

CHAPTER 1.1

THE FINANCIAL SIZE AND SHAPE OF THE SYSTEM

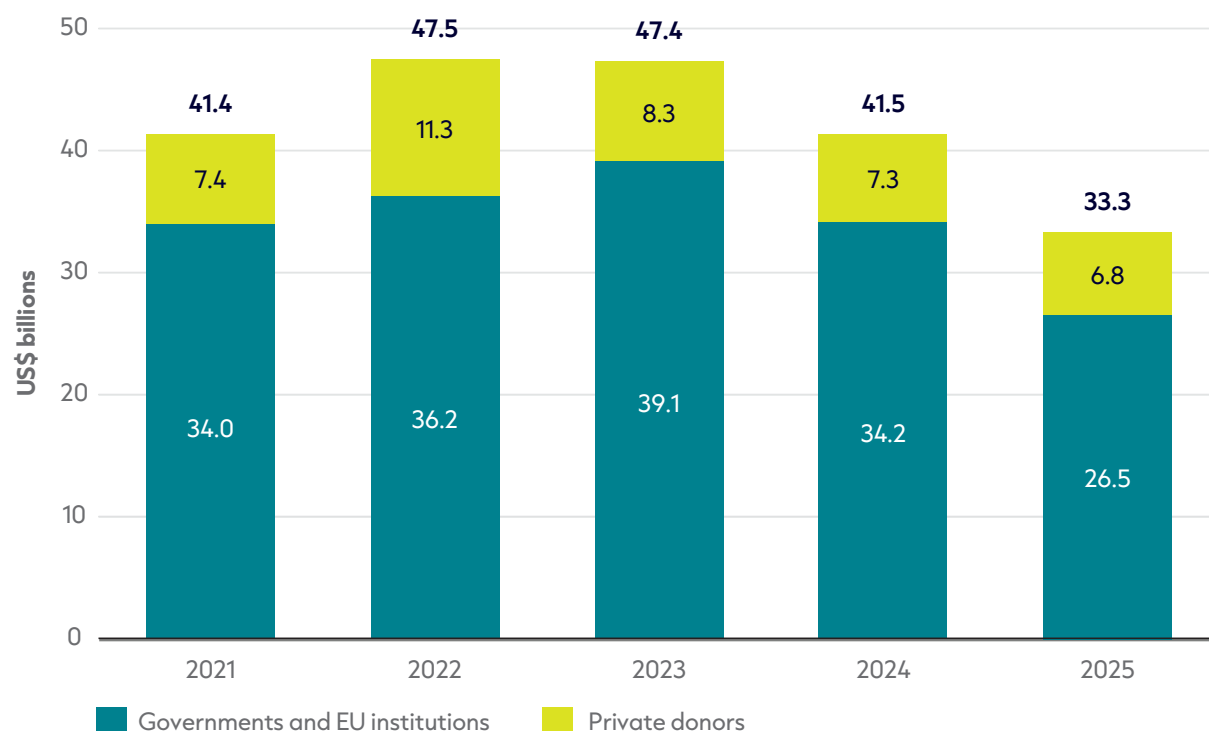
'You're not cutting fat. You're cutting muscle and bone. And bodies don't grow back quickly.'

– Thomas Byrnes, CEO and Founder, Market Impact²

In this study period, international humanitarian assistance (IHA) plunged by 30% from an all-time high of US\$47.5 billion in 2022 to US\$33.3 billion in 2025, while the interim years were characterised by significant stagnation and decline. Although 16 of 20 traditional donors had already cut IHA in 2024, the speed and scale of the cuts by the United States in early 2025 unleashed the effects of the system's dangerous dependency on a small number of government donors. By the end of 2025, widespread negative impacts on people affected by crisis were reported, United Nations (UN) coordinated appeals were only 35% funded, and IHA remained precariously concentrated among only a few donors and international agencies. Humanitarians stepped up efforts to explore potential new funding sources (such as non-Development Assistance Committee (DAC) donors, philanthropists and innovative finance) and ways to bolster political and public will to protect government budgets. The cuts emphasised the importance of humanitarian support structures outside the coordinated international system, including the ultimate responsibility of national governments and strong contributions of mutual aid, local private actors and diaspora support; yet some of these structures were also showing signs of strain by the end of 2025. Experts warned of compounding humanitarian needs over the longer term, unless local structures are strengthened and international assistance plays a more effective complementary role.

From all-time peak to sudden trough

In the first year of this study period (2022), IHA continued its previous trajectory of growth and reached an all-time peak of US\$47.5 billion, partly driven by the Covid-19 pandemic and the Ukraine war. Following a small contraction to US\$47.4 billion in 2023, IHA toppled by 13% in 2024 to US\$41.5 billion as 16 of the

Figure 1.1: Total international humanitarian assistance, 2021–2025

Source: ALNAP based on Organisation for Economic Co-operation and Development (OECD) DAC, UN Office for the Coordination of Humanitarian Affairs (OCHA) Financial Tracking Service (FTS), UN Central Emergency Response Fund (CERF) and our unique dataset for private contributions.

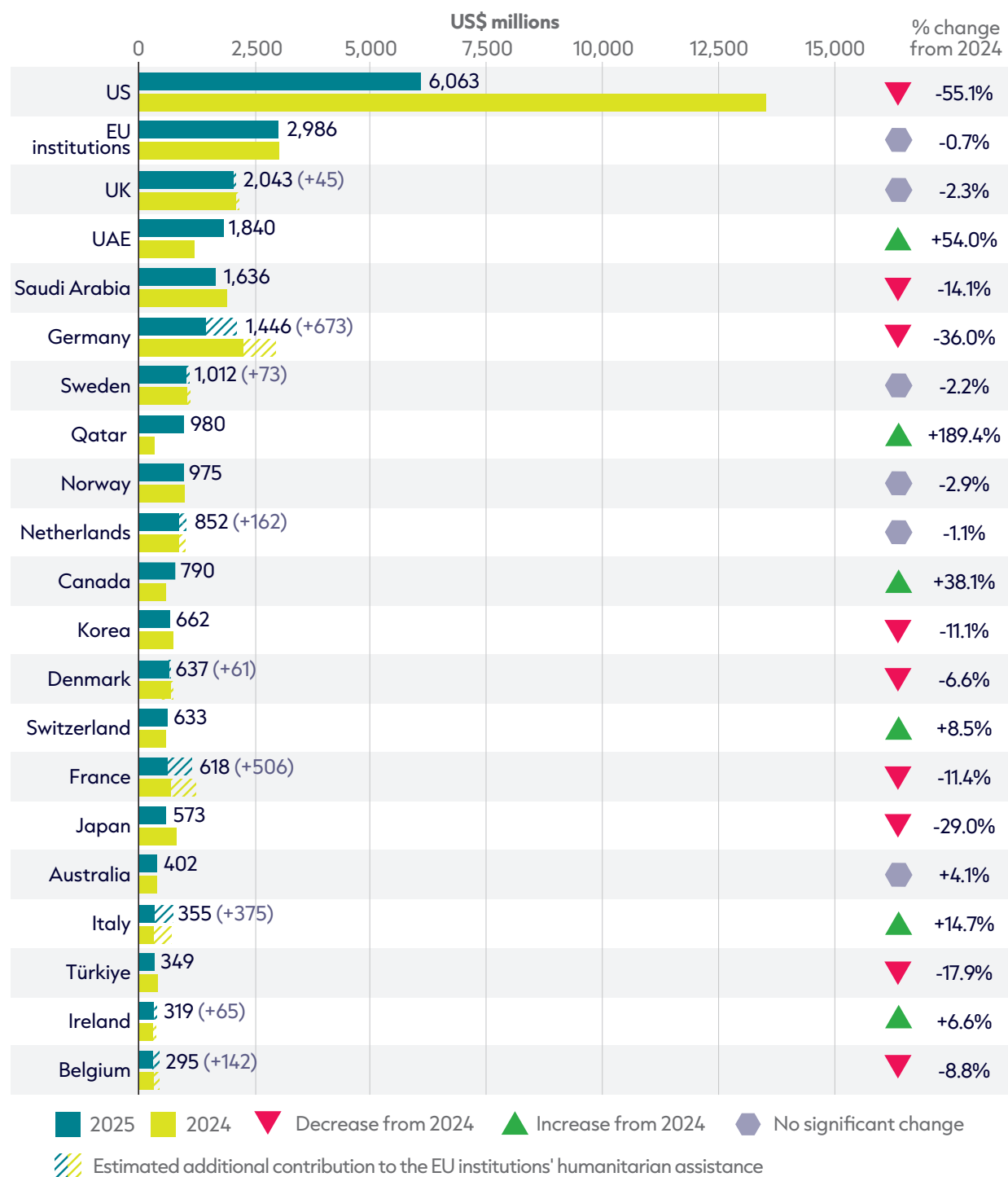
Notes: Figures for 2025 are preliminary. Totals for previous years differ from those reported in previous Global Humanitarian Assistance (GHA) reports due to updated deflators and data. Data is in constant 2024 prices. The methodology used to produce total international humanitarian assistance is detailed in the 'Methodology and definitions' chapter in the 2026 GHA Report. EU = European Union.



top-20 donors reduced their funding. The real shock came in 2025 though, when total IHA fell by a further 20% to US\$33.3 billion – a level of funding last seen in 2017, without a commensurate drop in crises (see [Humanitarian crises and global shifts 2022 - 2025](#)). The drop in funding recorded by the end of 2025 was, however, not as severe as some more pessimistic predictions made earlier in the year.³

The combined size and speed of the 2025 cuts caused widespread shock and revealed the dangers of a system dependent on a few government donors. The US government – whose funding had grown more steeply than other large donors before 2022 – froze all new foreign aid awards and issued Stop-Work Orders to existing foreign assistance awards in January 2025; in March, the US Secretary of State announced the termination of 83% of United States Agency for International Development (USAID) programmes.ⁱ Unlike previous phased cuts or grant non-renewals, these mid-programme disruptions were immediate. As discussed in [Chapters 3.2](#) and [3.3](#), the cumulative loss of funding from multiple donors drove hard choices over which people affected by crisis should be supported and which humanitarian staff and functions could be retained.

ⁱ See the timeline of 2025's funding story at <https://alnapp.org/help-library/resources/humanitarian-year-in-review-shocks-and-reverberations-pdf/>

Figure 1.2: Change in IHA from top-20 public donors 2024–2025

Source: Based on OECD DAC, UN OCHA FTS and UN CERF.

Notes: 2025 data is preliminary. Data is in constant 2024 prices. 'Public donors' refers to governments and EU institutions. Contributions of current and former EU member states to EU Institutions' international humanitarian assistance shown separately. 2024 figures differ from the 2025 GHA Report due to final reported international humanitarian assistance data and a different year for constant prices. UAE = United Arab Emirates. UK = United Kingdom.



These cuts were variously described as a 'generational funding collapse',⁴ a 'seismic shock'⁵ and 'cutting muscle and bone' of the system.⁶ While the US reduction of US\$7.4 billion was the biggest cut (-55%), 13 of the top-20 donors also



cut IHA in 2025. The US and Germany alone reduced their funding by a combined US\$814 million (-36%), accounting for 88% of the total cuts, but Saudi Arabia (-US\$268 million, -14%) and Japan (-US\$234 million, -29%) also made large cuts. Private donations from individuals, corporates and foundations also fell in this study period: from a high of US\$11.3 billion in 2022 to US\$6.8 billion in 2025.

Against this trend, some donors held relatively steady, including EU institutions, the UK, Sweden, Norway, the Netherlands and Australia.ⁱⁱ Others even increased their funding, including the UAE (+US\$645 million, +54%), Qatar (+US\$642 million, +189%), Canada (+US\$218 million, +38%) and Italy (+US\$45 million, +15%), but these increases could not offset cuts by some of the biggest donors.

Funding in 2025 remained concentrated among a small number of donors, of which the US – despite significant cuts – remained the largest; however, this pattern of dominance shifted. The 2026 GHA Report indicated that, between 2016 and 2024, the ‘traditional top four DAC donors’ in the system (US, EU institutions, UK and Germany) provided between 61% and 67% each year of total public donor funding.⁷ In 2025, they contributed only 47%. These shifts potentially created space for a wider range of donors to influence the system. The system also remained concentrated in terms of which organisations received funding (see [Figure 1.3](#)). Of the US\$26.6 billion contributions by primary donorsⁱⁱⁱ in 2025, multilateral organisations received almost half (47%) as ‘direct’ funding. International non-governmental organisations (INGOs) received 19%, followed by the International Red Cross and Red Crescent Movement with 7% and pooled funds with 6%.^{iv} Despite localisation commitments (see [Chapter 4.1](#)), local and national actors^v received the least: only 5% direct funding.^{vi}

While multilateral organisations received most direct funding, this dropped from 58% in 2024 to 47% in 2025. This was mainly driven by US and German cuts to multilaterals (65% and 58% respectively) rather than signifying a donor-wide trend. Proportions of funding granted to other types of organisations changed little: the system remained concentrated on a small number of international actors, which functioned as either direct implementers or intermediaries, presenting a potential risk if those channels became blocked.

Of the trackable indirect funding that intermediaries passed on, US\$2 billion went to international actors and US\$1.3 billion to local and national actors (LNAs).

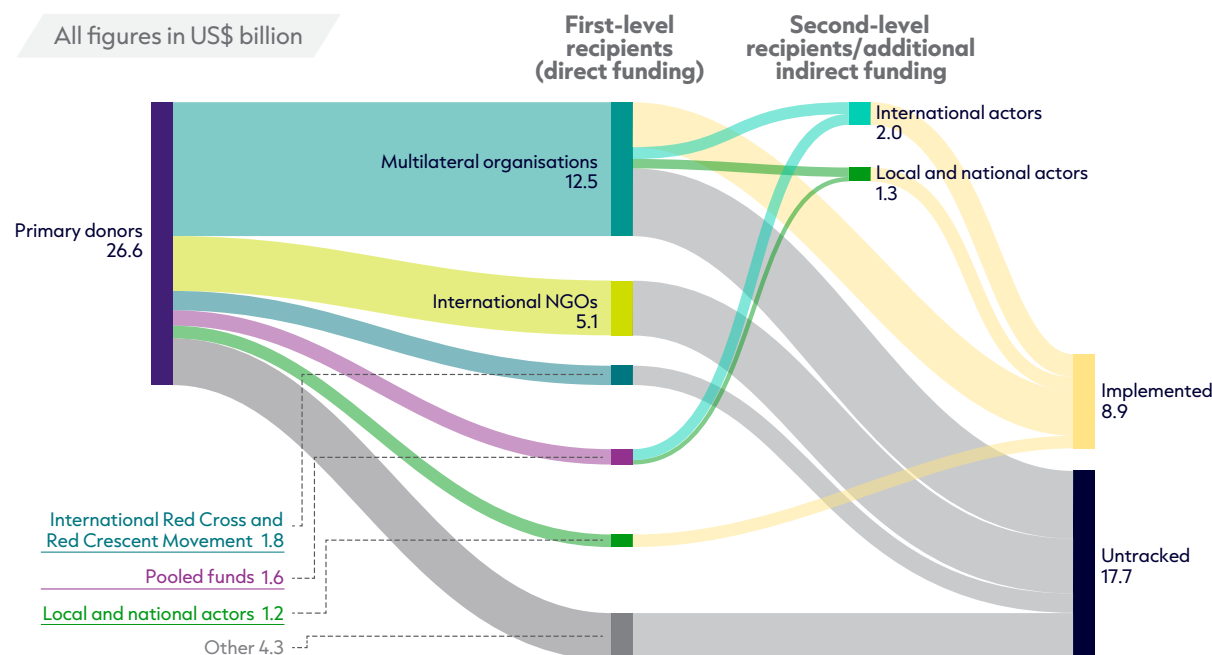
ii Calculated as within 5% of last 2024 disbursements.

iii Public and private donors tracked by OCHA FTS.

iv While there is no single definition of ‘pooled fund’, the Norwegian Refugee Council (NRC) provides a working definition: ‘a pooled fund involves pooling money from more than one donor in an entity. That entity then distributes the funds to multiple recipients on the basis of defined criteria’ (see NRC (2022: 11) <https://www.nrc.no/resources/reports/pooled-funds-the-new-humanitarian-silver-bullet>).

v Including local and national NGOs (L/NNGOs) and government bodies.

vi Other’ organisations (eg, donor-development agencies and private individuals and organisations) received 16% of funding (US\$4.3 billion), mostly from Gulf states. The 5% for local and national actors does not directly align with the number reported under Figure 4.1 on funding direct to local and national actors, which is that 4.3% goes to local and national actors. This is due to methodological differences in the analysis: whereas Figure 1.3 looks at all trackable funding through public reporting systems (FTS), Figure 4.1 supplements this with data from other sources and thus uses a different denominator to align with UN budget totals. For the avoidance of doubt, 4.3% should be used as the figure for the percentage of funding going directly to local and national actors.

Figure 1.3: Funding flows to different recipient organisation types, 2025

Source: OCHA FTS, International Organization for Migration (IOM) grant awards data, OCHA Country-Based Pooled Funds (CBPF) Data Hub, United Nations Children's Fund (UNICEF) Transparency Portal, UN High Commissioner for Refugees (UNHCR) Collaboration with Funded Partners.

Notes: Funding allocated by UN agencies with partner data in each year are taken from their own reports where available. The total displayed for pooled funds is equal to allocations as opposed to contributions, which is lower; this has then been reconciled at the primary donors' level.



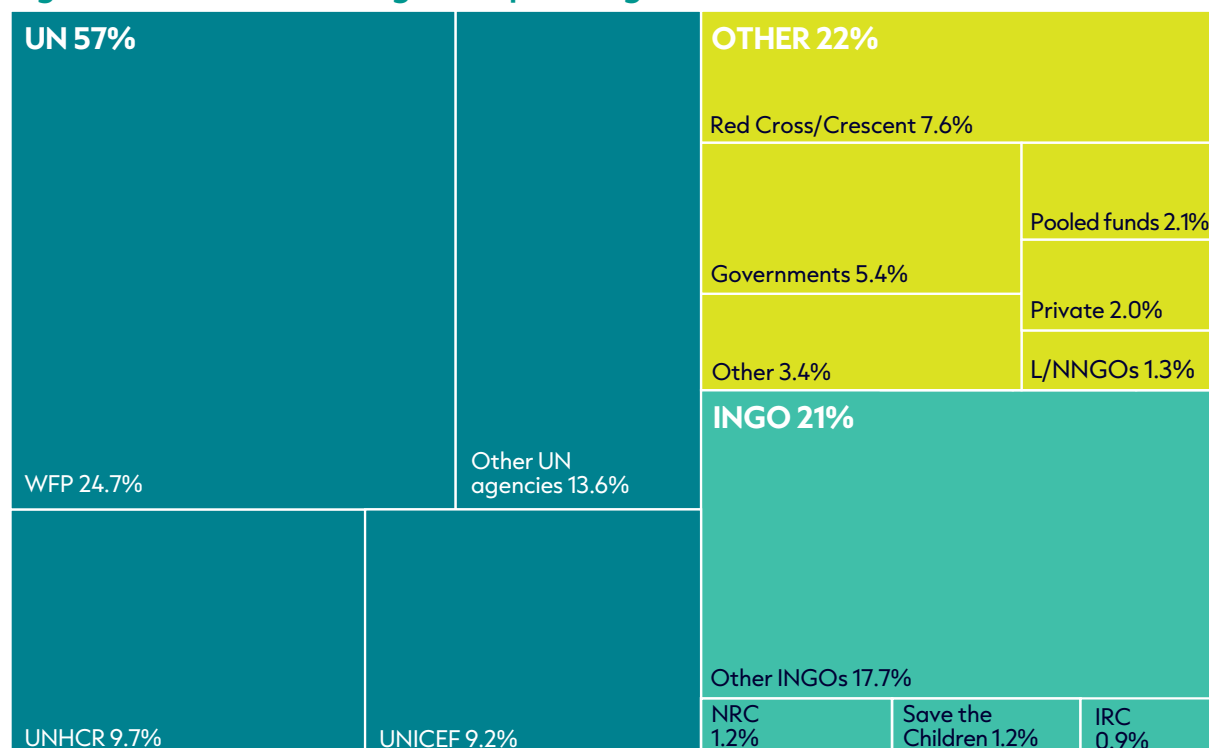
Multilaterals passed on US\$807 million to LNAs.^{vii} Pooled funds passed the second-largest amount to LNAs: US\$469 million in direct contributions. Two-thirds of funding that was passed through beyond the first level was not tracked on centralised platforms like the OCHA FTS, emphasising a need for better reporting by humanitarian donor and recipient organisations.⁸

Funding in this period remained concentrated in the same three UN agencies as in the previous The State of the Humanitarian System (SOHS) period (2018–21). These three agencies received 44% of total funding: the World Food Programme (WFP) was the largest recipient (receiving 25%), followed by UNHCR (10%) and UNICEF (9%). This was a reduction from the 48% received in the previous SOHS period. The 2025 funding cuts caused a greater year-on-year shift for WFP, whose share of funding reduced from 25% in 2024 to 21% in 2025.^{viii} Among INGOs specifically, NRC, Save the Children and the International Rescue Committee (IRC) received the largest proportion of funding in this period: 1.2%, 1.2% and 0.9%, respectively.^{ix}

vii The majority of this was recorded as coming from UNHCR and UNICEF; however, this partly reflects the fact that data from some other multilaterals was not available at the time of writing (see ALNAP (2026) <https://alnapp.org/help-library/resources/global-humanitarian-assistance-gha-report-2026/>).

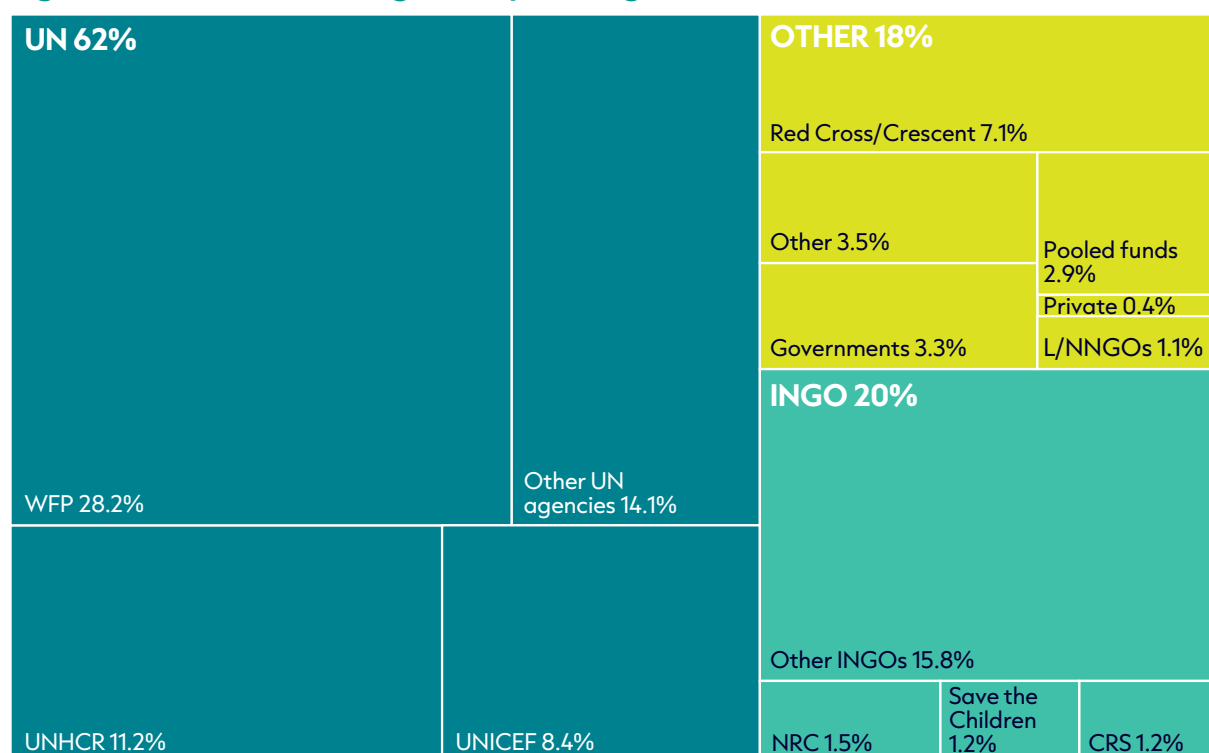
viii UNHCR's share fell from 11% to 8%, while UNICEF's remained largely steady.

ix Catholic Relief Services (CRS) received the third-largest share of funding in the previous SOHS study period (1.2%).

Figure 1.4: Share of funding to recipient organisations, 2022–2025

Source: UN OCHA FTS data

Notes: Figures are based on shares of net organisation-allocable funding and internal organisational coding. Data is in constant 2024 prices. As data is based purely on FTS, which largely disregards private humanitarian funding, NGOs that receive significant private funds are underrepresented.

**Figure 1.5: Share of funding to recipient organisations, 2018–2022**

Source: UN OCHA FTS data

Notes: Figures are based on shares of net organisation-allocable funding and internal organisational coding. Data is in constant 2024 prices. As data is based purely on FTS, which largely disregards private humanitarian funding, NGOs that receive significant private funds are underrepresented.





While the picture for IHA for 2026 onwards remains unclear, estimations suggest a deceleration of the rate of decline. The two scenarios presented in ALNAP's 2026 *GHA Report* include an optimistic 2% decline and pessimistic 11% decline on 2025 figures for public donors.⁹ Both suggest a deceleration in IHA retraction, largely because of a projected stabilisation of US funding. With an initial US\$2 billion and a subsequent US\$1.8 billion allocated to OCHA to manage in 2026, the US will likely remain the system's largest donor in this year.

Drivers of the cuts

Successive SOHS reports have pointed to the self-interested nature of foreign policy. In this period, several donors more explicitly stated that assistance should serve national interests, partly driven by the growing power of right-wing politicians across Europe and the US. The US State Department's 2026 strategy claimed: 'for too long, assistance justified on globalist or humanitarian bases benefitted groups unfriendly to the United States'.¹⁰

Humanitarian assistance fell down many donor governments' agendas in favour of increased security spending. World military expenditure escalated to US\$2,718 billion in 2024, representing 2.5% of global gross domestic product (GDP). This dwarfed humanitarian spending, with total IHA amounting to only approximately 1.5% of world military expenditure in 2024.¹¹ US military spending rose by 5.7% to US\$997 billion, but growth was mainly fuelled by Europe, where all countries except Malta increased their spend and Germany became the biggest



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military spender in Central and Western Europe.¹² The UK government was explicit about trade-offs in its February 2025 announcement that official development assistance (ODA) spending would fall from 0.5% to 0.3% of GDP by 2028 to support increased defence spending.¹³ Other European governments increased their spending following the US decision to suspend military aid to Ukraine in early 2025.¹⁴

US policy also sought to curtail rights-based approaches globally for being out of step with conservative principles. In February 2026, the administration announced a new policy, Protecting Human Flourishing in Foreign Assistance (PHFFA),^x which prohibited foreign assistance for 'discriminatory equity' or 'gender ideology'. This affected a broad range of domestic and international partners, while restrictions on diversity, equity and inclusion (DEI) programming posed risks to humanitarian inclusion efforts and impartiality.¹⁵

x An expansion of the Mexico City Policy, also referred to as the Global Gag Rule.



Vocal accusations about inefficient and corrupt assistance threatened the legitimacy of the sector. White House statements about disbanding USAID included claims that it had been: ‘unaccountable to taxpayers as it funnels massive sums of money to the ridiculous – and, in many cases, malicious – pet projects of entrenched bureaucrats, with next-to-no oversight’.¹⁶ Donor and practitioner interviewees claimed that criticisms such as these towards civil society led humanitarian leaders to reflect on how the system articulates its effectiveness and value to politicians and publics.

Surveys in multiple countries, including EU member states, the UK and the US, indicated strong public support for their governments providing humanitarian or development assistance abroad.¹⁷ However, other studies indicated that support dwindled when people were asked to trade off humanitarian assistance with other spending priorities, suggesting that, without domestic political and socioeconomic shifts, support for aid remained ‘a mile wide and an inch deep’.¹⁸ Many members of the public have, however, given generously to humanitarian appeals; for example, the Disasters Emergency Committee (DEC) Ukraine appeal raised £421.3 million from the public.^{xi} Yet political and press attention can shape generosity and public attention: longer-term and less-publicised crises can receive fewer donations.¹⁹ While research indicated that the public is moved by compelling stories about aid, those stories compete with the broader news cycle and outdated stereotypes.²⁰ The cuts were a wake-up call for humanitarians to communicate better with the public on the system’s value while maintaining the dignity of people affected by crisis. One commentator said:

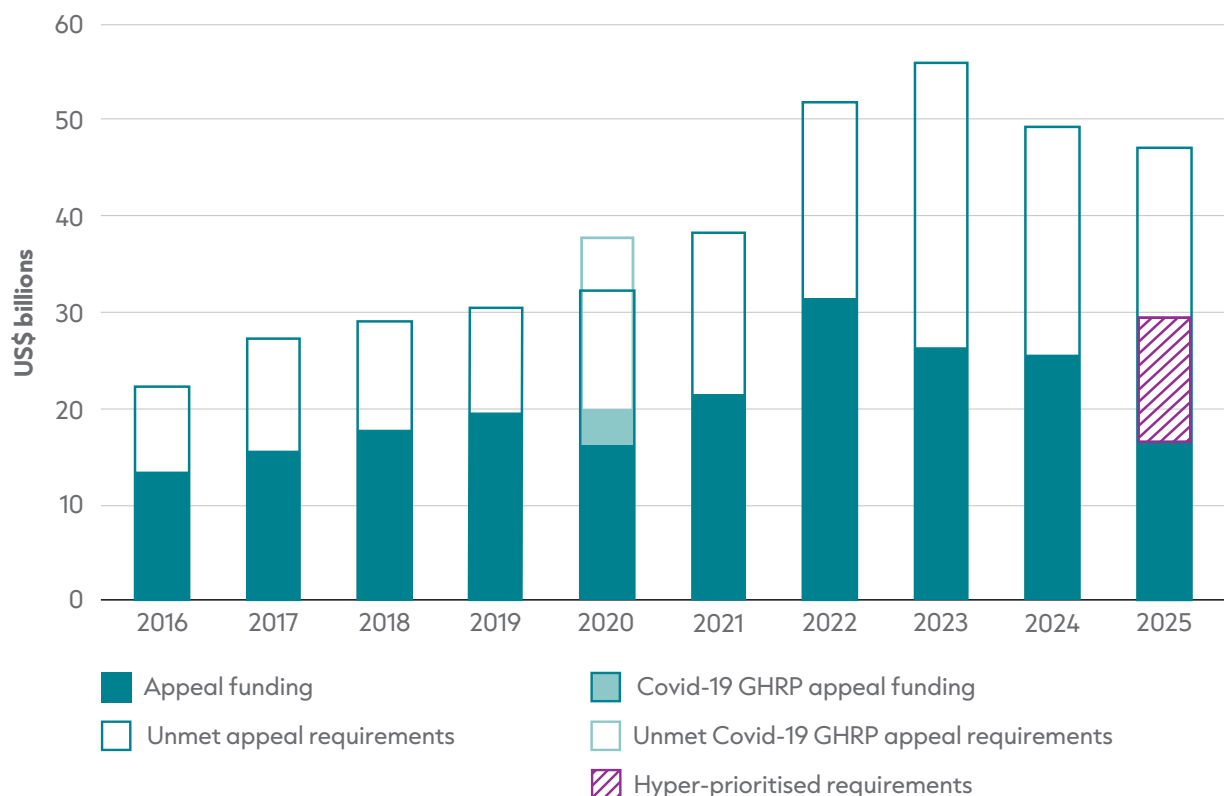


‘The stories we tell, the messengers we choose, and the evidence we use will determine whether aid continues to be sidelined or is reclaimed as a powerful tool for global justice.’²¹

The reality of funding gaps

The OCHA-led Humanitarian Programme Cycle (HPC) process estimates the number of people in humanitarian need annually and associated funding required at global and country level. As indicated in [Part 1: Humanitarian crises and global shifts 2022–2025](#), multiple new and large-scale conflicts, protracted crises and threats arising from the climate crisis all drove global needs in the review period. Needs stated in UN-coordinated appeals were reduced, however, due to a revised methodology introduced by the HPC process at the end of 2023 that put clearer boundaries around the humanitarian remit (discussed in [Chapter 1.2](#)).

xi An additional £25 million in matched funds came from the UK government (see DEC (n.d.) <https://www.dec.org.uk/appeal/ukraine-humanitarian-appeal>).

Figure 1.6: Requirements and funding for UN-coordinated appeals, 2016–2025

Source: Based on OCHA FTS, Syria Regional Refugee and Resilience Plan (3RP) dashboards and UNHCR data.

Notes: Data is in current prices. 2025 shows two figures for requirements to reflect regular requirements and hyper-prioritised activities and resulting requirements in response to significant funding cuts in 2025. GHRP = Global Humanitarian Response Plan.



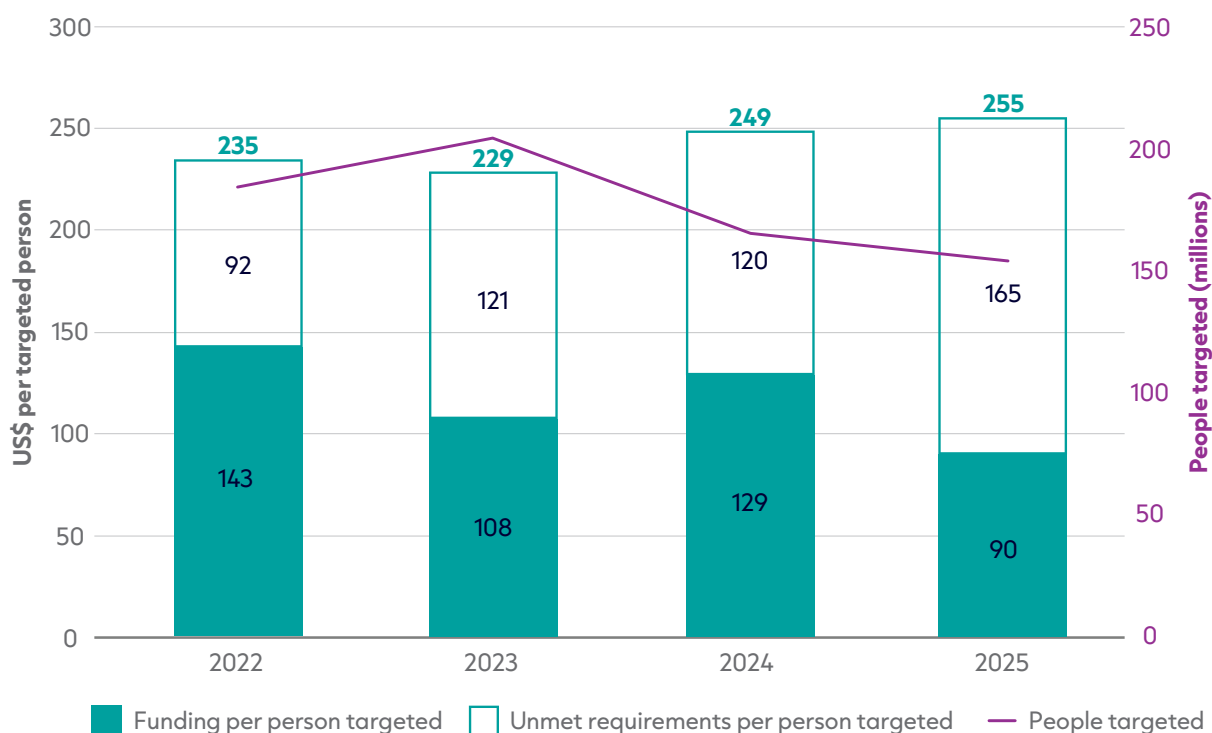
Donor funding to UN-coordinated appeals peaked in 2022 at US\$31.6 billion, which met 61% of requirements.^{xii} Funding then fell in every subsequent year – and by 35% between 2024 and 2025 alone (to US\$16.6 billion: comparable to 2017 and 2018 levels). Only 35% of the total 2025 appeals target was met, which was the biggest funding gap in appeal history (a shortfall of US\$30.5 billion). Due to the funding shocks in 2025, OCHA created a prioritised funding target (of US\$29.5 billion) to cover people most in need. But only 56% of that target was met.

Compared to 2022, humanitarian appeals targeted fewer people in 2025 and those people received less funding per person (US\$90 compared to US\$143).^{xiii} That year also saw by far the largest unmet requirements in this study period (US\$165 per person targeted in 2025 versus only \$92 in 2022). Even with reduced targets in 2025, only 35% of requirements per person were met.

There was strong variation in gaps across humanitarian appeals in 2025. The only two contexts that received enough funding per person to meet requirements were

^{xii} Total amount received peaked in 2022, but the percentage of funds met peaked in 2019, when 64% of requirements were met.

^{xiii} Requirements per person also went up in 2025, driven by the reduction in total number targeted, to an average of US\$255 per person.

Figure 1.7: Requirements and funding per targeted person in UN-coordinated appeals, 2022–2025

Source: OCHA FTS.

Notes: Data is in current prices. All appeals reported on FTS are included in the analysis. Requirements and funding per person are averages, calculated based on overall appeals data for funding, requirements and number of people targeted by each appeal as of May 2026.



the Philippines and Cuba, both of which were small appeals with relatively tiny amounts required per person (US\$32 and US\$12 respectively). Despite the scale of the crisis, recipients of assistance via Sudan's Regional Refugee Response Plan faced the greatest gap between requirements and funding per person in absolute terms: a shortfall of US\$556 per person, with 25% of the target met per person.^{xiv} The Mozambique flash appeal received the smallest percentage of requirements per person (7.4%), and those targeted received an average of US\$7.30 for requirements of US\$98.

Among surveyed aid recipients, 38% cited 'not enough aid' as the biggest challenge for assistance

Other evidence highlights insufficient assistance throughout this period. Evaluations of multiple responses, from Afghanistan to Yemen, found funding insufficient to achieve their aims.²² Among surveyed aid recipients, 38% cited 'not enough aid' as the biggest challenge for assistance in their area, making this the most common answer – and an increase from 33% in 2022. Similarly, the

^{xiv} The next-largest shortfalls were for those targeted in Venezuela's Regional Refugee and Migrant Response Plan and Syria's 3RP, where people targeted received only 10% of required funding.



top response for how the humanitarian system can improve was ‘give more’ at 25%.^{xv} Meanwhile, 43% of surveyed aid practitioners also highlighted inadequate funding as the biggest weakness in their setting: an increase from 37.8% in 2022. A local humanitarian actor in Gaza summarised the insufficiency:



‘You bring a little to many and enough for no one.’

While people affected by crisis felt the impacts of funding reductions as early as 2023 (for example, cuts to WFP rations for refugees in Uganda were linked to raised crime, prostitution, sexual abuse, school absences and child marriages),²³ the effects of the 2025 cuts were broader. The World Health Organization (WHO) reported that the effect of cuts on health facilities across 20 humanitarian settings reduced access to services for 53.3 million people between January and October 2025,²⁴ while Médecins Sans Frontières (MSF) reported that aid disruptions contributed to a rise in malnourished children in Somalia.²⁵ The cuts stripped away safety nets, pushing many vulnerable people to adopt increasingly dangerous coping mechanisms.²⁶ In multiple contexts, such as Bangladesh,²⁷ Kenya,²⁸ Mali and South Sudan, such coping mechanisms – including selling assets and sex, consuming seeds meant for crops and accumulating debt – increased protection threats for people experiencing vulnerability and catalysed concerns about a compounding future crisis in humanitarian needs.²⁹

Global modelling estimates of the 2025 cuts (with varying levels of certainty) predicted vast longer-term impacts. An article in *The Lancet* estimated widescale cuts of essential services and potentially over 14 million additional deaths – including over 4.5 million children under five – over the following five years,³⁰ while WFP estimated that funding and caseload gaps in 2025 could move between 10.5 million and 13.7 million people into emergency conditions (Integrated Food Security Phase Classification (IPC) Phase 4).³¹

Future evaluations will be important to track the full impact of the cuts; however, they will rely on the system’s ability to gather data – not only where the system remains, but also where it has retreated. Whether predictive models are correct in their estimations of impacts will also depend on how other actors, including national governments and other local and regional structures, alter their policies and approaches to domestic crisis support in reaction to reduced foreign assistance.³²

The search for alternative funding

The funding cuts spurred a widespread search for new sources of support. International and national humanitarian networks reported increased interest among their members in non-DAC donors, philanthropies and innovative financing models.

^{xv} Comparable with 24% in 2022.



Non-DAC donors

The retreat of some of the largest traditional DAC donors resulted in humanitarians looking to other donor governments to help fill the void. The Gulf states of Saudi Arabia, UAE, Kuwait and Qatar have been strong but fluctuating humanitarian donors over the past decade.³³ Between 2024 and 2025 their share of total public IHA rose from 10% to 17% (US\$3.5 billion to \$4.5 billion). UAE and Saudi Arabia



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became the fourth and fifth largest individual public donors in 2025, but the largest increase in spending was by Qatar, which almost tripled its humanitarian spend between 2024 and 2025.

Whether Gulf spending will help to fill the gaps is unclear due to a lack of public planning documents, a tendency to concentrate on a small number of contexts (46% of Gulf countries' 2025 spend went to Yemen and 16% to Palestine), and a potential need

to focus more on national priorities as a result of the cost of the 2026 US–Israel war with Iran.³⁴ They have also tended to channel money bilaterally: while 69% of Saudi Arabia's funding in 2024 went to LNAs, the majority of that was to local and national governments.³⁵ The contribution of other non-DAC donors remained small: 1.6% of IHA in 2025, with Türkiye providing the majority.³⁶

China's aggregate humanitarian funding was difficult to track because it does not report to coordinated system structures, but it has recently made significant investments in specific humanitarian crises. For example, China pledged US\$137 million in response to the Myanmar earthquake in early 2025, and China-supported crisis responders were among the first to provide assistance.³⁷ China also supported other regional humanitarian action in Cambodia, Mongolia and Nepal.³⁸ While some actors raised concerns about the potential negative influences of expanded Chinese engagement,³⁹ OCHA's Emergency Relief Coordinator, Tom Fletcher, made a direct appeal to China for greater humanitarian leadership in the wake of the US cuts.⁴⁰ While not insubstantial, there are signs, however, that China's spending is unlikely to fill the gap left by US funding; one estimate indicated that China provided around US\$1.5 billion for grants classified as capacity-building and humanitarian assistance in 2024.⁴¹

Philanthropies

It is difficult to provide accurate, up-to-date figures for philanthropic spending – there is no central clearing house for philanthropy, and measurement often relies on tax documents with an availability lag of about two years^{xvi} – but given that private funding only totals 20% of IHA, and philanthropy is just one component of private funding, it is unlikely to fill the gap left by public donors. Indeed, OECD estimated

xvi The *GHA Report* uses a survey of humanitarian organisations to report total private funding received.

total philanthropic funding to contexts exposed to high and extreme fragility at US\$3.2 billion in 2023, but noted that it was more likely to fund basic services in these contexts in comparison to ODA, which was primarily directed to emergency and humanitarian responses.⁴² The *State of Disaster Philanthropy Report 2025*⁴³ reported that 3,277 grant-makers provided US\$1.2 billion to disasters in 2023. Most of the funding went to response and relief; preparedness attracted the least funding, followed by risk reduction and mitigation. Funding also skewed towards sudden-onset disasters that tended to receive more public and media attention; complex humanitarian emergencies attracted lower amounts.⁴⁴

Funding skewed towards sudden-onset disasters that tended to receive more public and media attention; complex humanitarian emergencies attracted lower amounts

Some philanthropies tried to provide some cushioning to humanitarian partners after the cuts. For example, the Gates Foundation increased spending after USAID's closure,^{xvii} and a rare few drew down a bigger proportion of their capital, providing more assistance in the immediate term and reducing their endowments. MacKenzie Scott's Yield Giving donated US\$60 million to the Center for Disaster Philanthropy in late 2025 for instance (its previous largest donation had been US\$10 million).⁴⁵ Others increased emergency and rapid-response grants or gave more unrestricted grants to provide greater stability.⁴⁶ Feminist funder the Global Resilience Fund provided financial and convening support to women-led humanitarian organisations as they faced the double threat of budget cuts and US DEI regulations.

It is hard to characterise philanthropic giving because of the varied approaches and mandates of different funders. Many philanthropies reported targeting funds for the most catalytic impact rather than necessarily following UN-coordinated appeals. Individual approaches to doing that varied: several told us they targeted new crises to increase the impact of their individual contribution, others targeted forgotten or complex crises and some focused squarely on a specific geographic or thematic mission. They also varied in risk appetite; some were concerned about public reputations, while another said:



'The number one advantage is that we can provide a level of flexibility in funding and level of risk tolerance that institutional donors can't. Institutional funders are looking at taxpayer dollars and can't make mistakes.'

Indeed, some philanthropies have moved further on issues where government donors have remained stuck: 30.2% of global disaster philanthropy in 2023 went

xvii However, this only represented US\$9 billion across all types of funding (see Suzman (2025) <https://www.gatesfoundation.org/ideas/articles/development-aid-cuts-despite-progress>).



30.2% of global disaster philanthropy in 2023 went to organisations headquartered in the countries where the work took place

to organisations headquartered in the countries where the work took place,⁴⁷ and there were indications that a focus on sustainability may be translating into more investment in preparedness and resilience to future crises. Some philanthropies also collaborated in coalitions or pooled funds, such as the Strengthening Local Humanitarian Leadership Collaborative or Funders for Mutual Aid in Sudan.⁴⁸



Some philanthropies described increasing their engagement with government donors and exploring ways of working together. However, they also identified challenges, including different jargon, cultures and expectations of how they could navigate different operational models. One suggested that better partnerships would happen:



'if both sets of stakeholders did more to try and meet the other one where they're at rather than expecting one of us to go the entire way and become a full-fledged passionate humanitarian or an expert on philanthropic giving.'

Philanthropists felt it was also important for operational organisations seeking funding to recognise that philanthropies sometimes work differently from typical proposal models of grant-making, with their own perspectives on effectiveness, values and missions. One philanthropy said:



'I would encourage people to be curious, to view, approach and engage philanthropy not as an ATM ... but see them in their partnership role, their convening authority role, in their advocacy role.'

New forms of private financing

As the public sector shrank, some humanitarian organisations and several government donors increasingly sought to engage different forms of private funding. For example, in 2024, the Spanish Agency for International Development Cooperation (AECID) supported research by the Institute for Studies on Conflicts and Humanitarian Action (IECAH) that explored how Spanish private-sector actors could better contribute to humanitarian action.⁴⁹ Other collaborations included a 2025 public–private partnership between WFP, the Grundfos Foundation and the Danish Government, which created a US\$40 million programme in Kenya, Rwanda and Uganda.⁵⁰ Building on its previous engagement with Islamic sources of private funding, UNHCR launched the Islamic Fund for Refugees in 2022: a Sharia-compliant funding tool for projects in Islamic Development Bank member states. In 2025, the Refugee Zakat Fund received over US\$23 million in Zakat contributions and approximately US\$16 million in Sadaqah contributions: a sizeable increase from 2024, when it received US\$14 million and US\$7.8 million respectively.⁵¹



The Grand Bargain 3.0 explicitly prioritised exploring so-called innovative finance⁵² – a wide range of approaches and mechanisms with the potential to unlock larger and more sustainable finance solutions⁵³ – making it a hot topic among humanitarians during this study period. The instruments explored included grants; debt; guarantees; equity pay for success, insurance and carbon finance; blended finance; providing contextual advice to development investors; and debt swaps/conversion (among others).⁵⁴ As discussed in [Chapter 5](#), the suitability of innovative finance mechanisms for different forms of humanitarian action varies; there may be more scope for their employment in anticipatory action and preparedness, or in linking them with longer-term development solutions.⁵⁵

Humanitarians and private-sector actors still need to understand each other better for more fruitful partnerships.⁵⁶ Many humanitarians are not equipped with the knowledge required to navigate relationships and investment models.⁵⁷ Indeed, 46% of respondents to our practitioner survey described their working relationship with private-sector actors as ‘poor’.^{xviii} However, there have been some training efforts to bridge the knowledge gap, including by the Start Network,⁵⁸ the Austrian Red Cross, HIFHUB,^{xix} the International Federation of Red Cross and Red Crescent Societies (IFRC), and various universities and business schools.⁵⁹



Humanitarians and private-sector actors still need to understand each other better for more fruitful partnerships



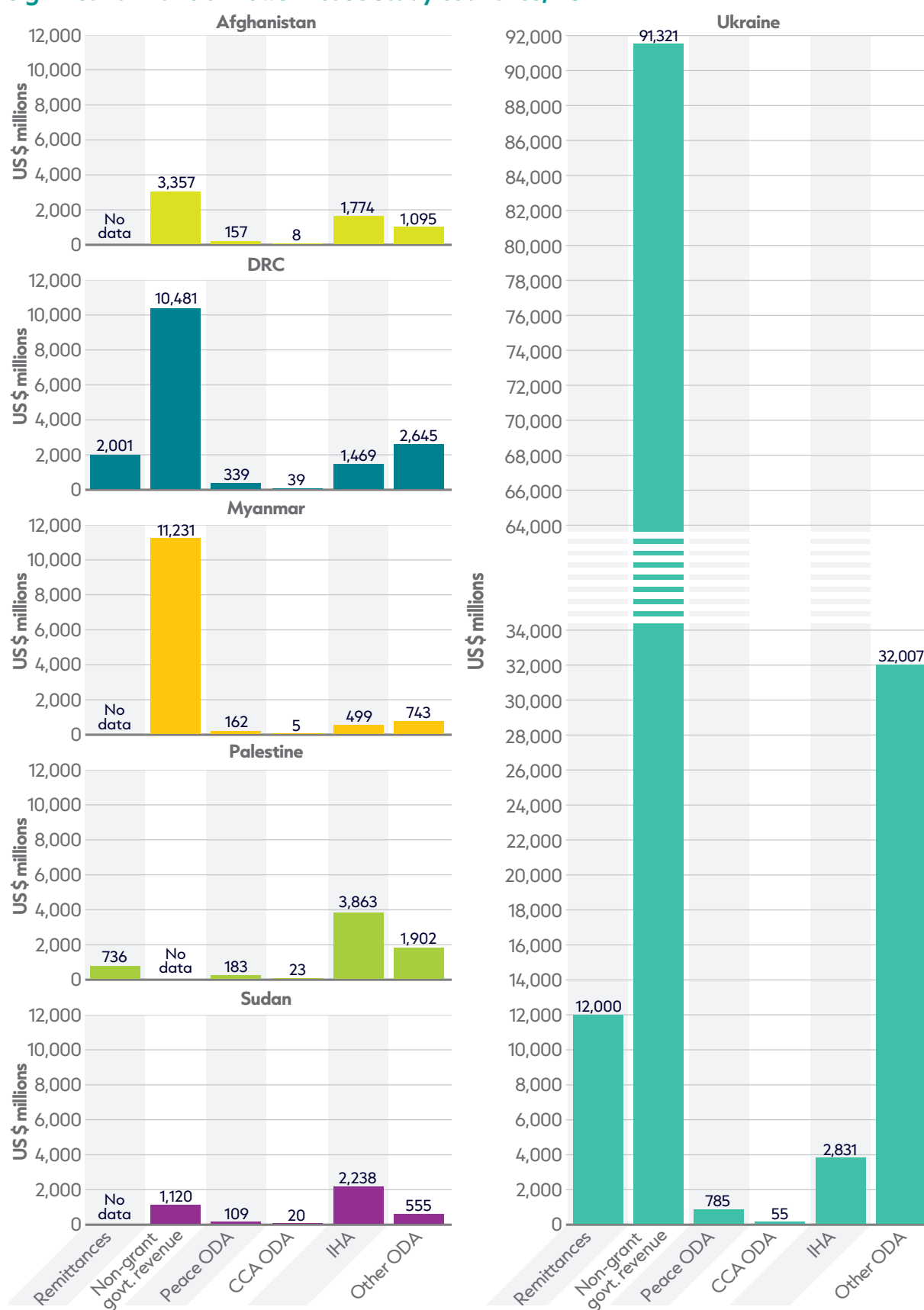
Support structures beyond IHA

Multiple other financial flows and non-financial forms of assistance were vital for people affected by crisis, often outstripping IHA contributions either in size or their importance to these people. Our case-study countries demonstrated significant variation in the mix of domestic and international, public and private finance for 2024 (the most recent year of complete data), as well as in the role each flow played.

IHA formed a significant component of financing in several contexts, including Afghanistan, Palestine and Sudan. While absolute IHA to Ukraine was high, it was substantially lower than other forms of ODA; other ODA was also higher than IHA in the Democratic Republic of the Congo (DRC) and Myanmar. In all case-study contexts, non-humanitarian ODA for peace, disaster risk reduction and climate-crisis adaptation was low, with the latter being relatively tiny in several contexts.

xviii 31% described it as ‘fair’, 20% as ‘good’ and 4% as ‘excellent’.

xix HIFHUB is hosted by the Danish Red Cross and serves the broader Red Cross movement to help build the investable project pipeline, the organisational capacity and the cross-sector partnerships needed to move beyond grants to new sources of capital.

Figure 1.8: Size of international humanitarian assistance compared to other significant financial flows in case study countries, 2024

Source: ALNAP based on OCHA FTS data on IHA, World Bank data on remittances, IMF data on non-grant government revenue and OECD DAC data on ODA.

Notes: Data is in constant 2024 prices. For Palestine, the value for non-grant government revenue in 2024 was omitted from the graph due to widely diverging figures from other sources. CCA = Climate Change Adaptation.



Governments

Research indicated that, while some governments shifted their domestic policies to cushion against the effects of IHA cuts, their ability to make up the losses varied in the short term.⁶⁰ A review of African governments found humanitarian and social protection responses to be weaker than development responses.⁶¹ Government revenue (excluding grants)^{xx} was higher than other forms of financing in all case-study contexts aside from Sudan,^{xxi} underscoring the potential for state-led disaster management and public services.



Higher domestic revenues did not necessarily translate into governments filling gaps in humanitarian response



However, higher domestic revenues did not necessarily translate into governments filling gaps in humanitarian response. Domestic funding often focused on defence objectives, including in Sudan, Ukraine and Myanmar. In contexts like Myanmar and Afghanistan,^{xxii} restrictive policies limited humanitarian assistance to only parts of the population (see [Chapter 3.2](#)).⁶² Domestic disaster response was stronger in this period for several contexts not included in the six case-study contexts shown in [Figure 1.8](#), such as middle-income contexts

like India, Indonesia and the Philippines.⁶³ It was often strong in the Pacific region, including in Vanuatu, where the UN played a smaller part.⁶⁴ The role of Somalia in domestic disaster response and in coordinating humanitarian with development and peace planning also grew compared to previous SOHS periods.⁶⁵ (See [Chapters 4](#) and [5](#) for further information.)

Diaspora support

Diaspora support remained key for many people affected by humanitarian crisis. In 2023, recorded remittances grew to US\$656 billion, making up the highest proportion of external financing to low- and middle-income countries: above ODA and foreign direct investments.⁶⁶

In 2024, remittance amounts to our case-study countries varied significantly: they outstripped IHA in DRC and Ukraine, but were significantly smaller in Palestine. While comparable data was not available for Afghanistan, Myanmar and Sudan, other sources indicated fluctuations. The World Bank showed a drop in remittances for Afghanistan in 2025 due to forced returns of migrants from Iran and Pakistan.⁶⁷ A household survey indicated increased reliance on remittances

xx The data for government revenue excludes non-tax revenue received as grants from other governments and international organisations to avoid double counting

xxi Estimates for government revenue (excluding grants) in Palestine for 2024 are not presented because they varied widely between the International Monetary Fund (IMF) and World Bank (with the World Bank estimate indicating much stronger retractions in GDP due to Israel's destruction of infrastructure) (see World Bank et al. (2025) <https://thedocs.worldbank.org/en/doc/133c3304e29086819c1119fe8e85366b-0280012025/original/Gaza-RDNA-final-med.pdf>).

xxii Afghanistan experienced stronger fiscal self-reliance in this period through tax revenues, although external donor grants accounted for over 40% of public resources.

in Myanmar as the share of household income made up by remittances increased from 33% in 2022 to 45% in 2024.⁶⁸ While not quantified, the World Bank suggested that remittances in Sudan dropped sharply in 2024.⁶⁹ In non-case-study crisis contexts, too, remittances were central to supporting people affected by crisis: in Yemen, for example (where public finance was weak), remittances of approximately US\$6 billion in 2023 supported household consumption and broader economic activity.

In 2023, recorded remittances of diaspora support made up the highest proportion of external financing to low- and middle-income countries: above ODA and foreign direct investments

While it is difficult to parse out humanitarian versus development funding from global remittance figures, there are clear examples of diaspora support during crises. A Diaspora Emergency Action & Coordination (DEMAC) mapping identified 200 diaspora organisations that donated to the Herat earthquake response, although our interviewees reported challenges in transferring private funds to Afghanistan due to banking restrictions.⁷⁰ The Sameer Project channelled diaspora funds to run camps in Palestine.⁷¹ Respondents in Ukraine, as well as in Sudan (where the diaspora helped to fund Emergency Response Rooms), expressed their appreciation for the flexibility and relative speed of diaspora funding. However, some people affected by crisis noted the uneven nature of individual transfers; they were only available to some households who had friends and family abroad, and they were easier to access for people in urban areas with more banking infrastructure. Respondents in Ukraine also noted that diaspora-network volunteers could experience burnout when trying to support a challenging crisis over the longer term.

Local private actors

Beyond international finance and domestic government revenue, the local private sector is often essential in a crisis. Research highlighted the importance of small and medium enterprises in contexts with diverse social and political structures, from the Philippines to Yemen.⁷² In our case-study contexts, people affected by crisis described local private actors as a key source of support – and often faster and more flexible than formal international assistance – in Afghanistan, DRC, Poland and Ukraine. In Afghanistan and DRC, these actors were largely individual businesspeople and those with private wealth, sometimes providing assistance as Zakat in Afghanistan. One Afghan woman told us:



'As soon as we crossed the border, I saw only private aid providers delivering aid directly to returnees. They were friendly and provided food items immediately.'



In Poland and Ukraine, private companies supported humanitarian action with technology, construction materials and logistics. However, in several contexts, local NGOs and civil society actors reported that private-sector support was inconsistent and largely reactive to acute stages of emergencies.

Mutual aid

During this study period, international humanitarians paid more substantive attention to the role of mutual aid; that is, ‘the self-forming, self-organised and voluntary actions of individuals, families and communities who support one another during crises’.⁷³ The most well-documented example of humanitarian mutual aid was in Sudan, where over 1,400 Emergency Response Rooms took on a strong role in delivering humanitarian response across different contested parts of the country, supporting needs from food to protection.⁷⁴ An Emergency Response Room representative told us that these locally led networks proved to be both resilient and capable of reaching places where international humanitarians could not go. Community kitchens were also identified by humanitarians as a key source of support in Gaza, including over Ramadan. Indeed, one UN actor indicated the extent to which local volunteers drove the response in Gaza, explaining:



‘Communities were our compass. Women organised themselves into committees to oversee distributions fairly. Youth volunteers created play circles for children. Elders mediated disputes over space in shelters.’

In Poland and Ukraine during this period, grassroots, solidarity-based volunteer movements built on their previous experience from the 2014 Russian invasion to respond. One young Ukrainian refugee explained that, between formal and informal support, ‘if needed, you can always find someone here who will help’. Indeed, the 2024 World Giving Index found that some contexts affected by crisis were among the most generous for people giving their time or money, or helping someone they did not know, with Indonesia, Kenya, Nigeria and Ukraine in the top 10.^{xxiii}

These structures have, however, felt the strain of drawn-out crises and experienced additional pressure due to funding cuts. In Ukraine, grassroots organisations told us they found their contributions stretched between helping military efforts and humanitarian assistance. In Sudan, respondents noted that vital volunteer structures became increasingly overstretched due to rising needs, diminishing community resources and limited external support. In Mali and South Sudan, people affected by crisis reported that funding cuts put more pressure on communities to support people experiencing vulnerability and strained community resources (like food, water and shelter).⁷⁵ And in Gaza, humanitarians reported that structures became hard to maintain: communities with little left to

xxiii Philanthropy was defined as people giving their time or money, or helping someone they did not know (see CAF (2024) https://www.cafonline.org/docs/default-source/inside-giving/wgi/wgi_2024_report.pdf).

give had to focus more on protecting their own families than on pooling supplies.

To maximise the impact of humanitarian financing, strategies need to better understand the mix of resources present in each country: which resources are most significant, what they are funding, who they include and whether they support state systems, humanitarian response or household survival.



People affected by crisis paid the biggest price of the humanitarian system's overreliance on one institutional donor



Conclusion

In the wake of significant funding cuts during this period, people affected by crisis paid the biggest price of the humanitarian system's overreliance on one institutional donor. The shocks caused by the cuts revealed the fragility of a concentrated system that was vulnerable to the whims of individual political actors.

In the short term, international humanitarian actors' efforts to access alternative funding are unlikely to fill the gaps left by public donors. Over the next few years, the choices of the US and other key donors will determine whether the system continues its downwards funding trajectory or whether there is political will to reverse these trends.

To grapple with not only the financial crisis but also the legitimacy crisis (and note the two are intertwined), humanitarian actors will have to influence public as well as political attitudes towards valuing and protecting people affected by crisis globally. The sharp drop in IHA during this period underscored the importance of other systems of support for people affected by crisis, both international and local. To ensure the greatest impact, it will be vital to improve how this smaller amount of IHA coordinates with and complements – but does not displace – those support systems.

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