Contents
1. Executive Summary ........................................................................................................... 3
2. Introduction ......................................................................................................................... 4
3. Context ................................................................................................................................ 5
4. Key Findings ........................................................................................................................ 9
   4.1 Main Challenges Facing Refugee and Host Communities ............................................. 9
   4.2 Response Performance ................................................................................................. 12
   4.3 Challenges to the Response .......................................................................................... 15
   4.4 Outlook and Conclusion ............................................................................................... 21
Appendix .................................................................................................................................. 24
Bibliography ............................................................................................................................. 26
1. Executive Summary

Since the Syrian uprising and armed conflict began in 2011, more than 11 million people have been internally displaced or have fled to neighboring states, namely Lebanon, Jordan, Iraq and Turkey. This has put a severe strain on host communities in these neighboring countries. In order to assist, the international community mobilized an estimated USD 3 billion for the 2018 Syria Regional Refugee and Resilience Plans, funding more than 50 organizations.

In order to obtain a comprehensive review of the response, Voluntas Advisory has for the past three years surveyed practitioners from international organizations, non-governmental organizations (NGOs), government authorities, international donors, the private sector and academia. The survey covers the breadth of the refugee and host community response, from workers on the ground in Iraq, Jordan, Lebanon, and Turkey to key decision makers. A first report was published in November 2016 and a second in April 2018. This is the third annual survey conducted. The most recent survey was conducted from 9 January 2019 - 31 January 2019.

Overall, the survey finds a notable increase in the challenges for vulnerable groups. These negative developments relate to the growing pressure on returns and increasingly polarized environment which affect both host communities and refugees in the region. Some improvements can however be observed when it comes to the performance and strategies of key response actors i.e. donors, international organizations, international and national NGOs and national authorities. It appears that actors are starting to adjust and learn from past mistakes, as well as exploring new, innovative ways of delivering support to host communities and refugees.

Significant changes to the response are yet to be witnessed and the international community’s efforts to address gaps in the response, most noticeably the Grand Bargain Commitments, are yet to change the realities on the ground. Key challenges to the response are the exclusion of affected people in decision-making and insufficient funding for local aid providers. The Grand Bargain Commitments seek to address these issues, but the impact on the ground appears to be limited. Localization of aid is a key factor in determining practitioners’ perceptions of the response performance and addressing this challenge may both improve perceptions as well as actual delivery of aid to host communities and refugees.

Practitioners are not optimistic that the situation on the ground and the response will improve in the future. Indeed, 4 out 10 practitioners believe the situation for vulnerable groups will be worse next year, as opposed to 1 in 10 that think it will be better. Similarly, 4 out of 10 anticipate that the national and international response will be worse, while only 1 in 10 think it will improve.

With areas inside Syria stabilizing and deteriorating conditions in neighboring countries, approximately half of practitioners believe that voluntary returns to Syria will increase next year. Consequently, practitioners assert that the response in 2019 should focus on ensuring that returns happen in a voluntary, safe and dignified manner.

The caseload of Syrian refugees in neighboring countries is however going to remain high for the foreseeable future, especially as long as no significant progress is achieved to solve the conflict in Syria. The international community should therefore continue to focus on improving the direct response. It is vital to not only pick low-hanging fruits, but also to address key systemic design flaws in the aid architecture. This include addressing the organizational barriers to increasing aid for local providers and reviewing the capacity in response actors to manage aid strategically and efficiently.

1 All monetary figures reported in USD.
2. Introduction

To date, more than five million people from Syria are registered as refugees in Jordan, Lebanon, Turkey, Iraq, and Egypt and 6.2 million people are internally displaced within Syria.

Vulnerable groups inside and outside of Syria lack access to basic goods such as food, water, shelter, and protection, as well as access to education, healthcare, and security. Major humanitarian organizations have identified a “lost generation” of children as a result of displacement. Host communities in states neighboring of Syria have shown their solidarity with refugees, but they are also running out of resources to support the overwhelming number of people crossing their borders every day. These countries continue to struggle to guarantee services such as power, clean water, education, healthcare, and waste management to their own citizens.

The objective of this study is to shed light on the status of the Syrian crisis and the response to it, looking at the main challenges that vulnerable groups and national and international actors face. The study mainly focuses on developments since the previous survey conducted in the summer of 2017. It also looks at the progress of implementation of the Grand Bargain commitments.

The study is based on a survey distributed to more than 6,000 professionals from all primary stakeholder groups involved in the crisis, including international organizations, national and international NGOs (INGOs), government agencies in the region, donors and partners, private sector, charitable organizations, media, and academia. The study is geographically focused on the Middle East, paying specific attention to respondents from Syria, Lebanon, Jordan, Turkey, and Iraq, who are currently or have previously been involved directly or indirectly with the crisis. The data was gathered in the period of January 9 to January 30, 2019 (see appendix for methodology).

The first section looks at the context and provides a background for the analysis. The second section presents the findings, focusing on:

a) Challenges faced by vulnerable groups
b) Perception of response performance and strategies
c) Challenges to the response
d) Outlook on the future development
3. Context

In 2018, the number of registered refugees in countries neighboring of Syria continued to grow albeit at a slower pace compared to previous years. While the numbers in Lebanon, Jordan and Iraq have remained relatively stable, the numbers in Turkey have significantly increased mainly due to the increased fighting in the North West of Syria.

Politics of Return
Developments in parts of Syria have stabilized and there has been a cessation of fighting in areas such as Damascus. This has led to increasing calls in both Europe and Syria’s neighboring countries for Syrian refugees to return. As an example, Germany has supported the voluntary return of 437 people to Syria in 2018 under its Starthilfe scheme, which provides small grants to refugees to help them return and resettle. Despite this increasing pressure on return, the number of returning refugees fell slightly in 2018 from the approximately 77,000 in 2017 to roughly 56,000.

UNHCR continues to assess the situation but as of now is not supporting or facilitating returns. The agency has formulated a number of protection safeguards that need to be in place in Syria before they engage in facilitating return. These include significant reduction in hostilities, guarantees that returnees will not face harassment and detention, as well as government mechanisms for addressing

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housing, land and property issues. Reports from returnees confirm that these conditions are still not in place, as returnees have been detained and disappeared or faced conscription into the army.\(^5\)

According to the 2019 UNHCR return intention survey, about 6 percent of refugees in the neighbouring countries intend to return to Syria within the next twelve months.\(^6\) This is slightly higher than in the previous survey from 2018 which found that 4 percent intended to return.\(^7\) This would mean that somewhere between approximately 250,000 and 500,000 would return within the next 12 months mainly from Jordan and Turkey, as shown in the figure below.\(^8\)

The surveys highlight that returns are to a large extent driven by safety and security, job opportunities, access to shelter and access to basic services. When such conditions or “pull-factors” are in place, intentions to return increases. Other studies have also highlighted things such as homesickness and nostalgia as significant “pull-factors” for refugees to return.\(^9\) “Push-factors” i.e. conditions in the place of exile have a more complex impact on intentions to return. Decreasing access to services and making life difficult for refugees in neighbouring countries does not necessarily invoke an increased intention of returning, according to a recent World Bank study.\(^10\) While response actors can help to ensure that the push-factors are limited by upholding service levels and a conducive policy environment, working on the pull-factors is another challenge, as restoring services in Syria is estimated to cost upward of USD 350 billion in reconstruction.\(^11\) Such an undertaking is still not on the table, as especially the EU has established a red-line when it comes to engaging in reconstruction in Syria as long as there is no political settlement to the conflict.


\(^6\) UNHCR (2019): Syrian Refugees’ Perceptions and Intentions on Return to Syria


\(^8\) Calculated by multiplying return intention with number of refugees residing in country. The low estimate is based on the official number of refugees registered with UNHCR and including negative margin of error (appr. -1 %). The high estimate is based on estimated number of refugees in Jordan to be 1,4 million and in Lebanon to be 1,5 million and including positive margin of error (appr. +1%). The intention survey has not been carried out in Turkey so the return intention for Turkey is based on the regional weighted average.


\(^10\) World Bank (2019): The Mobility of Displaced Syrians: An Economic and Social Analysis

\(^11\) World Bank (2017): The Toll of War: The Economic and Social Consequences of the Conflict in Syria
Regional political environment

Even though “push-factors” have a complex, non-linear effect on returns, governments in the region continue to instil policies to encourage Syrian refugees to return. In Jordan, the government has generally been accommodating refugees and is not vocally calling for the return of refugees. Yet, in March 2018, it reclassified Syrian refugees so they would become categorised as “uninsured foreigners” meaning that Syrian refugees would now have to pay up to 80 percent of the cost of health services. This translates into a two to five-fold increase in the cost for refugees. The policy change came as part of general austerity measures in Jordan due to its poor economic performance.

In Lebanon, the parliamentary election in May 2018 (followed by a 9-month legislative deadlock during the formation of the new government) did not significantly alter the policy of encouraging Syrian refugees to return, and Lebanon continues to impose restrictive measures on refugees in the country. In the run-up to the elections, as well as in the post-election environment, an increasing number of politicians have voiced that Syrians should return. The country has also seen curfews for refugees in more than 1/3 of their municipalities, as well as forced evictions. Lebanon’s General Security agency has established centres where refugees can register to return. The agency facilitates these returns, including arrangements with the Syrian authorities. Given UNHCR policy that conditions are not in place to facilitate returns, the position of the Lebanese government has created tangible tensions with UNHCR. The rift between the two entities led to public criticism of UNHCR by the Minister of Foreign Affairs in Lebanon and a decision in June to freeze residency applications for UNHCR staff. The intention to return by refugees in Lebanon from 3 percent in March-June to 5 percent in November 2018 - February 2019.

In Turkey, the policy environment related to Syrian refugees has remained relatively stable and accommodating. Yet, tensions appear to be on the rise. In light of the declining economic performance, failing currency and increased inflation, refugees are increasingly being seen as a burden. Host community grievances relate to access to public services, competition over jobs and increasing prices of e.g. renting apartments. As an example of the rising tensions, 927 Syrians were evacuated in Denizli due to fears of a lynching by the local population because of anger over the arrest of six Syrians accused of rape. Turkey has sought to limit the number of Syrians seeking asylum in Turkey by a 764 km concrete wall on the border with Syria which was completed in June 2018 and has cameras and lightening installed on it. The Turkish military apprehended more than 200,000 individuals trying to irregularly cross the Syrian border in 2018. A further effort to discourage Syrian refugees seeking asylum in Turkey has been the de-facto stop of registration of newly arriving refugees, leaving them without adequate protection and access to services. Finally, the Turkish authorities have offered financial assistance to Syrian refugees in Turkey to persuade them to return to Afrin.

In Iraq, the Kurdistan Regional Government has since the beginning of the crisis in Syria been receptive to the refugees arriving. The authorities have generally allowed Syrians to work and move freely in the

The arrival of Iraqi IDPs combined with economic challenges in the Kurdistan region has meant an increased competition over scarce job opportunities. Economic barriers have thus outpaced socio-cultural barriers as the main integration challenge for Syrian refugees. 74 percent of refugee and 45 percent of Iraqi households perceived that they had less access to income-generating opportunities compared to others in their community. The perceived gap in access to jobs, and similar for access to services, is a source of growing tension in the communities.

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4. Key Findings

4.1 Main Challenges Facing Refugee and Host Communities

Practitioners were asked about the perceived importance of challenges facing refugees in the neighboring countries concerning a number of core challenges such as education, health, employment, among other.

There is a mixed picture in the region when it comes to the developments in the key challenges faced by refugees. In Lebanon and Jordan, the countries with the highest per-capita presence of refugees in the region, the situation seems to be taking a downward turn with many key challenges increasing in importance compared to 2017.

In Jordan, access to food increased in importance as a key challenge for refugees. While food security for Syrian refugees improved in 2018, 1/3 of Syrian refugee households still remained moderately to severely food-insecure.25 Of particular concern are an estimated 40,000 refugees stranded at Rukban along the Syrian border who have limited access to food, water, and medical assistance.24 Another key challenge rising in importance is the proximity to conflict of vulnerable refugees.

In Lebanon, child labor recruitment is among the key challenges increasing in importance. Child labor rose from 4 percent in 2016 to 7 percent in 2018 in Lebanon. This increase is mainly driven by the protractedness of the crisis, which means that refugee households are depleting their assets and increasingly turn to child labor as a coping mechanism.25 Another negative coping mechanism is driving the increased importance of sexual and gender-based violence (SGBV) as a key challenge for refugees. The protractedness of the crisis has resulted in an intensification of instances of SGBV, e.g. seen by a sharp increase in early child marriage, which for some families is a coping mechanism resulting from the hardship of displacement.

“Official protection mechanisms addressed to women and children affected by violence and abuse is a big challenge not only for refugees but for host communities as well. In the region, those problems are considered family problems and public officials don't deal with them. NGOs face big challenges dealing with them”
- Aid worker in donor agency working regionally

Early child marriage of Syrian girls is also a result of other factors, including physical harassment in refugee settlements where parents pressure their daughters to get married in order to get a male protector. Other factors relate to customs and traditions.26

In Turkey and Iraq, the situation is improving on most of the key challenges faced by refugees. However, in Iraq, there has been a sharp increase in the challenge of accessing university education.

This may be related to the increase in tuition fees seen in recent years due to the difficult economic situation in the Kurdistan region. In Turkey, the key challenge that increased in importance was access to employment. This is due to the declining economic performance of Turkey and related increase in unemployment which reached the highest in a decade at the end of 2018.

As with the situation for refugees, there seems to have been a negative development for host communities in both Lebanon and Jordan, but also in Turkey, where a majority of indicators are increasing in importance.

In Jordan, one of the key challenges increasing in importance is political violence and absence of stability. The country is facing persistent economic challenges which have turned into a political crisis for the government. In 2018, there were continuous protests against tax increases which led to a cabinet reshuffle and removal of former Prime Minister Hani al-Mulki. The decreasing political stability is coupled with an increased threat of homegrown Islamist extremism. An estimated 3,000 foreign fighters in ISIS are of Jordanian origin, rendering Jordan the highest per capita foreign contributor to ISIS. As ISIS is being defeated in most of Iraq and Syria, not only are foreign fighters now returning to Jordan, but extremists in Jordan now have fewer opportunities to travel abroad. Moreover, issues related to power cuts and electricity shortages have become a major challenge in Jordan.

In Turkey, unemployment has become an increasing challenge, which, as mentioned earlier, also impacts refugees. In addition, the perceived importance of basic human rights protection in host communities in Turkey is increasing significantly. Following the attempted military coup in 2016, a state of emergency has been in place and 2018 which saw an upward trend in repression of the political opposition, journalists and civil society.
In Lebanon, many challenges also increased in importance albeit to a lesser extent than what was witnessed in Turkey and Jordan. Among the rising challenges are corruption, access to clean drinking water, electricity cuts and discrimination against women.
4.2 Response Performance

While conditions for refugees and host communities’ members seem to have deteriorated, the performance of the main response actors, i.e. donors, international organizations, international and national NGOs and national authorities, is perceived to be improving. In fact, 4 out of 5 response actor types are improving their performance in addressing refugees’ challenges compared to 2017. In response to host communities’ challenges, 3 out of 5 actors are improving.

Specifically international organizations are improving their response, seeing an increase of 10 percentage points in perceived performance in response to refugees’ challenge and two percentage points in relations to host communities’. INGOs continue to be the actor with the highest performance score in responding to needs of refugees. Seven out of ten surveyed reported that INGOs’ performance towards refugees was “good” or “very good”. This is the most positive performance rating of any actor type in the three years the study has been conducted. INGOs are however seeing the biggest decline in perceived performance when it comes to responding to needs of host communities. Despite a slight decline in performance, national NGOs continue to be perceived as those with the best performance when it comes to addressing host community challenges, with about half of practitioners reporting a “good” or “very good” performance.

National authorities had the poorest perceived performance responding to the challenges of refugees with less than 1/3 believing they display “good” or “very good” performance. The poor performance by national authorities should be seen in relations to the increasingly hostile policy environment, in particular in Lebanon, towards refugees. Given the central role of the national authorities in the response, their poor performance is hampering the response by other actors. As described here by an employee in an INGO in Lebanon and consultancy firm employee in Jordan.

“We have reached a point where national and international NGOs’ work is becoming inefficient due to the absence and lack of work from the government’s side. A dead end is being reached after 8 years of crisis in Lebanon” - International NGO employee in Lebanon

“Government institutions often have limited resources, therefore, national NGOs should be systematically strengthened to conduct projects. Government often hold up very strict rules and regulations and prevent or hold back significantly project implementation.” - Consultancy firm employee in Jordan

Also, the State of the Humanitarian System case study of Lebanon highlighted that the government’s policies and behavior constrained access for certain groups. A further example of government policies negatively impacting on response actors’ operations was the freezing of work permits for UNCHR staff in Lebanon, as mentioned above in the context section above. Elite networks in Lebanon have placed themselves in a powerful position in the response, enabling them to block decisions and projects, and support patronage and clientelism. This calls into question the feasibility of adopting a humanitarian-development nexus approach to the crisis in Lebanon.
Interestingly, while practitioners perceive response performance to be improving, people in need in Iraq and Lebanon think performance is declining. Fewer people in need in the two countries think that the aid they receive cover their most important needs and that it goes to those that need it the most.  

Donors are performing on par with national authorities when it comes to responding to the challenges of host communities and have seen a stable development when it comes to the response to refugees’ challenges. Donor performance is impacted by their relationships and leverage vis-à-vis the host governments, as well as by their own national politics, which affects funding, priorities and approaches. As described here by a donor employee working on Syria:

“Donors are too weak in the face of national authorities, paralyzed by an anti-migration strategy and the next elections in the EU, to be able to truly deliver quality assistance to those affected in neighbouring countries.” - Donor employee in Syria

While perceptions of performance have largely been improving, perceptions of whether actors have a meaningful strategy have declined for three out of the five response actors. On a general level, strategic approaches to humanitarian crises are often compromised due a supply-driven approach whereby both within and across agencies, actors prioritize their own sectors and sub-sectors rather than considering the needs as a whole. Strategies are further driven by donor priorities and funding opportunities which are often based on a general foreign policy objective rather than the specific contextual needs in an area, country or region.

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The changes in perception of strategies mean that NGOs are now perceived to have the most meaningful strategies when it comes to responding to the challenges faced by refugees. The developments further mean that the gap between strategies and actual performance has decreased. The performance of INGOs is actually perceived better than the strategies it is based on.

In Lebanon, there was an overall strategic shift in a key element of the response to refugees’ challenges - multi-purpose cash (MPC)-based programming - which was initiated by ECHO and DFID in late 2016. The shift meant that 2017 was a somewhat chaotic year, defined by a great deal of uncertainty and insecurity both for response actors and refugees. The unusually strong involvement of donors in defining the strategic approach has seemingly been received positively. 37 Whereas the overall performance of donors was stagnant, the perceived performance of donors in Lebanon increased by 6 percentage points. Similarly, the perceived meaningfulness of the donor strategies in Lebanon increased by 13 percentage points, compared to a general improvement in the region of 6 percentage points. The monitoring of MPC-based programming in Lebanon by WFP shows an improvement in the food consumption score among families receiving MPC, from 69 percent having acceptable food consumption in January 2018 to 91 percent in July 2018. 38

Most actors are seeing an increase in the number of practitioners that agree that the actor have a meaningful strategy towards host communities. International organizations and donors have improved significantly, by 5 percentage points each. The change means that international organizations now have the most positive strategy rating of any actor type in the three years the study has been conducted.

38 WFP (2018): After one year of UK-funded multi-purpose cash in Lebanon, what have we learned?
4.3 Challenges to the Response

Overall, one of the main challenges to the response is the lack of inclusion of refugees in decision-making on the design and implementation of aid programmes. Inclusion of refugees in decision-making can ensure that the humanitarian response is both relevant to their needs and effective. However, 51 percent of respondents disagree with the statement that refugees currently have enough say in programming design and implementation. This perspective is shared by the refugees themselves. Ground Truth Solutions research in Lebanon showed that 77 percent of refugees in Lebanon believe that aid providers do not at all or not very much take their opinions into account when providing aid. The situation appears to be better in Iraq, where 39 percent of refugees hold this opinion. Compared to 2017, practitioners in the region believe that the situation is improving as only 61 percent now see lack of inclusion as a challenge, compared to 69 percent. Refugees in Iraq also notice a positive trend in relations to participation, while the situation has deteriorated in Lebanon. One of the differences between Iraq and Lebanon is that approximately 40 percent of refugees in Iraq live in camps, while in Lebanon the government has a no-camp policy. Jordan has a similar situation with less than 1/5 refugees living in camps. This challenges the inclusion of refugees in decision-making as described by an aid worker from an international NGO in Jordan:

"Refugees need to be consulted more but aid agencies are challenged on making this happen in light of the fact that bulk of the refugees are in urban setting where convening them together or even identifying them is a logistical challenge" - International NGO employee in Jordan

Another key challenge to the response is coordination. More than 50 percent disagree with the statement that there is enough coordination between the various UN agencies involved in the response, confirming the results from previous surveys. As highlighted by a respondent from a national NGO in Lebanon:

"There is largely no coordination between humanitarian response and development aid and among UN organizations. Critical information is often not shared” - Donor employee in Jordan

"Organizations are competing and not coordinating in a very systematic [manner] though many coordination committees are established and running” -international NGO employee in Jordan

Lastly the key challenge is localization of aid, that is, channeling funding through local and national aid providers. There is widespread consensus that localization is cost-efficient and increases impact because the staff cost for local and national actors are less compared to international staff cost. Moreover, local staff have a better understanding of the local context to which the response needs to be tailored to. Being part of the community, local organizations usually have a better understanding of the needs, dynamics and cultures of their constituents and can therefore better target and deliver aid. However, 2/3 of respondents disagree that sufficient funding is provided to national NGOs.

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According to the OCHA Financial Tracking System, 0.07 percent of the funding towards the Syria Regional Resilience and Response Plan (3RP) 2018 went directly\textsuperscript{41} to national or local NGOs. This is significantly less compared to 2017, both in absolute and relative terms. In 2017, 0.9 percent of the funding for the 3RP went directly to local NGOs. This constituted approximately USD 27.5 million, whereas the funding in 2018 was only about USD 2 million. In 2018, the coverage of the total required funding by national NGOs in the 3RP was 1.1 percent covered, down from 6.4 percent in 2017 and 100 percent in 2016. Compared to global level funding appeals, the 3RP is also lagging behind, as globally, 0.17 percent of all funding against humanitarian appeals went to local or national NGOs.\textsuperscript{42}

Lebanon has been highlighted as a potential positive example of aid localization. The country has traditionally had a high number of civil society organizations who have among other played an important role during the civil war in providing different types of humanitarian response to the population in need.\textsuperscript{43} In the current situation, local NGOs have played an important role in bridging barriers between host communities and refugees.\textsuperscript{44} Given the weak capacity of the state, NGOs in Lebanon have also had an unfettered environment with less government interference as in e.g. Jordan.\textsuperscript{45} Localization has therefore been a key focus in the country, and, for example, the Lebanon Humanitarian Fund has in recent years set a target of providing more than half of its funding to national NGOs. In 2017, this target was achieved; yet, in 2018, it declined as it fell to 37 percent.\textsuperscript{46}

\textsuperscript{41} These numbers does not take into account all the funding that is channeled to local NGOs through UN agencies or international NGOs

\textsuperscript{42} OCHA (2018): Financial Tracking Service: Total reported funding 2017: \url{https://fts.unocha.org/global-funding/countries/2017}


\textsuperscript{44} Minority Rights Group International (2019): An uncertain future for Syrian refugees in Lebanon: The challenges of life in exile and the barriers to return


remains the country in the region where most of the direct funding to local NGOs is taking place, as 70 percent of funding to local NGOs under the 3RP appeal in 2018 went to organizations in Lebanon.

Despite these opportunities in Lebanon, the absolute levels of direct local funding remain low as highlighted. Indeed, a number of challenges exist in increasing funding to local NGOs. A key impediment is the technical and absorptive capacity of local organizations, who often lack proper organizational and financial management systems. Capacity has often been cited as one of the main challenges to increase funding for local aid providers. The capacity challenge is exacerbated by a trend among donor agencies of an increasing ratio of development and humanitarian aid funds per employee. As many donor agencies have been through a period of downsizing and decreasing the number of staff, while aid budgets have remained the same or increased, each staff now on average administers a larger budget. As shown below for a selected sample of key donor agencies, the ratio has been increasing over the last 15 years. For example, in SIDA, the ratio has more than doubled, i.e. each staff is now administering twice the budget compared to 2013. The same applies to DFID comparing 2017 to 2004. USAID has seen an increase in the ratio of approximately 60 percent since 2004. Only the Netherlands have seen slight decline in the period from 2007 to 2017.

The burden of administering a grant does not increase in proportion to its size. Donor agencies thus have a tendency to provide larger grants, as to avoid that the increased budget ratio per employee which translates into a massive administrative burden. As an example, the incoming contributions to the Syria Regional Response Plan have increased 2.5x in size from 2013 to 2018 from an average of approximately USD 2 million to 5 million. Given the capacity constraints of local NGOs this increase makes it progressively more difficult for them to obtain direct funding, as they are unable or ineligible to receive larger grants and contributions.

### Figure 2: Developments in ratio of staff to ODA in Donor agencies

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48 Calculated using OECD ODA data in constant USD prices (2015) compared to FTEs in annual reports where available. The selection of donor agencies has been made based on availability of data.
Increased participation of refugees and localization of aid were part of the Grand Bargain commitments made at the World Humanitarian Summit. There is still some way to go before the impact of the commitments is felt directly on the ground by practitioners.

Some of the commitments that have been noticed on the ground are improvements in joint and impartial needs assessments, where approximately half of practitioners believe that this has helped to improve the response to some extent. Also, greater aid transparency is perceived by a majority to have had some impact on the response. For the remaining commitments, less than a majority believe that they have improved the response. In particular, only about 1/3 of practitioners believe that the commitments of including refugees in decision-making and of reducing allocation of funding by donors have had a positive impact. Reducing allocation of funding is also closely linked to the other commitment of providing multi-year funding, which is generally improving however. Possibly, this is yet not visible in the context of Iraq, as noted by a field staff from an international organization:

"Often, aid is provided within a 12-month cycle and at the end of the 12-month cycle, donors take time to renew the aid contributions - this makes long term planning extremely difficult which negatively impacts the crisis response activities and also makes it extremely difficult to retain long serving and efficient staff - all of this in turn affects negatively to the crisis response [...] donors’ lack of understanding of the contextual needs and priorities have also affected the crisis response negatively and [display a] waste of aid funds” - Field staff from international organization in Iraq

"Funding for humanitarian programming is too short-term and focuses on short-term gains. This is a flaw as the crisis in the Middle East evolves because programming needs to focus on longer-term outcomes and sustainable solutions - even if still considered as ‘humanitarian’ programming. The context calls for sustainable programming to promote long-term solutions like infrastructure, legal rights, and education.” - Consultant working on the region as a whole

One of the reasons a majority of the commitments are yet to have an impact, is the limited progress being made in the working groups tasked with bringing the commitments to live. As highlighted in the annual independent report on the Grand Bargain:

"Progress within some workstreams has been stalled by a lack of consensus among or tensions between signatories with regard to definitions, objectives and priorities. In workstream 2 (localisation), for example, prolonged debates around definitions of ‘local actors’ and funding provided ‘as directly as possible’ diverted efforts to achieve progress across the full set of commitments for much of 2017”

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With response actors being pre-occupied in discussing definitions, it comes as no surprise that tangible improvements are yet to be seen on the ground in relations to the Syria crisis and other humanitarian crises around the world. On a general level, progress has been highlighted in relation to cash programming, inclusion of refugees in decision-making and multi-year planning and funding. The factors enabling progress on the indicators include being clear and actionable (as opposed to localization which is still undefined), limited policy differences between actors, clear priorities and strategy for implementation, links to pre-existing processes in the aid system, good collaboration and strong political investment from key stakeholders. In other words, as long as the commitments do not significantly “rock-the-boat” of existing organizational mandates, policies and approaches are relatively easy to turn into feasible progress from paper to action. This would, however, also indicate that commitments that can contribute to fundamentally changing the way humanitarian aid is being conceptualized, led and delivered will see limited progress in the foreseeable future.

The Grand Bargain outlined a number of initiatives by donors and aid organizations. To what extent have these initiatives so far helped to improve the response? (% high/some extent)

<table>
<thead>
<tr>
<th>Initiative</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve joint and impartial needs assessments</td>
<td>54%</td>
<td>53%</td>
</tr>
<tr>
<td>Greater aid transparency</td>
<td>43%</td>
<td>50%</td>
</tr>
<tr>
<td>Enhance engagement between humanitarian and development actors</td>
<td>42%</td>
<td>48%</td>
</tr>
<tr>
<td>More support and funding tools for local responders / Localization of aid</td>
<td>51%</td>
<td>44%</td>
</tr>
<tr>
<td>Harmonise and simplify reporting requirements</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td>Increase collaborative humanitarian multi-year planning and funding</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>Reduce duplication and management costs with periodic functional reviews</td>
<td>51%</td>
<td>41%</td>
</tr>
<tr>
<td>Reduce the earmarking of donor contributions</td>
<td>28%</td>
<td>38%</td>
</tr>
<tr>
<td>Include people receiving aid in decision making</td>
<td>37%</td>
<td>35%</td>
</tr>
</tbody>
</table>

While there is thus still some way to go for the commitments to change realities on the ground, we can observe that the commitments are not a key driver of the perceptions of the response performance, confirming the 2017 analysis. This calls into question whether the implementation of the commitments will change the way that practitioners evaluate the response and thus whether the commitments actually address the underlying challenges to the response.

The analysis of the drivers of the perception of the national and international response, focus on four key categories of drivers:

- Various indicators for how meaningful respondents find their work
- Background of respondent (i.e. country of focus, organization type, field/HQ level)

Various indicators for perceptions of the management and coordination performance

Various indicators measuring perceived impact of the Grand Bargain Commitments

The perceptions of the international response to the challenges faced by refugees is driven solely by two significant factors: 1) agree that organizations can adjust programming when context changes and 2) believing that one’s work does not make a difference. While the former highlights the importance of allowing organizations flexibility in managing aid and response, the latter is rather counter-intuitive. It may be explained as staff being part of the national response being more positive about the international response as they compare it to their own which is not perceived to make a difference.

Interestingly this latter factor is also driving perceptions of the national response. Not surprisingly, questions related to national and local actors are also significant factors. As such, respondents that think there is sufficient funding for local aid providers and people that do not think there is a lack of coordination and cooperation with national governments are more likely to have positive perceptions of the national response.

The same two factors are also significant when it comes to driving perceptions of the response to host communities’ challenges by national response actors. This is further driven by a perception that humanitarian and development actors work well together. Lastly, aid workers not working for donors are more likely to have positive perceptions, indicating that donors tend to view the national authorities and NGO response more negatively.

Perceptions of the international response to host communities’ challenges is also driven by perceptions that there is sufficient funding for local aid providers. This underscores the importance of the localization agenda and its ability to positively impact both perceived response quality and actual delivery of aid. Aid workers at regional or HQ level and not working for national NGOs are more likely to have positive perceptions of the international response to host communities’ challenges.
4.4 Outlook and Conclusion

As key international commitments do not seem to address the core and underlying drivers of the performance perceptions, it is not surprising that the outlook of practitioners remains bleak.

Close to nine out of ten practitioners do not believe there will be any improvements in the response. This is a similar picture as last year. Also, 2/3 of respondents believe that refugee flows to third countries, i.e. Europe or beyond, will increase consistently. This has decreased from last year where it was 8 in 10.

Without a durable and lasting solution, refugees will continue to face immense challenges in the host communities and some may consider returning to Syria as a better option given the developments in parts of the country. Practitioners are split on whether there will be an increase in returns as 52 percent believe that voluntary returns will increase in 2019.

Practitioners are also split on what should be the main focus for the response in 2019. Approximately 1/3 of respondents believe it should be on ensuring that returns to Syria happen in a safe, voluntary and dignified manner. One out of five respondents believe that focus should be on increasing support to rebuilding Syria. This is however most likely to not happen on a large-scale as long as there is no political solution to the conflict in Syria. The EU has firmly stated that it will only be ready to assist in the reconstruction of Syria when a comprehensive, genuine and inclusive political transition, negotiated by the Syrian parties in the conflict on the basis of UN Security Council Resolution 2254 and the 2012 Geneva Communiqué, is firmly underway.
As long as rebuilding does not occur on a large scale inside Syria, the caseload of refugees will remain high in neighboring countries. Addressing the response gaps, learning from past mistakes and implementing the international commitments to delivering aid differently is therefore of paramount importance.

"It is a shame that [we have seen] 7 years of Syrian refugee crisis and we are still making the same mistakes and the aid is far from sustainable or effective. Refugees till date in host countries are not able to have legal residence, work, obtain education especially for university…etc. We still hear of cases of forced prostitution and human trafficking. We have cases of forced deportations of refugees from host countries to Syrian borders. The response is shameful.”

- International NGO employee working on the region as a whole

In conclusion, this report finds that the increasing pressure on returns and polarized environment in the region has contributed to negative developments in the situation for both host communities and refugees in the region.

This is the case even though performance by key response actors generally appears to be improving and strategies also seem to have become more meaningful. It appears that actors are starting to adjust and learn from past mistakes, as well as exploring new, innovative ways of delivering support to host communities and refugees.

Nonetheless, a number of challenges continue to limit the impact of the response and international commitments to rectify some of these challenges are not making enough progress or having enough on-ground impact. In continuing to focus on improving the response, it is important to not only pick low-
hanging fruits, e.g. shift to cash-programming, multi-year funding, etc. all of which are pre-existing tools in the toolbox, but also address key systemic design flaws in the aid architecture; organizational barriers to increasing aid for local providers, capacity gaps of response actors to manage aid strategically and efficiently, ineffective coordination mechanisms. The caseload of Syrian refugees in neighboring countries is going to remain high in the foreseeable future, specifically as long as no substantial progress is made in resolving the conflict in Syria.
Appendix

About Voluntas Advisory (www.voluntasadvisory.com)
The purpose of Voluntas Advisory is to improve living standards and life quality through business as a force for good and public participants as catalysts for distribution of opportunities and creation of wealth. By working in the intersection between state and business, the interplay between society and market, and the synergy between citizen and consumer, we ...

• ... deliver intelligence based, informed and innovative policy making
• ... create purposeful business and branding strategies
• ... produce enlightening market research and impactful analysis

Voluntas Advisory has worked for a number of international organizations, NGOs, donors and private companies in the Middle East and North Africa since 2011 and is currently engaged in projects in Jordan, Lebanon, and Libya.

About the Middle East Crisis Survey
The project was originally designed by Voluntas Advisory based on our experience working in the region. A steering committee was established to provide inputs to the analytical framework and process. This committee consisted of:

• Anita Bay Bundegaard, Director and UN Representative of Save the Children, Geneva
• Dr. Melissa Phillips, Non-Resident Fellow at NYU Center for International Cooperation
• Dr. Nasser Yassin, American University of Beirut
• Thomas Gammeltoft-Hansen, Research Director, Raoul Wallenberg Institute
• Hart Ford, Country Director Lebanon, ACTED
• Andres Gonzalez Rodriguez, Country Director Iraq, OXFAM

The first survey was conducted in July 2016. The data for second survey was collected in the period from July 22 to August 23, 2016. The data for this survey was collected from 9 January 2019 - 31 January 2019 through a survey that was distributed in English and Arabic via email to a database developed by Voluntas Advisory of more than 5,000 practitioners working in Iraq, Jordan, Lebanon, Turkey, Syria or regionally on responding to the crisis in the Middle East. The database included staff from international organizations, international and national NGOs, government authorities, donors, the private sector and academia. The response rate for the survey was about 10%, comparable to response rates in regular public opinion surveys. The data has been weighted to make it comparable to the first annual survey in terms of geographic distribution and the type of organization the respondent represents.

Limitations
A number of limitations to the study should be considered:

• Sample size. With a sample size of 300 there is a margin of error of +/- 6%. Breaking down the data by country, the margin of error significantly increases. The results and changes from the first annual survey, should thus mainly be seen as indicative.

• Respondent bias and representativeness. As the exact population of humanitarian and development practitioners working in relations to the refugee crisis is unknown it is difficult to assess the representativeness of the obtained sample. The obtained sample includes 49% working at the field level, 31% working at the HQ level and the remaining working at the regional level. Given that field level staff spend more time out in the field and in some places have poor internet connectivity the use of an online survey may create a bias leading to underrepresentation of field staff. Similarly, in these types of surveys, there is a risk of self-selection bias. This type of bias would typically lead to mainly opinionated persons and people...
passionate about the topic participating. We should therefore expect more “extreme” views in the results i.e. either very positive or very negative. This is however considered to even out.

To account for these issues, the findings are sought to be corroborated with findings from other reports such as research articles, evaluation reports, etc.
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