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State of Practice: The Evolution of Security Risk Management in the Humanitarian Space

GISF and Humanitarian Outcomes Research Paper

Global Interagency Security Forum (GISF) & Humanitarian Outcomes

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Contents

Acronyms and abbreviations

ACLED Armed Conflict Location & Event Data Project

BHA Bureau for Humanitarian Assistance, US Agency for International Development

EISF European Interagency Security Forum

ERM enterprise risk management

GISF Global Interagency Security Forum

HEAT Hostile environment awareness training

HNS4D Humanitarian Notification System for Deconfliction

ICRC International Committee of the Red Cross

IFRC International Federation of Red Cross and Red Crescent Societies

INSSA International NGO Safety & Security Association

INSO International NGO Safety Organisation

MSF Médecins sans Frontières

NGO Non-governmental organisation

OCHA Office for the Coordination of Humanitarian Affairs

PLSO Partner Liaison Security Office

SAG Security Advisory Group

SLT Saving Lives Together

SMT Security management team

SOP Standard operating procedures

SRM Security risk management

UAV Unmanned aerial vehicle

UN United Nations

UNICEF United Nations Children's Fund

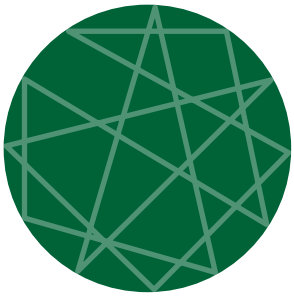
UNDSS UN Department of Safety and Security

UNHCR UN High Commissioner for Refugees

UNSMS UN Security Management System

USAID US Agency for International Development

WFP World Food Programme



Executive summary

In what is now accepted as a grim reality of war, hundreds of humanitarian aid workers each year fall victim to violent attacks. Delivering aid to people in conflicts and crises is an inherently dangerous endeavour, and as new and worsening armed conflicts fuel the need for ever larger humanitarian response efforts, the aid worker casualties continue to mount. Security risk management for humanitarian operations is a set of measures aimed at mitigating this risk as far as possible, to allow critical relief work to continue.

Systematic policies and practices to enhance staff security first emerged within the humanitarian sector early in the 21st century, prompted by a growing number of serious incidents of violence. As security risk management (SRM) slowly became more institutionalised and professionalised across the sector over the next two decades, it spawned new policies and tools, new professional positions and sub-industries, and new ways of thinking. Today, many credit SRM with enabling extensive aid activities amid conflict conditions that in the previous century would not have been possible. Conversely, some blame SRM systems for driving risk aversion and bureaucratisation that impede the core humanitarian mission. While one can find evidence to support both views, the key question for aid organisations comes down to this: Are we doing the best job we can to reduce the risk to our staff while enabling their vitally important work?

This study sets out to assess the current state of practice in humanitarian SRM, and whether it is fit for purpose in the changing landscape of humanitarian crises. It documents recent developments, challenges and gaps, and highlights good and promising practices. The research took place over 2023, designed and conducted by Humanitarian Outcomes in partnership with the Global Interagency Security Forum (GISF), and was funded by USAID's Bureau for Humanitarian Assistance (BHA). It encompassed key informant interviews with 262 practitioners and other stakeholders, an online survey of 358 humanitarian professionals (the majority in SRM positions), a review of data and relevant literature, and location-based research in five countries: Central African Republic, Colombia, Ethiopia, Iraq, and Ukraine.

Key findings

Development of SRM systems and capacities has been significant – but skewed

The humanitarian sector has made substantial advances in building SRM systems and capacities, especially in the past 10 years, including a shift away from reactive and restrictive security measures to active, 'enabling' risk management. This impressive progress has been lopsided, however, mainly benefiting international actors. The UN humanitarian agencies and a majority of large and medium-sized international organisations now have well-established security frameworks that, while differing in budget size, are very similar in basic structure and functions. In contrast, all but the largest national NGOs lack the resources for even a single dedicated staffer in the SRM role, let alone the requisite equipment and procedural frameworks.

New threats and shifting security conditions challenge humanitarian access and adaptability

Over the past decade, the humanitarian caseload of conflict-driven crises enlarged and intensified. Formerly consisting mostly of protracted, low-intensity civil conflicts and instability, in the 2010s and early 2020s, several large-scale wars, some with international involvement, erupted in Syria, Iraq, Yemen, Myanmar, Ukraine, Ethiopia

(Tigray) – and now Israel/Palestine and Sudan – that have severely tested the limits of humanitarian security and access. In each of these contexts, large areas have been functionally inaccessible for aid organisations, due either to the intensity of hostilities and risk to staff, restrictions by the controlling authorities, or both. In such settings, much of the aid for civilians has been provided by local organisations and informal groups assuming huge risks, largely without the benefit of SRM tools and resources.

Other emerging threats to humanitarian action include cybercrime and other hostile digital activity including mis- and disinformation, which can quickly transition from online to physical threats. The study also found evidence that organisations struggle to adapt to changing security and crisis conditions, whether deteriorating or improving. Complex emergencies, entailing numerous and overlapping armed factions and criminal groups as well as multiple international and governmental intervening actors, increasingly complicate efforts to enhance aid worker security and improve humanitarian access. Organisations are also awakening to the need to better address the impact of stress and trauma on staff wellbeing.

Deep disparity: Local and national organisations are unable to develop SRM within current partnership models

Despite the international community's stated aims for localisation, the relative level of SRM development suggests that local/national organisations are about 20 years behind their international counterparts, thanks to a pervasive and stubborn funding model that prevents them from building core organisational capacities. The discrepancy is especially problematic since local actors are assuming more of the risk as frontline providers.

International organisations are grappling with how to include SRM discussions within their partnerships as well as fundamental questions around how far their 'ethical duty of care' should extend to the local organisations implementing their programmes, and what that looks like in practice. Interviews reveal troubling disincentives for international entities to help develop the security systems of their local partners out of fear of potential liability, should security incidents occur. This creates a moral hazard; encouraging some international organisations to transfer the risk without the mitigation capacity, while keeping partners at arm's length. Many international organisations have started looking into how to address this problem and improve SRM support for partners, but these efforts remain ad hoc.

Significant progress in SRM coordination, inputs, and training – and a need to expand their reach

Aid organisations now have access to a wealth of practical tools and policy guidance on most aspects of humanitarian SRM, developed both internally and within interagency coordination bodies. This includes previously underemphasised areas such as staff mental health and wellbeing. Additionally, a growing number of commercial entities and humanitarian-to-humanitarian service providers offer outsourced assistance in everything from threat and risk analysis to individual staff training. At the moment, these resources and materials are predominantly in English and pitched to the Western-centric international community of organisations. More efforts are needed to address the relative scarcity of materials and courses available in relevant languages.

Security coordination between organisations has likewise seen major advances, with high-quality information and analysis provided by the International NGO Safety Organisation (INSO) to its NGO members in the countries where it operates, and global-level policy coordination and technical support provided by GISF. However, misunderstandings and frustrations around UN-NGO coordination in SRM matters (the Saving Lives Together (SLT) framework) have not been resolved and remain contentious. Other concerns and areas identified for improvement focus on extending the benefits of information, collaboration, and coordination beyond international aid organisations and their implementing partners to include a broader range of national and local aid groups. Evidence indicates that these groups are often unaware of existing coordination bodies – or unable to participate in them. Where national humanitarian NGO coordination bodies do exist, security is rarely seen as a priority area for support.

The challenge of access and cooperation with armed actors

International actors have faced severe access constraints in recent conflicts, such as in north-east Nigeria, Myanmar, Tigray, and Sudan. In these contexts, large segments of the population have been inaccessible to international organisations, leaving local actors, lacking SRM capacities and resources, to act alone. The formal aid sector has also faced significant issues in civil-military coordination, with many humanitarians expressing a lack of trust in deconfliction efforts, notably in Syria and Ukraine, including fears that their participation might actually increase their risk due to conflict parties acting in bad faith.

The promising access initiatives led by the UN Office for the Coordination of Humanitarian Affairs (OCHA), such as country-level access working groups, have made real progress and are widely endorsed among humanitarian organisations. Of particular note has been the focus on practical negotiations with armed actors and other stakeholders, including at very local levels, and other incremental actions to forge acceptance and tolerance. However, these access working groups do not exist in all contexts, and where they do, the research found a lack of engagement with SRM personnel. This divide between SRM and access activities is sometimes mirrored in individual organisations, where there can be tension rather than cooperation between SRM teams and programme personnel working on access initiatives. Better integration between SRM strategies and work on access could improve both.

Individualising security: Steps towards the person-centred approach in SRM

The research found a general consensus around the importance of diversity and inclusion in SRM focusing on two aspects: recognising how identity characteristics impact individual aid workers' risks, and diversifying the profiles of security staff. More risk assessments and orientations now consider individual risk factors like gender, ethnicity, and sexual orientation. However, while a 'person-centred approach' to security is supported in theory, many are still uncertain how to implement it in practice. A key challenge is the delicate balance between individualised support and potential discrimination, highlighting the need for transparent and systematic consideration of identity and risk in organisational policies. The goal of a person-centred approach, however, is not to limit opportunities for staff due to their individual risk profiles, but to tailor risk mitigation measures to individual circumstances, often through consultative processes with staff. Equally, it recognises that a more diverse SRM team is in a stronger position to understand and mitigate risks.

Finally, when it comes to the individuals in SRM positions, the research identified a trend towards greater diversity in the profiles of security professionals in the humanitarian sector, including more women and individuals from the Global South, and an increasing number with humanitarian programming backgrounds. This shift reflects a growing appreciation for 'soft' security skills, like negotiation and relationship-building, over traditional 'hard' security expertise. However, the growing expectations and expanding remit of SRM roles to include such things as digital security, high-level conflict analysis, strategies for collateral violence risk mitigation, and diversity/inclusion initiatives make recruitment and training a growing challenge.

To build on the progress made in SRM in the international aid sector, the next phase of efforts needs to focus on extending SRM capacities and competencies to the wider humanitarian space. Working to bridge the significant gap between international and local NGOs, adapting to evolving security threats, and fostering a person-centred approach in SRM practices will better protect those committed to delivering aid in increasingly challenging environments. It is also important to recognise that the progress in SRM, as in so many other endeavours, has largely been an exercise in 'fighting the last war'. To keep pace with changing threat environments and new challenges created by global economic and climate pressures, SRM personnel and systems will need to become more forward-looking.

Recommendations

Adapting to new threats and risks

- **Maintain updated and responsive risk assessment processes,** ensuring SRM systems and personnel lead in the process of identifying and adapting to changing local conditions and risk levels.
- **Explore developing in-house discussion exercises in 'horizon scanning',** where groups brainstorm about improbable yet impactful events to motivate innovative thinking and organisational resilience.
- **Widen the scope of inputs for risk assessment and context analysis,** bringing together staff from different departments, and from all levels of the organisation, to get a better understanding of the context.
- **Identify the appropriate skill sets and focal points for assessing emerging threats and risks,** including misinformation and cybersecurity threats, and clarify organisational responsibilities between SRM, IT, and communications staff.

Localising SRM through more ethical and equitable partnerships

- **Incentivise international organisations to share, rather than transfer, security risks with national and local partners.** This can be achieved by more donors requiring grantees to show evidence of collaborative SRM planning and support for any downstream partners.
- **Include SRM staff in project design with partners** to ensure security considerations are built into programme activities before contracts are signed.
- **Practise the principles of good partnership –** equity, transparency, mutual benefit, complementarity, and responsibility – to aid in the organisational mindset shift from 'risk transfer' to 'risk sharing'.
- **Implement previous fair funding recommendations** on providing adequate overheads, including security costs in programme budgets, and building flexibility and force majeure clauses into contracts.

Supporting coordination and filling coverage gaps

- **Support existing national and local coordination platforms** to incorporate and develop capacity for SRM, and/or support new local initiatives to coordinate around SRM. This is in recognition that international bodies cannot accommodate the SRM coordination needs of all local actors in the space, and there are benefits to locally-led entities to augment and link to existing coordination platforms.
- **Reset and recommit to the SLT framework** in the form of a new statement of intent between NGOs and UN stakeholders that clarifies the framework and sets goals for more effective leadership and communication at country level.
- **Leverage informal digital platforms while mitigating risks** to acknowledge the benefits and widespread use of digital platforms for SRM information sharing, but with guidelines to manage risks of disinformation and fragmented information channels.

Refining and extending existing SRM components

- **Support and enhance incident monitoring systems for local and national organisations** for more systematic tracking of security incidents.
- **Improve training accessibility and relevance for local and national staff and organisations**, preferably through pooling resources for continuous, relevant training opportunities in local languages that can accommodate large numbers of the local aid workers who need training most.
- **Do more to address staff wellbeing and mental health**, through culturally appropriate mental health support and a supportive work environment.

Using SRM to help enhance, not hinder, improved humanitarian access

- **Integrate SRM into access initiatives** to ensure the inclusion of risk mitigation strategies and SRM expertise in ongoing access initiatives and negotiations, and avert the growing siloisation of access and security within and across organisations. This requires reinforcing that SRM is about enhancing, not inhibiting, programme delivery and is not an end in itself.
- **Address weaknesses in deconfliction** through a collective strategy for engaging with governments on issues of trust and accountability.

Propagating the person-centred approach

- **Institutionalise the consideration of identity-based risks within SRM systems,** making this a more widespread and commonplace approach to risk management and mitigation than is currently the case.
- **Create an organisational culture supportive of a wide variety of identities and personal risk profiles,** thus fostering an environment that supports diverse identities.
- **Further diversify the profiles of SRM staff,** ensuring a diverse pool of security experts with a balance of skills and understanding in SRM and humanitarian programming and principles.

1 Introduction

1.1 Background and objectives of the study

As a subject of humanitarian policy and practice, security risk management (SRM) has been an active and growing – yet largely understudied – area of operations. Only a small number of comprehensive, sector-wide analyses of SRM have been published over the past two decades, and none of them are recent enough to cover the significant developments of the past several years. To address this gap, Humanitarian Outcomes, Global Interagency Security Forum (GISF), and Humanitarian Practice Network (HPN) partnered to conduct a global review of SRM in the humanitarian space, under a project funded by USAID's Bureau for Humanitarian Assistance (BHA). This report, co-authored by Humanitarian Outcomes and GISF, is the first output of this research programme, which will also inform a newly revised edition of the HPN publication *Good Practice Review: Operational Security Management in Violent Environments*, last updated in 2010.[1]

This report assesses current capacities, issues, dilemmas, and challenges in humanitarian SRM, presenting them within the historical context of a sector that is continually adapting to meet needs in the face of evolving threats. It aims to be useful for a broad audience of humanitarian practitioners and policymakers, as well as for humanitarian SRM professionals, many of whom provided the evidence and insights used for the analysis.

1.2 Methodology

The research approach used a mix of qualitative and quantitative methods, including key informant interviews, context-based research, survey data, and a review of relevant literature. These evidence components were augmented by data on aid worker violence, conflicts, and humanitarian sector funding and personnel.

Research team and advisory group

The research was conducted by a core team of seven researchers from Humanitarian Outcomes and GISF, who were supported by an additional seven contributing researchers who participated in the country-based case studies. The research team was supported by an advisory group comprising 15 leading subject matter experts and humanitarian practitioners who provided input into the research plan and feedback on this report.

Key informant interviews

In all, the research team conducted interviews with 262 individuals, remotely and in person. Interviewees included staff of international non-governmental organisations (NGOs) and consortia (122), national and local organisations (45), the United Nations (UN) (46), International Red Cross and Red Crescent Movement entities (10), donor government agencies (12), private security service and training providers (13), academics and independent researchers (6), and assorted other government and international organisation members (8). A list of interviewees is provided in Annex. The list excludes the few dozen individuals who participated on the condition of anonymity. The interviews were semi-structured, covering the full range of themes and issues detailed in the report, and

1 Humanitarian Practice Network (HPN). (2010). *Good Practice Review: Operational Security Management in Violent Environments.* Number 8 (new edition). Overseas Development Institute. https://odihpn.org/publication/operational-security-management-in-violent-environments-revised-edition/

interviewees participated on a not-for-attribution basis. The term 'international organisations' used in this report encompasses international NGOs, UN agencies, and international entities of the International Red Cross and Red Crescent Movement (International Committee of the Red Cross (ICRC), International Federation of Red Cross and Red Crescent Societies (IFRC) and partner national societies), unless specified otherwise. The primary findings of the report express the perceptions and views of the interviewees, as synthesised by the authors. Any errors of fact belong to the authors alone.

Country-based case research

Conducted in the latter half of 2023, the country-based research involved in-person interviews and participant observation in five countries: Colombia (Bogotá and Cúcuta), Central African Republic (Bangui), Ukraine (Kyiv and Dnipro), Iraq (Baghdad and Erbil), and Ethiopia (Addis Ababa and Mekelle). These countries were selected to ensure a mix of risk conditions and geographic diversity, while considering the conditions and feasibility for the research teams' effective operations. Each country was visited by a two-person team of researchers representing Humanitarian Outcomes and GISF. In four out of the five cases (the exception being Central African Republic) the international researchers were joined by a national researcher with experience in humanitarian response in the country and contacts within the local NGO community.

These visits were facilitated and hosted by GISF members: the Danish Refugee Council (Colombia, Iraq, and Ethiopia) and the International Rescue Committee (Central African Republic and Ukraine). The teams conducted in-person interviews with: international, national, and local NGOs; UN agencies and offices; donor representatives; private security providers; and other relevant actors. They also participated in coordination meetings.

Online survey

Prior to beginning interviews, the team designed an online survey, which was carried out between October 2022 and November 2023, aimed at understanding the level of SRM support provided to aid workers in international and national organisations. The survey was made available in English, French, Spanish, and Arabic, and received 358 responses from representatives of over 100 organisations in 76 countries. The majority of the respondents represented international NGOs (48%), followed by UN agencies (28%), and local/national NGOs (14%).

Most respondents were based at global headquarters (37%), followed by country headquarters (27%), with individuals from sub-national offices, regional offices and project sites represented to a lesser degree. Most respondents were in roles that were dedicated to SRM (55%), with less representation from other functions, such as senior leaders (19%), programme staff (9%), security focal points (where security is not their full-time role) (6%), and support service staff (such as finance, administration, and logistics) (<2%).[2]

Practitioner workshops

The research team presented initial findings at practitioner workshops held in Nairobi (August 2023) and Amman (October 2023), as well as at GISF's Global Autumn Forum in Washington, D.C., and Madrid (with additional participants online (September 2023)), and at AidEx in Geneva (October 2023). These workshops were attended by representatives of international and national NGOs, UN agencies, donors, and private companies in the security space. The research team also previewed findings in an online plenary meeting of the advisory group. The objective of these sessions was to validate the global and country-level research, discuss any points of contention, and collect additional insights from the participants.

Literature review

To inform this research, the team reviewed relevant literature within the humanitarian SRM space and other related areas of work. This report builds on this existing literature and makes reference to key sources throughout the document.

2 For more detailed survey results please go to: **https://www.surveymonkey.com/stories/SM-5OmzCZDLAEtu_2FRAnrIV2DQ_3D_3D/**

Much of the existing literature on humanitarian SRM takes the form of guidance documents or discussion pieces emerging from expert opinion. Where literature is based on research studies, it is usually context-specific or relates to thematic areas – for example, security training and acceptance. However, there have been a handful of more in-depth research outputs in the past decade or so that have brought new thinking and discussion around the complexities of SRM within the aid sector. This includes global assessments and evaluations, notably the Office for the Coordination of Humanitarian Affairs (OCHA) *To Stay and Deliver* reports (2011 and 2017), as well as more historical accounts and policy debates, such as *Aid in Danger* by Larissa Fast, Abby Stoddard's *Necessary Risks* and Médecins sans Frontières (MSF) CRASH's *Saving Lives and Staying Alive*.[3]

A related and much larger body of literature is focused on humanitarian access and principles, with links to aid worker security. These include: Mary Anderson's book, *Do No Harm: How Aid Can Support Peace—or War*; Fiona Terry's *Condemned to Repeat?: The Paradox of Humanitarian Action*; and the ICRC's *The Roots of Restraint in War*.[4] Research pieces by academics such as Larissa Fast, Mark Duffield and Antonio Donini, some carried out in collaboration with humanitarian practitioners, have also engaged with the role that perceptions and humanitarian principles play in aid operations, with significance for aid organisations' SRM approaches.[5] From a practitioner perspective, The Centre of Competence on Humanitarian Negotiation (CCHN) has published several reports on humanitarian negotiations and related security aspects.[6]

A variety of authors and organisations have contributed country-specific and thematic analyses of security issues and challenges. Noteworthy research pieces include the GISF (formerly European Interagency Security Forum or EISF) Managing the Security of Aid Workers with Diverse Profiles paper, which built on previous research on gender-based risks to assess the challenges and implications of all forms of identity-based risks in the aid sector.[7] This has served as the foundation for the emerging concept of a 'person-centred approach' to SRM, discussed in more detail later in this report. GISF's compilation of articles Achieving Safe Operations through Acceptance: Challenges and Opportunities for Security Risk Management also presents recent and innovative thinking around access challenges and the implementation of acceptance measures in complex operating environments.[8] Humanitarian Outcomes has also published a series of annual *Aid Worker Security* reports detailing global security incident trends and presenting research findings on topics ranging from security training to sexual violence and gender-based risks.[9] Maarten Merkelbach and Edward Kemp's 2011 paper, Can You Get Sued?, kick-started a debate on the meaning and implementation of 'duty of care' within the aid sector, further spurred by the landmark Dennis v Norwegian Refugee Council ruling in 2015 and Merkelbach and Kemp's follow-up article, published by EISF in 2016, Duty of Care:

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3 Egeland, J., Harmer, A., and Stoddard, A. (2011). *To stay and deliver: Good practice for humanitarians in complex security environments*. Policy Development and Studies Branch (PDSB), UN Office for the Coordination of Humanitarian Affairs OCHA. https://www.humanitarianoutcomes.org/publications/stay-and-deliver-good-practice-humanitarians-complex-security-environments; Jackson, A. and Zyck, S.A. (2017). *Presence & proximity: To stay and deliver, five years on.* OCHA. https://www.humanitarianoutcomes.org/publications/presence-proximity-stay-and-deliver-five-years; Fast, L. (2014). *Aid in danger: The perils and promise of humanitarianism*. University of Pennsylvania Press. https://www.pennpress.org/9780812246032/aid-in-danger/; Stoddard, A. (2020). *Necessary risks: Professional humanitarianism and violence against aid workers*. Springer International Publishing. https://doi.org/10.1007/978-3-030-26411-6; Neuman, M. and Weissman, F. (2016). Saving lives and staying alive: *Humanitarian security in the age of risk management*. Centre de réflexion sur l'action et les savoirs humanitaires (CRASH),
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4 Anderson, M. B. (1999). *Do no harm: How aid can support peace–or War*. Lynne Rienner Publishers; Terry, F. (2002). *Condemned to repeat?: The paradox of humanitarian action*. Cornell University Press. https://www.jstor.org/stable/10.7591/j.ctt2tt2j8; International Committee of the Red Cross (ICRC). (2020). *The roots of restraint in war*. https://www.icrc.org/en/publication/4352-roots-restraint-war

5 For example, Fast, L., Freeman, F., O'Neill, M., and Rowley, E. (2015). The promise of acceptance as a security management approach. *Disasters*, Volume 39, Issue 2 (April), pp. 208–231. https://doi.org/10.1111/disa.12097; Duffield, M. (2010). Risk-management and the fortified aid compound: Everyday life in post-interventionary society. *Journal of Intervention and Statebuilding*, 4 (4), 453–474. https://doi.org/10.1080/17502971003700993; Donini, A. (2012). Humanitarianism, perception, power. In Abu-Sada, C. (ed.). In the eyes of others: *How people in crises perceive humanitarian aid*. MSF, Humanitarian Outcomes, and NYU Center on International Cooperation. https://www.msf.org/sites/default/files/msf-in-the-eyes-of-others.pdf

6 Available from: https://frontline-negotiations.org/home/resources/publications/

7 Notably, Persaud, C. (2014a). *Gender and security: Guidelines for mainstreaming gender in security risk management*. EISF. https://www.gisf.ngo/resource/gender-and-security/

8 Available from: https://www.gisf.ngo/resource/achieving-safe-operations-through-acceptance/

9 Available from: https://www.aidworkersecurity.org/reports

A review of the Dennis v Norwegian Refugee Council Ruling and its Implications.[10]

More recent research has also sought to explore the SRM experiences of national and local aid organisations. This includes Humanitarian Outcomes and InterAction's study, NGOs & Risk: Managing Uncertainty in Local-International Partnerships: Global Report, and GISF's paper, Partnerships and Security Risk Management: From the Local Partner's Perspective.[11] Humanitarian Outcomes' report, Enabling the Local Response: Emerging Humanitarian Priorities in Ukraine, is one of the most recent contextual studies of the operational and security risk challenges faced by local aid actors.[12]

The current study aims to fill a gap in the existing literature by providing a robustly researched, up-to-date overview of the current state of global practice in humanitarian SRM, arguably the first of its kind since OCHA's To Stay and Deliver reports.[13]

1.3 Caveats and limitations

To be representative of the diverse field of humanitarian action, the selection of country cases, key informant interviews, and survey respondents sought to include a broad array of organisations, while deliberately emphasising operational-level personnel. While many senior headquarters staff of major humanitarian organisations were interviewed, the study was not aiming for an exhaustive list; inputs from the global advisory group and two headquarters-level workshop events helped ensure that the headquarters perspective was incorporated. It was also not always possible to get the number of local/national organisations we sought to include in each country. This was particularly the case in Central African Republic, where the team had difficulty making contacts and getting responses from organisations that lacked the time and staff capacity to participate. Additionally, as the preponderance of interview data came from international NGOs, corresponding to their larger combined staff presence on the ground, the findings of the report may reflect this weighting – that is, it may emphasise the experience and perspectives of international NGOs.

Although security and safety concerns can also arise in natural disasters, development contexts, and in low-risk and mostly stable environments, it was beyond the scope of this paper to research the full range of operational contexts, and we have limited ourselves to humanitarian responses in conflict-affected areas. It is important to keep in mind, however, that aid organisations need to attend to SRM even in non-conflict settings.

The online survey was targeted mainly to country-level SRM professionals, with special efforts to disseminate it among local/national NGOs. Because relatively few of these organisations have established SRM systems and personnel, the local/national NGO respondents in the survey arguably comprise a self-selected sample that likely skews toward the larger and more developed local/national NGOs. This bias is noted in the discussion of survey results.

The authors acknowledge that much of the literature cited here is the product of their individual and organisational research efforts. This, unfortunately, is further evidence of a limited amount of research focused solely on humanitarian SRM in the sector. Finally, as actors in the humanitarian space ourselves, we recognise that references made to GISF and Humanitarian Outcomes – and their products and publications cited in the body of this report – may raise conflict of interest concerns. To address these, we have ensured that the opinions shared of, and references made to, the two organisations in this report are solely those shared by interviewees and survey respondents, and are not a reflection of the authors' or the organisations' own opinions.

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10 Merkelbach, M. and Kemp, E. (2011). *Can you get sued? Legal liability of international humanitarian aid organisations towards their staff*. Security Management Initiative. https://www.gisf.ngo/resource/can-you-get-sued-legal-liability-of-international-humanitarian-aid-organisations-towards-their-staff/; Merkelbach, M. and Kemp, E. (2016). *Duty of care: A review of the Dennis v Norwegian Refugee Council ruling and its implications*. EISF. https://gisf.ngo/resource/review-of-the-dennis-v-norwegian-refugee-council-ruling/

11 Stoddard, A., Czwarno, M., and Hamsik, L. (2019). *NGOs & risk: Managing uncertainty in local-international partnerships (global report)*. Humanitarian Outcomes. https://www.humanitarianoutcomes.org/publications/ngos-risk2-partnerships; and Global Interagency Security Forum (GISF). (2020). *Partnerships and security risk management: From the local partner's perspective*. https://www.gisf.ngo/resource/partnerships-and-security-risk-management-from-the-local-partners-perspective/

12 Stoddard, A., Harvey, P., Timmins, N., Pakhomenko, V., Breckenridge, M.-J., and Czwarno, M. (2022). *Enabling the local response: Emerging humanitarian priorities in Ukraine March–May 2022*. Humanitarian Outcomes. https://www.humanitarianoutcomes.org/sites/default/files/publications/ukraine_review_2022.pdf

13 Egeland, Harmer, and Stoddard (2011); and Jackson and Zyck (2017).

2 Insecurity for aid workers: Long-term trends and recent shifts

Humanitarian aid workers in conflict areas are more likely to die from violence than any other job-related cause.[14] While the biggest risks are concentrated in a relatively small proportion of response settings, the toll remains alarmingly high.

2.1 Trends in casualty data

Over 20 years of data on security incidents shows a long-term increase in the number of major violent attacks and victims (Figure 1), reflecting both the expanding international humanitarian sector and the proliferation and intensification of conflicts, where most humanitarian aid work takes place.

While improved reporting may explain some of the long-term apparent rise in casualties, the fact of triple-digit fatalities each year for the past 10 years leaves no doubt that insecurity for staff and operations is a real and pressing issue for humanitarian organisations.

Similarly, the rise in violent incidents cannot be fully explained by the growing aid worker population. Using estimates of the global humanitarian aid worker population (for which data is available from 2012 to 2021), it is possible to trace broad trends in attack and fatality rates.[15] This analysis shows flatter - but still upward-trending - trajectory (Figure 2). This indicates that the rise in incidents is not simply a function of the increasing number of aid workers, but that the level of risk they face in some places has escalated.

2.2 Emerging threats and changing security landscapes

It is important to recognise that insecurity is highly context-specific and does not follow global trends; each crisis context presents a unique set of threats and risks. Nevertheless, humanitarian security professionals have noticed some general shifts, borne out by global incident data, that influence their current work and priorities.

In the early 2000s, the rise of transnational jihadist groups and a spate of large-scale terrorist attacks understandably became a major focus for humanitarian operational security. In contexts like Afghanistan, Iraq, Pakistan, and Somalia, armed groups used aid workers as proxy targets for governments and Western interests. The increased use of explosives, complex attacks, and high-profile kidnappings by armed groups drove and shaped the development of SRM.

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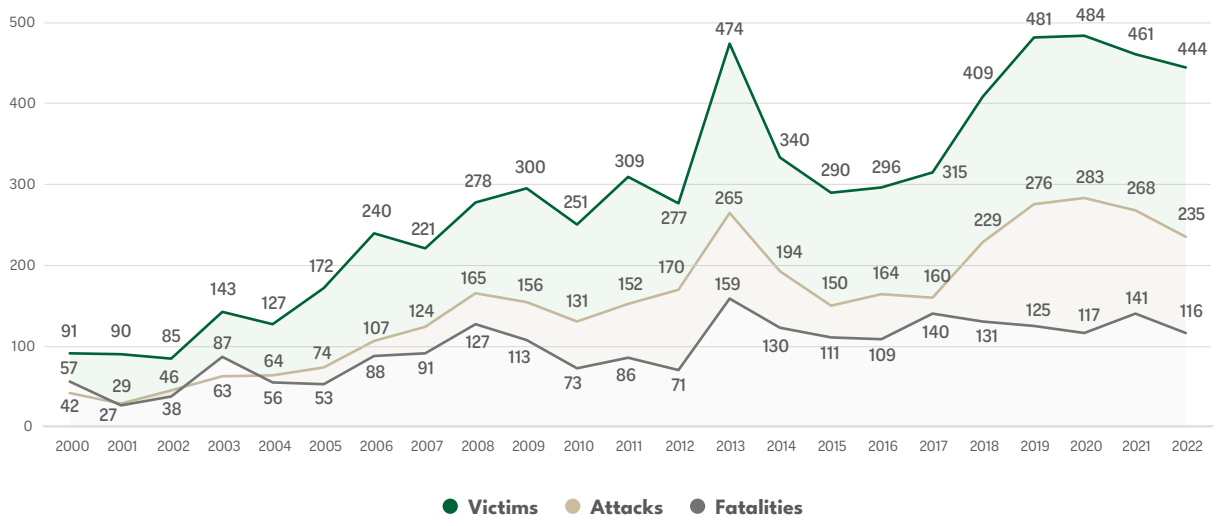
14 Contrary to popular belief, there is no sector-wide data supporting the claim that most aid worker deaths are due to vehicle accidents. The only published study on the topic finds that, "Most deaths were due to intentional violence." (Sheik, M., Gutierrez, M. I., Bolton, P., Spiegel, P., Thieren, M., and Burnham, G. (2000). Deaths among humanitarian workers. BMJ (Clinical research ed.), 321(7254), 166–168. https://doi.org/10.1136/bmj.321.7254.166).
The belief about vehicular fatalities seems to have originated in a 1985 retrospective study of Peace Corps volunteers (who were using motorcycles as a primary means of transport). Road accidents may be the most prevalent type of incident experienced by organisations, but do not necessarily cause the most deaths (Stoddard 2020).

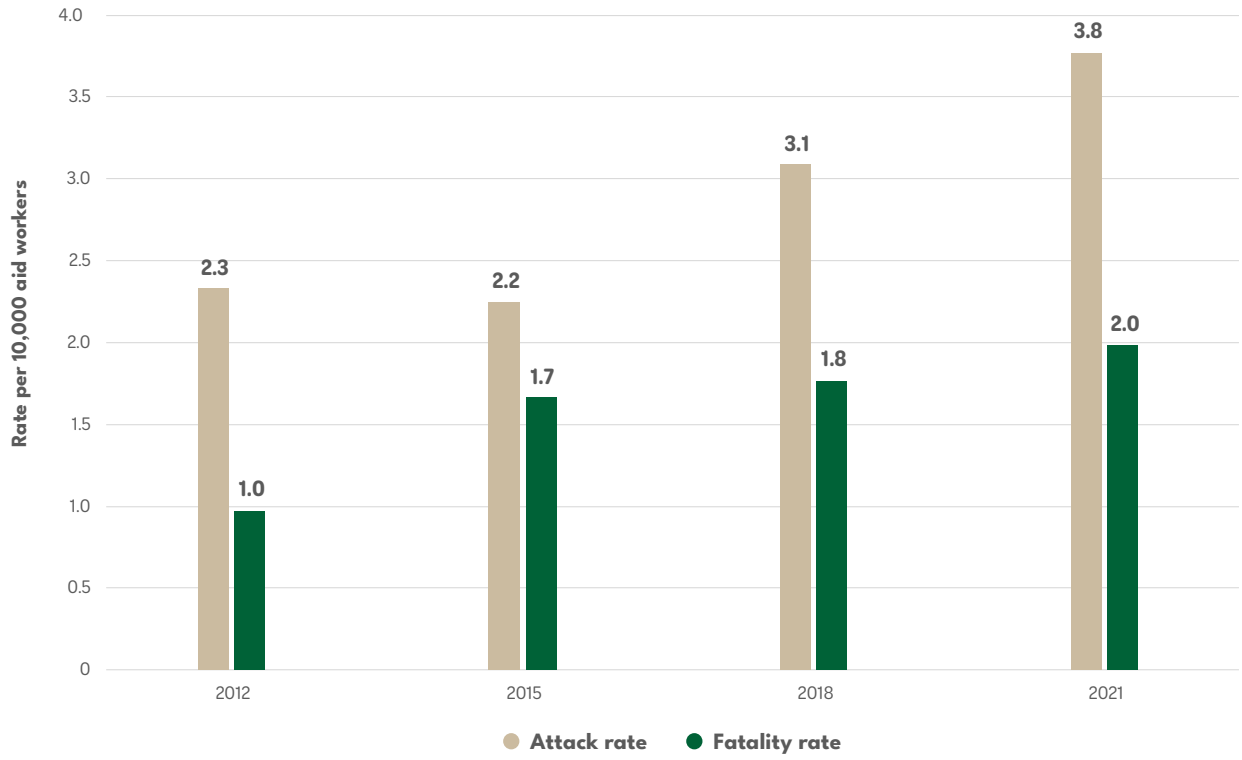
15 The global humanitarian aid worker population is estimated with data from the Global Database of Humanitarian Organisations, which includes local/national NGOs and international NGOs with more than 20% of annual programme expenditure on humanitarian activities (Humanitarian Outcomes. (n.d-a). *Global database of humanitarian organisations*. Retrieved 5 December 2023 from https://www.humanitarianoutcomes.org/gdho/search). Humanitarian staff numbers are calculated using humanitarian budget percentage and total staff numbers. Incident data used for rate calculations comes from: Humanitarian Outcomes. (n.d-b). *Aid Worker Security Database*. Retrieved 5 December 2023 from https://www.aidworkersecurity.org/

Figure 1: Major attacks affecting aid workers and total numbers of victims and fatalities by year, 2000–2022



Data source: Aid Worker Security Database, www.aidworkersecurity.org

Figure 2: Aid worker attack rates and fatality rates, 2012, 2015, 2018, 2021



Data sources: Aid Worker Security Database, www.aidworkersecurity.org and Global Database of Humanitarian Organisations, https://www.humanitarianoutcomes.org/projects/gdho

By 2023, the threat to aid organisations posed by groups like Al-Qaeda, ISIS, and their local affiliates had diminished somewhat, replaced by the challenges of operating in both new, large-scale major conflicts and disintegrating, lawless environments. Direct attacks on hospitals, once rare and shocking, have become disturbingly commonplace. In addition, the transformative advances in digital technology in recent years have spawned a new type of threat for which humanitarians are still struggling to understand their risk exposure and the best means of mitigation.

Complex threat environments

Humanitarian security professionals interviewed for this study described the increasing complexity of their operational environments, which is straining their capacity to measure and manage their risks. Conflicts and unstable settings, marked by weak or absent rule of law and multiple armed actors, make up a large portion of the humanitarian emergencies that aid organisations are responding to. In Colombia, for example, the ICRC recognises seven ongoing armed conflicts,[16] and a UN interviewee in Central African Republic cited 13 different armed groups controlling various portions of the country, along with numerous smaller criminal bands. Interviewees mentioned the Sahel as a region of particular concern, given the multiplicity of armed actors in an increasingly unstable environment. And South Sudan, despite the formal end to the conflict in 2020, experienced the greatest number of violent incidents affecting aid workers for three years running, perpetrated by criminal and ethno-political groups making use of ubiquitous supplies of small arms left over from decades of civil war, pre- and post-independence.

The above contexts, and others, show a pattern of fragmentation as armed groups, formerly integrated by political motives and ideologies, splinter into smaller units motivated principally by economic gain. Illicit activities once undertaken to fund their militant goals become ends in themselves. For aid workers, simply keeping track of the various actors is a challenge, let alone negotiating with them for secure access.

SRM professionals also mentioned climate pressures and resulting resource scarcity and economic dislocation that are increasingly fuelling hostilities and driving people to criminality, with the result that humanitarians are finding themselves in the crosshairs for both opportunistic crime and grievance-based violence.

Digital dangers: Mis/disinformation, cybercrime, and the phenomenon of globalised risk

For most global interviewees, digital risks were among the first mentioned in regard to recent changes.[17] Many described a more porous line between hostility online and real-life threats, which in some cases can morph quickly from the former to the latter. Interviewees shared examples of how globalised communication, especially through social media, led to situations in which advocacy statements made by their headquarters resulted in risks to staff on the ground. The threat of online rumours, creeping government controls over communications in crises, and the as yet unknown future impacts of AI were all risks noted as critical, yet expensive and complex, for aid actors to address. The resources required to monitor and combat these risks are rarely found at country-level operations, so accommodating this growing threat in headquarters or regional offices requires budgeting foresight, continuously updated IT training, and specialised staff.

The enormity of an organisation's exposure to digital risks is difficult to grasp. As one practitioner said, "Every employee with a phone or computer is a potential target." Integrating these threats into crisis management planning starts with categorising different digital risks and setting the thresholds that should trigger a response. Once triggered, there are further dangers of a siloed response. In larger organisations, misinformation is usually handled by media, marketing, or communications teams, while cyberbreaches are usually handled by IT. (For smaller organisations, these threats may be outsourced to external IT experts, further distancing the response from programme and SRM staff.) Security staff have started to insist that they be brought in early, by whichever department is responding, to understand what physical risks may now exist and how they can be mitigated.

16 ICRC. (2023, 10 November). *Come through the screen - see the reality of war in Colombia*. https://www.icrc.org/en/document/come-through-screen-see-reality-war-colombia-2023

17 An example of the problem examined in recent literature can be found in Leyland, J., Tiller, S., and Bhattacharya, B. (2023). Misinformation in humanitarian programmes: Lessons from the MSF Listen experience. *Journal of Humanitarian Affairs* 5 (2). https://doi.org/10.7227/JHA.107

Additionally, even if the lines of what each department is responsible for are clear at the head office, they may be unclear at the country level, where multi-hatting can cause confusion and certain threats may fall between the cracks.

Crime and criminal economies

In 2021, the annual Aid Worker Security Report noted, "In many insecure operational settings today, economic criminality (as opposed to attacks by conflict actors) accounts for a third or more of serious incidents against aid workers and can involve extreme violence."[18] Crime was one of the most prevalent threats reported by security staff interviewed at all levels.

Criminal activities thrive in unstable environments, marked by the absence of effective law enforcement and the vulnerability of affected populations. This is compounded by conflict-driven economic fragility, where crime may become a sole means of survival, as observed by practitioners in some contexts. Organised criminal elements capitalise on illicit economies, and the boundaries between criminals, armed groups, and government are often amorphous. Jobless youth in places like South Sudan and Ethiopia have increasingly become involved in crime due to poor livelihood prospects. In Central African Republic, criminality – particularly theft and robbery – was a concern raised by several organisations. Interviewees frequently mentioned opportunistic crime as one of the largest risks they needed to manage. Across many contexts, checkpoints appear to be one of the most common locations where thefts occur, especially by the armed groups controlling them.

Additionally, humanitarians grapple with the challenge of engaging with criminal actors who control access to places and populations. Not only are criminal actors often harder to map and make contact with than armed groups, but negotiating with them may be seen as being complicit with their crimes. Kidnapping-for-ransom and 'express kidnappings' (where the victim is forced to withdraw their money from an ATM, for example) are not a new threat, but fear is growing that where economic conditions deteriorate, aid workers will increasingly be seen as lucrative targets – a problem noted by interviewees in Kenya, Ethiopia, and Haiti. National and local NGOs, most often targeted in these cases, are least equipped with SRM mitigating measures, as this report will detail.

Despite their overlapping nature, political violence and crime are often treated separately by aid practitioners, who often consider themselves less equipped to address the criminal threat, with fewer analytical and negotiation tools to use in dealing with criminal actors.[19] The lack of frameworks for managing such complex criminal-political risk environments is one of the reasons humanitarian operations have been so stymied in Haiti, where multiple criminal gangs control key areas, and which security professionals note as one of the most difficult contexts to operate in.[20]

Collateral violence in major wars

Although the modern system of organised humanitarian action has its roots in interstate warfare,[21] for much of the late 20th and early 21st centuries (encompassing the lifespan of most of today's humanitarian organisations), the work has taken place mostly in chronic crises and protracted civil conflicts. In recent years, humanitarian efforts have faced a novel and escalating risk stemming from major warfare and the associated collateral violence. Some of the world's most intense armed conflicts, such as those in Iraq, Syria, and Yemen, have witnessed extensive use of air power and heavy artillery, resulting in a substantial toll on civilians. Aid worker fatalities in Sudan reached double digits in just three months following the outbreak of war in April 2023. At the time of writing, the Aid Worker Security Database shows that over 100 UN Palestinian employees in Gaza have been killed by Israeli airstrikes, most of them not while working but while at home with their families.[22] What sets this risk apart is the unpredictability and

18 Stoddard, A., Harvey, P., Czwarno, M., and Breckenridge, M.-J. (2021). *Aid worker security report 2021. Crime risks and responses in humanitarian operations*. Humanitarian Outcomes. https://www.humanitarianoutcomes.org/AWSR2021

19 Ibid.

20 Stoddard, A., Harvey, P., Duque-Díez, M., Czwarno, M., and Breckenridge, M.-J. (2023). *Humanitarian access SCORE report: Haiti survey on the coverage, operational reach, and effectiveness of humanitarian aid*. Humanitarian Outcomes. https://www.humanitarianoutcomes.org/publications/score-report-Haiti-2023

21 The bloody aftermath of the Battle of Solferino in 1859 led to the birth of the Red Cross Movement and the Geneva Conventions, laying the foundation for modern humanitarian action.

22 Humanitarian Outcomes (n.d.-b).

potential magnitude of collateral violence. Security decisions in these environments involve not only assessing the likelihood and impact of harm but also, for international organisations, considering the looming threat of litigation in the event of staff casualties caused by proximity to hostilities. For international NGOs, free to choose where they operate, the most obvious and compelling mitigation measure for collateral violence is avoidance: remaining outside of artillery range, minimising the numbers of staff exposed to airstrikes, and consequently remaining at a distance from those areas worst-affected by the conflict or humanitarian situation, as we are seeing in Ukraine.

Even in civil conflicts and instability, note interviewees, small armed groups can often acquire modern weaponry on global markets, whereas previously they could only access old or discarded weapons, mostly small arms. Increasingly affordable drone technology threatens a surge of unmanned aerial vehicles (UAVs) carrying explosives which could spread the risk of collateral (and targeted) violence to a wider range of response settings.

The Wagner Group's presence in Africa

Other international actors, like Wagner Group, a Russian private military company, are having a significant impact on the operational environment. Currently operating in several countries around the world (including as conflict actors in Central African Republic, Mali, and Ukraine), Wagner is thought to be seeking to extend its presence on the African continent. While its activities are often framed as a form of 'stabilisation' and security assistance at the behest of the host government, Wagner is a known instrument of Russian state interests, and its presence has been associated with exacerbated conflict and greater fatalities, autocratic governance, and human rights violations.[23] In Central African Republic, the Wagner presence has been linked to both improvements and challenges in security dynamics, especially for aid operations. Prior to Wagner's involvement in the country, the capital city, Bangui, and other regions were heavily influenced by armed groups, making movement and negotiation difficult for aid organisations. Wagner's intervention has contributed to a reduction in direct threats and theft by armed groups, leading to a more secure environment in some areas, particularly urban centres.

Although the Central African Republic government, assisted by Wagner, now controls more of its territory, rebel groups nevertheless remain active, and the level of risk remains unchanged in smaller villages and rural regions. Issues like robbery and banditry also continue to be a major concern. The presence of groups like Wagner introduces complicated new dynamics in international relations generally, with autocratic states like Russia exerting influence in conflict zones, often operating with significant resources and impunity. Interviews in Central African Republic illustrated the paradoxical situation faced by aid workers there, in that Wagner's presence has reduced many operational risks, while posing new ones.

Mixed extremes and transitional contexts

Since Russia's full-scale invasion of Ukraine in February 2022, the front lines of the conflict have solidified along a 600-mile stretch running down the eastern portion of the country, while the security situation to the west has largely stabilised (missile and drone strikes continue in major cities and elsewhere but have decreased and are mostly intercepted by Ukrainian air defences). Humanitarian organisations working in Ukraine with staff in both frontline-adjacent and safer areas have to manage a strangely divided operational context for SRM. As a result, they report a range of psychological issues affecting staff, such as trauma, survivor guilt, sleep deprivation, and vigilance fatigue, also characterised as 'complacency' and 'overconfidence'.

In Ethiopia, the transition from a development-focused approach to a humanitarian one has been challenging.Despite a long history of internal ethnic conflicts, the international aid community has viewed Ethiopia predominantly as a development context with medium to low levels of risk for aid groups.

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23 Armed Conflict Location & Event Data Project (ACLED). (2023, 2 August). *Moving out of the shadows: Shifts in Wagner Group operations around the world*. https://acleddata.com/2023/08/02/moving-out-of-the-shadows-shifts-in-wagner-group-operations-around-the-world/#exec; Thompson, J. (2021, 14 October). *The Wagner Group has its eyes on Mali: A new front in Russia's irregular strategy.* Modern War Institute at West Point. https://mwi.westpoint.edu/the-wagner-group-has-its-eyes-on-mali-a-new-front-in-russias-irregular-strategy/; Doxsee, C. and Thompson, J. (2022, 11 May). *Massacres, executions, and falsified graves: The Wagner Group's mounting humanitarian cost in Mali*. Center for Strategic and International Studies (CSIS). https://www.csis.org/analysis/massacres-executions-and-falsified-graves-wagner-groups-mounting-humanitarian-cost-mali

The 2020 conflict in Tigray upended the status quo, but many actors continue to maintain a development-driven mindset, reinforced by the Ethiopian government's restrictive policies. In such a context, SRM should lead the transition to an emergency footing, beginning with a situational analysis and tracking emerging risks. However, it has been a lagging component of operations, slow to gear up in funding and capacities. The issue is magnified by the government's sensitivities around anything labelled 'security', requiring SRM activities to be presented as related to 'safety', 'capacity-strengthening', or similarly innocuous terms. This is further compounded by the government restrictions on the number of international staffers because very few international NGOs are willing to dedicate one of their headcount to an SRM professional.

Colombia presents its own set of challenges, with high-risk areas, the proliferation and fragmentation of non-state armed groups, and a government that is often at odds with humanitarian actors. The humanitarian agenda in Colombia is complicated by multiple intervention remits, including migrant protection, peacebuilding, development, and initiatives aimed at reducing coca production.

Iraq, in its post-conflict, transitional phase in 2023, exhibits a striking disconnect between the reduced threat level and the persistently high security measures maintained by international diplomatic and humanitarian actors. Despite the end of armed conflict and a shift towards recovery and development, organisations retain strict security stances and limited movement – a legacy of past traumatic events, in particular the 2003 Canal Hotel bombing.[24] The Iraq case reflects the difficulty in lowering security measures, especially given the underlying political and sectarian tensions, which interviewees insisted could erupt anew at any moment.

Across the countries studied, organisations, especially local/national NGOs, spoke of their continuing risk of attack and/or government penalties relating to the work itself, especially in relation to equality, civic empowerment, gender-based violence, and gender equality. One concern that organisations have raised is a noticeable increase in the detention of aid workers by host governments and local authorities.

Along with the more novel threats outlined above, many of the SRM professionals interviewed in 2023 emphasised the more familiar – but still important – concerns such as road safety, environmental hazards (which interviewees have argued are increasing in frequency and severity), weak national infrastructure (from roads to communications), civil unrest, war remnants (particularly landmines), ethnic tensions, and staff intimidation and harassment, particularly at checkpoints or roadblocks. While many of these risks are not major causes of fatalities, security staff must contend with them daily. These tend to be the risks that can be significantly mitigated if staff adhere to SRM policies – something many organisations still struggle to achieve. One security manager described this age-old challenge: "You have all the policies and procedures, but compliance is still difficult. NGOs are struggling to build a positive security culture."

24 Psychological elements of this phenomenon in SRM are explored in Heer, S. (2023, 18 April). *How does anxiety and its social defence mechanisms affect security risk management practices in the international aid sector?* GISF. https://www.gisf.ngo/blogs/how-does-anxiety-and-its-social-defence-mechanisms-affect-security-risk-management-practices-in-the-international-aid-sector/

3 The development of security risk management (SRM) in humanitarian action

The progress made over 20 years of building and improving the tools and structures for humanitarian SRM is evident across international organisations, which have collaborated with each other and contributed to the building of knowledge and good practices. This section broadly maps that progress and highlights current areas of focus and improvement. Because this progress is not shared across the full expanse of humanitarian action, bridging the widening gap in SRM capacities between the international and local/national organisations appears as the logical and necessary next step in this evolution.

3.1 A brief history of SRM in the humanitarian sector

Before the development of formal SRM systems, aid workers found themselves navigating risky environments without security plans, safety equipment, or sometimes even reliable means of communication. As organisations grew and extended operations in conflict-affected countries, a handful of sector-shaking incidents – like the execution-style murder of ICRC workers in Chechnya in 1996 – highlighted the need for collaborative efforts to improve security measures.

In response, a group of international NGO practitioners developed the first global interagency security trainings in 1998, funded by USAID and coordinated by InterAction and RedR. These training sessions distilled key principles of SRM and developed practical guidance from a humanitarian actor's perspective, rather than merely borrowing from the military or private security sectors. The learnings from this initiative and other emerging inter-agency efforts were elucidated and compiled in a volume published by HPN in 2000, titled Good Practice Review 8: Operational Security Management in Violent Environments, and subsequently became the foundation of many international NGOs' early security plans.[25]

Around the same time, the UN was also improving its security system and developing risk mitigation measures for humanitarian operations – which had similar roots in an inter-agency training initiative. Lessons from Operation Lifeline Sudan in the 1990s – a training programme for humanitarian workers, focusing on survival tactics, first aid, and emergency communications – laid the groundwork for the UN's early comprehensive security policies and approach. Following the 2003 bombing of the UN Iraq headquarters in Baghdad's Canal Hotel, the UN remodelled its security architecture into the UN Department for Safety and Security (UNDSS) headed by an Under-Secretary-General level director. [26]

While the systems and protocols used by the UN humanitarian agencies were always, by necessity, more formal and uniform than those of NGOs, there was a good deal of cross-pollination, and the twin strands of humanitarian operational security closely resembled each other in their fundamentals. Commonalities have included the following key concepts and principles.

- **Acceptance approach**. One of three broad strategies for managing risks, along with protection and deterrence, the acceptance approach embodies the important recognition that humanitarians can enhance their security by actively seeking to cultivate familiar relationships and goodwill among the communities they serve, and gaining

25 Humanitarian Practice Network. (2000). *Good Practice Review 8: Operational Security Management in Violent Environments*. HPN/ Overseas Development Institute. https://gisf.ngo/wp-content/uploads/2014/09/0368-van-Brabant-GPR-8-Operational-security-management-in-violent-environments.pdf

26 The precursor to UNDSS was the Office of the UN Security Coordinator (UNSECOORD), established in 1982 after an attack on UN offices in Saigon.

the tolerance of armed actors. While aid organisations also employ protection and occasionally deterrence measures as well, their status as unarmed actors seeking to project neutrality amid conflict makes acceptance an indispensable element of their SRM strategy.

- **Risk assessment**. A process to identify and weigh security risks, based on situational analysis and threat/actor-mapping, according to their likelihood and potential impact. This assessment is the basis for deciding if the level of risk is acceptable, and for allocating attention and resources to mitigating the identified priority risks.

- **Residual risk**. The level of risk remaining after all mitigating measures have been implemented. The importance of this concept is the implication that risk can never be reduced to zero and, if humanitarian aid is to continue, this risk must be acknowledged and accepted by the organisation and its personnel.

As SRM policies and guidance continued to develop through the 2010s, some new key concepts emerged, including the following.

- **Programme criticality**. The idea that a risk threshold is not fixed but should rise in tandem with the urgency of needs; for critical operations (lifesaving, for example), humanitarians will explicitly accept greater levels of risk.
- **Person-centred approach**. The recognition that identity factors (such as ethnicity, nationality, gender, and sexual orientation, among others) combine to create different risk profiles for each individual and should be considered in security risk assessment and management processes.

SRM development was in many respects an exercise in formalising and institutionalising the mental models, common sense cautions, and intuitive behaviours of people experienced in working in high-risk conditions. As one interviewee put it, "Lots of tools exist today that didn't before that help counterbalance the gut feeling." Although SRM systems are predominantly a set of tools, and not blueprints or guarantees, aid workers almost universally affirm that when used appropriately, without abandoning personal agency and judgement, they make a material difference in security. Twenty years ago, it was found that aid workers were most likely to be harmed in a security incident within the first 90 days of their deployment. Putting the know-how and protocols on paper helped decrease the once near-total reliance on an individual's deep experience and good luck.

3.2 Current state of SRM structures and capacities

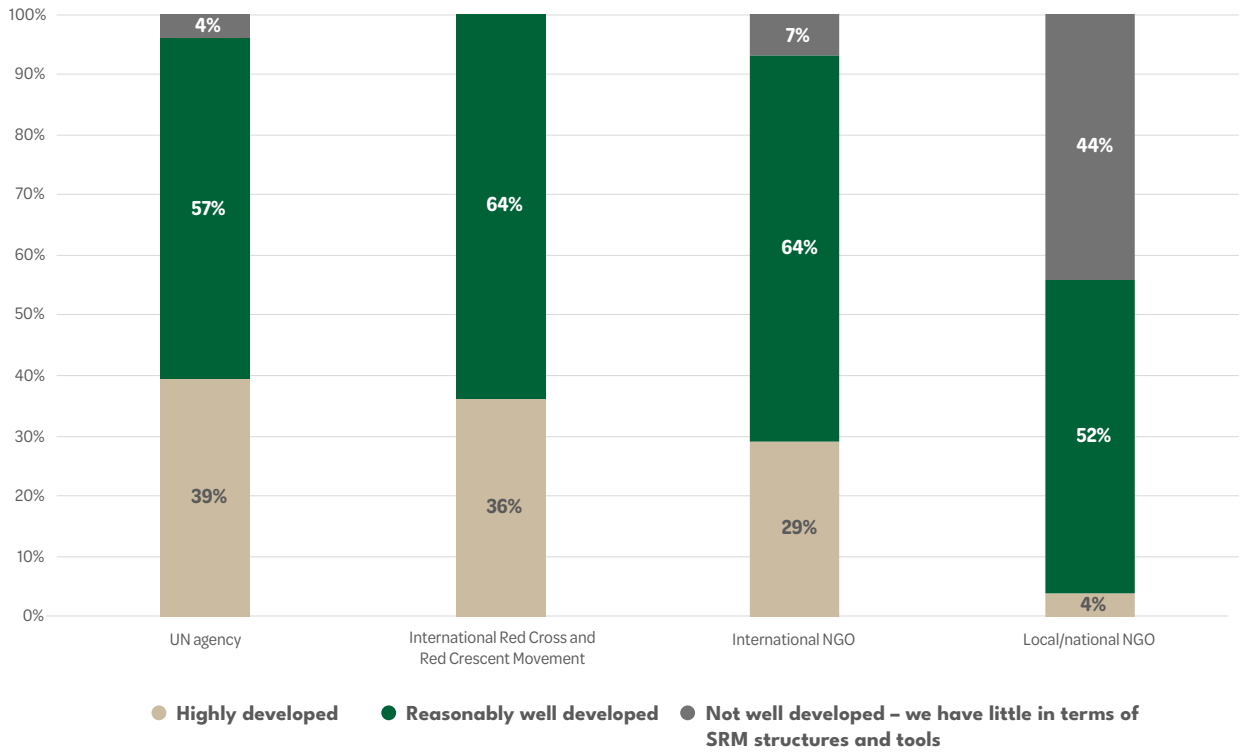
In the early 2000s, international organisations varied widely in terms of their security risk awareness, approach to mitigation measures, and organisational capabilities. Nowadays, there is a great deal more homogeneity in terms of core SRM principles, structures, and basic capacities. The differences have more to do with budget size, risk appetite, and how SRM is integrated as a business function at the headquarters level. From the UN agencies to the national partner societies of the International Red Cross and Red Crescent Movement to the youngest and smallest international NGO we consulted, virtually every internationally operating aid organisation could be counted on to possess all or most of the following:

- a chief SRM director or coordinator advising the leadership of the organisation
- staff with explicit SRM responsibilities at the country, local, and often regional levels
- written policies, guidance documents, and standard operating procedures (SOPs) on safety and security
- in-house and/or outsourced risk assessment capacity
- mandatory security training and/or orientation sessions
- crisis management teams and protocols
- security incident reporting systems.

The largest international organisations may further benefit from resources like full-time security staff at multiple levels, in-house training units, 24-hour operations centres, and GPS tracking systems for vehicle fleets. This all stands in contrast to local/national organisations, where SRM capacities are still under-supported and underdeveloped. In most cases we observed, if local/national NGOs had a security focal point it was often a double- or triple-hatted position. Organisation-wide policies were mostly absent, but some had project-specific security plans, established through active experience and/or with the help or at the direction of their international partners.

When survey respondents were asked to assess the state of their own organisation's overall SRM systems development, their answers indicated that SRM capacities are most highly developed across the UN system, followed by the International Red Cross and Red Crescent Movement and international NGOs, with local/national NGOs reporting the biggest gaps. Even with a survey sample that included the larger national actors with more established systems,[27] only 4% of local/national NGO respondents saw their capacities as 'highly developed,' and 44% reported that their organisation had 'little' in terms of SRM structures or tools (Figure 3).

Figure 3: In your opinion, how well developed is your organisation's SRM system (personnel structures, policies/ procedures, and guidance)?

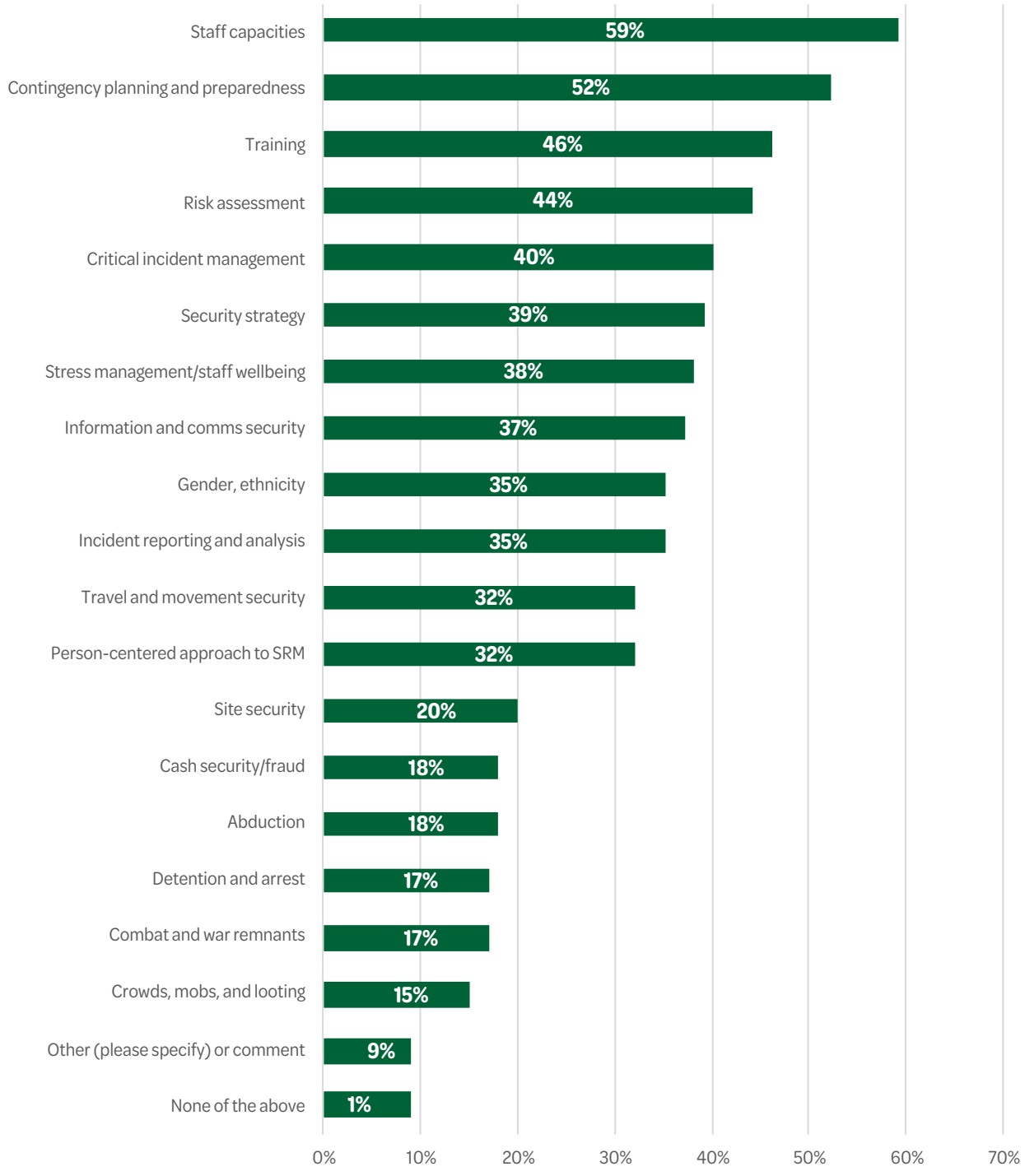


Data source: SRM survey, 2023 (N=358)

In a question asking survey respondents to rank their priorities for improvement, international organisation respondents said staff capacity in SRM was the area most requiring further attention and development, followed closely by contingency planning and preparedness (Figure 4). However, for local/national NGO survey respondents alone, risk assessment was the primary need cited, with staff capacities and contingency planning and preparedness tied for second.

27 See caveats, Section 1.3.

Figure 4: Which areas do you think require more attention or further development within your organisation's SRM system?



Data source: SRM survey, 2023 (N=358)

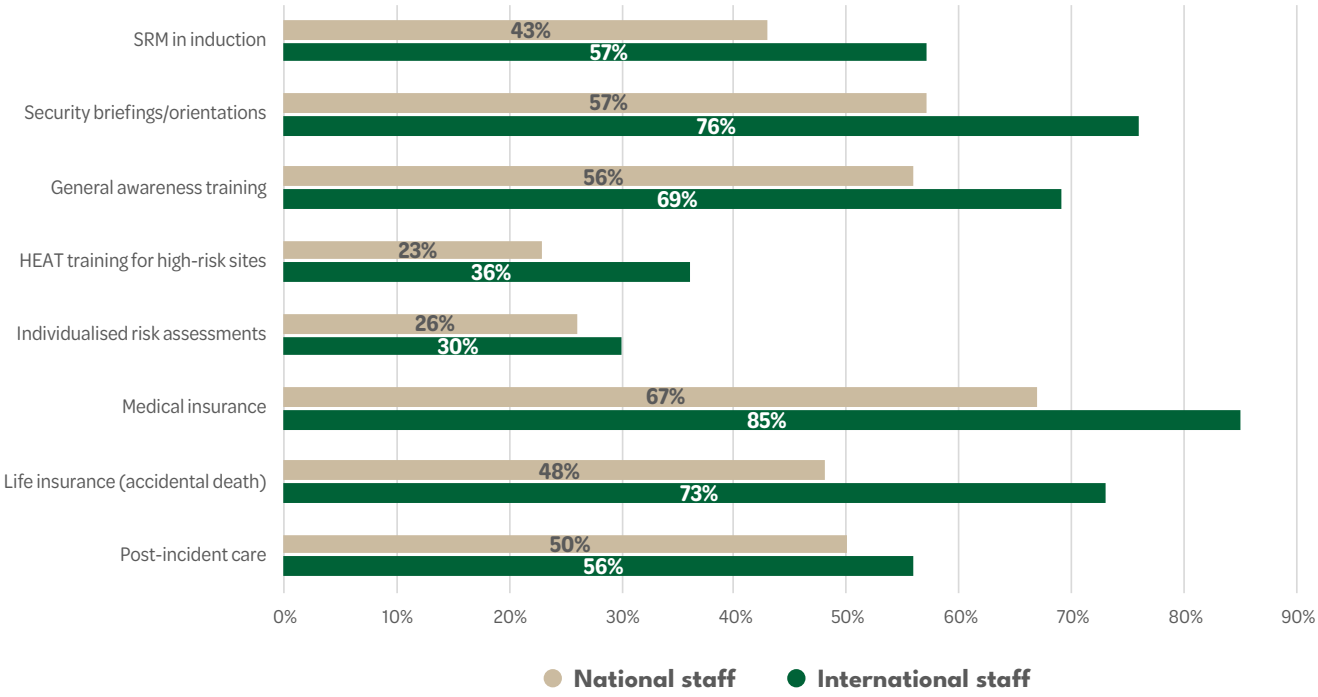
Survey respondents from local/national NGOs reported that staff support was often inconsistent, provided just 'sometimes' or 'rarely/never'. The most common form of support reported was security briefings conducted before new assignments. In contrast, hostile environment awareness training (HEAT) and first aid training were rarely offered.

The five most common areas of work (outside but adjacent to SRM) that survey respondents reported their organisations engaged in to improve the safety and security of staff were:

- NGO coordination bodies
- safeguarding
- cyber and digital security
- access
- programme design.

The survey findings also showed that disparities still exist within international organisations as to what is provided to international staff versus national staff. International staff were more likely to receive SRM support – including security briefings, training, medical insurance, life insurance and post-incident care – than their national colleagues.

Figure 5: SRM inputs 'always' provided by international organisations across staff profiles



Data source: SRM survey, 2023 (N=222)

Overall, the survey results affirmed the general research findings; namely, that staff of local/national NGOs were far less likely to regularly receive SRM support from either their own organisations or through international partnerships. The survey did not address questions of monitoring, evaluation, accountability, and learning (MEAL) in SRM, but interviews and past research suggest that apart from regular security audits, which some international NGOs perform, there is little in the way of formal processes for institutional learning and improvements in SRM. Some international NGOs are measuring qualitative indicators, such as staff satisfaction and effectiveness of SRM policies and practices, but any use of objective measures, such as trends in security incident numbers and rates, if attempted, has not been made public.

3.3 Risk assessment and analysis

As SRM capacities developed within humanitarian organisations, risk assessment became increasingly formalised as a way of making programming decisions and allocating resources. Today it is considered the cornerstone of SRM systems and is among the top SRM priorities according to survey results. Interesting conversations in the SRM space have centred on whether organisations are losing some of the art of risk assessment as they seek to make it more of a science, but there is wide agreement that the tools are only as good as the human judgement and local knowledge that their users apply to them.

Examples of risk assessment approaches across the sector

Within the UN Security Management System (UNSMS), a standardised tool and set of procedures known as 'the SRM'[28] is used by security personnel across the UN to "identify, analyze, and manage" risks. This involves a structured process and follows specific policies that guide all security-related decisions. The UN's SRM includes the procedure for assessing security risks and allocating commensurate human, material, and financial resources to support their mitigation. The SRM is widely endorsed by UN staff and other observers familiar with it. UN interviewees consistently emphasised that the quality of the result depends on the skills and experience of the users and the quality of data they feed into the process. "If people think they are managing risks by going through a process without understanding what risk is, then they are just ticking boxes", one user said, adding that the result would not be useful, and would tend toward overly restrictive security measures.

The ICRC also has a highly developed approach to risk assessment within its SAFE system,[29] built around a planning-for-results model, whereby once a year, all delegations sit down and review their context analysis to assess the security environment and identify major risks. This narrative helps determine priorities, which are then operationalised as activities.

Some of the larger international NGOs have expanded their risk assessment activities beyond local security analyses to encompass all manner of organisation-wide and global-level risks. Often described as enterprise risk management (ERM), this approach involves a comprehensive process to address and manage risks and their impact across an interconnected risk portfolio. Originating in the private sector, ERM gained traction in the humanitarian sector during the 2010s. A 2015 study found that many larger international NGOs had already embraced risk management practices encompassing safety, security, reputational, fiduciary, legal, ethical, information, and operational risks.[30] The adoption of these risk management frameworks, some influenced by traditional actuarial methods and the pressures from donor governments, marked a significant shift toward legal and financial compliance mechanisms, aiming to minimise fraud and diversion. Interestingly however, when asked about their organisation's ERM framework, country-level international NGO staff did not indicate that it was particularly relevant to their core work in SRM, but rather a headquarters-driven process they were periodically asked to contribute to.

The black swan question: Do formalised risk assessments narrow the field of vision?

A 2022 report authored by SRM professionals Araba Cole and Panagiotis Olympiou[31] described how aid organisations working in Afghanistan were caught unprepared (as, in fairness, were most of the global diplomatic community) by the rapidity of the Taliban takeover in August 2021. Despite knowing the Taliban's return to power after the US troop withdrawal was all but certain, organisations did not have plans in place for the quicker-than-expected outcome, and instead hurried to evacuate, suspending their programmes and temporarily abandoning people in need. Such experiences raise the question: if logic and limited resources dictate that you plan only for the most likely risks, are you neglecting to mitigate against risks that, while remote, will have a major impact? A similar scramble to evacuate was seen among international organisations in Sudan in 2023 when violence erupted in Khartoum, where nearly all had their country offices based. In that case, and in Ethiopia when major war broke out in Tigray in 2020, interviewees cited the common problems of 'groupthink' and what one called "a conspiracy of optimism" that led to the whole humanitarian community being upended by events. In the 2022 report, the authors propose that organisations strive to incorporate more uncertainty through expanded scenario planning as part of a continuous organisational process of updating prior information/understanding and encouraging thinking about events from a broader range of what is plausible and possible to occur. The point is not to be able to foresee the 'black swan' events (which are, by definition, unforeseeable) but to build in the flexibility and resilience to allow for quick responses to a wide range of scenarios without panic.

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28 Within the UN, the acronym SRM refers to the organisation's own procedures – not to be confused with the generic 'SRM' used in this report to refer to security risk management generally.

29 ICRC. (2021). *SAFE: Security and safety manual for humanitarian personnel*. https://www.icrc.org/en/publication/4425-safe-manuel-de-securite-pour-les-humanitaires

30 Stoddard, A., Haver, K., and Czwarno, M. (2016). *NGOs and risk: How international humanitarian actors manage uncertainty.* Humanitarian Outcomes. https://www.humanitarianoutcomes.org/sites/default/files/publications/ngo-risk_report_web.pdf

31 Cole, A. and Olympiou, P. (2022). *Risk management & decision making under uncertainty during the Afghanistan crisis 2021*. GISF and Humanitarian Outcomes. https://www.humanitarianoutcomes.org/sites/default/files/publications/ngo-risk_report_web.pdf

An interviewee for this study endorsed the idea of expanding contingency scenarios but felt it should be a distinct process. "Your [security risk assessment] will not be able to cover all possible risks", rather, they said, it should be concerned with "business as usual" while the organisation develops expanded contingency scenarios on a separate, longer timeline. Other interviewees were more sceptical, pointing out that it made little sense, in their opinion, to have contingency scenarios for catastrophic events if there were no resources to put in place adequate mitigation and response plans for them. Additionally, SRM staff are few and staff capacities in general are often stretched thin, which means there is "only so much bandwidth" to focus on different risks.

Other issues in risk assessment

In recent years, humanitarian organisations have increasingly recognised that security risk analysis requires a distinct skill set, separate from the practical aspects of SRM. For some organisations, this realisation has led to a greater reliance on outsourced analysis. Unfortunately, some of these outsourced analyses – often included in insurance packages – are of poor quality, are often generic (with 'copy-paste' content), and/or are more relevant to commercial business locations and risks than to the humanitarian community. This undermines the effectiveness of security risk assessments and poses significant challenges to organisations in accurately assessing and managing risks. Additionally, the need for continuously updated risk assessments is often neglected, especially in stable environments, leading to outdated analyses – static documents without indicators for change or means for monitoring – that fail to alert staff or facilitate necessary adaptations when conditions change.

The research team also heard from interviewees that risk assessments continue to be too siloed. Despite advocating over the past decade for integrated, horizontal approaches, many organisations still treat security risk assessments as an isolated activity that only security focal points feed into. For example, in organisations that have peacebuilding or advocacy programmes, the detailed conflict and stakeholder analysis for those programmes are not incorporated in the SRM process, or vice versa. The case of Ethiopia exemplifies these challenges, where organisations conducted risk assessments independently, leading to reactive results and limited cross-checking or incorporation of diverse perspectives.

Good practice example

Inclusive risk assessment

One international NGO country office described a risk assessment process undertaken prior to moving to new locations or initiating new programmes. In addition to advance visits and consultation with community members and relevant stakeholders, the team held multiple discussion sessions to involve "as many people as possible" in the risk assessment, with participation from staff from all departments and position levels. This has widened their risk assessment lens to other information and perspectives.

3.4 Funding for security

The costs of SRM resources involve core, cross-cutting expenses, and location- and project-specific expenses. They should include budget lines for staff positions to design and implement SRM systems, training/capacity development, protection inputs for facilities, safe transport (ranging from taxi fares to air assets as needed), stockpiled emergency kits, and personal protective equipment.[32]

International organisations

In the early 2000s, international organisations had to lobby donors to get them to require security plans as part of their project design guidelines. When donors asked for it explicitly, SRM became a valid programming cost and not part of overheads. This was important because when organisations relied solely on overheads to fund SRM expenses, it had the effect of (1) forcing security to compete with other organisational functions, and (2) increasing their overhead cost percentage, which could appear as cost inefficiency in public ratings like those by Charity Navigator, thus creating disincentives for organisations to budget for it. Today, for the most part, international aid organisations no longer have to make the case with donors that SRM is an essential component of programme design and planning, particularly in high-risk contexts. Most international NGO interviewees reported their donors were receptive to – and supportive of – their security funding needs, and they repeated variations on the theme that funding is generally sufficient (while adding, at the same time, that there is always a need for more). This makes security funding dependent on the organisation, as most donors, including pooled funding mechanisms, still do not specifically require security plans in programme proposals.

The way security is budgeted still varies by organisation (and within organisations by location) and improving "the articulation of common [i.e. jointly devised] security requirements... in humanitarian appeals, fundraising mechanisms, and negotiations with donors", as called for in the 2011 Stay and Deliver report, does not seem to be a priority.[33]

Some interviewees said they still face challenges when interfacing with programme and grants management colleagues to adequately budget for security in proposals. Sometimes this occurs when SRM is not introduced into the programme planning phase early enough, and also when limited funding makes security one of the most likely expenses to be cut from the budget.

To address this, some SRM staff mentioned that improving engagement with their own grants and financial management colleagues was a primary area of focus for them moving forward, more so than engaging with donors. With this comes the need to upskill security staff in budget preparation and management.

National and local organisations

In contrast to international organisations, every local/national NGO interviewee expressed that their funding for SRM was inadequate. Whereas international NGO staff "can ask HQ for [core or unrestricted] funding to meet gaps in security funding in each country", for national and local organisations, insufficient and sporadic (project-based) funding for security also means a lack of the inputs needed to develop and implement SRM. Not only do many report having no budget to "make solid our SRM processes", local/national NGO staff said that their international funders "expect us to have these capacities already", and expected project budgets to go mainly to the costs of programming. As far as their international funders are concerned, one local/national NGO interviewee said, "Security and protection are almost always focused on the beneficiaries, not on the personnel." Funding scarcity and their international partners' requirements combine to incentivise local/national NGOs to prioritise programmatic and administrative spending over comprehensive risk management, with SRM considerations not usually included in local/national NGO funding proposals.

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32 A 2013 EISF report on the subject detailed a range of SRM costs and introduced the risk management expense portfolio (RMEP) tool, developed together with member organisations. It aims to be an adaptable instrument for proposal writers as well as programme and SRM staffers, to reflect specific organisational needs in SRM, both tangible and intangible. (European Interagency Security Forum (EISF). (2013). *The cost of security risk management for NGOs*.
https://www.gisf.ngo/resource/the-cost-of-srm-for-ngos/)

33 Egeland, Harmer, and Stoddard (2011), p.49.

Among local/national NGOs interviewed, only a small number of the most robust entities invest in external information and analysis services or hire dedicated personnel. However, these initiatives require financial stability beyond project funds. Overall, the research showed that the deficits within local/national NGOs were in resources rather than knowledge, attitudes, or practices. The structural inequities facing local actors are discussed in more detail in Section 4.

Donors

Donor representatives report, and their international grantees agree, that the major humanitarian funding agencies have improved in their ability and willingness to support SRM initiatives and facilitate flexible budgeting for organisations operating in complex security environments. One donor interviewee confirmed, "Our funding is responsive to security needs of programmes. We do not try to nickel-and-dime [grantees, and] our requirements in effect force quite the opposite", meaning that planning and thoughtful budgeting for security is actively encouraged.

Not all donors have improved to the same degree, however, and there is little evident policy coordination between them on issues of security support. This is in part because the donor presence in high-risk settings is quite limited, with only a handful, including USAID and ECHO (European Civil Protection and Humanitarian Aid Operations), typically deploying personnel for in-person programme oversight and support. To date, only USAID appears to require funding partners not only to submit their own security risk mitigation plans, but to ensure their downstream partners have such plans in place as well. And donors in general, having not yet fulfilled their commitments for directly funding local actors, play a big part in the inability of local/national NGOs to resource their SRM needs.

4 Local actors and national- international partnerships

Responses to major humanitarian emergencies demand the large, concerted efforts of national, international, and local actors. In areas of high insecurity, such as near frontlines of active conflicts, the number of organisations responding drops significantly.[34] Past research has found that, in the highest-risk settings, fewer than a dozen international organisations (including specific UN agencies, a handful of international NGOs, and the ICRC) reliably seek to establish an operational presence – and to do so they often rely on local partner organisations to extend their operational reach.[35] These adaptive approaches began to proliferate during the 2010s along with the growing number of major conflict emergencies and raise thorny questions of ethics and responsibility. Namely, when is it risk transfer as opposed to risk sharing, and how far does an international organisation's duty of care extend?[36]

4.1 Local actors: At greatest risk with the least security support

The number of casualties experienced by national and local organisations has increased steadily over the past 7 years and, in 2022, surpassed that of international NGOs (whose own casualty numbers have declined since 2019) (Figure 6, see next page). This rise is worth noting, even if partly explained by better reporting, because usually international organisations command much larger staff numbers than local/national NGOs in these settings, so could be expected to experience more incidents, all else being equal. It appears that, in dangerous places, localisation of service delivery is occurring faster than localisation of funding and security capacities.

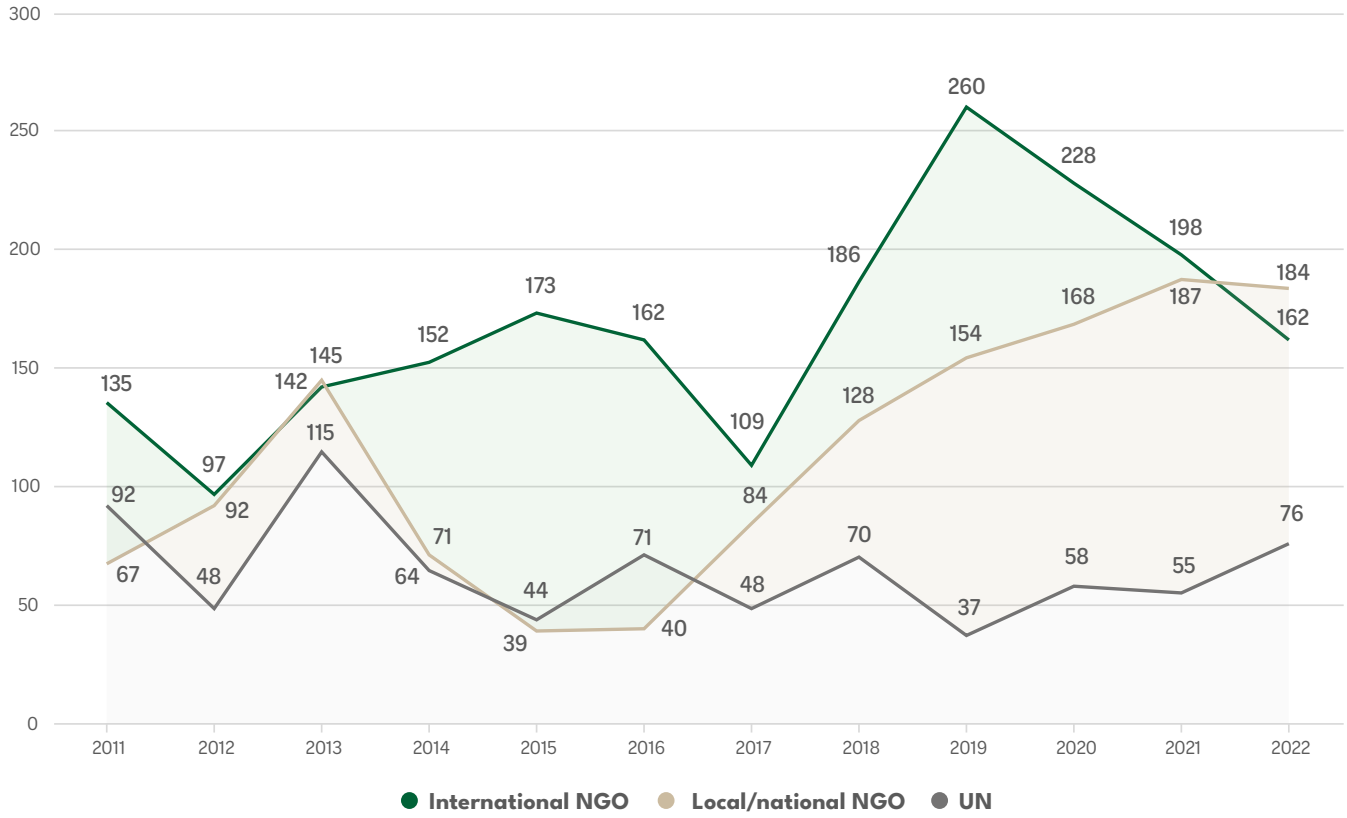
International and local aid actors each face different risks and security challenges in different scenarios. Often, but not always, it is easier for local actors to maintain access in volatile environments using low-profile approaches. The concern – and potential moral hazard – arises when international organisations seek local partners for projects not because they assessed it as less risky for local actors, but because the local partners are incentivised to accept a far higher level of risk.

34 A 2017 study found that, on average, countries with no aid worker attacks had more than four times the number of organisations engaged in the response (Stoddard, A., Shoaib Jillani, Caccavale, J. L., Cooke, P., Guillemois, D., and Klimentov, V. A. (2017). Out of reach: How insecurity prevents humanitarian aid from accessing the neediest.
Stability: International Journal of Security & Development, 6(1), 1–1. https://doi.org/10.5334/sta.506).

35 Unlike many international organisations whose operational model is to work through local partners, the international NGOs that do much of their work in conflict-driven emergencies use a direct implementation model but will seek local partners "as an adaptive measure to extend access in extreme environments where they are unable to operate for reasons of insecurity or government restrictions" (Stoddard, Czwarno, and Hamsik 2019, p.15).

36 For more on risk sharing, see GISF (2020); and Fairbanks, A. (2021). *Partnerships and security risk management: A joint action guide for local and international aid organisations*. GISF. https://www.gisf.ngo/resource/partnerships-and-security-risk-management-a-joint-action-guide-for-local-and-international-aid-organisations/

Figure 6: Number of aid worker victims by type of organisation, 2011–2022



Data source: Aid Worker Security Database, www.aidworkersecurity.org

Previous research found that local organisations competing for international contracts not only accepted higher risks, but also routinely cut corners when it came to security measures in order to be seen as more attractive (lower cost) partners.[37] Additionally, local and national organisations felt much stronger engagement from their international NGO partners around financial issues than security.[38] If the local/national NGO were to mismanage money or materials, its international partner would be answerable to the donor. However, "No such accountability chains exist for security risk, which is borne entirely by the personnel of the affected organization."[39]

As noted earlier, local/national NGOs remain chronically under-resourced for SRM, with only the largest having dedicated staff and developed SRM systems. Organisations can only build and maintain these core capacities if they have access to adequate unrestricted (i.e. non-project-based) funding, which is vanishingly rare, or pieced together with overheads from many overlapping projects, running continuously with no gaps, which is similarly uncommon. The reality of the short-term, project-based funding model in humanitarian response means that one side is coming to the partnership with a significant handicap in SRM.[40] Because the bulk of humanitarian funding flows downward from donor governments to international 'prime' partners, there are bottlenecks that prevent resources from meeting the needs of the last-mile providers. In Ukraine, where local organisations received less than 1% of the direct funding over the first year of the response, there was a striking inverse relationship between an organisation's level of SRM capacities and resources and their proximity to the frontline.[41] Short-term and project-based partnerships additionally reduce the timeframe and scope of engagement between partners, making it difficult to build trust and a mutual understanding of risk.

37 Stoddard, Czwarno, and Hamsik (2019).
38 GISF (2020).
39 Stoddard, Czwarno, and Hamsik (2019), p.23.
40 GISF (2020).
41 Stoddard, Harvey, Timmins, Pakhomenko, Breckenridge, and Czwarno (2022).

A senior representative of one large and long-standing national NGO in Iraq noted that the “good” donors (partners) not only provide reasonable overheads but also give 10%–15% flexibility across budget lines. The "majority", however, do not, and treat their implementing partners as instruments. ("Sometimes the primes [international partners] don't share even the project document.") He added that most local/national NGOs were unaware that they are entitled to 10% overhead both by local law and the principles of the Grand Bargain.[42]

International practitioners once complained that their local partners lacked risk awareness and did not consider SRM systems necessary.[43] While this was reinforced in discussions with international NGO interviewees, it was not evident in our conversations with national and local organisations in 2023. On the contrary, virtually every national organisation we spoke to had a very keen sense of the risks it was running, and the value of SRM staff and institutional capacities, but simply could not afford them. A local NGO interviewee summarised the problem this way: “We depend on internationals to fund our security. They ask us who is our security focal point, and we give them the name of our HR or logistics person, but the truth is we don’t have anyone to really do this role and we need it. There is no budget, and we know we can’t ask for it.” Financial disincentives, such as loss of funding and budgetary pressures, deter local/national NGOs from voicing security challenges and seeking support from their international partners.[44]

Global interviews with aid practitioners and country-based research confirmed that, in most UN and international NGO partnerships with local actors, collaboration on SRM is neither close nor comprehensive. This echoes the findings of previous research in this area, in which local/national NGOs reported a widespread absence of security-related conversations and a lack of dedicated budget lines for security or basic security requirements in partnership agreements.[45] In the current study, interviewees indicated that partnerships broadly ranged from the worst case of no staff security discussion at all to the best case of an actively supportive and collaborative partnership to enhance security for the project activities. By far the most common type of partnership falls along the middle of this range, comprising a fairly superficial SRM systems review and the designation of a security focal point within the local partner organisation, typically a staff member with other competing responsibilities. In some cases, partnerships also involved regular discussions around security risks and general security awareness training. At times, there were agreements to share security incident information, but these were not always reciprocal. Examples of joint security assessments were also rare, and though some international organisations provided their partners with formal training opportunities, this tended to be very small-scale.

Results from the survey underscore the patterns described above. Local/national NGOs reported that ‘security contacts’ (a designated focal point arrangement) were the most common type of support, either ‘usually’ or ‘always’ provided by their international partners. Conversely, more costly inputs such as emergency medical training and HEAT for high-risk contexts, as well as security equipment inputs or security budget lines, were the ones most ‘rarely’ or ‘never’ provided, according to local/national NGOs (Figure 7, see next page).

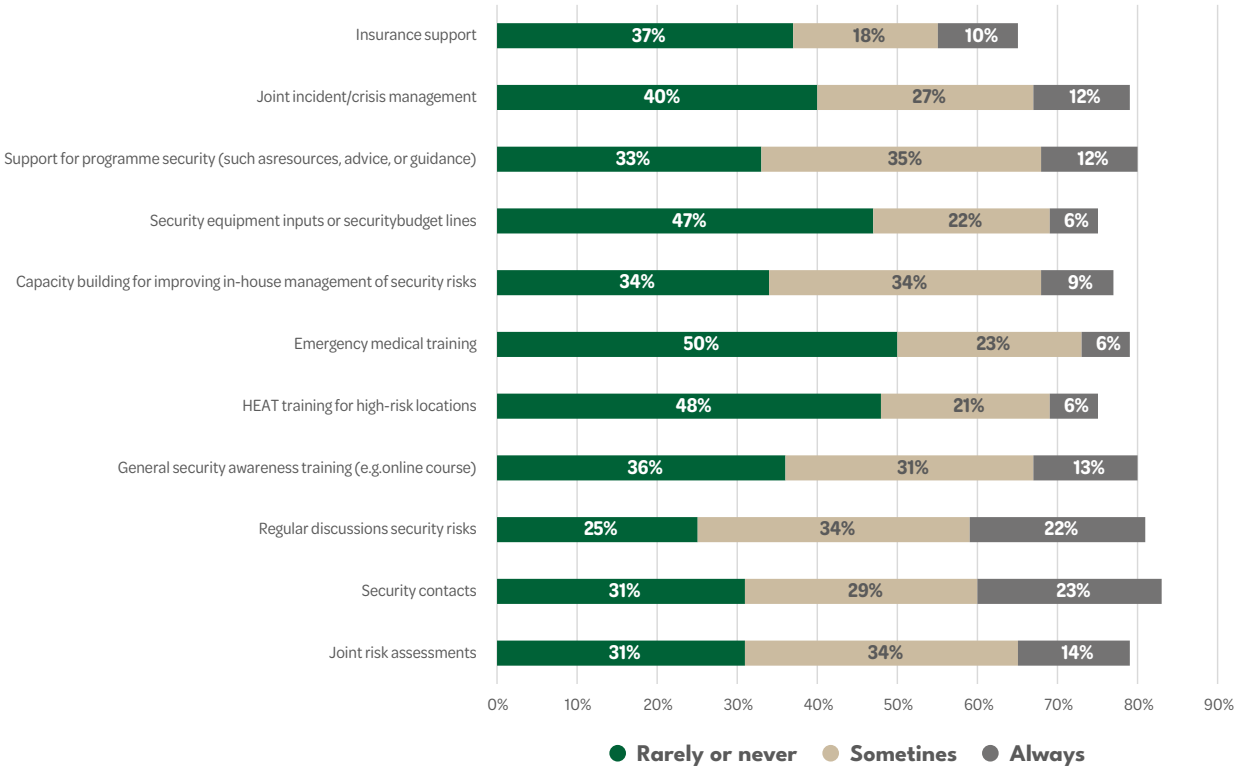
42 For further details on the Grand Bargain, see: https://interagencystandingcommittee.org/grand-bargain/workstreams

43 Egeland, Harmer, and Stoddard (2011).

44 GISF (2020).

45 GISF (2020).

Figure 7: For local/national NGO respondents: Which of the following do your international partners/donors provide?



Data source: SRM survey (N=119)

In recent years, one major government donor, USAID/BHA, has implemented the requirement for its international funding recipients (the 'primary partners' or 'primes') to ensure that any secondary partners they sub-grant to (i.e. local partners) also have SRM plans and procedures. If they do not, the primary partner must either include them under its own SRM systems or support the local partners to develop their own. According to donors and international NGOs, this has helped somewhat to prevent unconsidered risk transfer, but this 'show or share' requirement has yet to be adopted across the sector. A donor representative said that, while it has helped "at least in forcing the conversation" between partners, it was not clear that it was having a demonstrable impact on SRM support on the ground.

Good practice example

Partner capacity reviews

As part of due diligence when starting the relationship with a new partner, one international NGO described how it undertakes a thorough capacity review involving a range of technical specialists, including in SRM. Through this, the partners create a project support plan that includes training and equipment needs. This specific support is then built into the budget. The international NGO staffer we interviewed characterised this as a move from a "transactional to a relational partnership".

4.2 Perverse outcomes: Is liability risk preventing collaboration on security?

When surveyed on the subject in a separate study, the staff of international aid organisations overwhelmingly agreed that, whether or not there is a formal legal responsibility toward the staff of their partner organisations, they have at the least an ethical or moral duty of care.[46] This strong ethical intuition is at odds with a more cautious approach often communicated by their headquarters, conscious that, if any formal duty of care relationship is acknowledged or implied, the organisation could be liable for any harm that may come to local partners. Consultations revealed that this sense was fairly pervasive among international organisations, and the leadership of at least one international NGO explicitly instructed its country-level staff not to share security plans with local partners for concern over legal responsibility and possible exposure.

Certain donors, such as those focused on development programming, can pass on this aversion to liability risk. An international NGO staffer working in public health shared, "The donors in this field have no SRM and have explicit statements that they have no liability. We're finding resistance from big health donor providers, even just budgeting for security."

More often, the issue is left ambiguous. As one international NGO staffer put it, "We are unclear on our legal responsibility and duty of care. For instance, if I tell them what to do in terms of SRM, does that create liability?" Another echoed the confusion over responsibility for local partners and how they should be thought of and treated: "Are they fully autonomous? Extensions of our organisations?" Ultimately, such confusion and uncertainty can have almost the same outcome as an explicit policy to keep partners at arm's length – an international NGO that fears potential legal harm if its partner organisation suffers a security incident will decline to take steps that would make such incidents less likely.

Another perverse outcome that results from this distancing is the failure to capitalise on the comparative advantages of the partnership, including the loss of critical security information and insights from local/national organisations. International organisations seem to perceive local/national NGOs in extreme terms, especially within SRM, seeing them either as very weak and in need of significant 'capacity-strengthening', or as experts in their context, entirely responsible and independently capable of managing their own security. In reality, the truth likely lies in between these extremes, where both partners can add value to the partnership and support each other through SRM inputs. In Ethiopia, the research team found that, while local/national NGOs had a good understanding of the context, they had limited capacity to link this to effective SRM policies and practices – either their own or those of their partners. Symptomatic of the distance between partners, the research found a surprising number of international NGO security staff who had limited knowledge of who their organisation's local partners were and what their programming consisted of. Added to this unhelpful divide, noted by an international NGO interviewee, is the tendency of internationals to wrongly conflate informal and 'hyper-local' information with 'low-quality' information.

4.3 When the 'support' adds to the burden: Overlapping and uncoordinated partnership arrangements

It is often the case that a small number of well-established and capable local/national NGOs (often the only local actors that have SRM systems already in place) become the preferred partners of multiple international agencies. When that happens, it is possible to witness an opposite type of problem to the one of too little SRM support, with these local/national NGOs forced to juggle multiple, uncoordinated workstreams set by their international partners seeking to strengthen their capacities in SRM. Often, when the international partner provides SRM support and training, it is based on the international NGO's own system, without the opportunity to review what the local/national NGO already has in place and match their specific needs. This can result in the local/national NGO experiencing it as 'another demand' from a donor, rather than as capacity-strengthening support.

In Ethiopia, the research team found only two national NGOs with well-developed SRM capacities, both having been driven by proactive international NGO partners. Unfortunately, these organisations had multiple international NGO

46 90% of international NGO staff surveyed answered "yes" to the question of whether they "have an obligation to help minimize the risk faced by local/national NGO partners". (Stoddard, Czwarno, and Hamsik (2019, p.24)).

partners, none of which coordinated to provide a consolidated and supportive partnership approach. Other country cases noted the lack of common due diligence or proposal procedures for local partners; every international NGO has its own due diligence requirements as well as its own SRM priorities and procedures.

In initiatives following from the 2016 Grand Bargain commitments on localisation, international actors agreed that partnerships often created heavy transaction costs for local/national NGOs and that steps should be taken to "harmonise and simplify reporting requirements" along with other paperwork and related administration.[47] The lack of harmonisation among SRM capacity-strengthening activities clearly needs attention as well. And again, the lack of coordination tools and basic information available in local languages continues to be a serious problem in many settings.

Some interviewees indicated that this problem, along with other partnership issues, could be usefully approached with better communication as a starting point. One wondered, "If we think of it as asking [our partners] what they need from us for us to fulfil our duty of care – is this overstepping?" Another was more definitive: "Our programming through national NGOs is lacking structure for communication. Quarterly discussions have helped. It came out that our partners didn't know they could say to us, "We don't want to work there."[48]

Good practice example

Involving SRM staff in the earliest stages of partnerships

Often the SRM aspects of partnerships are not addressed until after partners have been found and programme activities planned – if at all. One international NGO has started involving its local SRM staff in the identification and contracting processes with local partners: "This brings in [attention to] security issues from the beginning and solves the 'check-box' [the superficial SRM systems review] problem."

47 Inter-Agency Standing Committee (IASC). (n.d.). *Grand Bargain workstreams*. Retrieved 18 November 2023 from https://interagencystandingcommittee.org/grand-bargain/workstreams

48 For guidance on security-related questions to include in discussions between partners, see Fairbanks (2021).

5 Security coordination

As in the cybersecurity truism, "You're only as secure as the least secure part of your network", the interdependence of security among humanitarian aid actors in a given location is an important concept in SRM. In the early days of SRM development, many organisations were reluctant to share information about their security plans and challenges – especially about incidents they experienced – for fear it would harm their reputation and recruitment efforts. In the 2020s, this is much less the case. While some critical gaps remain, coordination at both the global and local levels has increased and become more systematised, and its value is seldom questioned. Any dissatisfaction with aspects of coordination, as expressed by interviewees for this study, should thus be viewed against an overall backdrop of significant progress.

According to the gaps and needs expressed by study participants, the biggest challenge for SRM coordination in the humanitarian space would seem to be achieving it at scale. In major crises, the humanitarian actors, particularly at the local level, can be so numerous and disparate that no single internationally-led mechanism can cover and serve them all.

5.1 Formal coordination

The principal function of security coordination at a local level is to share information and provide a common understanding of present and changing security conditions and risks. Information sharing happens through formal and informal channels, and most SRM staff rely on a combination of both to do their jobs.

Formal coordination platforms can also provide a space for operational coordination, shared learning, and good practices, and serve as a hub for common services, such as training and technical advice. In humanitarian responses in insecure places, these functions are provided by two main formal mechanisms, one serving the UN agencies globally (UNSMS) and one serving NGOs, currently operating in 16 countries (International NGO Safety Organisation, INSO). The Saving Lives Together (SLT) framework links the UN and NGOs. ICRC coordinates with both the UN and INSO on security information, and provides SRM support to other International Red Cross and Red Crescent Movement members in framework agreements with the national society of the given host country and with partner national societies in specific contexts. Outside of these bodies, a variety of other platforms, and many informal smaller groups, coexist and overlap.

At the global level, SRM coordination serves to share learning and develop good practice while supporting and enhancing country-level coordination when required. Mirroring the country-level relationships, UN agencies are coordinated under UNSMS, and SLT provides a link between the UN and international NGOs. The international NGOs coordinate with each other on SRM within GISF.

The UN security coordination structures, UN Department of Safety and Security, and Saving Lives Together

The UN Department of Safety and Security (UNDSS) was established in 2005 (replacing the previous Office of the UN Security Coordinator, UNSECOORD) with the mandate to support and coordinate the SRM of various UN organisations in over 125 countries. At the country level, UNDSS provides UN agencies with security analysis and information and advises the designated official for security (DO), typically the most senior UN official in the country, who is accountable for security decisions. On the country-level UN Security Management Team (SMT), the senior UNDSS official participates along with the UN agency heads to discuss and advise the DO on security-related

decisions, including crisis management and response. Supporting the SMT is a working level technical body called the Security Cell, which consists of security officers from UNDSS and other agencies, such as UNICEF, World Food Programme (WFP), and UNHCR, charged with the day-to-day management and coordination of security operations and activities. While it is chiefly concerned with the safety and security of UN personnel, UNDSS has always acknowledged that UN humanitarian agencies do most of their relief work with and through NGO implementing partners, whose security is thus also of concern. Moreover, NGOs are important sources of information for understanding and monitoring changing security conditions.

The framework for including – and in some cases extending – the UN security coordination services to NGOs has a long and somewhat fraught history. SLT is a framework for how the UN and NGOs can collaborate on security and foster greater coordination. Not a coordinating body per se but rather "a series of recommendations aimed at enhancing security collaboration" between the UN, international NGOs, and international organisations,[49] the original idea behind SLT was to clarify and formalise the relationship that already existed in many locations, and to make coordination the norm rather than 'personality dependant'. SLT has been an abstraction from the beginning, and it is deliberately framed to be flexible rather than prescriptive. As a result, the objectives and functions of SLT have been – and remain – widely misunderstood, and consequently a frequent source of frustration, as evidenced by the comments received by the research team.

According to those inside the UN, international NGOs have inflated expectations of what SLT can and should provide. "Even calling it 'the SLT' gives the impression that it is a mechanism or platform, which it is not", one UN interviewee said. Rather it is simply a framework for collaboration and is primarily for information sharing. For example, there is "no way it can provide evacuation guarantees" or meet the needs of national and local NGOs, which is more appropriately the responsibility of their international NGO and UN agency partners. Most importantly, the UN staffer emphasised, SLT could never be "a tool for advocacy", as some NGOs have reportedly called for.

For their part, many international NGO representatives had very strong criticisms of the SLT framework, saying that it "has never worked" and suffers from weak stewardship by UNDSS, and poor communication and outreach in many country settings. International NGO interviewees expressed the concern that donors provide funding to UNDSS for SLT on the understanding that it will benefit the NGOs – but in too many places, NGOs are an afterthought, offered fewer seats on training courses, for example, and often not made aware of the training opportunities at all. Others noted that NGOs and the UN had incompatible approaches to SRM. One said SRM cooperation was "fundamentally problematic" owing to the fact that the UN is not a purely humanitarian entity but has many competing priorities and takes a much more protective ("bunkerised") approach to security than NGOs.

Donors, for the most part, were more circumspect, saying SLT "has yet to live up to its promises", and needs to be more inclusive of local/national NGOs. (The gap between a donor's statement that including more local/national NGOs was "a no-brainer", and a UN interviewee's insistence that it was "impossible", speaks to the lack of common understanding around SLT.) Another donor referred to the most recent update of the SLT guidelines in 2015 as "a brilliant idea", which failed in rollout because the people leading it in UNDSS were not able to communicate it properly to NGO counterparts.[50]

In the country-based research for this study, there were frequent disconnects between what UNDSS said was available for NGOs (for example, information meetings and training seats) and what the NGOs experienced. Many were unaware they were 'welcome' to participate and some cited examples such as, "It took us over a month and five or six reminders to get on the list for UNDSS reports."

49 UN Department for Safety and Security (UNDSS). (2015). *Saving lives together. A framework for improving security arrangements among international non-governmental organisations/international organisations and the United Nations*. https://www.gisf.ngo/wp-content/uploads/2020/02/2225-UNDSS-2015-Saving-Lives-Together-Framework.pdf

50 For more information see: https://gisfprod.wpengine.com/resource/saving-lives-together-framework/

Coordination among NGOs

Among international NGOs, the main SRM coordination mechanism at the country level is INSO, an independent non-profit organisation funded by humanitarian donor governments for the purpose of enhancing the security of NGOs. Currently working in 16 countries,[51] INSO is highly valued by its NGO constituents, the UN, and other stakeholders for the quality of its products and services, which it provides free of charge. Before the establishment of INSO in 2011, security coordination took place between NGOs in high-risk contexts, often in groups hosted by a single international NGO, or a rotating group of international NGOs, as part of a general NGO coordination forum or only informally. Originating in Afghanistan as ANSO (2002–2011), INSO replicated its model in other countries where aid groups were dealing with insecurity, providing a standard and consistent set of services. INSO is valued chiefly for information and analysis, which its members, particularly those without an in-house analytical capacity, rely on to make decisions about security measures. It also provides security training in many contexts. INSO shares its information and analysis with UNDSS and OCHA, and it serves as one of the primary links between the NGOs and the UN on security matters, including participating in the Security Cell and the SLT framework.

Although its proponents far outnumber its detractors, the research team heard some repeated criticisms of the platform. These tended to revolve around three main perceptions: narrowness of membership (specifically not enough participation of national actors); secrecy and opacity of data; and an unnecessarily competitive approach to its position in the space that has at times displaced other in-country SRM coordination efforts.

Regarding membership, INSO is clear that its remit is to serve NGOs, and that any non-profit entity formally registered as an NGO can become a member – meaning that its services are equally as accessible to national actors as international ones. This is an easier proposition in some countries than in others however, particularly at the onset of major crises where newly formed ad hoc groups are among the most active aid providers and may be the least aware of the international humanitarian sector and its conventions – which was a particular concern in Ukraine. Nevertheless, following three years of active efforts by INSO, national NGOs now account for 42% of its membership across all countries of operation.

Finally, as effective as the INSO model has proven to be in countries where it operates, and as much as SRM coordination benefits from there being a single, unified – and standardised – platform and conduit for NGO coordination, some note the corollary risk of it as a single point of failure. When INSO's operations were temporarily suspended in Iraq, for example, its absence was keenly felt. The information channel went dark for an extended period and interviewees noted that NGOs found themselves with no fallback mechanism.

Moreover, INSO is not yet operational in every country that would benefit from SRM coordination, and some host governments, viewing the security information role with suspicion, have shown resistance to its setting up operations. In Ethiopia, this has been resolved by INSO providing technical support and training through the in-country coordination group, Humanitarian International NGO Forum (HINGO).

Also operating at the country level, the partner liaison security offices (PLSOs) were established as an SRM coordination initiative, funded by USAID to support the operational security of its implementing partners, and including both relief and development NGOs as well as private sector entities. Currently operating in 16 countries, PLSOs are either run by USAID staff or a contracted entity, depending on the location. Designed as a 'non-prescriptive' resource for security information and advice,[52] PLSOs have had a mixed reception from some humanitarian NGOs. Several report having found value in them at country level, while others have raised concerns that USAID-funded NGOs might feel pressured to join and report to the mechanism, and that their security information might be shared with other US government entities and used for non-humanitarian purposes (i.e. political or security intelligence). In interviews, a PLSO representative explained that general security reporting is shared beyond the immediate team, but raw data is strictly confidential. Additionally, as it is designed to support direct partners of USAID, there is very limited local/national NGO participation in these entities.

At the global level, an important external resource used by NGOs for information and coordination purposes,

51 Afghanistan, Burkina Faso, Cameroon, Central African Republic, Democratic Republic of Congo, Haiti, Iraq, Kenya, Mali, Mozambique, Niger, Somalia, South Sudan, Sudan, Syria, and Ukraine (https://ngosafety.org/where-we-work/ retrieved 8 November 2023).

52 United States Agency for International Development (USAID). (2017). *ADS Chapter 573. Partner Liaison Security Offices*. https://www.usaid.gov/about-us/agency-policy/series-500/573

according to the SRM survey, was GISF.[53] GISF is a membership organisation of more than 150 international NGOs, providing a platform for global-level dialogue and collaboration, SRM guidance, original research, and practical tools and templates. Originally established as the European Interagency Security Forum (EISF), it was created as a companion forum for the US-based Security Advisory Group (SAG), operating within the large NGO policy and advocacy coordination body, InterAction. In later years the SAG was discontinued and in 2020, EISF took on a global remit, establishing a second office in Washington, D.C. While GISF membership is restricted to organisations operating in more than one country, research outputs and some events are open to all actors.

In 2008 a core group of SRM professionals who had been part of SAG founded the International NGO Safety and Security Association (INSSA) and have continued with a focus on technical SRM skills development for individuals and developing accreditation standards for SRM professionals in the humanitarian sector. Aid organisations are also provided with global-level information and trends analysis from Humanitarian Outcomes, which maintains the Aid Worker Security Database and produces annual reports and periodic alerts,[54] and from Insecurity Insight, which produces a bi-monthly news brief on security incidents.[55]

Good practice example

A meaningful NGO presence in the UN Security Management Team

In Ukraine, in addition to representation through INSO in UN coordination structures, NGOs are represented at the highest security decision-making level by having the head of the NGO coordination body, invited by the designated official for security (the Humanitarian Coordinator), sitting on the UN SMT. Inviting NGO representatives to sit on SMTs as observers is included in the SLT framework, but not always meaningfully applied. In Ukraine, it has allowed for close coordination around high-risk missions, such as aid delivery convoys to frontline and newly de-occupied areas.

5.2 Informal coordination

The rise of digital communication platforms has been both a boon and a risk to security coordination. Social media and messaging apps have allowed humanitarian security staff to receive and relay nearly instantaneous information, and to curate a variety of information sources and contacts to suit their purposes. Interviewees often mentioned using WhatsApp, Signal, Skype, or Telegram groups for gathering information and communicating with team members. In Ukraine, many organisations relied on such groups for regular check-ins and information sharing regarding incoming airstrikes and all-clears.

At the same time, interviewees were cognisant of the risks entailed in these digital tools.

- **Misinformation, disinformation, and surveillance**. Not only can these channels inadvertently become 'rumour mills' through the sharing of unverified information, but interviewees widely agreed that informal communication channels are vulnerable to infiltration by malevolent actors who can spread falsehoods or gather sensitive information on humanitarian groups. Nevertheless, there were no reports of mitigating measures taken to prevent bad outcomes; evidently, the perceived value of these channels outweighed the risk.
- **Fragmentation**. Having numerous overlapping or parallel channels and discussions arguably undermines the purpose of a unified information stream such as INSO to facilitate shared information and understanding. Participation is also opaque and tends to be exclusionary/non-representative by default since it is based on personal contacts.
- **Impermanence**. Usually, these informal groups are driven by – and centre around – one or two key individuals, whose departure can quickly derail or dissolve the group.

53 The top five most frequent external resources used by survey respondents were: INSO (58%), the GISF website and linked toolbox and guides (50%), private security company reports (45%), Insecurity Insight reports (39%), and Aid Worker Security Database data (37%). SLT was cited by 28%.

54 See: https://www.aidworkersecurity.org/

55 See: https://insecurityinsight.org/projects/aid-in-danger/aid-security-digests

5.3 The coordination coverage gap

A near-universal sentiment expressed by interviewees was that local/national NGOs were underrepresented in many of the existing coordination mechanisms that are designed and led by international actors. In Ukraine, for example, most local/national NGOs (and community-based organisations and informal groups) were not familiar with or did not participate in any coordination mechanisms or platforms (SRM or otherwise), pointing to a gap in the dissemination and accessibility of these systems.

Although available in principle to all NGOs, the reality of participation in these entities is mostly international organisations with a smaller number of local/national NGOs included at the invitation and encouragement of their international partners. There are real and valid reasons why UNDSS focuses on UN agencies and personnel, and INSO's main clients comprise internationally operating NGOs and their implementing partners, and it stands to reason neither of them can be expected to fully cover the full array of actors working in humanitarian response. The same logic behind the need for international NGOs and their partners to be coordinated and channelled through INSO, linking with the UN, would suggest the need for supporting additional, context-specific local coordination platforms that could similarly link to the international bodies.

6 Advancements in SRM inputs

The research shows that there has been immense progress in the development of tools, SOPs, and training resources over the past decade, particularly within international organisations. While challenges and inequities remain, noteworthy advancement has been made in security incident monitoring and security training. Staff care and mental health support are also receiving increased attention within the humanitarian SRM space. The progress and remaining challenges in these areas are explored in more detail in this section.

6.1 Incident monitoring

Security incident monitoring has become much more widespread in the last decade, as indicated by 72% of survey respondents reporting having a global incident reporting system in place in their organisation, including most of the local/national NGO respondents. The UN maintains a centralised Safety and Security Incident Recording System (SSIRS) that has standardised incident reporting and made global data more accessible for UN agencies. In addition to organisation-specific incident collection, there are now many other groups that compile data on incidents at a global level and produce analysis on humanitarian security generally, while making the data available for any organisation to use to bolster their analysis.[56] National NGO forums and INSO have also expanded their incident and data collection capacities significantly over recent years, so there are now often multiple actors collecting incident data relating to the same context.

Despite the clear advancements in this area, interviewees identified three main challenges. Firstly, the vast majority of international NGOs and UN agencies do not systematically record incidents affecting implementing partners and contractors. Humanitarian and private sector national actors play a massive role in service delivery, and without reporting incidents affecting them, it is impossible to have full confidence in security analysis of a specific context. Secondly, the quality of reporting was identified as an aspect that organisations need to monitor, provide training on, and resource adequately. The comparability of incident data within and across organisations is dependent upon its standardised nature. While more training in this area is now available online, ensuring it is accessible and in different languages is important.[57] Finally, practitioners brought up the challenge of getting staff to report incidents and ensuring they know why it is important and what it is used for. Headquarters security staff explained building a personal trustworthy relationship with country-level teams is the best way to increase the comfort and willingness of staff to report incidents.

6.2 Training

The past decade has also seen significant advancements in security training in the aid sector, both in terms of personal safety and security courses for general aid workers, as well as SRM training and skills development for security professionals.[58] Training now covers a multitude of thematic areas (from general security awareness

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56 Examples include: ACLED (**https://acleddata.com**); Aid Worker Security Database (**https://aidworkersecurity.org/**); Humanitarian Data Exchange (HDX, **https://data.humdata.org**); and Insecurity Insight (**https://insecurityinsight.org/**).

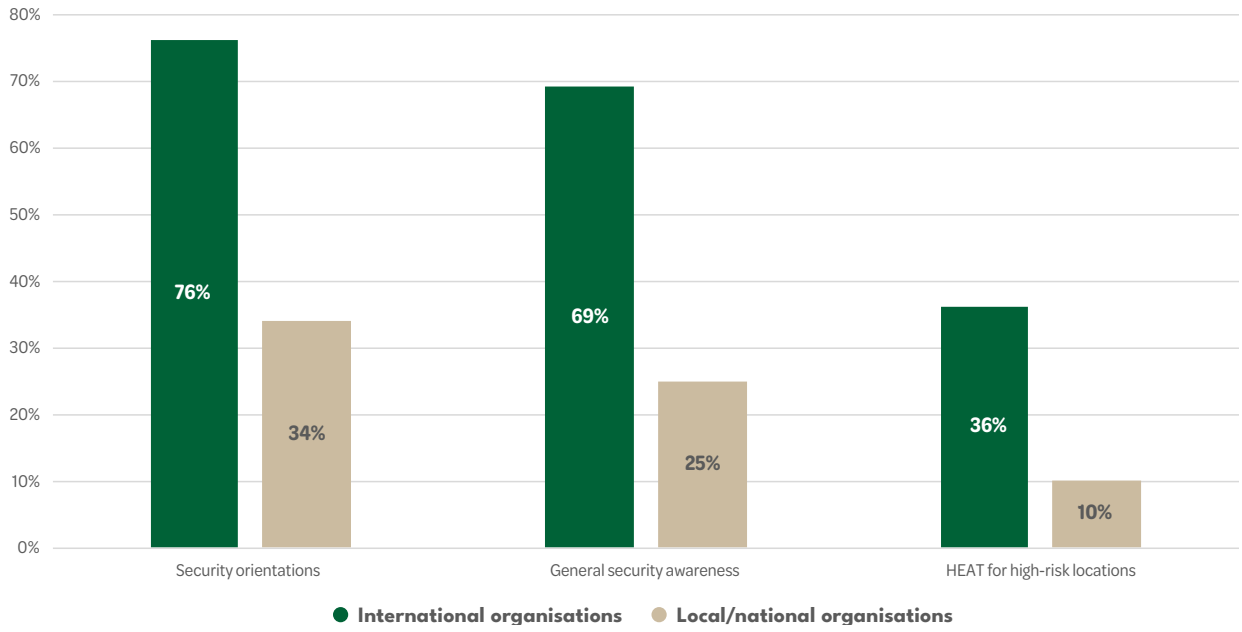
57 Guidance now exists to support security incident information management (SIIM), including templates and tools, notably the RedR UK, Insecurity Insight, and EISF Security Incident Information Management Handbook (**https://siim.insecurityinsight.org/tools-and-resources/handbook-guide-and-tools**) as well as the training and resources available from: **https://siim.insecurityinsight.org/**

58 These advancements include the development of guidance on security training, such as: Persaud, C. (2014b). *NGO safety and security training project. How to create effective security training for NGOs*. InterAction and EISF. **https://www.gisf.ngo/blogs/ngo-safety-and-security-training-project-how-to-create-effective-security-training-for-ngos/**

to managing and reporting security incidents), across different modalities (e.g. in-person, online, blended), and in various formats (for example, classroom-based, simulation-based, through games, or training of trainers).[59] For many global security staff, training is a large part of their role. Security training is increasingly a part of staff recruitment and travel procedures. The number of formal training providers has also grown significantly, with more professional training providers delivering online and in-person courses in more locations and languages, and actors such as INSO expanding their training portfolios in the contexts in which they are based. In-house training has also grown, with some international organisations opting to develop internal training structures to minimise costs, reach more staff, and adapt training content to relevant contexts, languages, programmes, and staff profiles.

However, in the area of personal safety and security training, this study found significant gaps and disparities in security training across the humanitarian sector, with resources disproportionately allocated to international staff in less risky roles. This leaves local aid workers, who arguably face the highest risks, without comparable training. Survey responses show that local/national NGO staff were much less likely than international NGO staff to report having security training (Figure 8).

Figure 8: Training resources received by staff of local/national organisations vs. international organisations



Data source: SRM survey, 2023 (N=358)

The research found that larger international organisations have more established security training protocols, although compliance and global rollout remain a challenge, while smaller, often national actors, adopt a more ad hoc and opportunistic approach to training. In Colombia and Ethiopia, for example, interviewees indicated that local/national NGO access to security training relied on the support provided by their international partners.

Interviewees in Ukraine and Ethiopia raised concerns about the level of training provided in general, particularly that which is relevant to the context and accessible to local/national organisations. In Ukraine, interviewees indicated a pressing need for more security training courses, especially training of trainers, available to local/national NGOs and volunteers and delivered by qualified trainers in the Ukrainian language. There is anecdotal information that international staff based in safe cities in Ukraine are prioritised while project staff go untrained – an imbalance some are trying to correct. Unsurprisingly, the staff of local/national organisations are last in line, and while our research team heard of a few getting a place on INSO and other courses, it appears to be a very small subset.

59 For more details on the types of training available in security, see Breckenridge et al. (2023).

There were calls for an initiative among the international actors and donors to pool resources for establishing training centres in the country to meet training needs.[60]

More broadly, discrepancies in training between international and national staff (of both international organisations and local/national NGOs) are in part due to a lack of locally accessible and language-appropriate security training. This gap has been addressed in recent years to a certain degree by the explosion of online courses following the lockdowns brought about by the COVID-19 pandemic. Many of these online resources are free and available through platforms such as Kaya and DisasterReady, and by organisations such as UNDSS (BSAFE) and IFRC (Stay Safe). One large international NGO reported having no online security courses available for staff prior to the pandemic, but now offers 20 separate courses related to security on its online learning site, with partner organisations having their own section on the platform. Many international organisations appear to be increasingly turning to online training as a basic security requirement for their staff. However, the benefits of online courses versus in-person training remain disputed, with some concerned that online training can leave staff unprepared in especially dangerous situations.

The research team also found that no interviewee could point to hard evidence (formal evaluations or studies) on the effectiveness of security-related training in the humanitarian sector. Reports of impact are based on post-training feedback forms and follow-ups, which, while valid, are anecdotal and informal. It has yet to be robustly demonstrated that training improves security outcomes in terms of reducing incidents or increasing the operational presence of the organisations that provide it to their staff. However, one notable programme evaluation was undertaken by the Headington Institute and World Vision International, which reached back over 5 years and received 258 responses, with the aim of collecting respondents' reflections on various aspects of the HEAT course they had attended. Of the individuals who had experienced a critical incident following the HEAT course, the evaluation found that 98% indicated that the training had helped them. This study presents a compelling case for the value of HEAT, which needs further exploration through future research in this area.[61]

Nevertheless, HEAT courses were a particular point of discussion among interviewees. One of them noted that, "There are a lot of vested interests in maintaining the 3–5-day HEAT as the 'gold standard'", but that there is no evidence that the money organisations have spent on it has "allowed them to be more present in high-risk places." Another said, in a similar vein, "We set off making [HEAT] the benchmark, but now can't give it to everyone. Do we really need this level of training? Can we look at different models? Manage costs a bit more?" The high cost of traditional HEAT courses has meant that only a few staffers benefit from it, and these unfortunately tend to be internationally-deployed staff. By prioritising this type of security training, international NGO interviewees noted that they had less budget to train other staff, notably nationals, in security.

As the number of training providers has increased in recent years, HEAT courses have become more readily available and lessened the emphasis on general personal security courses, which were more common for international organisations previously. However, what the difference is between a HEAT course and a more general personal security training course was a question raised by several interviewees. The content and format of HEAT varies significantly by provider. Additionally, the research found that there is a wide variance between good quality and context-appropriate HEAT courses (whether provided in-house or externally) and lesser quality, more opportunistic courses like the ones springing up in Ukraine. While some of the training provided is extremely good, there is still a tendency occasionally towards "cookie-cutter" course design (within HEAT courses but also other forms of security training), which lack tailoring towards specific contexts, programmes, organisations, and individuals.

Many of these challenges are not new or surprising,[62] and a number of training providers and international organisations interviewed indicated efforts towards addressing some of these concerns. Some international

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60 Following the team's visit to Ukraine, INSO established a training centre in Lviv in October 2023, which provides free security training to INSO partners, and will go some way to addressing this gap, especially as INSO has indicated that it will prioritise seats for nationals over internationals and by area of operation and position (presumably those most at risk). See: INSO. (2023, 10 November). *Ground-breaking non-profit humanitarian safety training centre launches in Ukraine*. https://ngosafety.org/latest/humanitarian-safety-training-centre-launches-ukraine/

61 The results are, unfortunately, not publicly available, but some of the findings of the evaluation were covered in: Roberts, N. T. (2021). *Hostile environment awareness training for humanitarian aid workers: An outcome evaluation*. Doctoral dissertation, Fuller Theological Seminary, School of Psychology. ProQuest Dissertations Publishing. (Publication No. 28771119).

62 Persaud (2014b).

organisations reported that they are prioritising providing security training to national staff over internationals and exploring ways to increase training support to local partners. Overall, while the value of security training is not questioned by interviewees, there is an acknowledged need for it to be more tailored to specific contexts, evolving risks, and individual profiles, rather than following a one-size-fits-all approach.[63]

Good practice example

Training of trainers approach

A number of interviewed organisations have been moving towards a training of trainers model to:

- cut costs
- reach more staff
- adapt training to needs and context
- build SRM capacity internally.

While this methodology entails a large internal organisational investment to build and run, it can prove a valuable investment in the long run, not just in terms of money saved but also in greater numbers of staff trained, especially those who might not have received higher quality training otherwise.

Beyond personal security training, interviewees also expressed the need for skills development opportunities in SRM more generally for staff with security responsibilities. Interviewees indicated a lack of open training on SRM for systems implementation, including training on SRM for leaders and programme managers rather than just security focal points. This includes a greater need for crisis management training, as well as training on developing negotiation skills and de-escalation. The research team found several examples of efforts to meet this demand, such as SRM training and crisis management courses provided by training providers, and in-house mentoring initiatives for security staff within organisations. The SRM Essentials Certificate Programme developed by GISF, Insecurity Insight and DisasterReady, serves as an initial entry point for non-specialists to learn more about SRM, and complements the SRM professional certification, also hosted on the DisasterReady platform, which was developed by INSSA for country- and regionally-based SRM professionals to assess their competencies across several topic areas. Some organisations, including the UN, are encouraging security staff to complete this certification as a way of demonstrating their SRM competencies.

6.3 Staff care and mental health support

The research team found that the challenge of stress and mental wellbeing is increasingly falling into the realm of SRM. According to the World Health Organization (WHO), mental health conditions and substance use disorders have risen globally in the last decade, with the COVID-19 pandemic triggering a 25% increase in anxiety and depression worldwide.[64]

Interviews indicated that aid workers are a particularly vulnerable group in this regard, with one interviewee arguing that threats to an aid worker's mental wellbeing are far greater (particularly in terms of likelihood) than the physical threats most SRM systems are centred on.[65]

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63 For more details on our findings on security training, see: Breckenridge, M.-J., Czwarno, M., Duque-Díez, M., Fairbanks, A., Harvey, P., and Stoddard, A. (2023). *Aid worker security report 2023. Security training in the humanitarian sector: Issues of equity and effectiveness.* Humanitarian Outcomes. https://www.humanitarianoutcomes.org/AWSR_2023

64 World Health Organization (WHO). (2022, 2 March). *COVID-19 pandemic triggers 25% increase in prevalence of anxiety and depression worldwide*. https://www.who.int/news/item/02-03-2022-covid-19-pandemic-triggers-25-increase-in-prevalence-of-anxiety-and-depression-worldwide

65 For more research on the mental health challenges faced by aid workers, see: Young, T. and Pakenham, K. I. (2021). The mental health of aid workers: Risk and protective factors in relation to job context, working conditions, and demographics. *Disasters*, 45(3), 501–526. https://doi.org/10.1111/disa.12440

Historically, for security staff, mental health support was confined to psychosocial support following an incident, and stress management was covered in some personal security training for aid workers. While these remain important aspects of staff care, many interviewees highlighted the growing need to support staff wellbeing more generally (outside of training and before incidents occur) – not least because unwell staff risk making poor decisions, which may have implications for security. One SRM professional highlighted that mentally distressed staff can even become direct threats to other staff. Interviewees recognised the need for organisations to have a mechanism for preparedness of wellbeing and mental health, rather than just a response following severe incidents. In Ukraine, interviewees said staff were facing chronic psychological stress due to overwork and fatigue, resulting in burnout, chronic sleep deprivation, emotional and behavioural issues, as well as poor decision making. They noted that for relocated national Ukrainian staff, there was the added emotional strain of guilt over no longer being with frontline communities.

Despite acknowledging mental health and wellbeing risks, interviewees in Ukraine, and the other country case studies, could not always point to commensurate mitigation systems.[66] Managers are often the first line of support to staff, but they are rarely trained on what to do. International staff of international NGOs receive generous rest and recuperation leave (R&R), but the same is usually not available to national staff. Additionally, mental health counselling, offered by a few larger international NGOs, has varying uptake (and not much at all by national staff in Ukraine, according to one interviewee). Most mental health counselling is opt-in, meaning staff who wish to make use of the service must take proactive steps to access it, such as contacting the service providers directly. This is problematic according to some interviewees, as it places the burden of responsibility on the individual, making it less likely they will receive help, while allowing the organisation to step back from responsibility. Additionally, there are doubts about whether a counselling modality is always the correct approach. These services are often provided remotely (over the phone for example) and can be difficult for field staff to access, in part due to poor connectivity but also due to limited language availability. Mental health also remains a challenging topic to discuss in many cultures due to stigma, and standard Western models of counselling may not be appropriate to every individual and context. One interviewee noted that, within the humanitarian sector's own culture there remains a stigma about needing mental health support, which can be exacerbated by personal and collective beliefs such as, "I have no right to feel like this, I am so much better off than others." Interestingly, while some interviewees reported low uptake of available counselling support, others noted increased demand from staff.

Another aspect raised by contributors to the study is the risk of vicarious trauma, which is not always confined to frontline staff, but can also include staff across the entire organisation, from translators in refugee camps to communications staff in headquarters who are exposed to sometimes horrific images and stories on a continual basis.[67] Security staff themselves are at high risk of vicarious trauma because of the subject matter of their work, their involvement in responses to severe incidents, and interactions with affected colleagues, including on occasion kidnapping and assault survivors.

Interviewees, however, were able to share some examples of efforts that have been made to destigmatise mental health and make support more readily available. In Ukraine, one organisation provided a flexible benefit to national staff, who are not eligible for R&R, to be used at their discretion on anything that they felt supported their wellbeing (such as exercise courses and therapy). In Colombia, the UN has a specialised stress management unit and UNDSS has its own organisational stress counsellors, while in Ethiopia, one international NGO includes stress awareness and management as part of the training and resources it provides to local partners. One international NGO in Ukraine was employing a psychologist to carry out a detailed review to then design and implement specific mitigation measures. The team also found examples of stress management incorporated into personal safety and security training courses, with one training provider interweaving psychological risks into its security course rather than keeping it as a standalone component.

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66 Previous research on aid worker mental health found that the most common stressors were work-based issues (such as workload, managers, and colleagues), while effective coping strategies included social connections and lifestyle activities such as exercise and hobbies. (Young, T., Pakenham, K. I., and Norwood, M. F. (2018). Thematic analysis of aid workers' stressors and coping strategies: Work, psychological, lifestyle and social dimensions. *Journal of International Humanitarian Action*, 3(1), 19. https://doi.org/10.1186/s41018-018-0046-3

67 This is an area that is receiving increased attention in the private sector, with Facebook successfully sued in 2020 for failing to protect its staff from the mental health impacts of moderating disturbing content. (Paul, K. (2020, May 13). *Facebook to pay $52m for failing to protect moderators from 'horrors' of graphic content*. The Guardian. https://www.theguardian.com/technology/2020/may/12/facebook-settlement-mental-health-moderators)

It is important to emphasise that mental health support is more than simply offering staff counselling services, especially given the diversity of aid workers and the cultures they come from and work within. One contributor suggested that mental health and staff care should be reflected in security risk assessments, thereby ensuring that the support provided considers contextual dynamics and avoids a 'one-size-fits-all' approach. Additional support may take the form of flexible working arrangements.[68]

Good practice example

Normalising peer-to-peer mental health support

Mental health support does not always require formal counselling or professional services. One organisation developed a buddy system and routine daily informal debriefings for staff working in a highly stressful work environment. At the end of each day, the team would have a chat about how they were feeling. Buddies were encouraged to support each other on a one-to-one basis.

While staff wellness is undoubtedly important and has a significant potential impact on behaviour and risk – a familiar concept in the SRM space – some have asked if staff mental health and wellness is appropriately an SRM responsibility. In many cases, human resources departments are expected to cover staff wellness and stress management, but some contributors to this research noted that this support is not always being provided appropriately, which is why SRM professionals are finding themselves stepping into the area. This reflects a broader trend of SRM professionals being increasingly drawn into areas outside of their expertise, such as digital security and safeguarding, which presents benefits but also raises risks of potential harm despite good intentions.

68 For examples of good practice within the UN system, see: Pehrman, K., Sasaki, S., Nurminen, M., Phillips, H., Gawellek, D., Ronda, S., and Haapea, K. (2021). *Make parity a reality: Field-specific enabling environment guidelines*. UN Women. https://www.unwomen.org/en/digital-library/publications/2021/01/make-parity-a-reality

7 Humanitarian access challenges and the role of SRM

Humanitarian access refers to the ability of people to reach aid, and for aid to reach people. Insecurity can be a major hindrance to both. The ability of humanitarians to safely enter and work in high-risk and contested areas is impeded by multiple obstacles. In some conflict environments, such as Myanmar, Syria, Ukraine, and Yemen, international organisations have effectively abdicated their presence to local/national organisations and informal groups in large parts of the country. The uneven humanitarian presence and coverage of needs have troubling implications for the impartiality of aid – a core humanitarian principle.

In Ukraine, the humanitarian sector's absence from the Russian-occupied areas (apart from the ICRC and local Red Cross actors) raises similar unsettling questions about the principle of neutrality. Additionally, civil-military coordination and deconfliction efforts, which can be important facilitators for access, have not lived up to their promise in the eyes of many humanitarians interviewed. In recent years, however, collaborative access initiatives have gained traction, focused on practical, highly localised negotiations. The study, however, discovered that security staff were mostly isolated from these access efforts, which could potentially benefit from integration.

7.1 A limited international footprint

From the perspective of humanitarian providers, 'access' can refer either to the actual number of organisations able to reach and work in a given area, or as a set of activities to overcome barriers to entry and sustain their activities. In terms of the former, recent conflicts in north-east Nigeria, Myanmar, Tigray, and Sudan have seen humanitarian access severely constrained by security threats, often compounded – or even exceeded – by governmental constraints. This has created significant challenges in reaching affected people, leaving many areas inaccessible to international organisations.

Our research team found that in Ukraine, aid operations witnessed the emergence of a two-tiered system of humanitarian security culture. On one hand, there is the formal aid sector, which is well-protected and equipped, facing serious risks that are nevertheless relatively straightforward to mitigate (such as sheltering upon air raid alerts and remaining well outside artillery range). On the other hand, there is an informal aid response, primarily composed of ad hoc, volunteer groups. These groups, lacking in training, protective equipment, or any sort of SRM support, operate in extremely high-risk areas near the frontlines of the conflict. When international organisations have accessed frontline areas, it has often been in armoured convoys organised and led by the UN (with the participation of a small number of international NGOs) for quick, in-and-out aid deliveries.

7.2 Civil-military challenges and the deconfliction problem

Deconfliction – the process of coordinating with military actors to avoid harm to humanitarian operations and civilians – is a critical activity in conflict zones. Even in the best of circumstances, when military actors can be assumed to be acting in good faith, the task is complicated by the sheer number of different actors and activities involved in an aid response. Despite serious, concerted efforts to build mechanisms like the Humanitarian Notification System for Deconfliction (HNS4D),[69] trust remains low, and participation far from universal, due to the

69 OCHA established HNS4D in 2014 at the request of the humanitarian country team in Damascus as part of a humanitarian deconfliction mechanism in Syria. The mechanism has OCHA serving as a channel between humanitarian organisations and designated focal points of the military parties (ICRC. (n.d.). *Syria, deconfliction of humanitarian facilities*. https://casebook.icrc.org/case-study/syria-deconfliction-humanitarian-facilities).

perception among many NGO staffers that to do so creates more danger than it mitigates.[70] Interviews with aid actors in Syria and Ukraine in particular revealed a deep distrust in deconfliction efforts, and several interviewees stated that they had stopped participating in them or do so only partially (for example, registering their facilities' locations but not their movements, or vice versa). The 2015 US airstrike on the MSF hospital in Kunduz, Afghanistan, serves as a stark reminder of the potential for deconfliction to fail and, in some conflict zones, notably Syria, humanitarian agencies believe their participation has made them more vulnerable to deliberate, targeted attacks by providing their locations to conflict parties acting in bad faith.

The lack of effective recourse or accountability when deconfliction fails exacerbates these challenges. The UN Board of Inquiry's perceived reluctance to assign equal blame to Russia for a Syrian attack, presumably influenced by Russia's Security Council presence, did little to inspire confidence.

In addition, the weaknesses in coordinating mechanisms supporting dialogue between humanitarian and military actors in conflict contexts (civil-military coordination) have also contributed to overall coordination challenges for NGOs. UN Humanitarian Civil-Military Coordination (UN-CMCoord), led by OCHA, struggles with a lack of resources, including experienced in-country leadership, and sometimes a disconnect between official civil-military guidance and on-the-ground realities.[71] There is limited attention to how SRM for aid workers fits into the discussions, and in some contexts a lack of clarity as to which UN body – OCHA or UNDSS – the NGOs should coordinate with on these issues. There is also confusion among organisations regarding the UN-CMCoord mandate, particularly in terms of practical on-the-ground support.[72]

7.3 Collective access initiatives and the missing link with SRM

OCHA serves as the focal point for humanitarian access and in recent years has sought to formalise and strengthen this role,[73] providing a 'minimum package of services on access', including leading country-based collaborative efforts on advocacy, practical tactics, and negotiations in humanitarian access groups. These efforts are largely valued by humanitarian actors, who give particular praise for OCHA's leadership in this area of work in some settings, notably Haiti and Ukraine.

More than a few interviewees pointed out, however, that the success of the collective action by the UN agencies and NGOs on the access working groups happened largely without – and sometimes despite – interventions from SRM staff who, according to several interviewees, in some cases have acted as "the primary obstacle to access" by taking a restrictive approach. Such reports are concerning and evoke a time when programme and security staff were frequently at odds over the overly restrictive approach by 'old school' SRM staffers who take a 'go/no go' approach rather than an enabling mindset of 'go and how'. If, as one international NGO interviewee said, "We need to bring SRM into access conversations; SRM professionals need a seat at the table", which many agree is currently missing, it will be a value added only in so much as these professionals fully commit to an enabling approach, with expanded access as a principal objective. Arguably, the access working groups are stepping into a coordination void caused by the difficulties of UN-NGO engagement within the SLT framework.

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70 Stoddard, A., Harvey, P., Czwarno, M., and Breckenridge, M.-J. (2022). *Aid worker security report 2022. Collateral violence: Managing risks for aid operations in major conflict*. Humanitarian Outcomes. https://www.humanitarianoutcomes.org/AWSR_2022

71 Such as: UN Humanitarian Civil-Military Coordination (UN-CMCoord). (2020). *Civil-military guidelines & reference for complex emergencies*. https://www.gisf.ngo/wp-content/uploads/2021/10/civil-military_guidelines_and_reference_for_complex_emergencies.pdf

72 Bebbington, C., Fang-Horvath, S., Harrington, G., Polatty, D., and Robinson, J. (2020). *Reviewing guidance and perspectives on humanitarian notification systems for deconfliction*. Center for Human Rights and Humanitarian Studies, Watson Institute for International and Public Affairs, Brown University and Humanitarian Response Program, College of Maritime Operational Warfare, U.S. Naval War College. https://watson.brown.edu/chrhs/files/chrhs/imce/research/2022%20HNS4D%20Research%20Paper%20-%20CHRHS%20%26%20HRP.pdf

73 In its 2023 strategic plan, OCHA reiterates its aim of providing "systemic and predictable leadership on access", including to invest in the "skills of all staff on access and humanitarian negotiations… update the Minimum Package of Services on Access and ensure all staff are aware of their roles and responsibilities to deliver on it." (OCHA. (2023). OCHA's strategic plan 2023-2026. Transforming humanitarian coordination, p. 28. https://www.unocha.org/publications/report/world/ochas-strategic-plan-2023-2026-transforming-humanitarian-coordination

8 SRM and the individual

Donors, for their part, have tried to support better access. One described trying to lead by example: "We try to encourage partners to expand. We don't tell them what to do, but when they see us moving into relatively forward areas, it can encourage them." The official further observed that many international organisations have struggled both to staff up and to establish "credible SRM systems" in very high-risk areas: "They either over- or underdo it. Mostly they are too risk averse."

Another way of looking at access is as a series of efforts toward – and ultimately a measure of – acceptance. Local/national NGOs, community-based organisations, and international NGOs that have had a longstanding presence in a community all credit their integration in the area and the trust built up with communities and authorities over time as the key to their continued access in challenging locations. For many interviewees, acceptance continues to be a primary focus of their SRM approach. But in some conflict environments, where one or more of the belligerents do not consider the humanitarian organisations as neutral actors and will not accord them their protected status under international humanitarian law, acceptance strategies will not be sufficient to gain secure access. A broader discussion currently taking place in the humanitarian sector concerns whether solidarity-based approaches with oppressed populations are more appropriate in contexts like Myanmar and Ukraine, rather than acceptance based on the humanitarian principles of neutrality and impartiality.

Many practitioners spoke of the need for diversity and inclusion in SRM, in two respects: firstly, as it relates to how identity characteristics affect the risks of individual aid workers, and secondly, to diversify the profiles of security staff themselves. While significant challenges and gaps exist in this area, with one interviewee noting it is "long overdue", the research found examples of promising practice.

8.1 Person-centred approach

SRM in the humanitarian space has long attended to security issues related to the identity of its staff, however, this has usually centred on gender, ethnicity and nationality, and has often been ad hoc. In 2012, GISF (at the time EISF) published its paper on gender and security, outlining how gender can affect personal risks.[74] This research built on previous work in this area, such as the Women's Security Awareness Training (WSAT) developed by the UN in 2008. In 2016, UNSMS developed a gender in security management policy, and RedR UK and GISF held a workshop expanding the discussion to lesbian, gay, bisexual, transgender, queer and intersex (LGBTQI) aid workers and their experiences of risk.[75] A follow-up research piece by GISF in 2018, Managing the Security of Aid Workers with Diverse Profiles, helped identify additional challenges and recommendations for developing an inclusive SRM culture.[76] Following this, more guidelines and manuals were developed, particularly within organisations, looking at the security implications of different identity aspects.

74 Persaud (2014a).

75 RedR UK and EISF. (2016). *Report: Inclusion and security of LGBTI aid workers*. https://www.redr.org.uk/RedR/media/RedR/Training%20and%20Learning/Resources/LGBTI%20Inclusion/RedR-and-EISF-2016-REPORT-INCLUSION-AND-SECURITY-OF-LGBTI-AID-WORKERS-WORKSHOP-22-01-2016.pdf

76 EISF. (2018). *Managing the security of aid workers with diverse profiles*. https://www.gisf.ngo/resource/managing-the-security-of-aid-workers-with-diverse-profiles/; see also: Arthur, T. and Moutard, L. (2022). *Toward inclusive security risk management: The impact of 'race', ethnicity and nationality on aid workers' security.* GISF. https://gisf.ngo/wp-content/uploads/2022/05/Towards-Inclusive-Security-the-impact-of-race-ethnicity-and-nationality-on-aid-workers-security.pdf

The emerging consensus in SRM thinking is that an aid worker's personal security is impacted by the interplay between where the aid worker is working, their role and organisation, and who they are (intersectional identity characteristics, such as age, gender, religion, ethnicity, and nationality). This can manifest in many different ways. The risk of sexual violence, particularly but not exclusively for women, was mentioned by several interviewees across the different case studies. In Colombia, one interviewee recounted a UN vehicle being stopped by a non-state armed group and staff harassed because a member of the team had tattoos. Interviewees in Iraq noted severe risks for women travelling and working outside main cities. Several interviewees reported complex security risks to staff in Ethiopia due to ethnic conflicts.

GISF and other thought leaders in SRM have advocated in recent years for a 'person-centred approach' to security, which aims to incorporate identity-based risks within organisational SRM approaches. Notably, within the UN, the 2021 update of the UNSMS Framework of Accountability explicitly established a person-centred approach.[77] However, some resistance to the approach was evidenced in the research as well, for example, by leaders who feared damaging their organisation's reputation by investigating the lived realities of staff with minority profiles. In some contexts, such as Ethiopia, the research team found that discussions around ethnicity and sexual orientation are also particularly challenging due to local dynamics and culture. In some interviews, the person-centred approach seemed to be treated as a 'luxury' that SRM focal points did not have time for. Many interviewees in this study, however, knew of the approach and endorsed it but said, "We are not there yet", with many uncertain as to how to address this within their organisation's SRM structure.[78]

Individualised risk assessments are a key method in implementing a person-centred approach, many agree, especially when done for staff in advance of travel. However, this can be an unrealistic expectation for organisations with frequent staff deployments and large in-country teams. This is borne out by our survey results as well, which indicated that only 30% of international NGO staff and 18% of local/national NGO staff felt their organisations provided individualised risk considerations or assessments. Smaller organisations, particularly human rights ones, appear better equipped to undertake this level of individualised support prior to travel.

Instead of individualised risk assessments, some organisations have taken the path of informing staff of risks more generally (for example, by providing information about risks to LGBTQI staff in particular countries) and encouraging staff to raise concerns if they want to. An interviewee who represents a minority profile preferred this approach, indicating that, "People have a pretty good idea how their profiles can affect their security. People should take individual responsibility. I don't think the employer should get involved with this too much." Adopting a detailed informed consent process, which provides sufficient information to allow individuals to make informed personal security decisions, would allow an organisation to employ a person-centred approach and also support the organisation in meeting its duty of care obligations, as one interviewee proposed.

However, many security professionals said they struggle with a thorny question: when is engaging with security-related identity issues a form of 'support' and when is it 'discriminatory'? As one interviewee put it, "When Americans were targeted in Syria, international NGOs did not take the risk of sending in people with US passports, but can you tell a gay person they can't work on your programme in Uganda?" This is a valid concern, and especially challenging when identity characteristics are not visible, but GISF's research has found that this fear of being discriminatory has resulted in a 'don't ask, don't tell' approach, which means that security decisions based around identity aspects are often not transparently communicated or openly discussed.[79] In effect, this approach increases the risk that security decisions around personal vulnerability are random and based on individual decision maker's beliefs and, unfortunately, biases as well. The research team found several examples of this type of decision making around individual risk profiles, which often results in exclusionary risk mitigation measures affecting certain profiles. An institutional and systematic approach to these kinds of security discussions and decisions can reduce the risk of discrimination and inequity, and foster a culture of openness and discussion about differentiated risks.[80]

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77 UNSMS. (2021). *Section A. Framework of accountability*. October 2021 revision. https://policy.un.org/sites/policy.un.org/files/files/documents/2022/Jan/spm_-_chapter_ii_-_section_a_-_framework_of_accountability_oct_2021_revision.pdf

78 A couple of interviewees also mentioned how security teams were being brought into wider organisational discussions around decolonisation, though what this means in practice, particularly for security, was still unclear.

79 EISF (2018).

80 See EISF (2018) for a more detailed discussion on legal and ethical concerns around identity-based SRM.

At its core, a person-centred approach is not about reducing opportunities for staff due to their individual risk profiles, but to put in place appropriate risk mitigation measures to match individual risk levels. What this means in practice will vary and can be challenging to address, which is why some organisations have engaged in a consultative process with staff to ensure the approach matches staff needs and expectations.

Good practice example

Staff consultation

One international NGO carried out a multi-country consultation with more than 2,000 female staff members to understand their security concerns. During the consultation, staff were asked what risks they faced and how they would like the organisation to address their concerns. The consultations resulted in a global report and action plan supported by a crisis management team. The findings were shocking to leaders within the organisation and spurred a major organisational shift to addressing identity-based risks at an institutional level. While the work remains ongoing, some examples of results include: more women involved in security risk assessments, an increase in HIV post-exposure prophylaxis (PEP) kits, breastfeeding rooms in some offices, a minimum security budget in every country office, transport for female staff travelling to and from work, and flexible work hours. The organisation is planning to do similar consultations in the future on racism as well as for LGBQTI and differently abled staff.

A number of organisations have taken proactive steps to consider identity-based risks in their work, with some even investing in larger internal reviews of their organisation's SRM system to move away from a conception of individual responsibility with regard to identity-based risks to an organisational responsibility. Examples of efforts to adopt a person-centred approach include incorporating identity risk in training, risk assessments, risk mitigation measures, travel guidance documents, and through general communication about identity-based risks and organisational support available.

8.2 People in SRM roles: The changing skills profile

One of the major trends identified by the research team and interviewees was a growing diversity in the profiles of the professionals employed in SRM positions. As the specialised field of humanitarian SRM has grown, rooted in programming and focused on enabling access in challenging environments (as opposed to heavy protection and movement restrictions), the profile of security staff has shifted as well. The field now includes more professionals with humanitarian programming backgrounds, more women, and more individuals from the Global South. This shift has coincided with a new perception of the skills needed by humanitarian security staff – mainly a shift away from 'hard' skills focused on technical aspects of security, to a greater appreciation for 'soft' skills, such as negotiation and relationship-building. National staff of international NGOs are also increasingly represented in security roles. Of the global-level security professionals interviewed for this study (most of them global security advisors or directors for their organisations) roughly a third were women and two were African nationals. Many of the security focal points for international organisations we interviewed at country level were nationals, with more women represented in Latin America than in other contexts.

Of course, not all aid organisations have a single position expressly designated for SRM. As noted, many smaller organisations with limited personnel have staff whose roles include a number of responsibilities, one of which is security. This is also the case for larger organisations in certain field offices, especially where country risk levels are deemed low or medium. Some larger organisations with highly developed SRM protocols, most notably MSF, have chosen to integrate the responsibilities for SRM into country management positions. However, most international organisations that operate in high-risk areas, and that have the resources, choose to employ people in dedicated SRM roles to advise the heads of office on SRM decisions, and to manage the day-to-day security measures, in the same way they employ specialised logisticians and financial officers. It is these SRM professional positions that have undergone a change in profile, according to interviewees.

Of note during the research was the employment patterns in SRM roles in Ukraine that appear to be leaning toward more 'traditional' security professionals from the military and diplomatic sectors. The research team found that many of these security staff could not speak about their organisations' programmes beyond broad modalities. In general, they spoke less about enabling and extending programme activities and more about procedures and standards. Some even expressed their belief that only ex-military security staff should be employed because of the conflict context. This was echoed by an international security professional recently returning from a security audit in Ukraine, who found that the security approach of acceptance seems to have been replaced by a heavily protectionist approach in the country. This appeared to result in a greater divide between security and programme staff than is usually seen in other contexts.

The limited diversity among security staff can often be attributed to a failure to recognise its value, although contextual circumstances can also impose constraints. The challenge of finding the right profiles for security positions at the country level, particularly with relevant skills, was voiced by many.[81] One international NGO interviewee noted that, for the in-country security positions they advertise, they very often receive hundreds of job applications from ex-police officers with no humanitarian experience. This has led to some organisations to invest in training existing staff in humanitarian SRM skills. A balance of hard and soft skills and a solid understanding of SRM, both the technical and more conceptual aspects, as well as humanitarian operations, principles and ethics, are helpful.

Finding the right person for an SRM role seems to be increasingly challenging, as the expectations for these roles seem to be ever-expanding. This makes a case for having a diverse pool of security experts to draw from, within and outside of the organisation, who can provide insight into different security-related challenges, from identity-based risks to how to protect staff in the event of aerial bombing.

81 INSSA has developed a certification programme for country and regional-level SRM professionals, available via DisasterReady.org, which offers guidance on potential selection and training criteria.

9 Conclusion: Areas for action

The considerable progress made by aid organisations in managing security risks is demonstrated by their continued work in high-risk crisis contexts and is widely acknowledged by humanitarian practitioners. It is not to diminish this achievement to recognise that the field could stand to further strengthen and improve its capacities in several key areas.

This section summarises the potential areas for action and improvement elaborated in the report. The common thread across the areas for improvement is greater expansion and inclusivity – proactively extending what is now available mainly to international organisations and a portion of their implementing partners to the wider array of actors in the humanitarian space, to the extent possible.

9.1 Adapting to new threats and risks

- **Maintain updated and responsive risk assessment processes**. An organisation's SRM system and personnel should arguably be the first to identify and adapt to changing conditions and risk levels. However, in countries facing sudden and dramatic changes, or transitioning from development to humanitarian needs, the study found SRM to be noticeably behind the curve, hindered by complacency or groupthink. A dynamic, context-specific approach to SRM involves regularly updated situational analyses based on continuous monitoring of local developments. Given the natural tendency toward complacency and inertia, the periods of relative calm and stability should be when security staff and systems are most vigilant.
- **Explore developing in-house discussion exercises in 'horizon scanning'**. Group brainstorming about improbable yet highly impactful events can inspire SRM and programme staff to think innovatively about a wider range of threat scenarios and potential response strategies. The aim is not to avoid the organisation being caught by surprise – the most significant changes and events will always be unexpected – but rather to avoid panic and paralysis, using adaptable strategies that could potentially cover a range of events.
- **Widen the scope of inputs for risk assessment and context analysis**. To enhance the effectiveness of security risk assessments, organisations should systematically integrate diverse perspectives and expertise, beyond just security focal points, to include staff from a range of roles and positions. Assessments should also consider relevant social media and public perception/sentiment analysis to the extent possible.
- **Identify the appropriate skill sets and focal points for assessing emerging threats and risks**. As new risks emerge, organisations need to ensure there is clarity, at the country level as well as at headquarters, on where the responsibility for mapping and assessing them lies. For example, with digital risks, responsibility may sit across IT, communications, and SRM departments.

9.2 Localising SRM through more ethical and equitable partnerships

Many of the SRM advances made by international organisations came after years of lobbying their donors and senior management for funding and contract models that enabled (even required) them to establish strong SRM plans and systems. Today, local/national organisations find themselves with similar needs for reliable, flexible funding to strengthen SRM capacities. To date, few of *their* donors, as they sometimes call their donors (i.e. UN agencies and INGOs), have come through for them. Beyond sufficient and fair funding, however, both sides of the partnership need clarity on the nature of the relationship as regards risk sharing. Concerns about potential liability exposure incentivise distance, while a mindset of co-ownership of risk promotes closer cooperation and trust. Donors play a

vital role in making this possible through appropriate funding availability, incentives, and requirements. Numerous detailed recommendations for quality funding and other specific actions in local-international partnerships have been made before, including in previous GISF and Humanitarian Outcomes reports on the subject,[82] which remain valid. Rather than reiterate them here, the authors propose the following summary areas as a place to begin forging consensus on a path forward.

- **Incentivise international organisations to co-own, rather than transfer, security risks to national and local partners**. Other government donors should consider modelling the USAID/BHA requirement for their international grantees to confirm or else help develop their sub-grantees' security plans and systems. There is ample evidence that, just by instigating the initial conversation, both parties have learned about the SRM needs of partnered activities and achieved closer collaboration. Often, international NGOs do not know what their local partners may lack or need, while local organisations do not know what they are entitled to ask for.
- **Include SRM staff in the project design phase.** To ensure the aforementioned accountability and avoid 'tick-box' exercises on SRM, security staff should sit with their counterparts in partner organisations to make sure security considerations are built into programme activities and adequately costed in budgets before partnership contracts are signed.
- **Practise principles of good partnership**. To aid in the shift in mindset to risk sharing, organisations can explicitly adopt and implement the partnership principles of equity, transparency, mutual benefit, complementarity, a results-oriented approach, and responsibility. When used to guide partnerships, these principles underscore that both sides have equal rights to be heard and have their contributions valued, fostering a long-term beneficial relationship for both parties.[83]
- **Implement fair funding recommendations**. Providing fair and quality funding for local/national NGO partners, including adequate overheads, adding security costs in programme budgets, and building flexibility and force majeure clauses into contracts is foundational for supporting SRM improvements.

9.3 Supporting coordination and filling coverage gaps

Humanitarian SRM coordination has strengthened and become more systematic across a number of operational contexts, but challenges remain in scaling coordination in major crises, especially for local actors. Formal mechanisms like UNDSS and INSO are crucial but have limitations, especially in fully integrating local actors. Additionally, informal digital communication platforms are now widely used, but come with risks of misinformation and fragmentation. Consequently, three recommended areas for action are as follows.

- **Support the establishment of local coordination platforms**. Whether by strengthening existing local coordination bodies with additional resources for SRM coordination, or enabling the creation of new ones, it is the responsibility of international actors to assist local civil society counterparts in developing their own platforms. These bodies would be designed to link with international bodies like INSO, but also to sustain local coordination activities, whether or not international structures are stood up, widening coverage to include greater numbers of humanitarian actors, including community-based organisations and informal groups. Such support would address the coordination coverage gap while promoting wider localisation goals.
- **Reset and recommit to the SLT framework**. Discontent with SLT is widespread and one of the strongest findings of the research. At the same time, there is no doubt of the value and critical importance of a common understanding for SRM collaboration between the UN and NGOs. The UN and international NGO members of the SLT Oversight Committee should consider reaching out to their broader constituencies to propose coming together on a new statement of intent to clarify understanding and set a path forward for more effective leadership and communication of the framework.
- **Leverage informal digital platforms, while mitigating risks**. SRM staff and units could acknowledge the widespread use of digital communication platforms for informal SRM information sharing and coordination, while implementing guidelines to manage risks such as misinformation and surveillance. This could involve establishing good practices for digital communication, including verifying information sources and securing communication channels.

82 See GISF (2020); Stoddard, Czwarno, and Hamsik (2019); and Fairbanks (2021).

83 Adapted from the summary of Partnerships and Security Risk Management: A Joint Action Guide for Local and International Aid Organisations (Fairbanks 2021).

9.4 Refining and extending existing SRM components

- **Support and enhance incident monitoring systems for local/national NGOs**. Many local actors lack the systems for tracking their security incidents and the majority of international NGOs and UN agencies do not systematically record incidents affecting their local/national NGO partners, which creates a major information gap. Without the funding structure for dedicated security personnel or SRM systems in smaller NGOs, it is difficult for partners to monitor and record their own incidents. The monitoring of incidents suffered by partners and contractors should be brought into international organisation SRM policies and 'duty of care' discussions, while training on incident reporting should be extended to every person involved in programming, regardless of position.
- **Improve training accessibility and relevance for staff of local/national NGOs and local/national staff of international organisations**. Training is not an end itself, but a tool with the end goal that programmes can be implemented, and staff members are more secure, not simply that they are trained. Donors and international organisations should pool resources to establish continuous, appropriate, relevant, and accessible training opportunities, facilities and training of trainers programmes to reach far larger numbers of aid workers, particularly those who face the highest risks, especially local/national staff and organisations. Investments in evidence and learning to assess the relative effectiveness of training could help organisations in this regard.
- **Do more to address staff wellbeing and mental health**. The psychological impact of working in high-risk environments should not be underestimated or treated as an afterthought. Providing culturally appropriate mental health support, destigmatising and facilitating access to that support, and ensuring a supportive work environment are critical for staff wellbeing and, by extension, enhance security for all.

9.5 Using SRM to help enhance, not hinder, improved humanitarian access

Humanitarian access in conflict areas continues to be impeded for formal humanitarian response efforts, with local and informal groups often acting alone in areas inaccessible to international organisations. Thorny issues in deconfliction, moreover, have created a trust deficit among humanitarian actors. Collective access initiatives spearheaded by OCHA show promise but often occur without effective integration of SRM professionals, who sometimes have been seen to hinder rather than facilitate access. At its most fundamental, continued access relies on acceptance in communities with trust, built up over time, being a crucial factor.

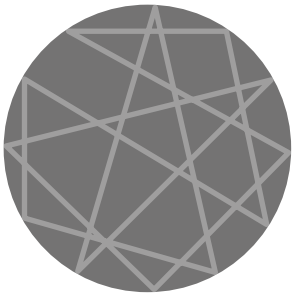
- **Integrate SRM into access initiatives**. SRM strategies and expertise should be included in access initiatives and negotiations, both in individual organisations and in collective activities. The objective is not to establish checks and balances, but to foster an enabling approach where security considerations (and the mindsets of SRM staff) support rather than obstruct humanitarian access. Organisations should identify pathways to connect the SRM, access, and civil-military coordination functions and seek new opportunities for collaboration.
- **Address weaknesses in deconfliction**. Given the complex challenges surrounding deconfliction in conflict zones – issues that are beyond the scope of humanitarian actors to change – aid organisations should work to further develop and promote a collective strategy for engaging with member states and warring parties to address the current deficits of trust. In addition to improving protocols, advocacy efforts could centre on creating stronger international mechanisms for accountability when deconfliction fails.

9.6 Propagating the person-centred approach

- **Institutionalise the consideration of identity-based risks within organisations' SRM systems**. Identity-based risks need to be considered in SRM, and ad hoc approaches to identity-based risks increase the chance of discrimination and inequality. A systematic, institutional person-centred approach is not about reducing opportunities for staff with certain risk profiles but rather implementing the appropriate risk mitigation measures to enable their work. Organisations should review existing SRM systems and processes to ensure they are inclusive of diverse profiles, and consider undertaking a comprehensive consultation with staff about identity-based risks and how they would like to see them addressed.

- **Create an organisational culture supportive of a wide variety of identities and personal risk profiles**. Organisations should communicate with staff about identity-based risks, destigmatise these types of discussions, and foster collective responsibility for team members' risks. Organisations should have an informed consent process for individuals to support their individual decision making around identity-based risks and to meet duty of care obligations. More generally, staff should feel empowered to make more informed security decisions for themselves and others within a supportive organisational SRM framework, as well as have trusted focal points with whom to voice concerns.
- **Further diversify the profiles of SRM staff**. Organisations should ensure that their SRM staff have a balance of hard and soft skills, as well as a solid understanding of SRM, both the technical and more conceptual aspects, and humanitarian operations, principles and ethics. Individuals who can effectively build relationships and engage with programme colleagues are particularly valuable in overcoming the siloing of SRM within broader organisational processes. Overall, organisations benefit from having a diverse pool of security experts to draw from, within and outside of the organisation, who can provide insight into different humanitarian security-related challenges and reflect the different profiles of the people they are working to keep safe.

As violent conflict and instability continue unabated across the globe, the need for SRM remains as pressing as ever. Rapidly changing contexts and newly emerging threats, moreover, demand that SRM be forward-looking and adaptive as past ways of working become obsolete. Humanitarian organisations, individually and in coordination, have made significant advances in systematically enhancing the security of their people with proactive measures, leaving less to the realm of chance and intuition. While the institutionalisation of methods can go too far or be misapplied (tick-box and cut-and-paste approaches), overall, humanitarians have made progress in a challenging area that often deals with life-and-death stakes and the knowledge that risk can only be reduced – never eliminated. Ultimately, the success or failure of SRM is not measured in the number of staff trained or procedures implemented, or even in security incidents encountered, but rather in how well the measures enabled effective humanitarian response to people in crisis.



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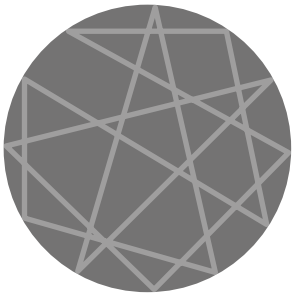
Julian Zakrewski, Country Director, DRC, Ukraine



About the partners

The Global Interagency Security Forum (GISF) is a diverse network of organisations active in the fields of humanitarian aid, international development, human rights, and environmental protection, who value security risk management (SRM) as an important element of their operations and programme delivery. In a rapidly changing global landscape, GISF values the importance of continuous documentation, adaptation, and innovation of SRM policy and practice. Therefore, we take an inclusive approach to SRM and don't believe in 'one-size-fits-all' security. We recognise that different staff face different risks, based on the diversity of their personal profile, position, context, and organisation. In summary, we are the leading SRM network and a one-stop-shop for information sharing, knowledge management, coordination, and collaboration.

Humanitarian Outcomes is an international team of experts providing research and policy analysis on international humanitarian action since 2009. Our work covers the institutional, financial, and operational mechanics of the international humanitarian system, and considers the broader political environment in which aid policy takes shape. As the creators of and institutional home for the Aid Worker Security Database, along with other unique data assets, we have led the sector in evidence-driven analysis of security and access for humanitarian operations in challenging environments.

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