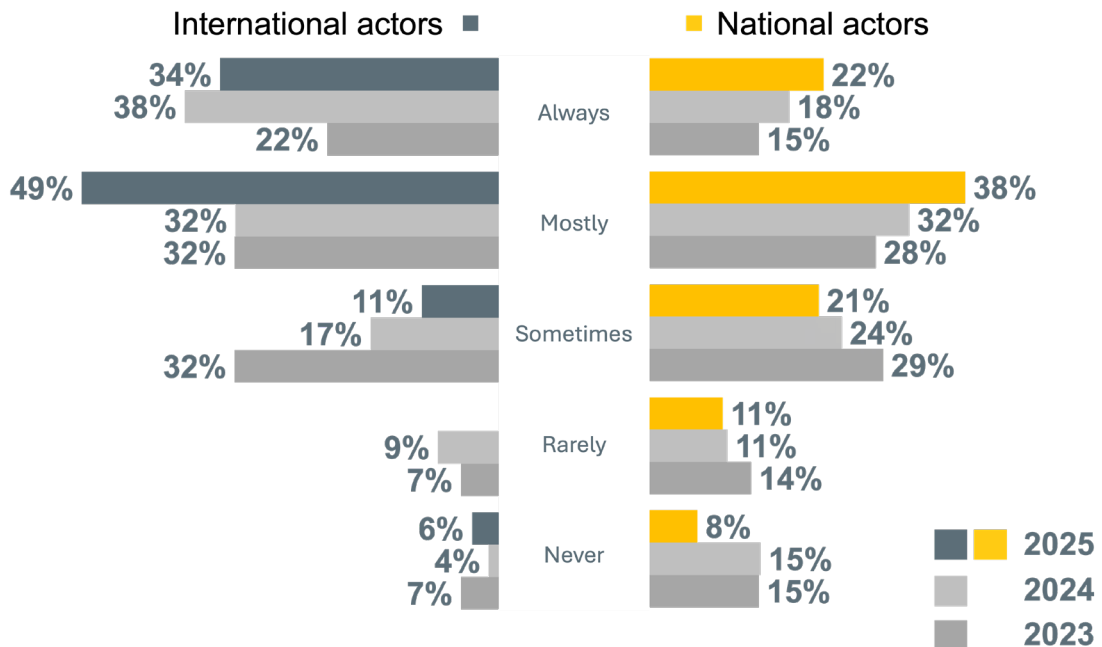
Many international actors seem to be increasingly responding to localization commitments and non-negotiable donor expectations by adopting more inclusive partnership models, integrating co-creation practices, and involving local partners in strategic planning. Increased direct interaction between institutional donors and national actors has meant that examples of bad practice partnerships reach them more frequently and consistently. Additionally, international actors seem to institute feedback mechanism from their own national partners more frequently.

Together, these dynamics suggest a gradual rebalancing of influence process, where national organizations are no longer viewed solely as implementers but as equal contributors within a partnership. While this shift is not yet uniform across all sectors and actors, it marks a significant step toward shared ownership and accountability within the humanitarian ecosystem.

Figure 10. Involvement in the decision-making process

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

International actors: Is your local/national partner organization involved in decision-making in partnerships, e.g., decisions on changing geographic focus, target groups of a project, or decisions on budget reallocations?

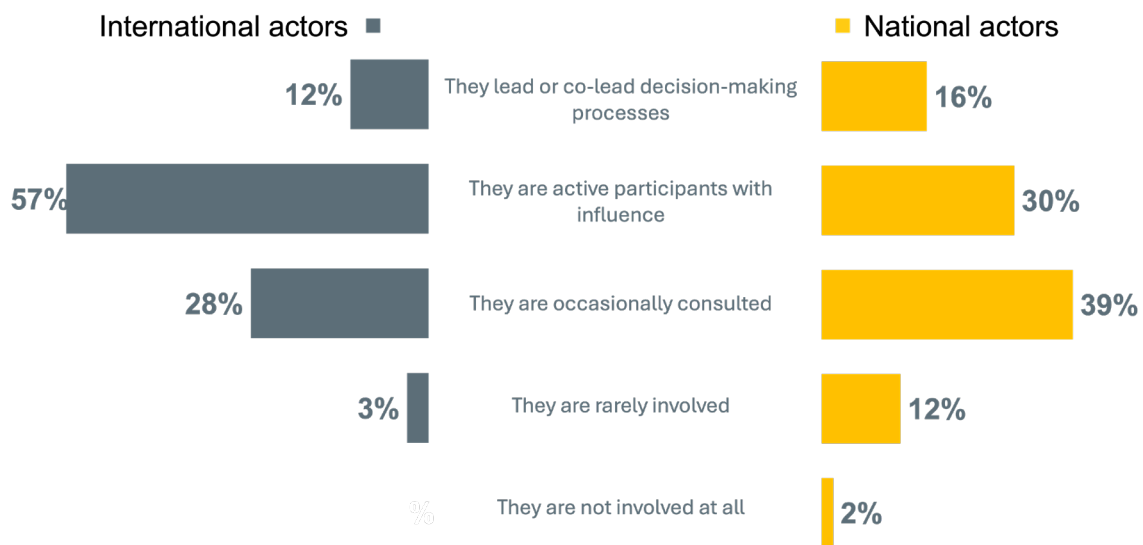


There is a gap between how national and international actors assess the role of national organizations in joint decision-making. While 69% of international organization respondents believed that national actors lead or significantly influence discussions, only 46% of national organizations agreed. This suggests that international actors may overestimate the level of influence process that Ukrainian organizations actually experience in practice (Figure 11).

National organizations reported a much lower level of meaningful participation than international organizations. Nearly four in 10 (39%) said they are consulted only occasionally, compared to 28% of international actors. Another 14% felt they are rarely involved or not involved at all, while only 3% of international actors felt this way. This suggests that many national organizations continue to experience decision-making as selective and uneven, despite international stakeholders’ perceptions of progress.

Figure 11. Organizations’ participation in decision-making processes

How would you describe the involvement of local and national organizations in local decision-making processes?



Key informant interviews (KII) confirmed this trend. International organizations noted that partnerships are becoming more equal and adaptive, with local partners actively involved in co-design, implementation, and monitoring. There is also a growing focus on incorporating partner feedback into the process. Respondents acknowledged that local organizations have a deeper understanding of the context and therefore bring significant benefits to joint work. At the same time, some participants emphasized that donor restrictions and bureaucracy still hinder equality within these partnerships.

Question: Do you consider your partnership to be meaningful, important, useful?

KII 1 (International actor): "In general, it is extremely meaningful. I think we need each other and we both bring added value to the collaboration. I would say that the contributions in terms of knowledge, in terms of expertise, in terms of capacity are quite balanced."

KII 2 (International actor): "The feedback we get is very positive. Of course, there is always room for improvement, but we base how we work and our policies and decisions on feedback from our partners."

KII 18 (International actor): "I hope so. I think that we admire our partners. They are doing incredible things... They know the needs. They come from those communities. They are serving those communities and they know what they need."

National organizations' respondents considered partnerships to be important and useful, and emphasized the need for a better understanding of the roles and strengths of international and national actors.

Question: Do you consider your partnership to be meaningful, important, useful?

KII 22 (National actor): "Recognition of each other. They recognized who was who, understood who was who, started... after recognition came the understanding that you can learn from each other. That is, after we recognized that the international actors recognized that you have this, the national actors understood the role of the international actors, and that's when this equal partnership began to be built."

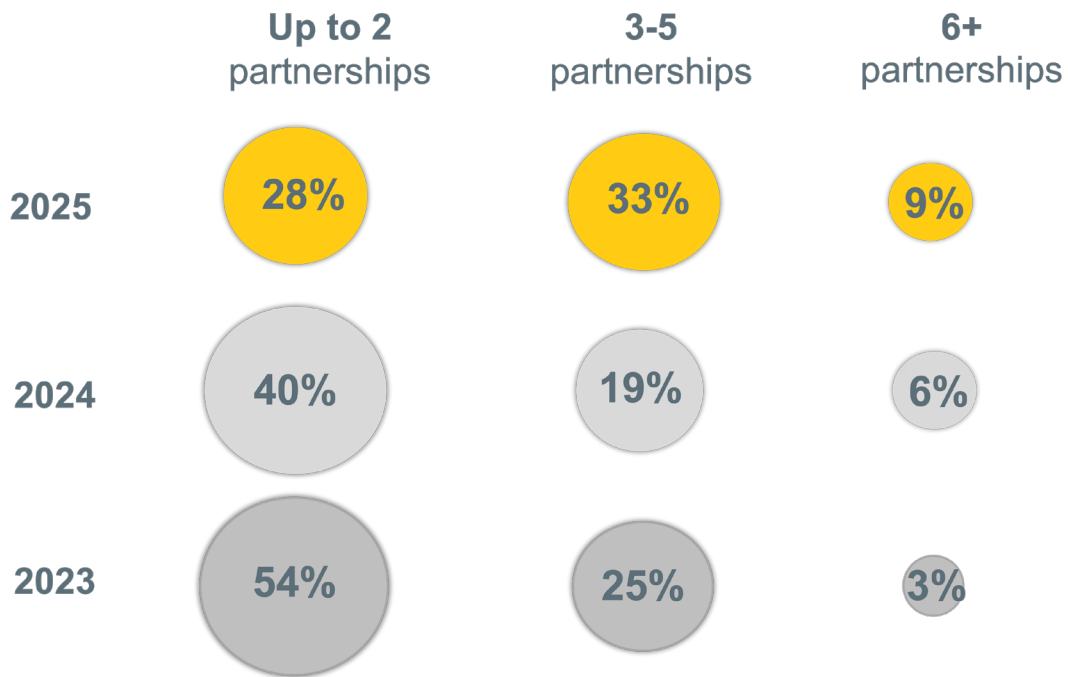
The more partnership agreements national organizations had, the more actively they participated in decision-making processes, confirming the results of previous years. However, the difference between smaller and medium-sized organizations decreased: 28% of organizations with up to two partnerships were not involved/rarely involved in decision-making processes, while 33% of organizations with 3-5 partnerships were not. This is a 14-percentage-point increase from 2024 and suggests that having a higher number of partnerships does not necessarily translate into greater influence within a partnership.

The rise may reflect the growing complexity and administrative burden associated with managing multiple partnerships, or a shift towards more transactional and short-term collaborations that provide less space for strategic participation. Among national organizations with more than six partnerships, 9% reported that they were rarely or not involved in decision-making processes, which is three percentage points higher than in 2024 (Figure 12). Furthermore, the results for 2025 show continuing positive development: organizations with fewer partnerships felt less excluded from the decision-making process compared to previous years, and smaller organizations were beginning to "catch up" with medium-sized organizations in terms of their influence on important decisions.

Compared to the previous year, organizations with a higher number of partnerships perceived themselves as being less involved in decision-making processes within partnerships. As more actors enter the decision-making arena, the balance of influence may be redistributing, creating both opportunities for smaller organizations and international intermediaries focusing on fewer quality partnerships.

Figure 12. Percentage of never or rarely involved in decision-making: National actors by number of partnerships

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



Examining the distribution of partnership numbers according to the operational profile of humanitarian organizations indicates that organizations with more partnership agreements tend to cover more regions of Ukraine and employ more staff. Among organizations operating in only one region, more than half have up to two international partnerships, while one third have more than six partnerships. At the same time, among organizations working in more than four regions, 66% have already concluded more than six partnerships.

Among the organizations that have been working for up to two years, the share of those that already have six or more partnerships is 46%. Whereas, the organizations that have been operating for 3-5 and 6+ years are 63% and 61%, respectively. Therefore, there is no consistent correlation between the age of organization and the number of partnerships.

Nearly one-third of organizations with five or fewer employees have concluded six or more partnership agreements, while 4% of organizations with more than 50 staff members have up to two agreements. This indicates that the number of employees does not always correlate with the number of partnerships. However, the overall trend remains: a larger number of staff is generally associated with a greater number of partnership agreements.

Figure 13. Partnerships by regions (national actors)

How many partnership agreements (like project agreements or memorandums of cooperation) with International/foreign actors do you have?

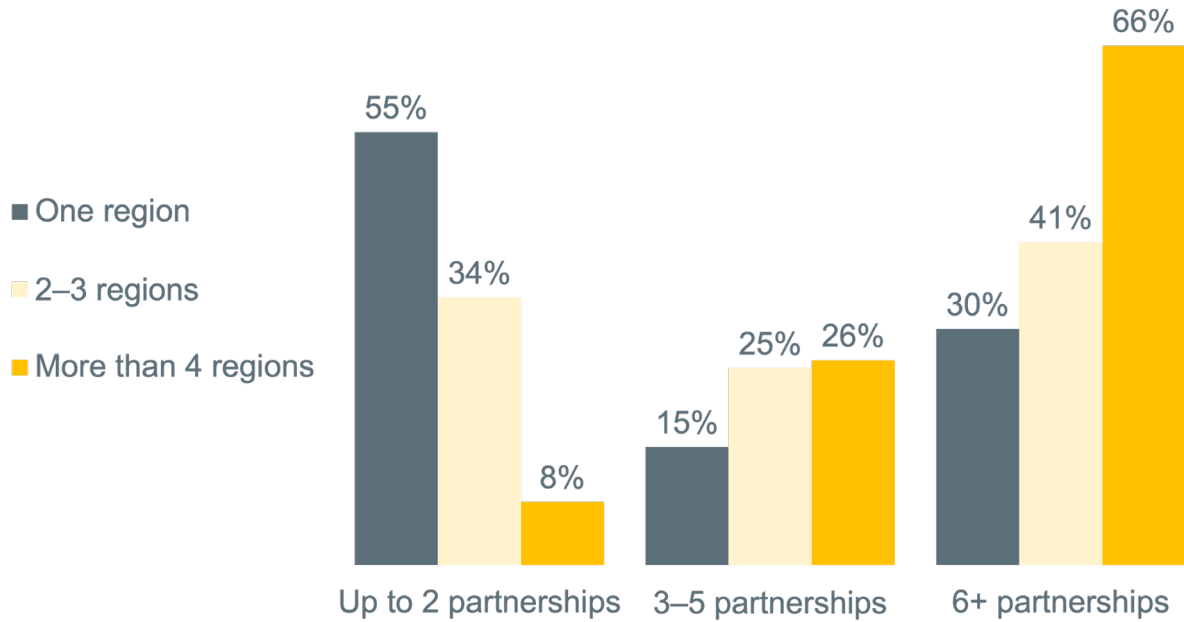


Figure 14. Partnerships by years of experience (national actors)

How many partnership agreements (like project agreements or memorandums of cooperation) with International/foreign actors do you have?

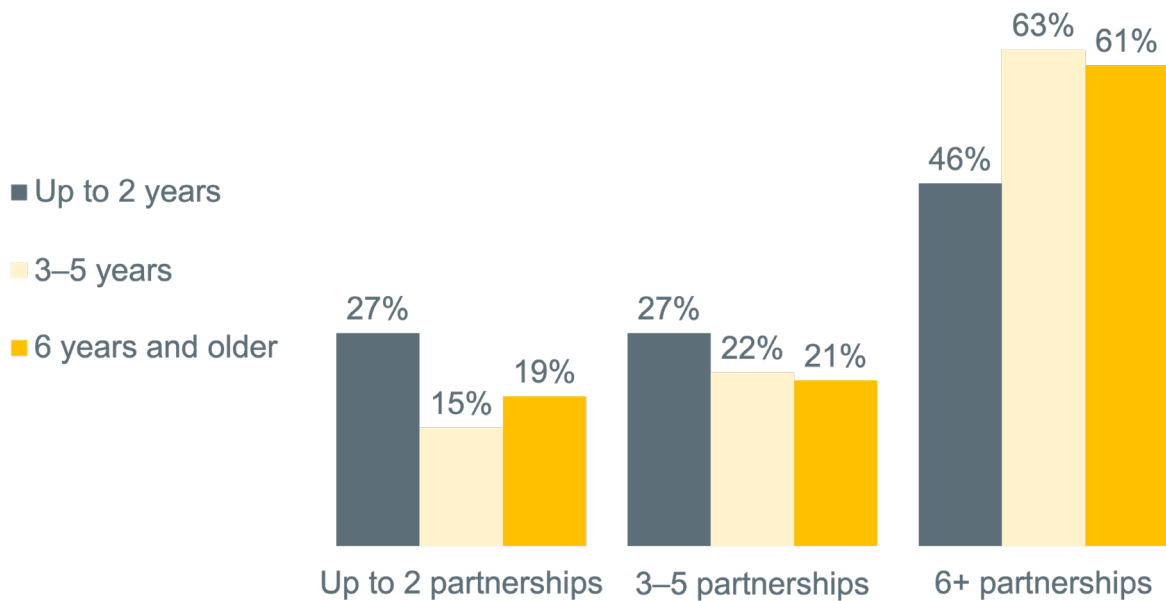
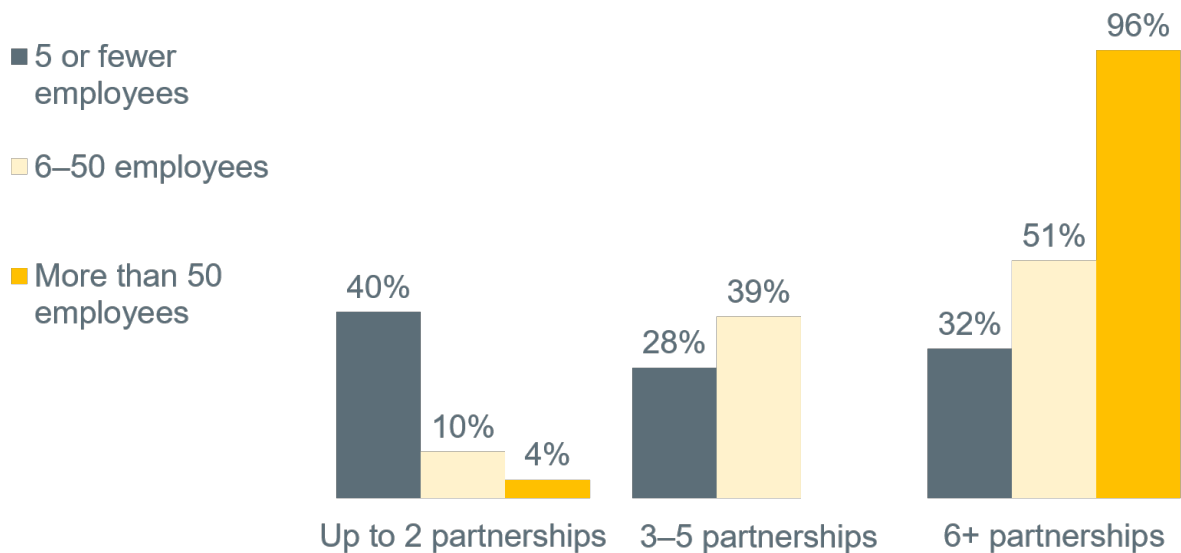


Figure 15. Partnerships by number of employees (national actors)

How many partnership agreements (like project agreements or memorandums of cooperation) with International/foreign actors do you have?



In 2025, positive dynamics in partnership funding indicate gradual progress toward more equitable and transparent financial relationships between international and national actors — an area that has traditionally, and still is, associated with structural power imbalances (Figure 16).

Many Ukrainian organizations still noted that their administrative costs were not always covered by project funds when cooperating with international partners. However, the situation is gradually improving; administrative costs were always covered in 42% of cases.

There is a significant positive trend among national respondents regarding funding overhead, with a decrease from 46% to 27% of national organizations never receiving overhead funding, although only 12% of national organizations always receive overhead. Principled changes in this regard among big donors, such as UHF, may have contributed to a more systemic change.

Organizations with few partners remained the most financially vulnerable, as they had limited access to diverse funding.

Figure 16. Partnership funding (national actors)

In your partnerships with international/foreign actors, do the partners fund the following...?

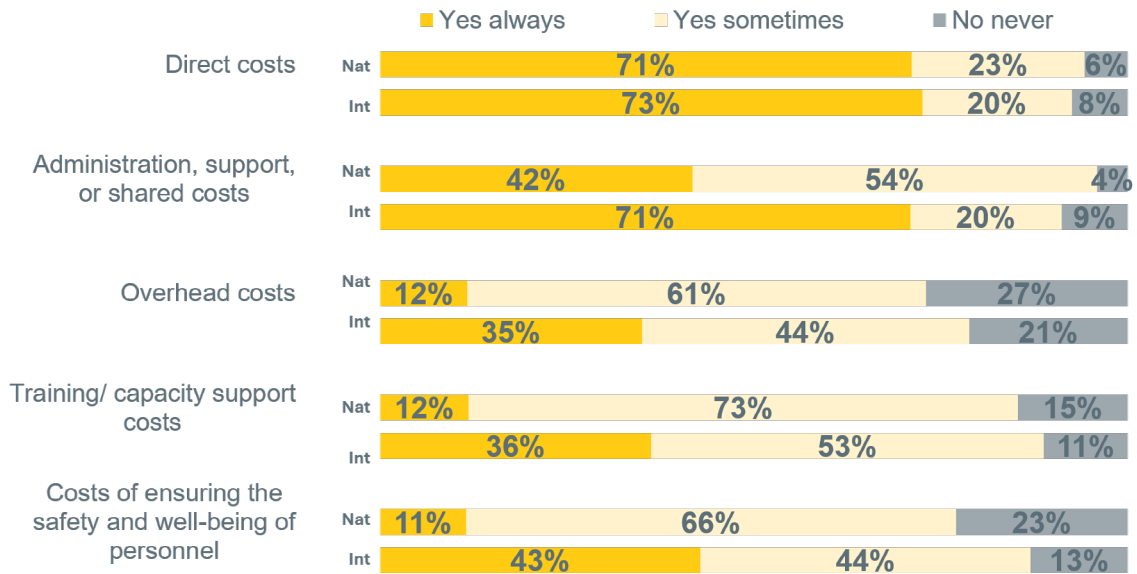
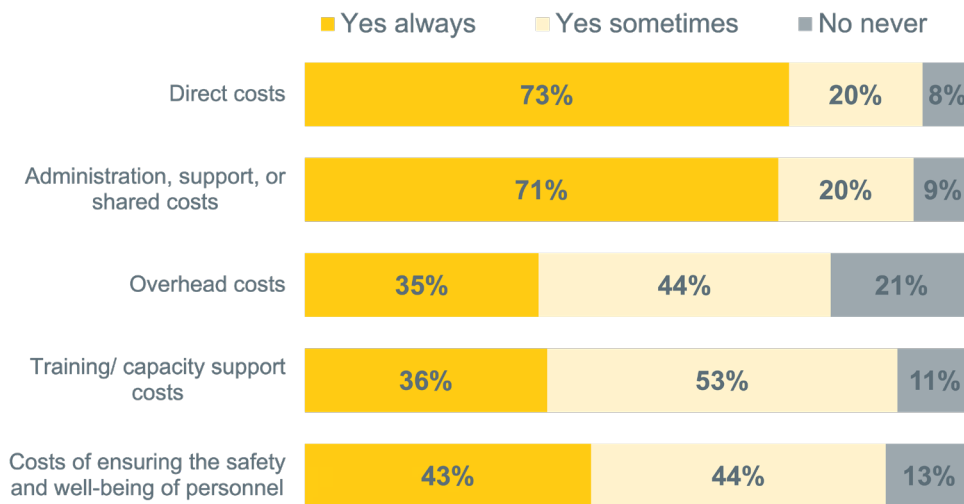


Photo provided by Depaul Ukraine / Kharkiv region

Figure 17. International organizations funding for national organizations within partnerships (international actors)⁹

Do you finance the following areas of activity for your partners – local/national organizations?



Interestingly, the responses of international and national organizations to the mirror question differed. While the responses regarding direct expenses had a similar distribution, the financing of international and national intermediaries diverged in other categories: 71% of international organizations reported they always compensate for administrative costs, while 42% of national actors reported they always receive it. Funding for overhead remains limited. Still, more than a third (35%) of international organizations reported they always compensate for it, while only 12% of national actors reported always receiving it (Figure 18).

In terms of funding, 23% of national NGOs reported rarely receiving funding for direct costs, and 6% never received such funding at all. Of significant concern is that only 11% of national actors reported always receiving funding related to Duty of Care, which is critical given the realities of life in Ukraine and the risks that exist as a result.

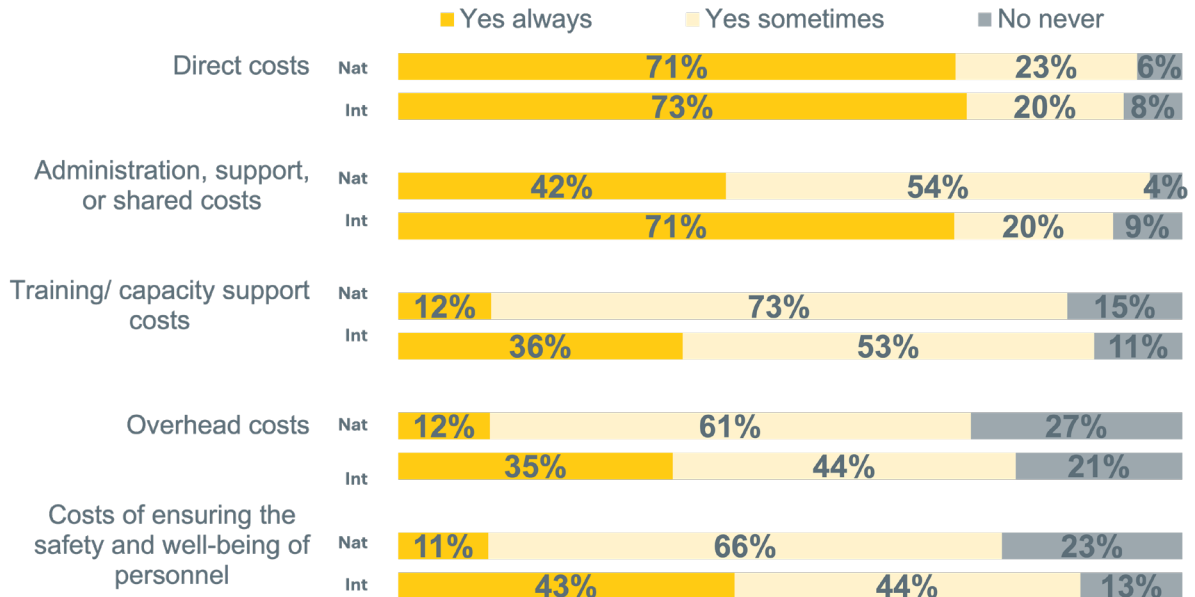
National organizations whose overhead costs were funded by international partners were more likely to cover such costs themselves for local partners in Ukraine. Unfortunately, the practice of financing overhead costs for partners was not replicated 100% by national intermediaries in the financing of their own local partners: one-third of national intermediaries who received overhead compensation never financed it themselves.

⁹ Answer options in the questionnaire: Direct costs (detailed costs directly related to the project); Administrative or support costs (costs resulting from project activities, which may or may not be itemized); Training/professional development costs (costs aimed at meeting the training and professional development needs of the organization’s personnel); Overhead costs (overhead, costs not directly related to project activities, calculated as a percentage of total project costs); Costs of ensuring the safety and well-being of personnel (costs related to ensuring physical safety, psychological health, adequate working conditions, etc.)

Figure 18. Partnership funding (national actors vs international actors)

National actors: In your partnerships with international/foreign actors, do the partners fund the following areas of activity?

International actors: Do you finance the following areas of activity for your local/national partner organizations?



In 2025, the study examined national actors as intermediaries who financed specific areas of activity for their local partners within the framework of various projects. National NGOs that functioned as intermediaries were usually larger organizations, typically had more staff (20+ employees), and worked in more than four humanitarian sectors (Figure 19).

Overhead and costs related to employee safety and well-being of local partner organizations were the least widely funded, with half of national intermediaries never compensating their local partners for these costs.

The larger the intermediary, the more likely it was to share overhead costs. National actors working with national partners were significantly less likely to fund direct costs, administrative costs, and overhead than international actors. While part of this can be attributed to national actors working more frequently with informal community groups and volunteers, it still constitutes a significant difference, as funding was transferred to implementing partners.

Figure 19. Funding of local organizations within a partnership (national intermediaries)¹⁰

Do you fund the following areas of activity of local organizations that participate in the implementation of your projects?

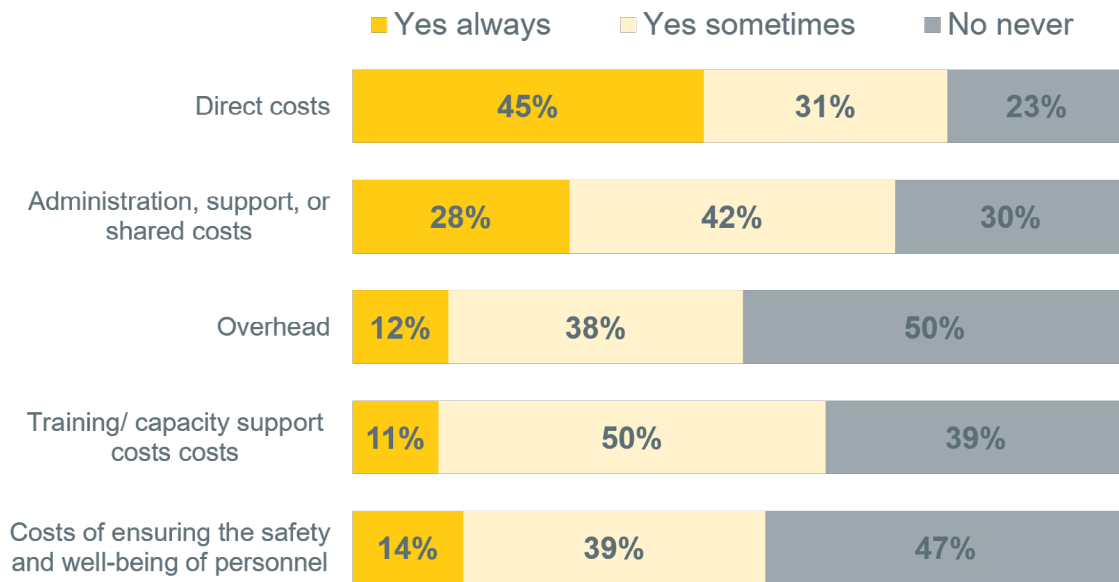
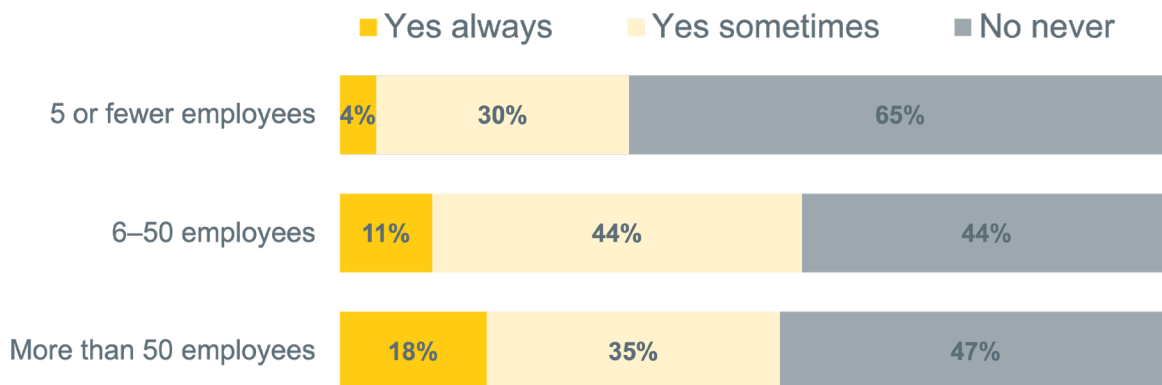


Figure 20. Compensation of overhead by the number of employees (national intermediaries)

Do you fund the following areas of activity of local organizations that participate in the implementation of your projects?

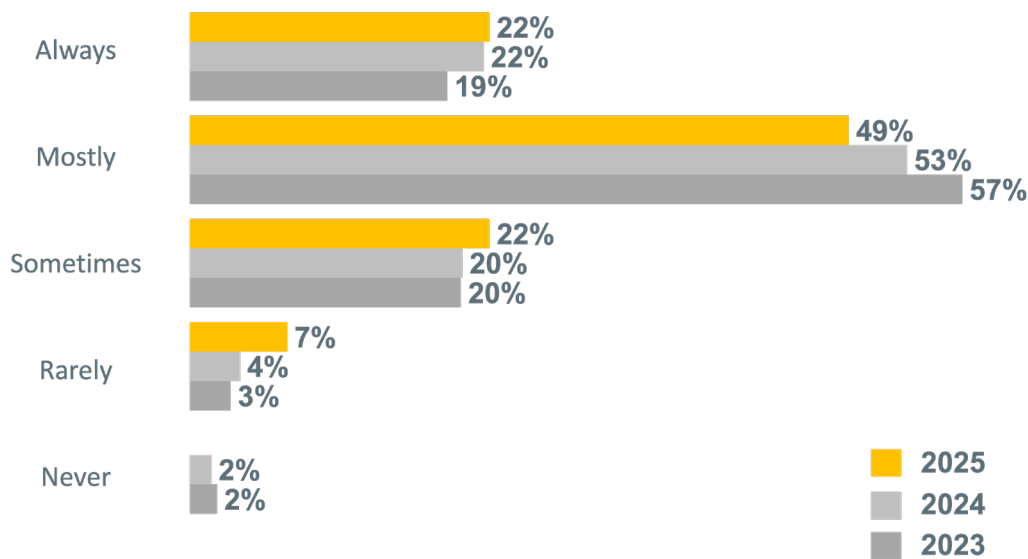


¹⁰ Answer options in the questionnaire: Direct costs (detailed costs directly related to the project); Administrative or support costs (costs resulting from project activities, which may or may not be itemised); Training/professional development costs (costs aimed at meeting the training and professional development needs of the organization’s personnel); Overhead costs (overhead, costs not directly related to project activities, calculated as a percentage of total project costs); Staff safety and welfare costs (costs related to ensuring physical safety, psychological health, adequate working conditions, etc.)

The proportion of respondents whose ideas and views are taken into account within partnerships largely remained the same compared to 2024 (Figure 21). Only 22% of national organizations state that their views are “always” considered. Given that national actors typically have a stronger understanding of the local context and the needs of affected populations, limited consideration of their input may negatively affect the effectiveness and relevance of humanitarian programming.

Figure 21. Sharing ideas within a partnership (national actors)

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



Almost half (46%) of international organizations reported that Ukrainian organizations had assessed their capacity, compared to 27% in 2024 (Figure 22). Similarly, there was significant progress in providing recommendations for improving interaction: in 2024, 47% of national organizations made such recommendations to international actors; in 2025, this had risen to 57%.

However, the practice of providing recommendations for improving activities and assessing strengths and weaknesses remains consistently high, with both national and international organizations reporting positive experiences, as confirmed by over 90% of respondents (Figures 22 and 23).

Figure 22. Receiving assessment and recommendations

National actors: Have your international/foreign partner organizations ever formally assessed your capacity and provided recommendations on areas for improvement?

International actors: Have your local/national partner organizations ever formally assessed your capacity and provided recommendations on areas for improvement?

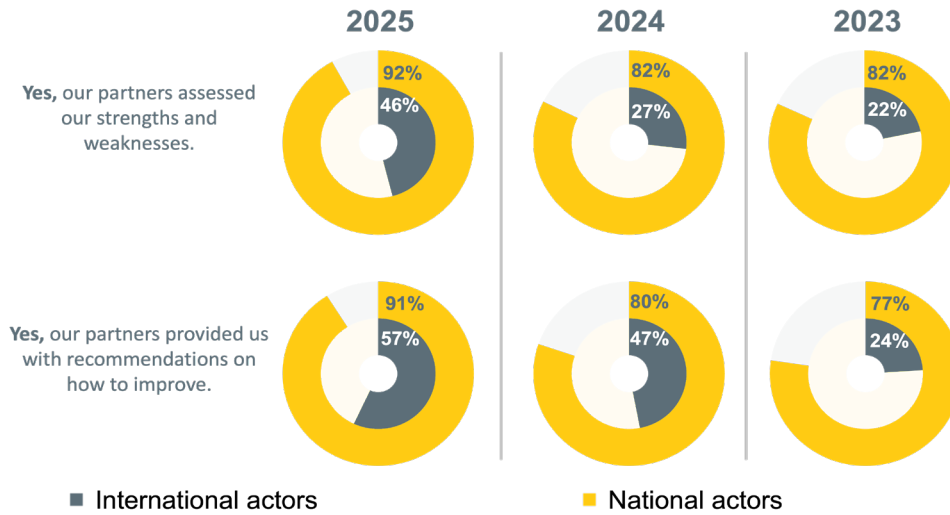
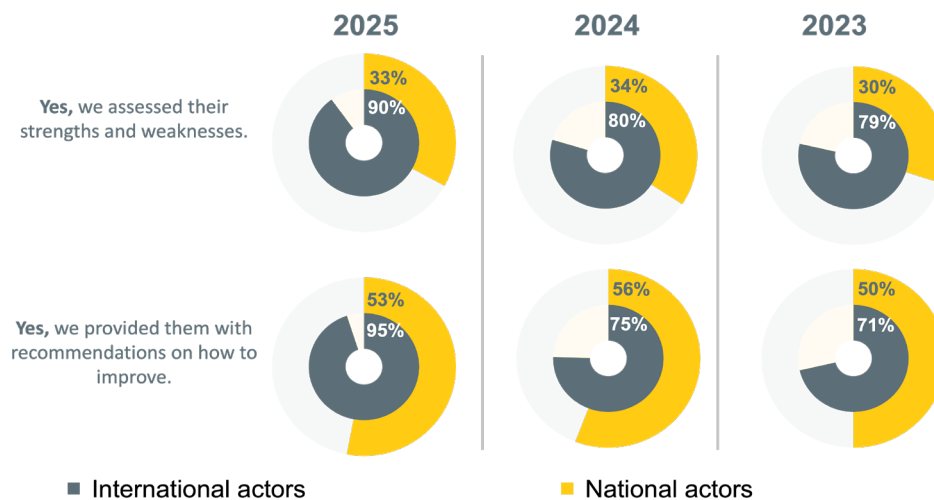


Figure 23. Providing assessment and recommendations

National actors: Have you ever formally assessed the capacity of your international/foreign partners and provided recommendations on areas for improvement?

International actors: Have you ever formally assessed the capacity of your local/ national partners and provided recommendations on areas for improvement?





LEADERSHIP

KEY FINDINGS

The overall assessment of localization evidence in the leadership domain remains Some Evidence (2.1 points), an improvement over the 2024 progress review (1.9 points).

Progress indicators	Level of evidence		
	2023	2024	2025
International actors support and strengthen national leadership	1.3	1.0	2.0
Local and national actors lead the response and dominate decision-making	1.8	2.3	1.8
International actors work with and respect in-country leadership structures and mechanisms	2.8	2.5	2.5

«A locally-led humanitarian response is not about sidelining international actors or fighting for resources. It's about rethinking partnerships to create future cooperation built on dignity and equity. Localization only works when all stakeholders collaborate, moving together toward shared goals.»

— Mila Leonova,
Director of Alliance UA CSO, 2025

The overall increase in the leadership progress indicator in 2025 was primarily due to an increase in international actors' support to strengthen national leadership, driven by a combination of factors: the growing recognition among international actors of the need to operationalize localization commitments through leadership transfer, coupled with the increasing assertiveness and coordination capacity of national organizations, along with some donors' increased focus on efforts in translating commitments to practice.

Leadership is recognized as a core dimension of localization progress. However, the perception of national actors leading decision-making processes decreased significantly, suggesting that Ukrainian NGOs are still not consistently perceived as equal strategic leaders within response coordination. This regression is particularly concerning given that several assessments emphasized that meaningful leadership transfer remains one of the weakest aspects of localization.

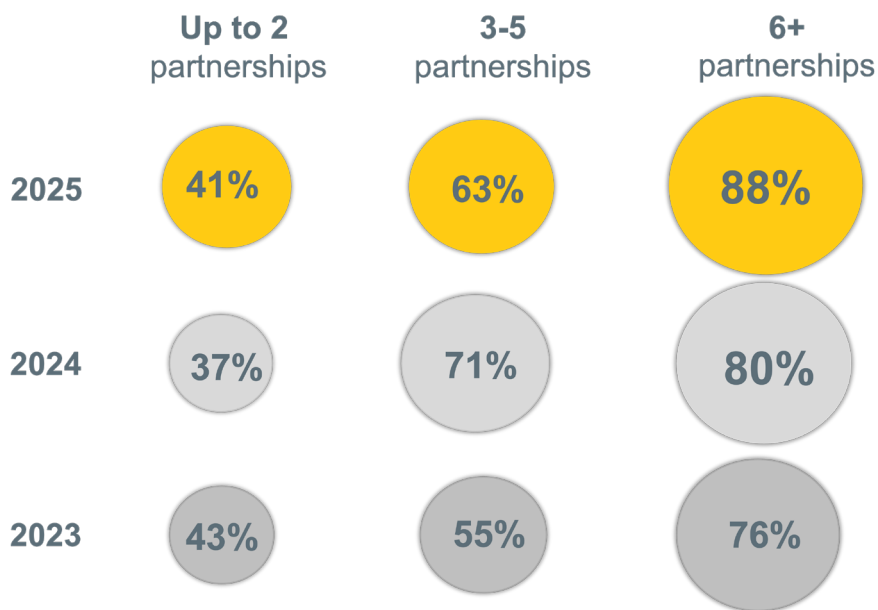
The indicator for “International actors work with and respect in-country leadership structures” remained stable, reflecting gradual but slow progress toward shared governance and accountability frameworks.

The baseline (Figure 24) reveals a widening polarization among national NGOs: while organizations with multiple partnerships were increasingly embedded in strategic dialogue with international actors, smaller and mid-sized ones risked being left on the periphery of decision-making. The growing interaction among “well-connected” NGOs (88% meeting regularly with the international/foreign partners) reflects a consolidation of influence within the national sector rather than systemic inclusion.

The findings suggest that local leadership is deepening, but not broadening. Without mechanisms to ensure representation of smaller actors in partnership forums and coordination platforms, the localization process may reproduce internal hierarchies instead of balancing power across the national humanitarian system.

Figure 24. Share of organizations that had direct meetings with the international/foreign partner five or more times in the last six months (national actors by number of partnerships)

How often in the last six months has your organization met directly with the international/foreign partner?



The frequency of meetings between national organizations and donors increased slightly. While in 2024, 35% of national organizations did not meet with donors at all, in 2025, it decreased to 30% (Figure 25).

There was an increase in percentage of those who met with donors and foreign partners more than five times (an increase of 13 percentage points and 10 percentage points, respectively). This trend could reflect the growing number of partnerships among national actors and changes in approaches by donors and intermediaries, which in turn could facilitate easier access to a wider range of donors. Larger national NGOs with six or more partnerships had more frequent donor engagement: 57% reported five or more direct meetings with institutional donors in the past six months, a 12 percentage point increase from 2024. Mid-sized organizations (with 3-5 partnerships) also had a modest improvement in engagement, while smaller ones remained less visible in donor interactions. Nevertheless, the share of the smallest NGOs (with up to two partnerships) meeting donors 3-4 times doubled compared to 2024, suggesting gradual progress in inclusiveness and access to institutional dialogue.

Figure 25. Meeting with donors (national actors)

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

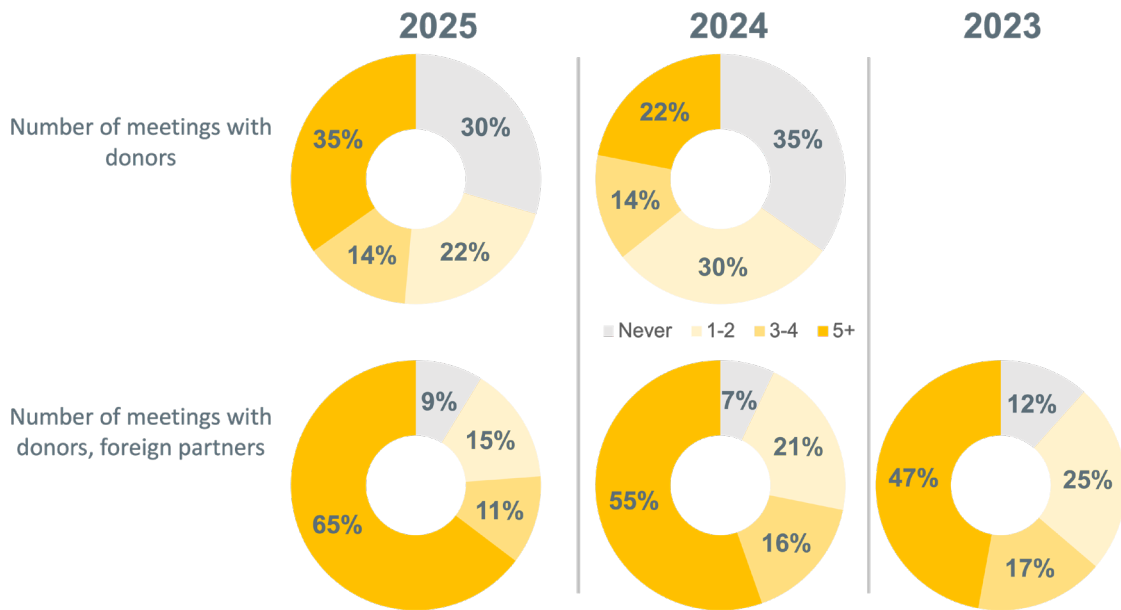


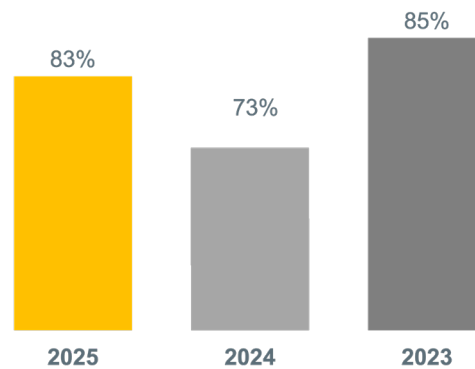
Figure 26. Meeting with donors (national actors by number of partnerships)

	Up to 2 partnerships		3-5 partnerships		6+ partnerships	
	2024	2025	2024	2025	2024	2025
0 (never)	53%	55%	25%	33%	12%	14%
1-2 meetings in the last 6 months	27%	19%	36%	26%	22%	15%
3-4 meetings in the last 6 months	8%	16%	17%	17%	20%	15%
More than 5 meetings in the last 6 months	12%	10%	22%	24%	45%	57%

Most international actors stress that they facilitate direct contacts between local partners and donors. However, while 83% of respondents state this in 2025, there has been no major shift over time. Efforts to establish direct contacts between Ukrainian organizations and donors remain primarily focused on large and more experienced national humanitarian organizations, which can contribute to knowledge gaps within the donor community.

Figure 27. Facilitating meetings with donors (international actors)

Does your organization ever facilitate local/national partners to meet with international/foreign donors?



In key informant interviews, all international organizations stated that they support direct contact between national partners and institutional donors, if possible, either by inviting organizations to meetings with donors or by facilitating such contact (e.g., through partners’ participation in joint calls, trips, conferences). At the same time, international actors acknowledged that not all donors are ready to work directly with Ukrainian organizations, referring to language, reporting, and compliance as obstacles. Some were only planning to systematically implement this practice in their new strategies, as their partnerships are just starting, and all policies have not yet been adopted.

Question: Do you support meetings between national organizations and donors?

KII 3 (International actor): «Yes, when we had a consortium together with national actors and internationals, when we were meeting with the donors, we were inviting representatives of all organizations to speak to the donor at such meetings... Many times I introduced our national partners to the donors.»

*KII 4 (International actor): «As ***, we haven’t. But we will develop our next 3-year strategy around October and we will make sure that this will be one of our main goals as part of our exit strategy... we will invite them to our donor meetings, so they can start having in-person meetings, as well.»*

National organizations confirmed that they increasingly had the opportunity to meet with donors directly, but this often happened through international intermediaries. Direct contact helps gain recognition, opportunities for cooperation, and funding, but access to them is challenging, and there is a lack of resources to organize such meetings, as well as language barriers, that further complicate the process.

Question: Do you support meetings between national organizations and donors?

KII 24 (National actor): «The second model is when we establish cooperation directly with the donor without an international partner. We do this too. It is very difficult. Usually, the biggest challenge in such cases is the model of how this development agency works through agencies in their countries, which are INGOs in our country. Accordingly, you cannot work with them without an INGO. And this, in my opinion, is one of the critical points: most development agencies that issue open calls for funding humanitarian response and development activities in Ukraine do not have requirements in their open calls for cooperation or the presence of Ukrainian partners»

KII 23 (National actor): «It still exists, it is a problem of language, participation in clusters of Ukrainian organizations due to the language barrier and due to a lack of understanding of the benefits so far, from the fact that you are there.»

Although most donors reported being open to meetings with Ukrainian organizations, these interactions rarely translate into real leadership opportunities. National NGOs sometimes found themselves in a reactive rather than a leading position, where they must adapt to donor frameworks rather than shaping their own agendas. In this context, meetings become moments of advocacy rather than genuine co-decision-making and dialogue, limiting the extent to which local actors can exercise leadership within donor relations.

Question: Do you support meetings between national organizations and donors?

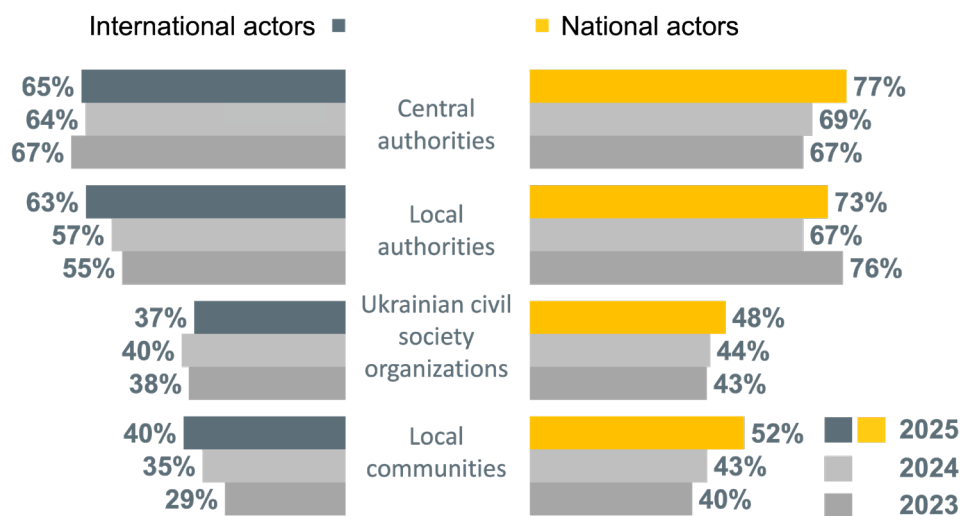
KII 7 (Donor): «I want to emphasize: we always meet with any that want to meet us. That is, as an institutional donor, any can write to us, present their work, meet with us, and advocate for their project. We always meet with them and consider their proposal. This is not just for formality. Clearly, we don't have funding for everyone, but if there is a genuinely interesting project that we believe has some innovative mechanism or is very important for humanitarian assistance, we try to find ways to collaborate with the organization.»

National organizations continued to attribute greater importance to central authorities than international partners, with this indicator increasing by eight percentage points compared to 2024. The share of international actors who recognized the leadership role of central authorities remained virtually unchanged (Figure 28).

In both groups of respondents (national and international organizations), the assessment of local authorities increased slightly, but the indicator remained higher among national organizations. At the same time, the assessment of leadership of Ukrainian civil society remained lower among both international and national stakeholders. Although the leadership and decision-making roles of governmental and coordination structures are more visible, grassroots and civil society actors continue to be underrepresented in strategic processes.

Figure 28. Leading the decision-making process

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



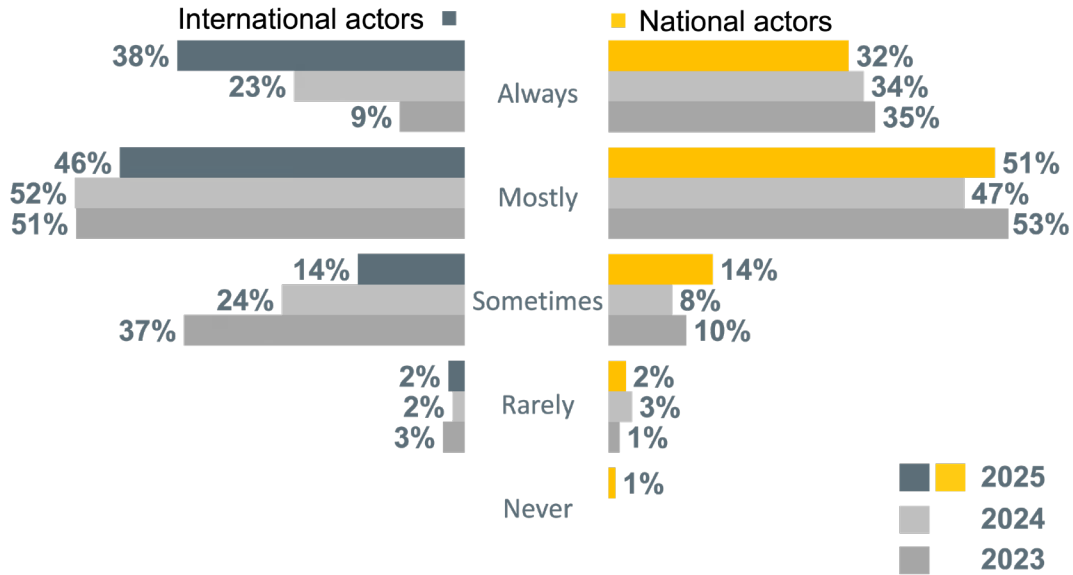
For the second consecutive year, there was positive development in international partners' recognition and respect for the requirements, administrative procedures, and management mechanisms of the state institutions with which they interact. In 2024, 23% of international organization representatives indicated that international/foreign actors always respect and cooperate with leadership structures and mechanisms in the country; in 2025, this rose to 38% (Figure 29).



Photo provided by Jara Hesar / ActionAid, Petro-Mykhailivka village, Zaporizhzhia region

Figure 29. Respect towards in-country leadership

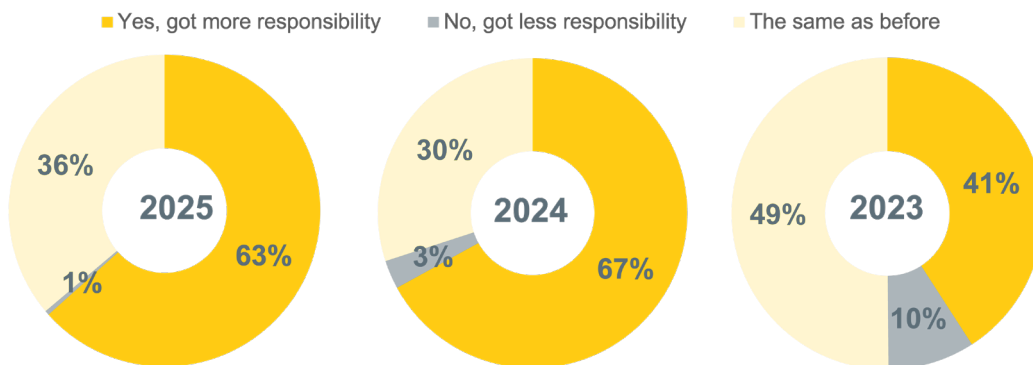
Do international/foreign actors respect and work with in-country leadership structures and mechanisms?



Local organizations perceived that they have become marginally less influential in local decision-making processes over the past year (Figure 30), which may be related to a growing number of actors operating across broader geographical areas and to partnership models that are less directly driven by local community input.

Figure 30. Responsibilities (national actors)

Did your organization get more responsibility for decision-making locally in Ukraine in 2025?



Interestingly, larger national NGOs with a large number of employees reported a decrease in influence, while NGOs with five or fewer employees remained unchanged; it also decreased among medium organizations.

In general, the perceived influence of organizations still correlates with their size. Larger national NGOs remained the most influential, but the gap between them and smaller actors is slowly narrowing. This suggests a gradual levelling of influence within the Ukrainian humanitarian system.

Figure 31. Level of influence compared to the size of organization

	1-5 employees		6-50 employees		50+ employees	
	2024	2025	2024	2025	2024	2025
The organization has become more influential	55%	55%	76%	62%	81%	77%
The organization has become less influential	5%	0%	1%	1%	3%	0%
The organization is as influential as before	40%	45%	23%	37%	16%	23%



Photo provided by NGO Resource Center / Kharkiv Charitable Foundation "Blago"

COORDINATION AND COMPLEMENTARITY

KEY FINDINGS

The overall assessment of localization evidence in the coordination and complementarity domain remains Some Evidence (2.0 points), with no change from the 2024 progress review (2.0 points).

Progress indicators	Level of evidence		
	2023	2024	2025
National representation and engagement in coordination forums and meetings	1.8	2.0	2.0
Clearly defined parameters for international actors complementing local and national actors in humanitarian response ¹¹	2.0	2.0	2.0

«If existing working relationships are based on long-standing inequalities, including implicit assumptions about the role particular actors should or even could play in the process, there is little reason to believe that coordination will bring about Coordination may simply reify existing ways of working.»

— Marie-Eve Desrosiers, Haley J. Swedlund, 2025

In 2025, the overall assessment of localization in coordination remained at the same level, showing no quantitative progress compared to 2024. However, this apparent stability masks important qualitative shifts.

Coordination remains a critical element of an effective and efficient humanitarian response, independently of context. The overall impact of humanitarian interventions often depends on the complementarity of efforts, reduction of duplication, and careful balancing of activities between actors. As noted by Garth Smith, “Humanitarian coordination today increasingly follows one-size-fits-all models and approaches, shaped by global standardized organigrams, structures, and siloed agency mandates... [it] has over-centralisation, inflexible processes, limited adaptability around local actors, and slow responsiveness in fast-changing, complex emergency environments.”¹² While there has been a significant trend towards centralizing coordination in Ukraine since 2022, often to the detriment of locally-led efforts, 2025 saw efforts towards coordination reform, through ABC approaches and blended coordination models. While it is too early to assess the actual impact of these coordination processes, it is important to emphasize allowing space for trial and error within such efforts. It will be crucial that the participating organizations and individuals thoroughly assess the performance so that valuable lessons can be learned.

¹¹ The indicator was assessed using a qualitative survey of key informants.

¹² Transforming humanitarian assistance in the age of the polycrisis | February 2025

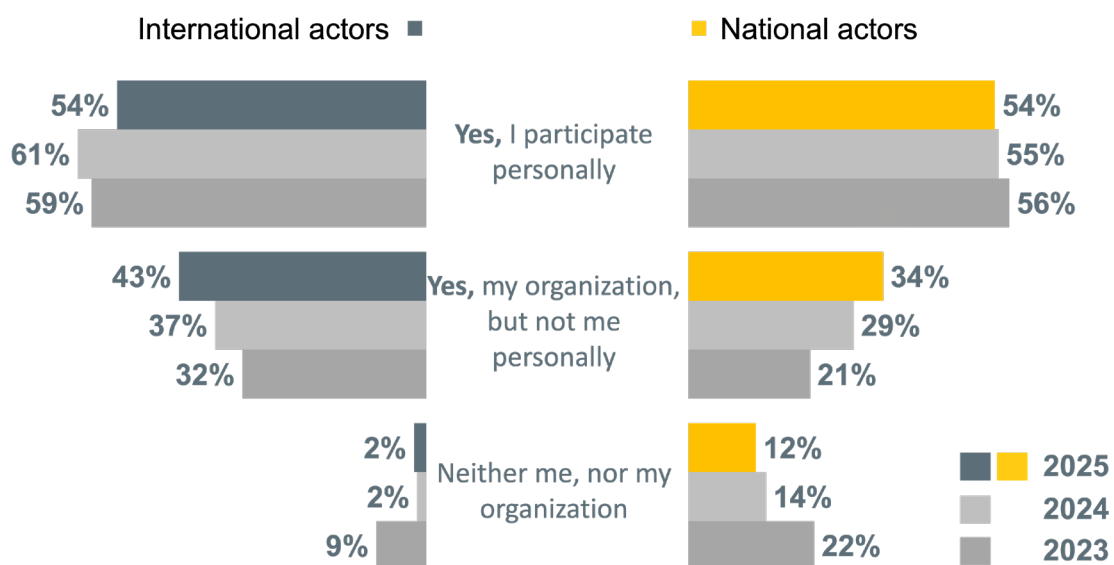
The level of participation in coordination mechanisms among both international and national NGOs remained relatively stable in 2025 (Figure 32). While the overall proportion of national organizations that participated personally did not change significantly since 2023, the share of those organizations (rather than individuals) increased by 13%. This shift could suggest a gradual institutionalization of participation, as coordination is less tied to individual representatives and increasingly embedded in organizational processes.

The number of national NGOs that did not participate in more structured coordination decreased, indicating growing access for smaller or regional actors within coordination bodies, potentially linked to the overall efforts promoting more decentralized and agile systems.

However, the quality of participation remained uneven. While international actors reported stable engagement, Ukrainian organizations still had limited influence on agenda-setting within coordination bodies, which reflects ongoing asymmetries in leadership and decision-making.

Figure 32. Cluster participation

Do you/your organization participate in international and national coordination forums and meetings, such as clusters?



The level of activity in coordination mechanisms among national organizations remained strongly correlated with organizational size and geographic reach. Larger NGOs, especially those operating in four or more regions, maintained almost complete representation in coordination forums (93%), while smaller or single-region organizations continued to lag behind. A similar pattern was observed in relation to the number of partnerships: organizations with 3-5 or more partnerships were substantially more engaged, both at the national and regional levels, than smaller organizations.

This suggests that coordination in some aspects remains capacity-dependent: participation requires staff time, travel, and dedicated technical roles, which smaller organizations often lack. For many local NGOs, participation is still often primarily informative rather than decision-shaping.

Figure 33. Cluster participation by regions (national actors)

Do you/your organization participate in international and national coordination forums and meetings, such as clusters?

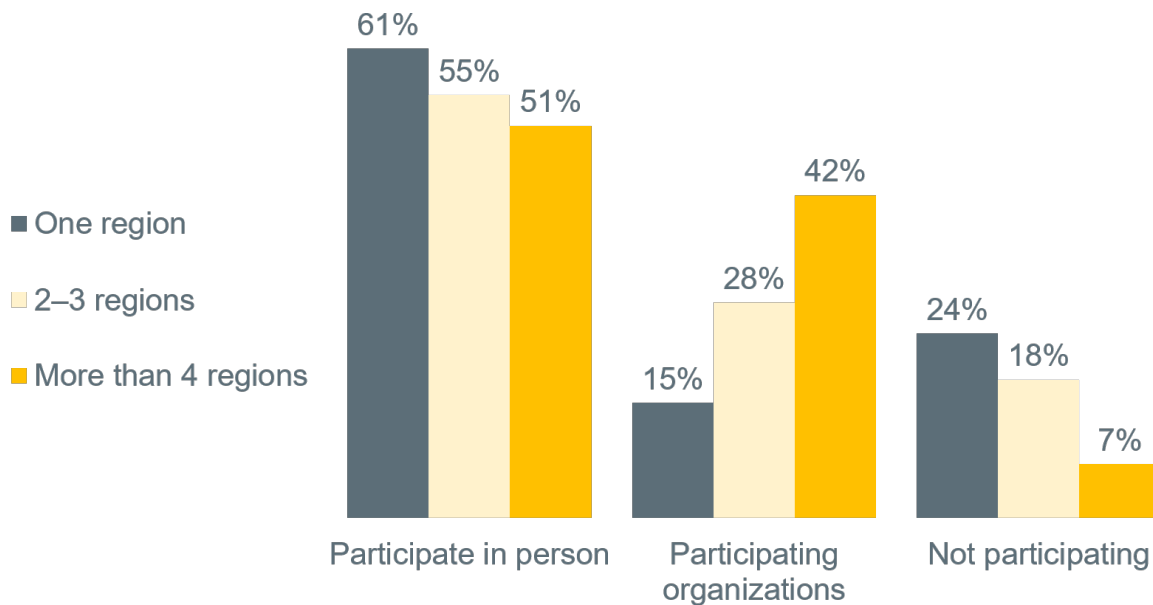


Figure 34. Cluster participation, by number of partnerships (national actors)

Do you/your organization participate in international and national coordination forums and meetings, such as clusters?

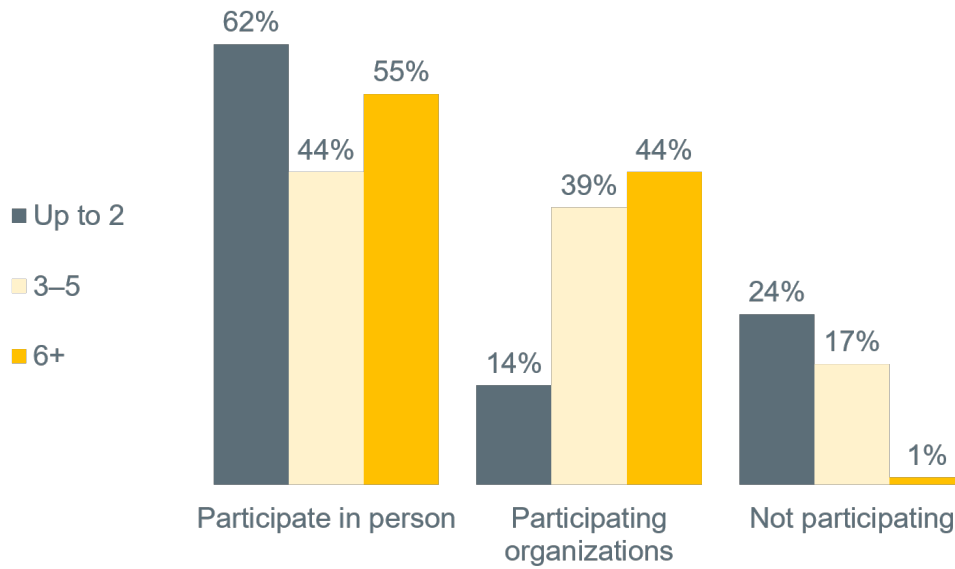
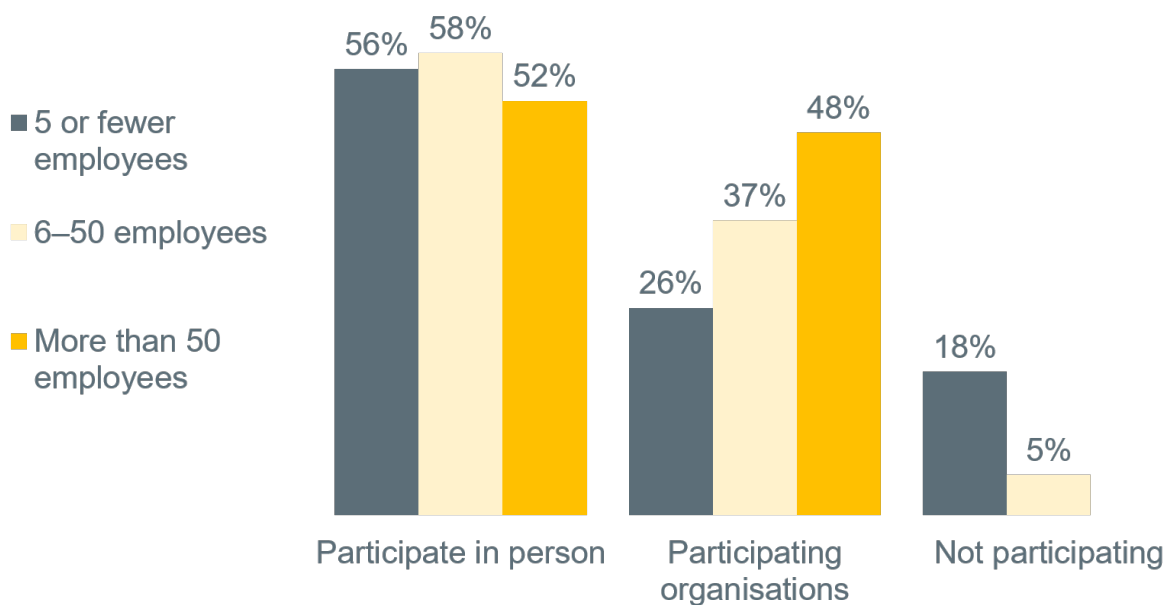


Figure 35. Cluster participation, by number of employees (national actors)

Do you/your organization participate in international and national coordination forums and meetings, such as clusters?

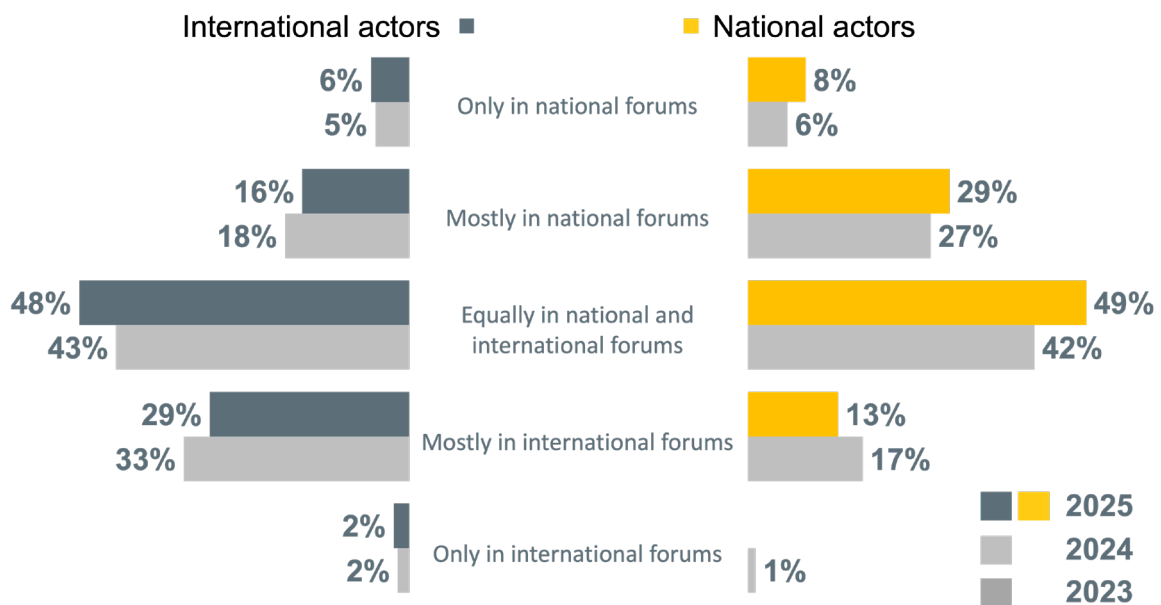


Participation in national and international forums became more balanced, yet fragmentation persists. National organizations remained primarily active in national coordination mechanisms, while international actors continued to focus on international or cross-agency forums.

This ongoing divide can potentially reduce opportunities for mutual understanding of context. Since international actors are primarily present in international spaces, their understanding of national actors' realities often relies on indirect sources, which can lead to contextual gaps and misaligned priorities within coordination and decision-making processes.

Figure 36. Forum participation

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



As expected, larger organizations with more partnerships and broad regional coverage participated more often in both national and international forums at the same level.

Figure 37. Forum participation, by regions (national actors)

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

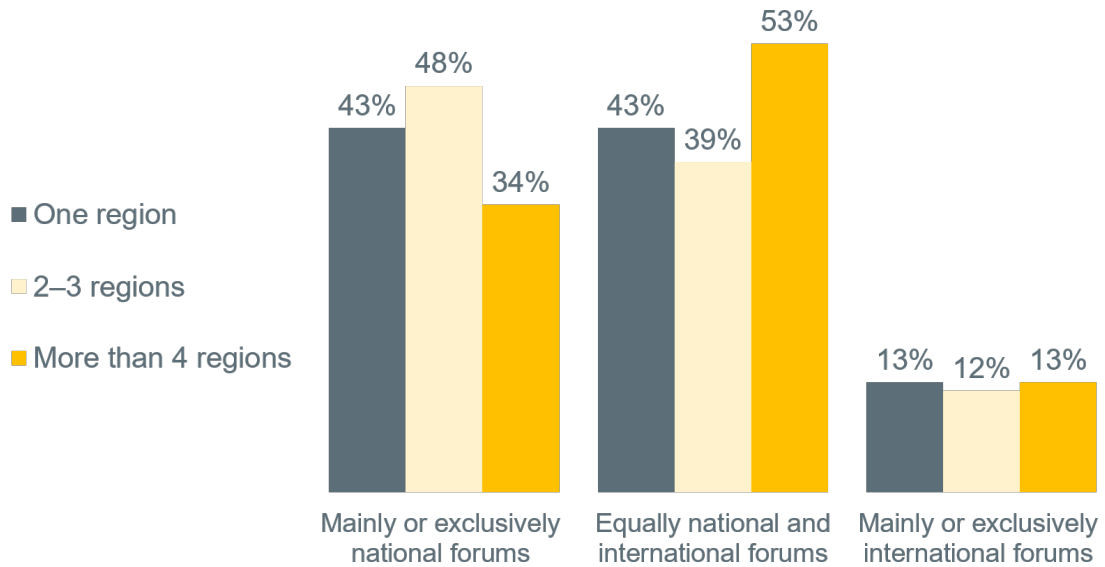


Figure 38. Forum participation, by number of partnerships (national actors)

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

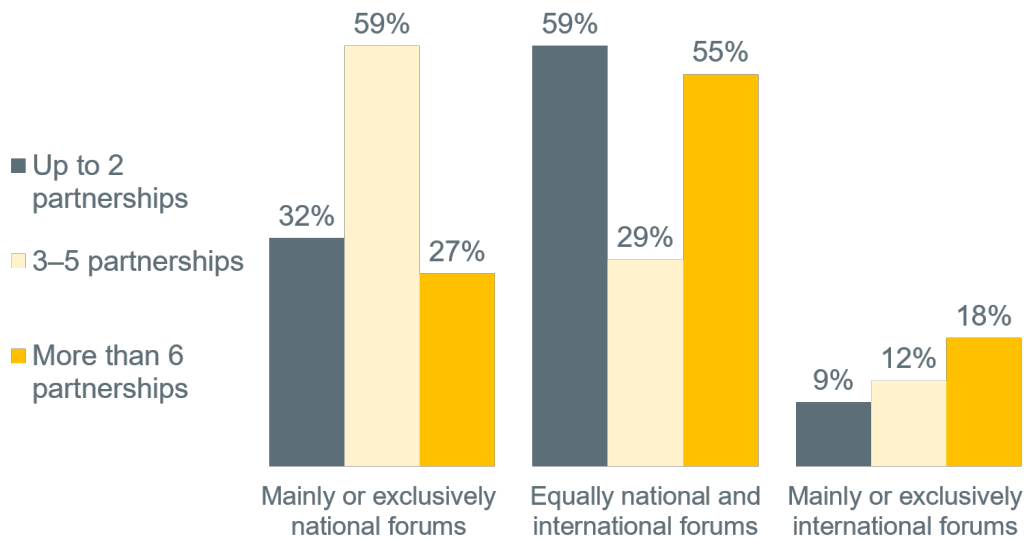
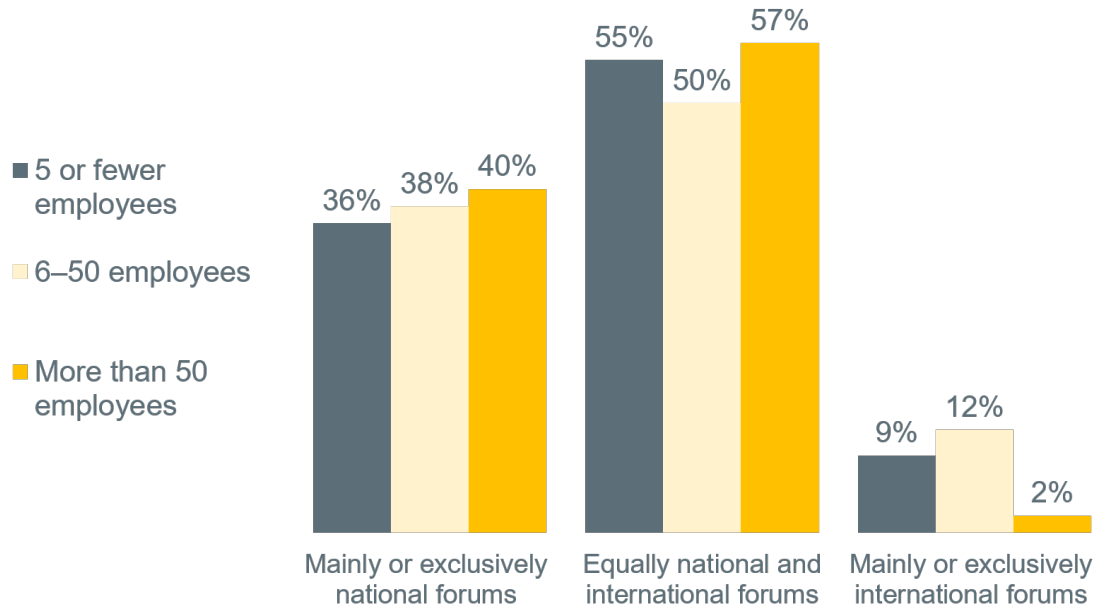


Figure 39. Forum participation, by number of employees (national actors)

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

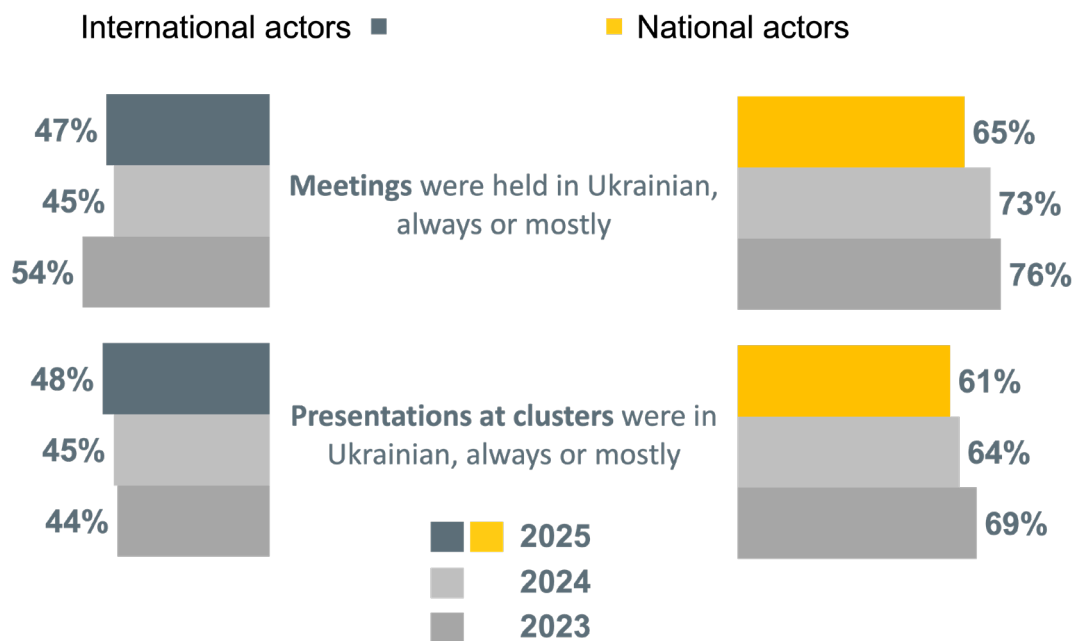


Although many national respondents reported using Ukrainian at coordination meetings in Ukraine, the overall level of this indicator decreased slightly among national actors compared to last year (Figure 40). This appears to be a consistent negative trend, reflecting an 11% decrease since 2023.

A gradual return to English as the dominant working language in coordination spaces, particularly those led by international organizations, is underway. While this may appear minor, it risks reinforcing linguistic and power asymmetries, limiting the meaningful participation of smaller and regional actors, particularly those without strong English language capacity.

Figure 40. Ukrainian language at coordination meetings

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



Despite overall progress in access, the perception of influence among national organizations slightly declined. Fewer respondents confirmed that their ideas are consistently heard in coordination meetings, particularly among smaller organizations and those with limited numbers of partnerships.

This signals that representation does not always translate into influence: smaller NGOs often attend meetings but lack the capacity or visibility to shape decisions. The data suggest that coordination still reflects existing hierarchies of power and access, where organizations with stronger partnerships and resources are more likely to have their voices acknowledged.

Figure 41. Share of national organizations whose ideas were heard in forums

Please share your impressions about international cluster meetings and other international forums: Your (or your organization) ideas and suggestions were heard in the coordination forums

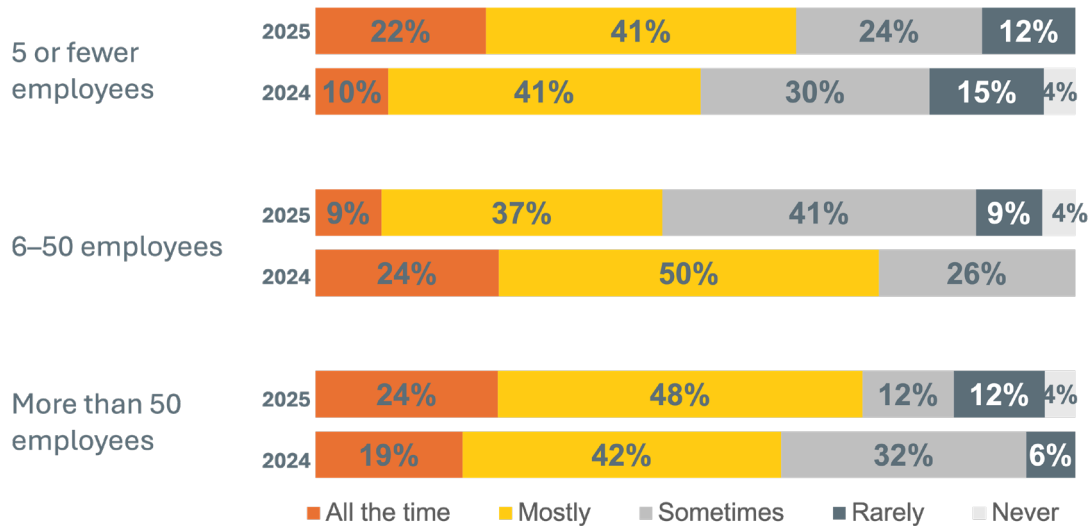


Figure 42. Participation in forums

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

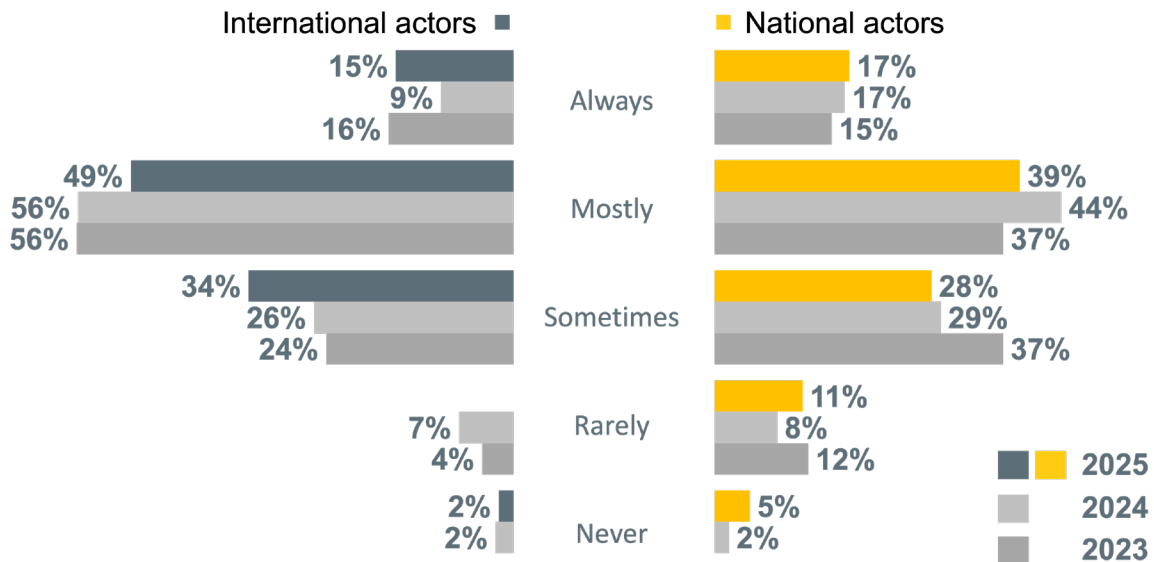
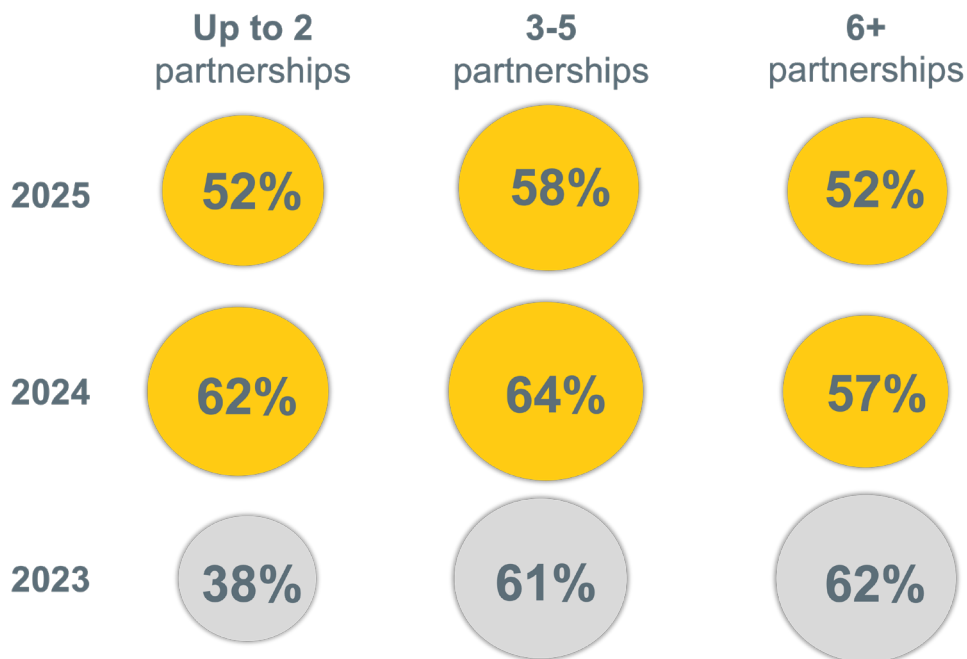


Figure 43. Participation in forums (national actors, by number of partnerships)

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



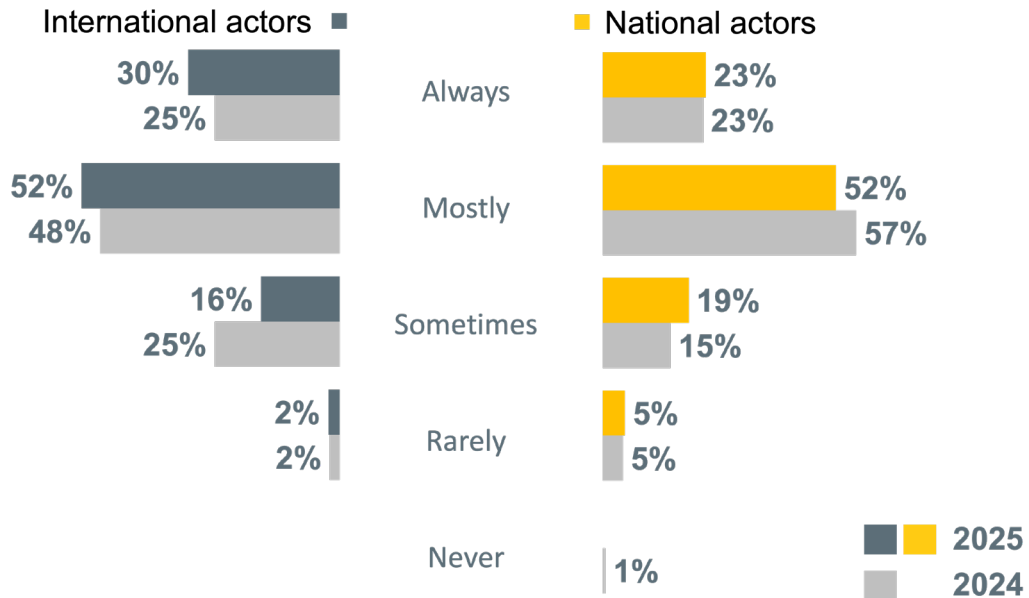
In general, both national and international actors agreed that international organizations recognize the role of their local partners in disseminating information about project activities and results. This applies to communication with donors, coordination with other stakeholders, reporting, social media, and other relevant activities (Figure 44). While there is a contrasting trend between international and national actors, the majority of respondents still chose “mostly”, indicating that recognition of local partners’ role has not yet become routine practice in reporting and communications.



Photo provided by Depaul Ukraine

Figure 44. International organizations recognize the role of their local partners

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



International respondents generally acknowledged that their understanding of the complementarity of roles is incomplete and continues to develop. At the same time, they believed that progress is noticeable, although the level of understanding between organizations remained low. Some representatives claimed that there is a theoretical awareness, but in practice, all parties, both international and national, remain confused due to the complexity of the system following recent changes, such as the humanitarian reset, and whether these changes are actually reflected in real-world practice.

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

KII 11 (International actor): «They did understand. Now they are confused like everyone else. The reason is that they are confused because they don't know what it will involve.»

KII 1 (International actor): «I think we're making progress towards complementarity, but I think there's still work to do. I still think that some actors don't quite understand the role of local authorities... the NGO Platform does a good job... but this whole humanitarian reset and redesigning the structures, there's a lot of work that needs to go into there because there's a lot of protecting funding sources.»

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National organizations sometimes emphasized that the complementarity of roles is formally recognized, but it is not always implemented in practice. They also noted misunderstandings about the complementarity of roles in the context of who makes decisions and who has strategic leadership. They saw progress in the transition to a more equal partnership, but stressed that it will take time to develop a genuine sense of complementarity.

KII 22 (National actor): «We all seem to be talking about the same thing — cooperation — but everyone has their own idea of what that means. For some, partnership means money, for others, shared responsibility. That's why it's important for all parties to understand their roles beyond just words.»

KII 25 (National actor): «Understanding comes gradually. We see that international partners no longer view us simply as implementers, but as equal partners in decision-making.»



Photo provided by Jara Henar / ActionAid



FUNDING

KEY FINDINGS

The overall assessment of localization evidence in the funding domain improved to Limited-Some Evidence (1.4 points), a visible improvement compared to the 2024 progress review (Limited Evidence, 1.1 points).

Progress indicators	Level of evidence		
	2023	2024	2025
Local and national actors have access to direct funding with limited or no barriers	0.0	0.3	1.3
Increase in the amount of humanitarian funding to local and national actors	1.8	1.7	1.7
Local and national actors have increased decision-making over financial matters	1.0	1.2	1.3

«The humanitarian system arguably operates as a competitive aid economy. Success is largely measured by institutional prestige, budget size, and operational footprint, rather than collaboration, partnership equity, or outcomes for affected people. In general, staff are incentivized to protect organizational interests, retain control, and compete for resources, rather than to build trust, share leadership, or step aside when others are better placed to deliver.»

— ICVA,
Humanitarian Complementarity: Rebalancing Power for a People-Centred System,
2025

In 2025, there was an increase in access to and funding sources from international stakeholders, despite the lower overall level of funding. As previously highlighted, national actors had a significantly increased number of partnerships and geographic scope of their activities, some of which were driven by accessing new funding sources, considering the general downward trend in overall funding available. Despite progress, funding remains a rather weak link that limits the effective progress of localization and the ability to respond at the local level. As noted earlier, the areas of funding and leadership are closely linked: the ability of Ukrainian actors to play a leading role in humanitarian responses is to a certain extent determined by their level of access to resources.

While local and national actors had somewhat easier access to direct funding, both international and national actors considered the area problematic. The distribution of financial resources remained unbalanced, favoring international actors.

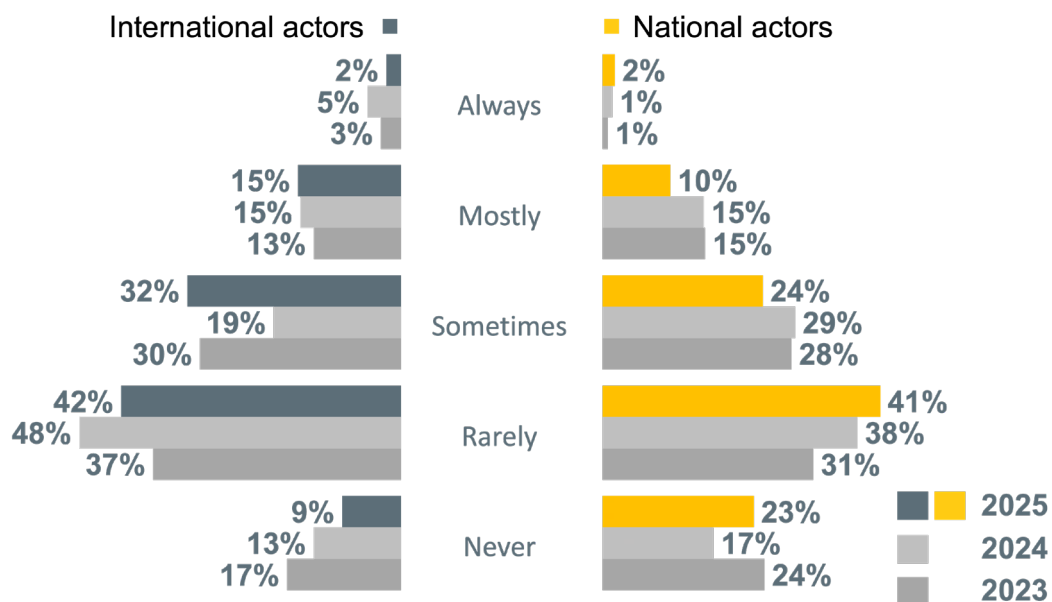
The overall assessment of localization in the funding area increased from 0.9 in 2023 to 1.4 in 2025, marking the most notable improvement among domains with previously limited evidence. This progress primarily reflects the expansion of funding channels and international grant mechanisms that have become more accessible to Ukrainian organizations.

Only a very small percentage of national and international organizations considered the current funding situation to be fair and proportionate. In particular, the share of respondents who rated the funding process as “fair and proportionate” in 2025 decreased from 2024, especially among national actors, which may be related to increased awareness surrounding the issue.

Unequal funding allocation remained one of the most persistent barriers to localization in Ukraine: “While local organizations are often on the frontlines of response, they continue to receive a fraction of the resources channeled through international intermediaries.”¹³

Figure 45. Fairness of funding¹⁴

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



The increase in the share of national actors who reported having more than five sources of funding was at least partially linked to new donors, changed donor practice, and strategic focus on localization (Figure 46), but also to the need to find alternative funding sources, and a general downsizing of humanitarian funding making implementation through national partners by intermediaries sometimes the only feasible option. However, one in 10 national organizations continued to operate without funding, effectively on a voluntary basis.

The number of funding sources increased for both national and international organizations (an increase of more than five funding sources, a 14% increase in both cases), which could be seen as a response to declining overall funding, access to replacement funding, and linked to organizations working in more sectors and more regions.

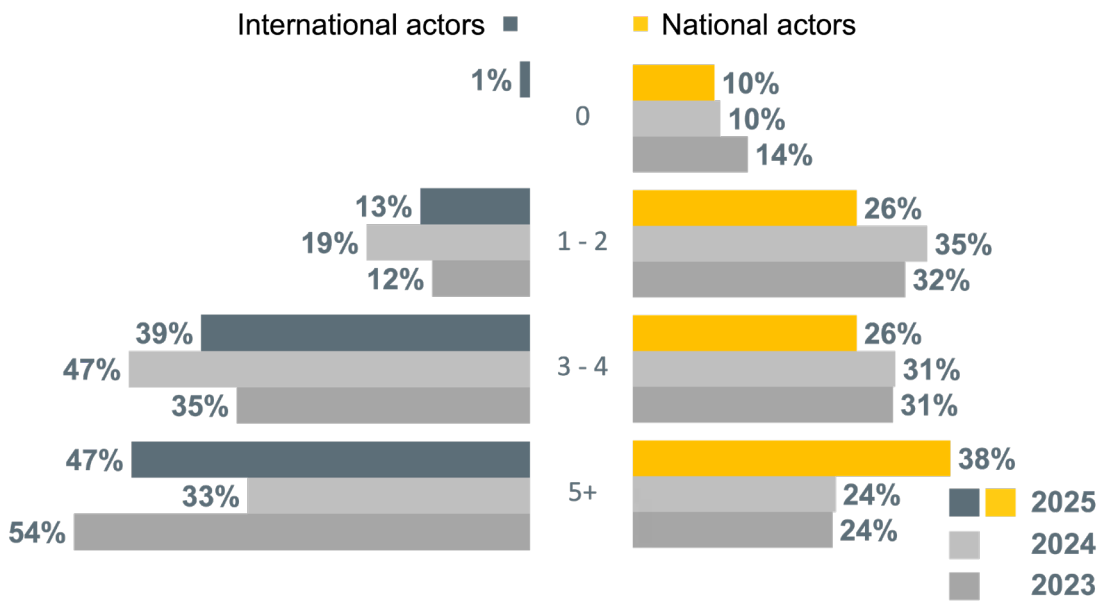
¹³ [Amplifying the Voices of Local Actors in Ukraine: Current Localization Dynamics, 2025](#)

¹⁴ In 2023, the question used the phrase “fair and proportionate funding.”

International actors also diversified their funding significantly and followed a similar trend to national organizations since 2024. Notably, organizations whose primary work is in the education sector were more likely to report financial instability and staff deterioration. Health-focused organizations also reported staff deterioration.

Figure 46. Sources of funding

Approximately how many different sources of funding does your organization have for humanitarian activities?



Key informants did not observe a meaningful increase in direct funding to national actors; most resources continued to be channeled through international intermediaries. While a few mechanisms, such as pooled funds, provided some space for progress: for example, UHF explicitly prioritized direct allocations to national partners in 2025¹⁵. Although, pooled funds remained exceptions rather than the rule and sometimes came with their own set of problems.

However, broader data indicate that the bulk of humanitarian funding still flowed through international organizations. International actors cited barriers such as donor risk controls, heavy reporting requirements, and limited trust in smaller NGOs, while Ukrainian NGOs pointed to compliance and administrative capacity gaps that made it harder for them to obtain direct awards.

¹⁵ [First Standard Allocation Strategy, OCHA UHF, 2025](#)

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

KII 9 (International actor): «I would not say so... I think that is one of the main problems of the humanitarian system, that national actors are not getting enough direct funding. It's probably consciously a control issue. Who controls resources and who controls the rules how the money is spent.»

KII 6 (International actor): «Some of those organizations do not meet the minimum international standards for finance and administration. So, if you want to become a well-recognized local NGO... legal and administrative aspects of finance need to be very open and transparent.»

KII 23 (National actor): «To receive direct funding, you have to meet all donor requirements, have transparent reporting and strong administration. This requires resources that we often do not have.»

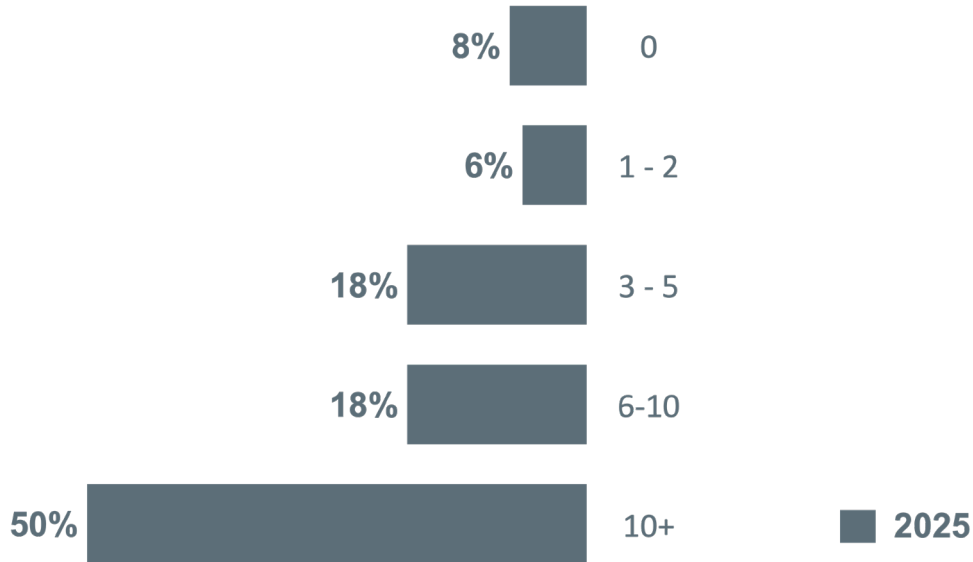
Among the organizations involved in the study, 8% did not provide financial assistance to their partners at all, but worked with them on other terms. At the same time, half of the international organizations financed more than 10 local organizations.



Photo provided by Heritage Ukraine / Odesa region

Figure 47. Number of organizations funded by partners (international actors)

Approximately how many local/national organizations receive financial assistance from your organization?



The slowdown in the perception of “strong improvement” should not necessarily be interpreted as a negative trend. Following the rapid growth and expansion phase of 2022-2023, many organizations entered a consolidation stage, with structural systems, internal procedures, and partnerships already in place. In such contexts, fewer “strong improvements” may reflect a shift from reactive development to organizational stabilization and maturity, rather than decline (Figure 48).

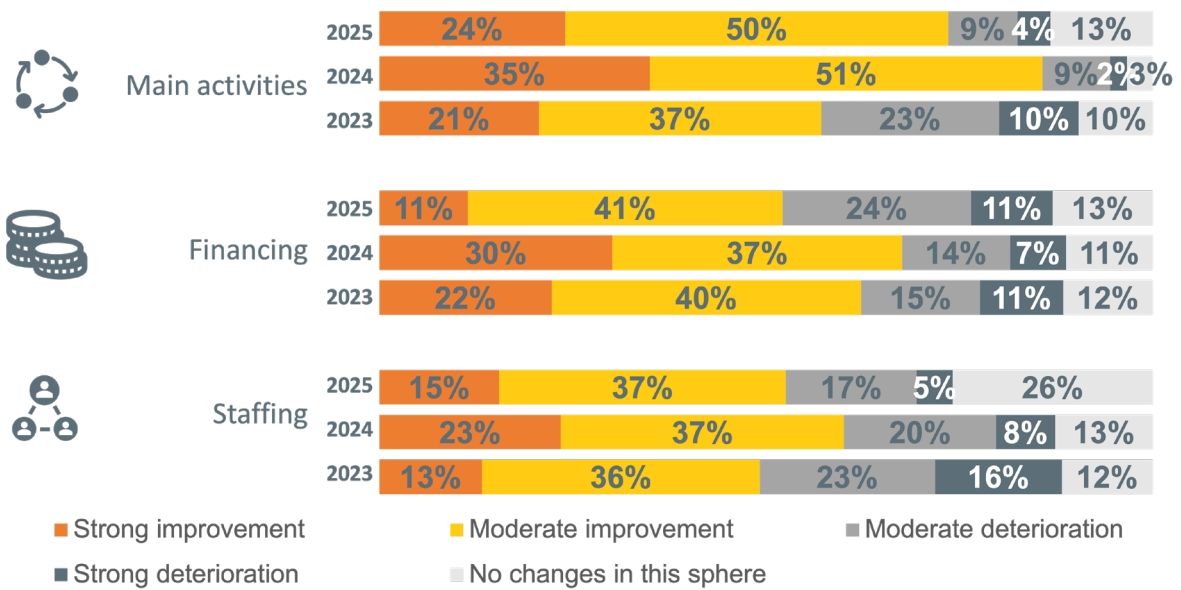


Photo provided by Heritage Ukraine / Odesa region

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Figure 48. Organizational changes since the full-scale invasion (national actors)

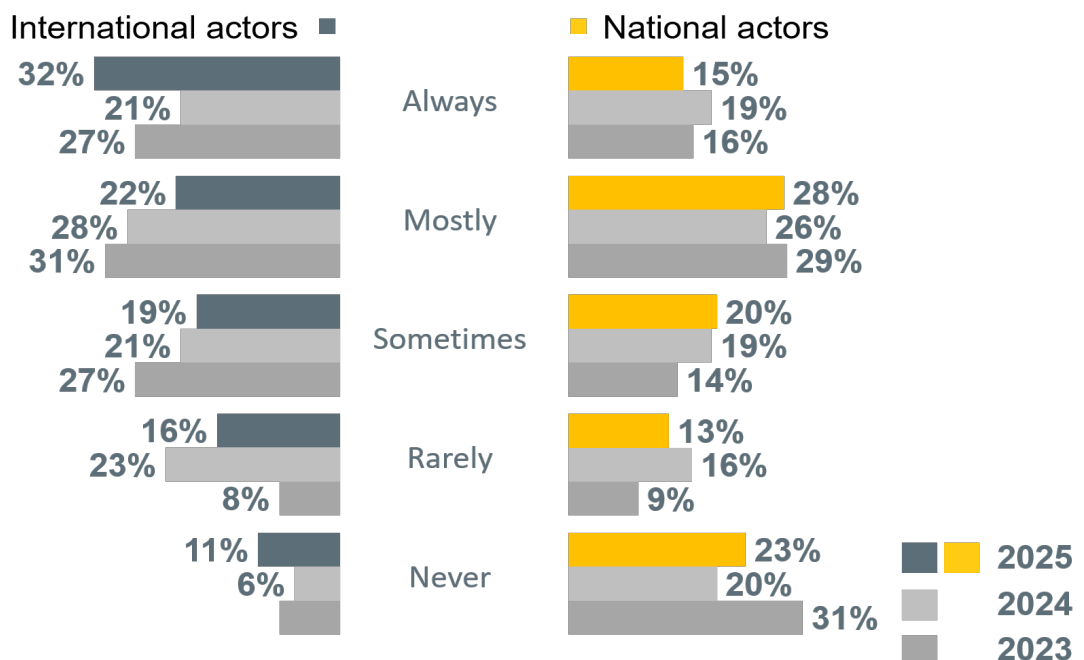
What changes did you have? Please estimate each sphere:



Funding control remains a sensitive issue in planning and implementing humanitarian assistance. Open access to project budgets and financial reports remains a crucial factor in fostering mutual trust and partnerships. However, limited progress has been made in this area. The share of positive responses (“always or mostly”) from international organizations increased by five percentage points. For national organizations, the share of positive responses that have access decreased by two percentage points (Figure 49).

Figure 49. Sharing project budgets and financial reports

We share full project proposals, including the budget and financial reports, with our local/national partners.

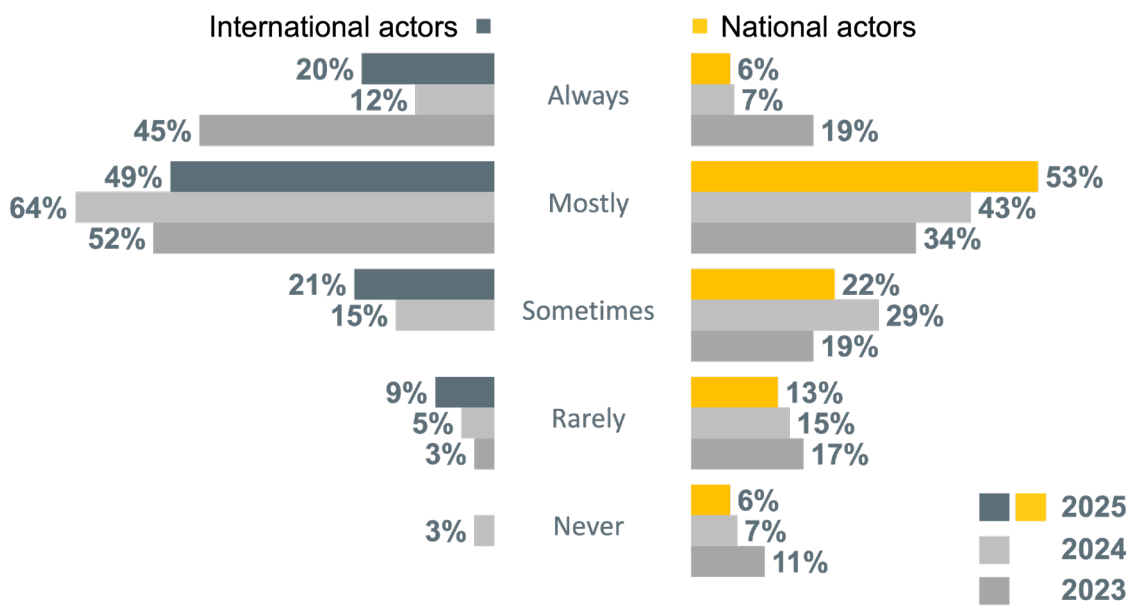


More national actors feel financially stable: 59% felt always or mostly stable, compared to 50% in 2024. The data for international actors follow a completely different trajectory, having fallen from 76% to 69%, reflecting the overall funding drop within the humanitarian response in Ukraine. It is still interesting that a fifth of international actors consistently felt stable, a significant increase from the previous year, indicating asymmetric development (Figure 50).

International organizations that perceive themselves as financially stable were more likely to share budgets and financial reports with local partners, firmly believe that capacity strengthening is having a positive effect, and are significantly more likely to recognize and credit the role of national actors within their operations than less financially stable international organizations.

Figure 50. Perceived financial stability

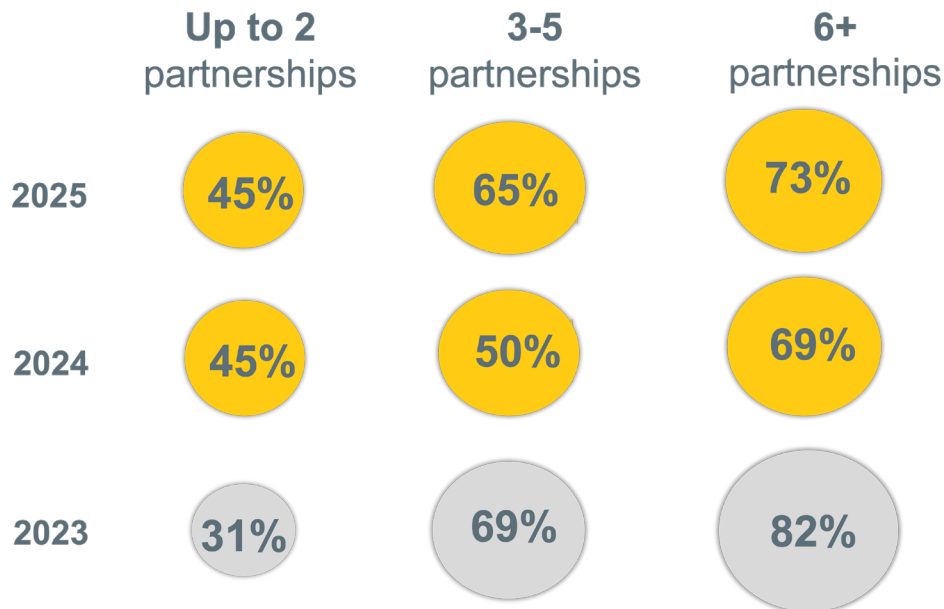
I feel that my organization is financially stable



Perceived financial stability among national actors improved overall, with 59% reporting that they feel “always” or “mostly” stable (Figure 51). However, this stability is unevenly distributed: organizations with six or more partnerships were significantly more likely to feel financially secure (73%) compared to those with fewer than three partnerships (45%).

Figure 51. Financial stability: national actors by number of partnerships, % of 'always' and 'mostly'

Do you feel that your organization is financially stable?



28% of national respondents confirmed that they definitely have an operating budget in the bank for at least three months, while another 43% answered “mostly yes.” Thus, there is a positive change in financial stability among national actors (Figure 52). However, the situation is different among international organizations: 65% had an operating budget for the coming months (a 16% decrease compared to 2024), and 30% were likely to have one.

The availability of operational reserves, as well as financial stability, is linked to access to overhead and indirect cost coverage, making it possible to create operational buffers. These buffers increased significantly for national actors, with an almost 20% increase in organizations receiving them compared to 2024. Organizations that regularly receive overhead as part of donor or intermediary agreements were significantly more likely to maintain a 3-month operational reserve. Conversely, those operating with minimal or no overhead, including both small and medium-sized Ukrainian NGOs, remained dependent on project-based funding and faced ongoing liquidity risks.

Figure 52. Operating budget

Do you think your organization has an operational budget in the bank for at least 3 months?

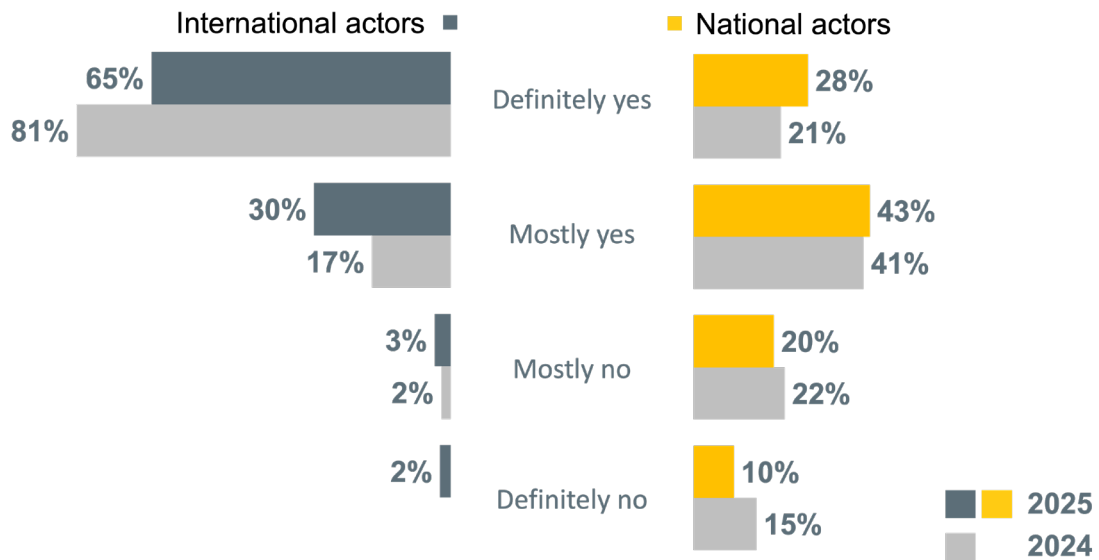


Photo provided by the NGO Resource Centre / training in Lviv



KEY FINDINGS

The overall assessment of localization evidence in the capacity domain remains Some Evidence (2.3 points), with no change measured compared to the 2024 progress review (2.3 points).

Progress indicators	Level of evidence		
	2023	2024	2025
Increased use of local, national, and regional capacity over international expertise	3.0	2.5	2.5
International actors do not undermine the capacity of national actors in emergency response	1.7	2.0	2.0

“Capacity strengthening is not charity — it’s the foundation for sustainable humanitarian leadership. Investing in local organizations’ systems, people, and governance allows them to lead responses, not just implement them.”

*— Jagan Chapagain, Secretary General of IFRC
Humanitarian Networks and Partnerships Week
Geneva, March 2025*

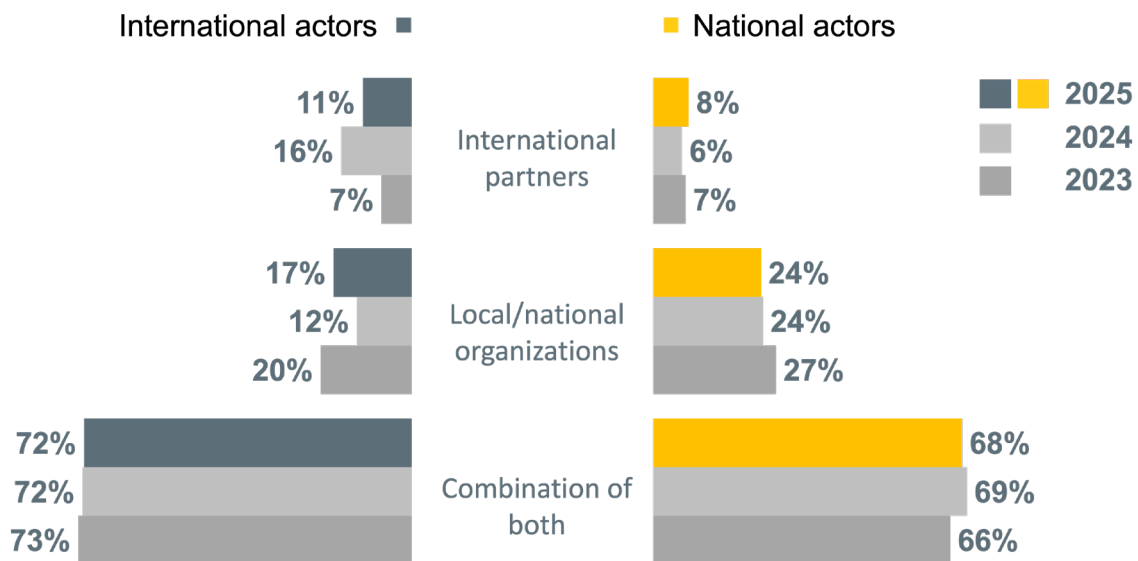
Capacity is one of the key determinants of whether local and national organizations can effectively manage financial resources, maintain accountability, and act as equal partners in humanitarian response. Strengthening capacity is therefore a pre-condition for sustainable localization, ensuring that local actors are not only implementers but decision-makers and resource managers within the overall response systems.

The vast majority of both national and international organizations continued to report that the capacity needs of local and national actors are defined jointly (around 70% across all three years).

Despite the apparent stability in how capacity needs are defined, the data point to a persistent pattern of shared but not locally-led ownership. The fact that around 70% of respondents across three years reported that needs are identified “jointly” suggests that international actors remain embedded in decision-making processes and are the owners of resources that, in theory, should gradually shift to national leadership. The lack of growth in the share of locally-defined capacity needs suggests some parts of capacity strengthening continue to be externally driven, with international partners maintaining influence over priority setting and resource allocation. In other words, localization in the domain of capacity appears to have reached a plateau.

Figure 53. Capacity needs

Who defines the capacity needs of local and national actors?



Both international and national respondents acknowledged that the process of defining capacity and identifying capacity needs remains influenced by intermediary and donor-driven initiatives. While collaboration between partners has improved, it often reflects consultation rather than shared decision-making. National organizations are increasingly included in discussions, yet their ability to shape organizational development priorities and resource allocation remains somewhat limited.

Question: Who determines the capacity building needs of local/national actors?

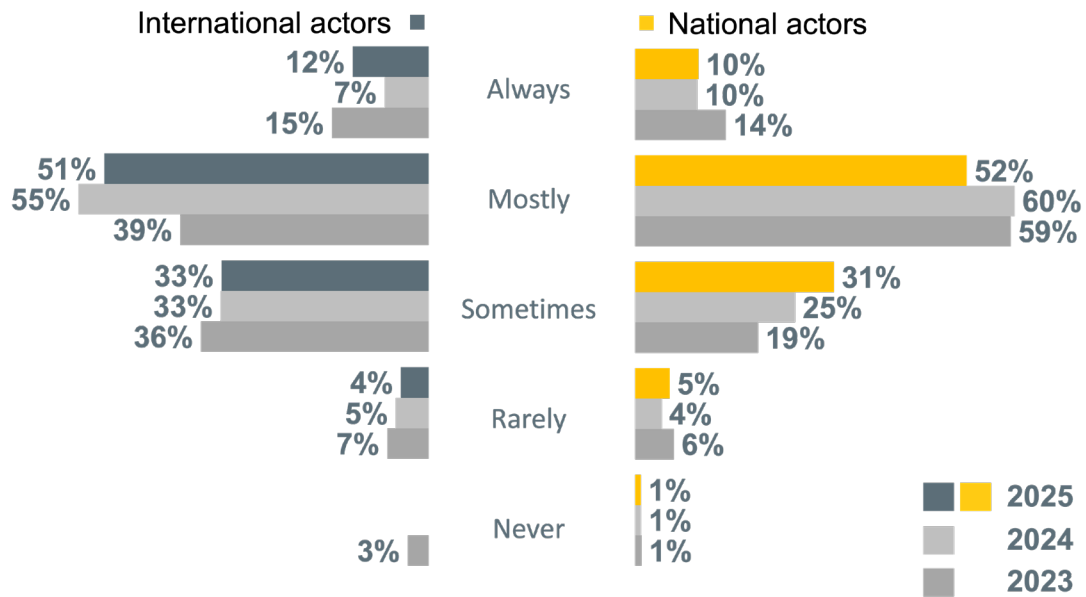
KII 22 (National actor): «Most often, international partners decide for themselves what training we need. We don't always have the opportunity to say what is more relevant for us right now.»

KII 16 (International actor): «In our, it is the local actor. So, we have this whole process called ASPIRE. So, they do this whole workshop that we facilitate, but they come up with their own plan for capacity strengthening within that.»

The data suggest a persistent perception gap between national and international actors regarding how well international partners respond to locally-defined priorities for capacity strengthening. While most respondents, international and national, believe that international actors “mostly” align with local requests, the proportion of national actors who feel fully heard declined slightly. In practice, capacity-strengthening initiatives often remained shaped by intermediary and donor frameworks rather than by the evolving institutional needs of local organizations.

Figure 54. Capacity strengthening

Do international/foreign actors focus on the areas of capacity strengthening requested by local and national actors?



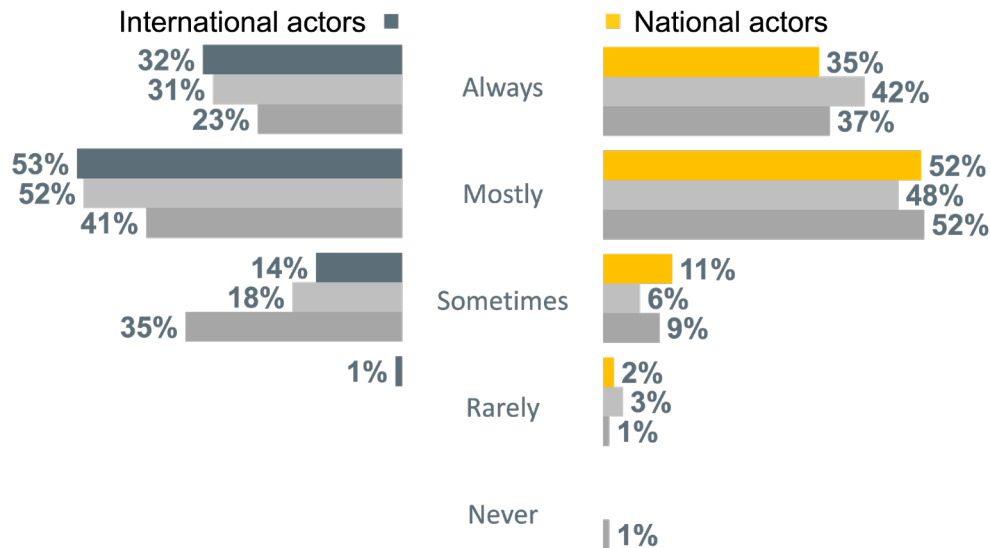
Perceptions of how effectively international support strengthens local capacity remained largely positive but static. Both national and international actors consistently reported that such support “mostly” or “always” contributes to capacity development. The existing capacity-strengthening models often reinforce operational competencies, but fall short of enabling strategic autonomy. Combined with earlier findings, this suggests that while Ukrainian organizations are benefiting from international mentoring and resources, their institutional resilience and capacity are not always growing proportionally.



Photo provided by Depaul Ukraine / Kharkiv region

Figure 55. Capacity support

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



Key informants emphasized that there are also negative aspects that need to be highlighted and addressed. In particular:

- Support was often project-based, short-term, or technical in nature; for example, in the form of training, consulting, equipment procurement, or policy development. Respondents emphasized that genuine institutional strengthening requires greater flexibility, long-term partnerships, and stable funding, which are currently lacking.

- International organizations were not always interested in fully “levelling” their partners, as this may diminish their role as intermediaries in the aid system.

This dynamic creates a paradox within the localization process: while international support is well-meaning and intended to foster technical expertise and manage risks, it can also contribute to sustaining dependence. The prevalence of intermediary and donor-driven, short-cycle projects means that local organizations adapt to international systems rather than developing their own, contextualized ones. As a result, capacity strengthening focuses on improving operational efficiency and risk management, but lacks support for institutional independence.

Question: In your opinion, is your organization's capacity being strengthened by international support?

KII 26 (National actor): "International support is important, but there is a feeling that international actors are not interested in us becoming fully independent — because then we would become their competitors."

KII 24 (National actor): "Thanks to international partners, we have become stronger — we now have policies, procedures, and trained specialists. But we would like more institutional support, not just technical support."

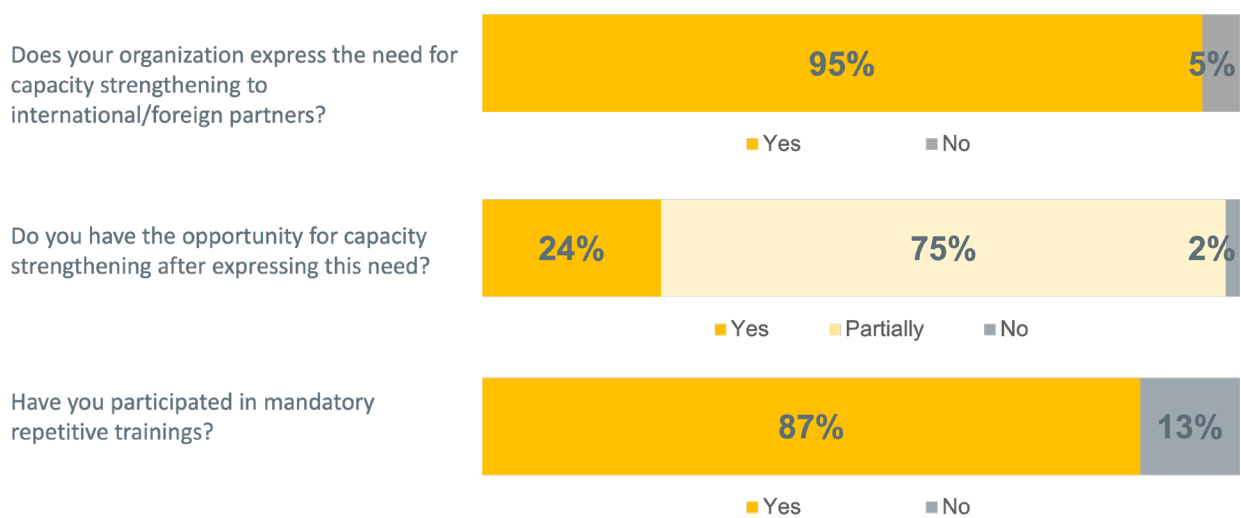
National organizations typically expressed a need for capacity building, but only 24% had the opportunity to fully satisfy these needs. Additionally, 87% of national organizations participated in mandatory regular training sessions.

Figure 56. Expression of needs (national actors)

Does your organization express the need for capacity strengthening to international/foreign partners?

Do you have the opportunity for capacity strengthening after expressing this need? (if expressed)

Have you participated in mandatory repetitive trainings?



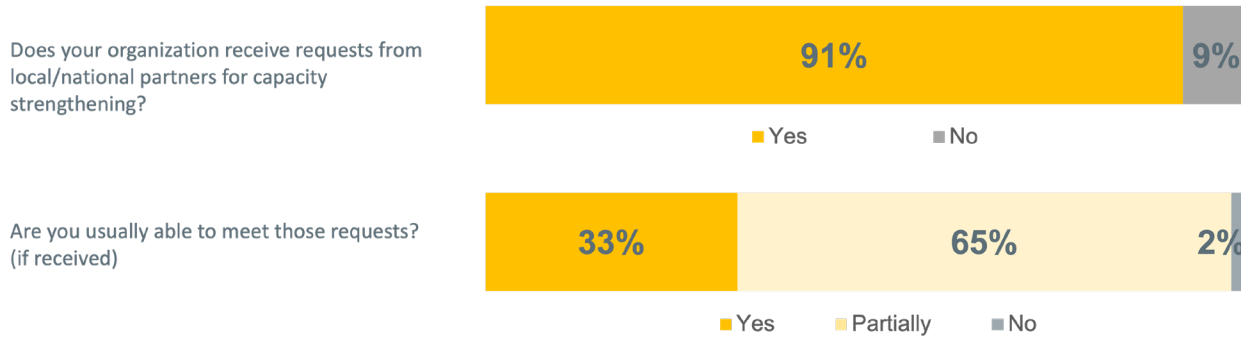
91% of international actors received requests from national actors to strengthen their capacity, and they were able to meet or partially meet the requests in almost all cases (98%). This contradicts the response of national actors, who believed that needs were not fully met in the majority of cases (Figure 57).

The data reveal a consistent asymmetry between recognition and response: while almost all international actors received requests for capacity support, they could only partially meet the requests. This gap highlights not a lack of willingness but systemic limitations, which often prioritize project delivery over partner development. This dynamic sustains the appearance of responsiveness but delays genuine transformation, underscoring the need to integrate capacity-strengthening goals into principled partnership frameworks.

Figure 57. Requests for capacity strengthening (international actors)

Does your organization receive requests from local/national partners for capacity strengthening?

Are you usually able to meet those requests? (if received)



National actors frequently highlighted repetitive trainings from international actors as an ongoing issue that diverts time away from partners, and often stated they were conducted to meet donor compliance requirements. The trainings often lacked progression in content or skill level, as there was no coordination among international actors to build upon each other’s work, and international actors also failed to spread training over time (usually concentrated at the point of receiving funds from institutional donors). It is essential to note that repetitive training can be highly beneficial in certain areas, such as first aid, mine awareness, and safeguarding; however, even there, respondents identified problems due to the lack of standardized content, and best practices transform into different practices that cannot be implemented simultaneously.

Question: Who defines the capacity needs of the local national and is this appropriate right now?

KII 17 (International actor): “We have worked with partners saying that they have had to follow, let’s say, eight SHE courses, shared trainings to access to partnerships or funding and after the eighth SHE training, they were feeling that they didn’t learn anything new or useful. So, we have forced partners, international NGOs, to repeatedly do the same kind of things.”

KII 14 (National actor): “But we are working on it, especially on the platform, where we are actively trying to find ways and solutions to reduce this burden of repetitive training. There is no answer yet, because what do international organizations say? These are donor requirements... We are advocating for this.”

POLICY INFLUENCE

KEY FINDINGS

The overall assessment of localization evidence in the policy influence domain improved to Limited-Some Evidence (1.4 points), a considerable improvement compared to the 2024 progress review (Limited Evidence, 0.8 points).

Progress indicators	Level of evidence		
	2023	2024	2025
Policies are informed by local and national voices, including communities	1.0	0.5	1.3
National actors are recognized as key stakeholders in national debates about policies and standards that may have a significant impact on them ¹⁶	1.0	1.0	1.5
Local and national actors have an influence on donor priorities in-country, including program design and implementation	0.0	1.0	1.5

“True localization is not just about transferring resources. First and foremost, it is about trusting local actors and recognizing their right to participate in policy-making, program planning and fund allocation on equal terms with international partners.”

— Gritt Richter,

Team Lead Global Programme «Help Localization Facility, HLF», 2025

Policy influence is a crucial aspect of localization, ensuring that all stakeholders can shape the strategic direction of the humanitarian response. In 2025, there was a significant positive development, with national organizations increasingly participating in broader policy discussions and donor consultations, where their expertise and contextual knowledge were recognized and valued.

This growing engagement indicates a move from participation to influence, where local actors are not only consulted but begin to shape the humanitarian agenda and policy frameworks. While full co-ownership has yet to be achieved, the progress demonstrates a clear trend toward stronger local leadership within the policy domain, and a humanitarian system that increasingly reflects the perspectives and priorities of Ukrainian organizations. However, efforts are still hampered by structural inequalities.

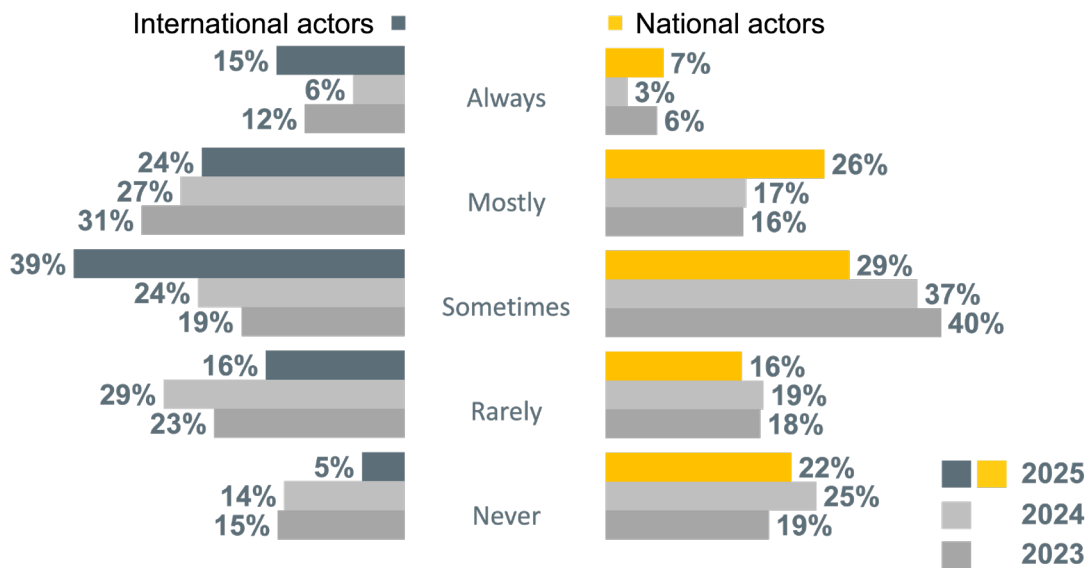
The proportion of respondents who reported being actively involved in policy discussions grew notably among both national and international actors, with international organizations showing a two-fold increase in those “always” engaged and a sharp decline in those rarely involved. This signals a broader understanding of inclusion in policy-making processes and a greater commitment to collaborative policy development. At the same time, Ukrainian organizations are increasingly recognized as credible contributors whose contextual expertise informs humanitarian priorities.

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

Together, these changes reflect a gradual rebalancing of influence, rendering policy-making in the humanitarian response more inclusive, effective, and reflective of local leadership.

Figure 58. Involvement in policy development

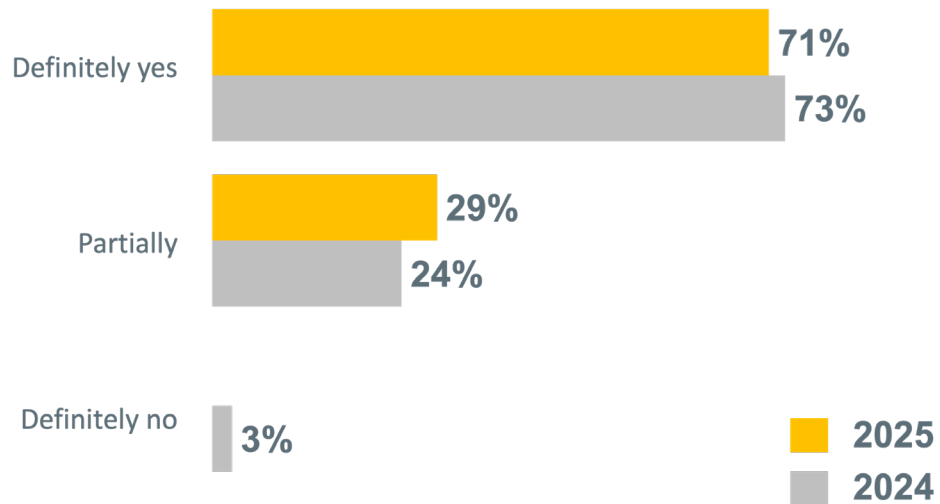
How much are you or your organization involved in influencing/feeding ideas into developing humanitarian policies and planning processes in Ukraine?



Even the national actors who perceived themselves as having little or no influence on humanitarian policy remained eager to participate in shaping it. This continues to highlight a significant untapped potential within Ukrainian civil society: organizations that already possess contextual knowledge, networks, and motivation but lack access to formal policy spaces. Enabling their participation would not only strengthen inclusivity but also enhance the quality and relevance of humanitarian policy development in Ukraine (Figure 59).

Figure 59. Willingness to be involved in policy influence (national actors)

Would you like to be [more] involved in influencing/feeding ideas into developing humanitarian policies and planning processes for Ukraine? (for those who answered «sometimes», «rarely» and «never» to the previous question)



Key informants representing international stakeholders confirmed that they participate in humanitarian policy and planning. Their engagement, however, tended to remain within the boundaries of established coordination systems, rather than proactively shaping policy direction, as it was limited by headquarters decisions and capital guidelines. While the commitment to “open dialogue” with partners demonstrates progress toward more inclusive practices, it also suggests that influence is still exercised within predefined frameworks. Although international actors consistently contribute to policy processes, genuine co-leadership and shared ownership with Ukrainian partners are still evolving and would benefit from further institutional reinforcement.

Question: To what extent are you or your organization involved in developing humanitarian policy and planning processes in Ukraine, and can you contribute your ideas?

KII 19 (International actor): “I think I wouldn’t say that we are leading it. We are doing as much as any other NGO is doing. So, through the cluster meetings, through the other forums, for strategy meetings, HCT meetings... we are taking part in all of those.”

KII 10 (International actor): “I think we are involved. How much? I don’t know. I’m not able to quantify. But what I can tell you is that because we have this policy of open doors with our partners... they ask for our suggestions when they enter into a dialogue for the decision-making process. And we do the same.”

At the same time, national actors emphasized that their influence on donor policy remained limited. While donors increasingly consulted with Ukrainian organizations and acknowledged their input, key strategic decisions are perceived to be made primarily at the international institutional level. Ukrainian actors participated in clusters, working groups, and bilateral meetings; yet, many felt that these platforms provided a space for information sharing rather than genuine influence.

Several respondents described this dynamic as a system that enables participation but not decision-making power, where local organizations can be listened to, but not necessarily heard. This reflects a continuing structural power imbalance within the humanitarian system, where ownership of policy decisions has yet to be meaningfully localized.

Policy influence in the context of localization also extends beyond formal participation in coordination and policy forums and is closely linked to transparency and access to information. The growing practice of international organizations to share full project proposals, budgets, and financial reports with their Ukrainian partners represents a significant enabler of influence. When local and national actors have access to full project data, they gain a clearer understanding of how priorities are set and resources allocated, which allows them to engage in more informed dialogue with donors and policy-makers. Sharing information also links to these organizations being more successful, possibly linked to higher-quality proposals based on input from national actors.

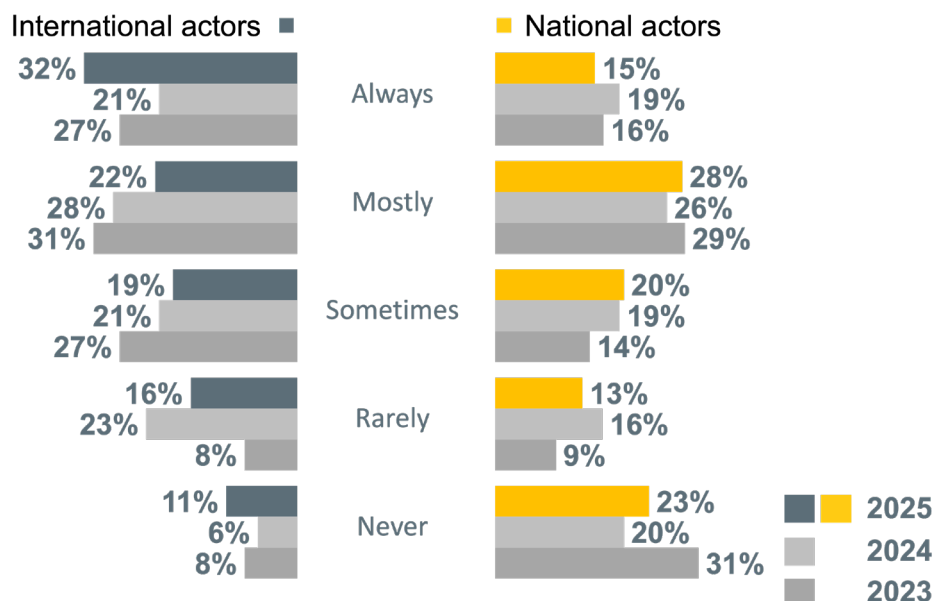
Question: Do you feel that you are able to influence donor policy?

KII 23 (National actor): "You can go there and say what you need, and you will most likely be heard. But to say that this system they have built is, in principle, unnecessary — no. You can just fit into the system and then give your idea... But when you have a choice between an orange and a tangerine, you can't say you want an apple."

KII 25 (National actor): "We have the opportunity to express our position, but not to influence policy. Decisions are made at a higher level, and this does not always correspond to what is needed on the ground."

Figure 60. Sharing project budgets and financial reports

We share full project proposals, including the budget and financial reports, with our local/national partners



Key informants confirmed the quantitative survey data. Most respondents, especially national organizations, reported that access to international partners' budgets and projects remained limited within ongoing cooperation. International partners usually shared only parts of reports, proposals, or information related to specific project components, rather than complete narratives, budgets, and financial documents. Ukrainian actors believed that such secrecy on the part of international partners limits transparency and equality, as it makes it impossible to understand how resources are allocated, and emphasized that genuine partnership requires openness.

International actors acknowledge this gap, explaining that they rarely share complete data due to internal confidentiality rules or other restrictions. However, such practices perpetuate unequal power dynamics and hinder progress toward genuine localization. Transparency is not only about accountability; it is also a precondition for equitable participation in decision-making and builds trust between partners.

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

KII 24 (National actor): «International partners do not show full financial reports. We only receive general figures or summaries, but not details.»

KII 1 (International actor): «We do not share the total. We do not share the information on other partners and our own to the partner. We can generally explain how their contribution fits overall, but we do not avail all the detailed information.»



Photo provided by NGO Resource Center / training in Kyiv

PARTICIPATION

KEY FINDINGS

The overall assessment of localization evidence in the participation domain regressed to Some Evidence (2.3 points), marking a decline compared to the 2024 progress review (Some-Significant Evidence, 2.5 points)

Progress indicators	Level of evidence		
	2023	2024	2025
Community/contextualized standards exist for all actors working in that context	3.0	2.0	2.0
Communities have increased opportunities to shape programming, including evaluation of international actor programs ¹⁷	1.5	3.0	2.5

“..., bringing together national NGOs, local volunteers, international NGOs, and UN agencies enabled humanitarian assistance to reach over 8 million people across Ukraine in 2024. Only through collective efforts, aligning priorities and resources, can we overcome access challenges and ensure that help reaches those most in need, wherever they are.”

— Matthias Schmale, Humanitarian Coordinator for Ukraine, 2025

Participation, as a core domain of localization, reflects the extent to which affected communities and local actors are not only consulted but also actively shape humanitarian priorities, program design, and implementation. It goes beyond listening to people’s needs — it is about sharing power, ensuring that those most impacted by crises have a meaningful role in decisions that affect their lives, and that humanitarian response is co-created rather than externally delivered.

The participation domain remains one of the strongest, despite a slight decline in 2025. Local and national organizations played a crucial role by providing a deep understanding of the context, local problems, and effective solutions. They are able to mobilize local networks and communities, which facilitates better access to affected populations and a more rapid response to their needs.

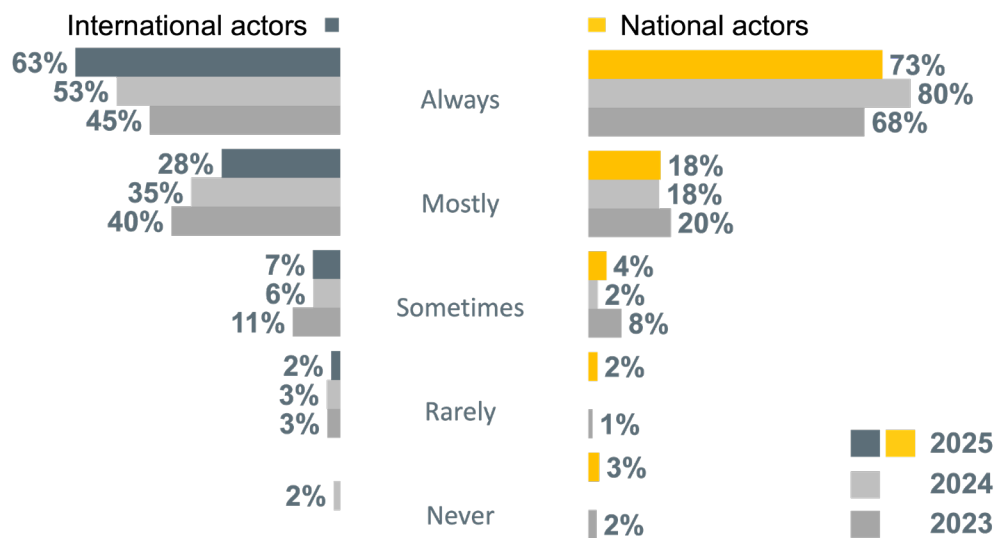
Most respondents note that the needs of affected populations were taken into account when developing and implementing humanitarian programs. However, this percentage fell slightly among national organizations: in 2025, 73% reported that they always take needs into account, compared to 80% in 2024. The decrease can be attributed to the significant increase in national actors working in more regions, which makes them less able to maintain close contact with local communities and work within new regional contexts with fewer close connections to the local communities present.

¹⁷ The indicator was assessed using a qualitative survey of key informants.

Among international organizations, the proportion of those who always take needs into account increased by 10%. Thus, the difference in the level of involvement of national and international organizations in addressing the needs of affected populations remained, but was less pronounced, linked to national organizations' closer ties with communities and their deeper understanding of local needs. However, the longer international actors stay in Ukraine, the stronger their own networks become.

Figure 61. Accountability to affected population

Does your organization consider affected people's opinions when designing and implementing programs in Ukraine?



While adjustments to projects and programs require donor approval within the framework of existing agreements, which often delays the process, many international organizations noted that they were able, in practice, to urgently allocate funds for specific needs or make minor project modifications when necessary. This indicates a gap in perceptions and practices: while donors and international partners may consider their processes flexible, national organizations often experience them as slow and bureaucratic, especially when rapid adaptation is required.

Question: Do humanitarian organizations have the flexibility to adjust their projects and programs in case of changing conditions/based on the needs expressed by the affected population?

KII 2 (International actor): "There is flexibility, but within limits. We cannot change donor contracts completely. However, we do adapt activities based on feedback from affected people."

KII 10 (International actor): "Of course, we have some flexibility... but donors often want written justification for every change, which can slow down the response."

National organizations generally experienced less flexibility than international ones. They noted that local needs often change faster than funding change procedures allow, and therefore, adjustments are slow or do not happen at all.

National actors emphasized that communities actively shape their programs through feedback, consultations, field visits, and joint planning. However, this influence was mainly within the scope of local initiatives rather than at a broader level.

Question: How do communities shape your humanitarian response programs?

KII 23 (National actor): "Our programs are shaped by community requests — we hold meetings, conduct surveys, and respond to needs. But when this does not suit donors, it is difficult to change."



Chernihiv region, Ukraine
Anastasia Shcherbina, along with her husband and three daughters — Polina, Sofia (pictured), and Solomiya—were forced to leave their home in the frontline Donetsk region. They found new accommodation in the village of Khlopyaniki in the Chernihiv region. The international non-governmental organization ZOA, with financial support from the Humanitarian Fund for Ukraine (UHF), provided this and more than 2,000 other families with fuel for the winter and materials to insulate their homes.

November 2024

Photo: ZOA / Natalia Bogdan

DUTY OF CARE

Duty of Care remains a significant consideration for any humanitarian work within the Ukrainian context, as fighting intensifies, long-term effects become more pronounced, and risks increase for those working on the ground to support affected communities.

A principled approach to Duty of Care remains more an exception than a systemic practice within the humanitarian response in Ukraine. While the introduction highlights the scale of risks faced by humanitarian personnel, the findings in this section emphasise a structural gap: risk-sharing within partnerships remains uneven, and local actors continue to bear a disproportionate share of exposure during frontline operations.

Local responders, who are themselves part of affected communities, undertake the majority of high-risk tasks, including evacuations, aid delivery in volatile environments, and rapid response in areas under active shelling. Despite this, the many stakeholders do not yet apply Duty of Care as a formalized standard in partnership arrangements. In practice, this means that the responsibilities for safety, preparedness, insurance, and operational risk mitigation are often insufficiently defined, resulting in inconsistent protection measures across the response.

Addressing this requires a shift from ad hoc organizational practices to a coordinated, partnership-wide approach. For example, Duty of Care being embedded within donor requirements and partnership agreements, ensuring that risk-sharing extends downstream to national NGOs and volunteer groups who perform the most dangerous work. This includes allocating dedicated funding for insurance, training, protective equipment, psycho-social support, and other essential components needed to operate safely in high-risk contexts.

As hostilities continue to intensify and humanitarian access becomes more challenging, incidents affecting frontline responders are expected to increase. Without adequate investment in Duty of Care, these trends risk undermining both the safety of personnel and the broader effectiveness of the humanitarian response. For localization in Ukraine to advance meaningfully, the protection and well-being of humanitarian workers must be recognized as a strategic priority rather than a supplementary component.

Strengthening Duty of Care is therefore not only an ethical requirement but a critical enabler of locally-led response. When local actors are properly protected, equipped, insured, and supported, they are better able to sustain operations, expand their leadership roles, and contribute to a more resilient and effective humanitarian system in Ukraine. The majority (70%) of national actors received safety training or instructions from international organizations, but only 33% always received them within their cooperation. Additionally, 61% implemented physical security measures for their employees, and 36% of organizations received insurance programs; however, there is a significant additional need. For example, 56% of respondents emphasized their need in health insurance. One-third of respondents (34%) were not provided support for mental health support in partnerships with international stakeholders, indicating that there is room for all actors to improve current conditions.

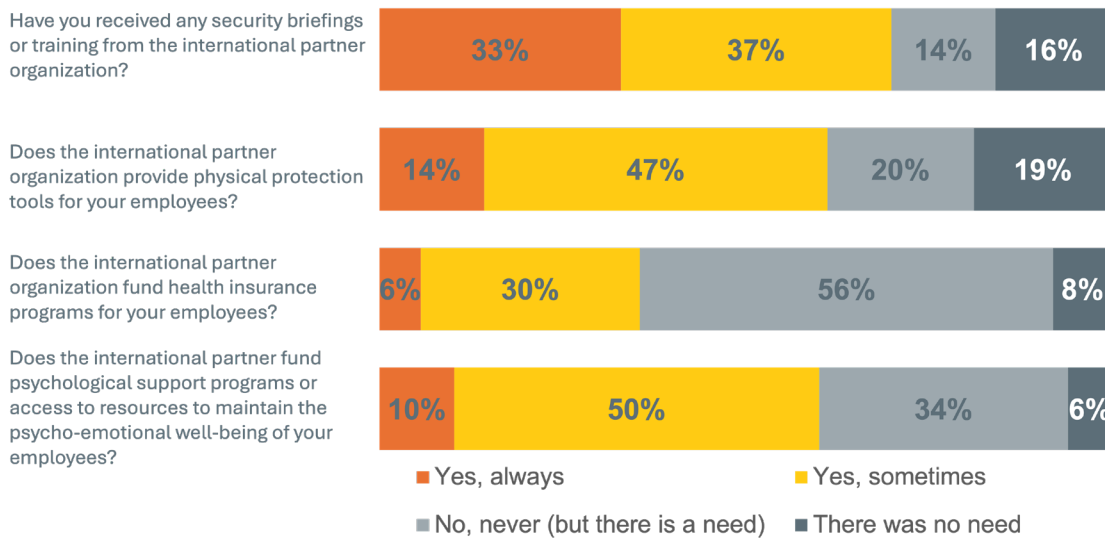
Figure 62. Duty of Care, support from international partners (national actors)

Have you received any security briefings or training from the international partner?

Does the international partner provide physical protection tools for your employees?

Does the international partner fund health insurance programs for your employees?

Does the international partner fund psychological support programs or access to resources to maintain the psycho-emotional well-being of your employees?

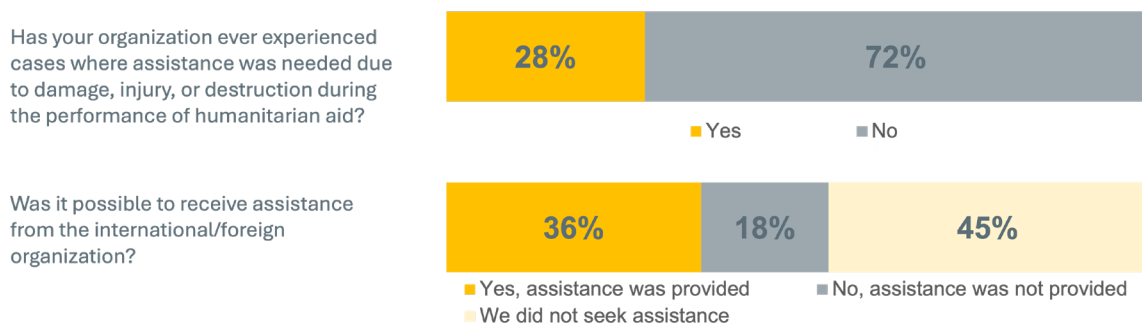


More than a quarter of respondents needed assistance due to physical injury, trauma, or damage (28%), but of those, only 36% actually received it, while 18% did not receive it even though they requested it, and 45% decided not to request it at all.

Figure 63. Duty of Care, need for assistance (national actors)

Have you ever experienced cases where assistance was needed due to damage, injury, or destruction during the performance of humanitarian aid?

Was it possible to receive assistance from the international/foreign organizations?



Almost all international respondents confirmed that Duty of Care principle is an essential part of their policy towards their partners and staff, and some are in the process of implementing it. They understand it as ensuring the safety, well-being, and psychological support of employees and partners, particularly those working in challenging or hazardous conditions. In practice, this principle manifests itself in providing insurance, safety training, psychological support, evacuation plans, consultations, and ongoing communication about risks. Virtually all those who apply Duty of Care principle provide for all aspects, including safety policies and providing protective equipment, life and health insurance, and mental health support programs.

Question: Do you follow the Duty of Care principle in your interactions with national organizations in Ukraine?

KII 1 (International actor): "Yes, absolutely. We take it very seriously... It means ensuring staff safety, psychological well-being, and a safe environment for everyone involved, including partners."

At the same time, some national actors noted that the application of Duty of Care principle is often limited or selective, and international organizations tended to prioritize the safety of their own staff over that of local partners, even though the latter may have a greater need for it. However, there are also positive examples, such as joint training, access to psychological assistance, care during shelling, and other types of support.

Question: Do you follow the Duty of Care principle in your interactions with national organizations in Ukraine?

KII 26 (National actor): "Everyone talks about duty of care, but when it comes to risks, they tell us, 'You decide for yourselves whether to go.' That's not the level of care they should be providing."

KII 25 (National actor): "We had an experience where an international partner provided us with safety training and paid for psychological counselling. That helped a lot."

CONCLUSIONS

Localization is defined as the process of conducting humanitarian responses under the leadership of local organizations. In Ukraine, there is an incremental but positive shift towards increased localization. This baseline report notes progress in four key areas of localization:

- Partnerships
- Leadership
- Funding
- Policy influence

The results indicate that humanitarian localization in Ukraine is gradually shifting from conceptual recognition to system adaptation and institutionalization, and perhaps even cultural and mindset change, through modest but positive progress in the domains above, with the most substantial increases observed in the weakest domains, i.e., funding and policy influence.

Evidence across various domains indicates that local and national actors have strengthened their visibility and financial stability, while international actors have increasingly acknowledged the need for equitable partnerships and fair cost-sharing. Notably, there is a significant difference between international and national intermediaries in terms of cost allocation, where national actors are less likely to provide support for both direct and indirect funds compared to their international counterparts.

Of special significance this year was the overall funding decline and its effects on the organizations implementing the humanitarian response. This forced international and national stakeholders to work differently, leading national organizations to engage in broader geographical areas, working in more sectors, and working with more partners. Among the effects was a visible decline in the number of partnerships and financial stability among international organizations.

Paradoxically, national stakeholders experienced a relative level of financial stability, highlighting a different funding landscape, efforts to replace funding, more direct funding mechanisms, and donor strategies that increasingly prioritize local needs and capacities.

While improving, local actors still face challenges due to underfunding of critical areas, such as Duty of Care and indirect costs, as well as unfulfilled capacity-strengthening needs, thereby limiting institutional resilience.

The baseline results signal a broader understanding of inclusion in policy-making processes. While still insufficient, it demonstrates a greater commitment to collaborative policy development, with changes that reflect a gradual rebalancing of influence, making policy-making in the humanitarian response more reflective of national actors' opinions. There was a substantial increase in national organizations' donor interactions in 2025, which further positively impacted policy influence.

Nonetheless, the leadership and coordination domains still reflected an imbalance of influence, with international actors continuing to dominate strategic decision-making. The gap between decision-making power and pure participation highlights the ongoing need for mechanisms that genuinely incorporate the voices of affected communities into program design and evaluation, not only at the consultation level but also through joint decision-making and transparent resource allocation.

The results highlight the need for full transparency and equity within partnerships, as well as a principled approach, including fully integrating key principles into practice, such as Duty of Care. The results indicate that the work for qualitative partnerships and recognition of partner contributions leads to a positive effect for international stakeholders, as well.

The continued annual increase in baseline respondents indicates a strong interest and engagement in localization processes, as well as the importance the community places on accountability. This highlights the humanitarian response community's need to look beyond words and theory towards actual practice and impact.



Photo provided by Swiss Agency for Development and Cooperation (SDC)
Swiss Federal Department of Foreign Affairs