



# EVALUATION OF THE IATI STRATEGIC PLAN 2020-2025

Final Report (Second Draft)

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## Project and evaluation information details

Project/outcome Information		
Project/outcome title	International Aid Transparency Initiative (IATI) Secretariat 2.0	
Project Number	01000749	
Corporate outcome and output	<b>Expected SP Outcome(s):</b> Quality programming and managing for results allow UNDP to contribute effectively to Agenda 2030 <b>Expected SP Output(s):</b> Evidence-based performance, cross-cutting approaches, knowledge and innovation	
Country	Global	
Region	Global	
Date project document signed	22 May 2023	
Project dates	<b>Start</b>	<b>Planned end</b>
	1 May 2023	30 June 2028
Total committed budget	<b>Total Resources Required: 18,198,468</b> <b>Current Contribution Amount: 6,523,934.71</b>	
Project expenditure at the time of evaluation	<b>As of 7 May, the cumulative expense up to 2025 is:</b> <b>4,804,385.69 USD</b>	
Funding source	Third Party Cost Sharing Funds	
Implementing party <sup>1</sup>	UNDP	

Evaluation information		
Evaluation type (project/outcome/thematic/country programme, etc.)	Strategic Plan Evaluation	
Final/midterm review/other	Final	
Period under evaluation	<b>Start</b>	<b>End</b>
	2020	2025
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Evaluation dates	<b>Start</b>	<b>Completion</b>
	Nov 2024	May 2025

<sup>1</sup> This is the entity that has overall responsibility for implementation of the project (award), effective use of resources and delivery of outputs in the signed project document and workplan.

## List of acronyms and abbreviations

AI:	Artificial Intelligence
ATI:	Aid Transparency Index
CRS:	Creditor Reporting System
CSOs:	Civil Society Organisations
DFI:	Development Finance Institution
EITI:	Extractive Industries Transparency Initiative
FDI:	Foreign Direct Investment
FfD:	Financing for Development
FTS:	Financial Tracking Service
HDX:	Humanitarian Data Exchange
HLPF:	High-Level Political Forum
INFFs:	Integrated National Financing Frameworks
IPLCs:	Indigenous Peoples and Local Communities
OCHA:	Office for the Coordination of Humanitarian Affairs
ODS:	Open Data Services
OECD:	Organisation for Economic Cooperation and Development
PWYF:	Publish What You Fund
SDGs:	Sustainable Development Goals
SFH:	Sustainable Finance Hub
SSWG:	Standard Stewardship Working Group
ToC:	Theory of Change
TOSSD:	Total Official Support for Sustainable Development

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# Executive Summary

## Introduction

The International Aid Transparency Initiative (IATI), launched in 2008, is a global, multi-stakeholder initiative designed to increase the transparency and accountability of development and humanitarian financing. By 2023, IATI had become one of the most widely used open data standards in international development cooperation, with over 1,500 organizations publishing data on more than 97,000 humanitarian activities and over 150,000 contributions toward the Sustainable Development Goals (SDGs).

This independent evaluation assesses the implementation and performance of IATI's first Strategic Plan (2020–2025). It examines the initiative's effectiveness, relevance, efficiency, and sustainability, while offering lessons learned and recommendations to inform the development of IATI's next Strategic Plan (2026–2030). The evaluation covers a time of profound global change, with the COVID-19 pandemic, growing geopolitical tensions, and shifts in development finance presenting both challenges and opportunities. These dynamics have underscored the enduring importance of aid transparency while also increasing demands for enhanced institutional performance and clarity of purpose.

## Purpose and Methodology

The purpose of the evaluation was to assess progress against IATI's Strategic Plan objectives, analyze contextual and institutional factors that have influenced results, and generate forward-looking recommendations. The evaluation applied a theory-based and utilization-focused approach. Data was drawn from stakeholder interviews, a review of organizational documents, a member survey, benchmarking with similar initiatives, and selected case studies.

## Effectiveness

The evaluation found that IATI has made tangible progress in improving the quality and accessibility of aid data. Technical tools such as the Validator and the Country Development Finance Data tool have helped enhance the utility and reliability of data. Notably, 19 partner country governments were systematically using IATI data by 2023, exceeding the target set under the Strategic Plan. Partnerships with entities such as the World Bank and Education Cannot Wait signal a widening user base and indicate new data uses.

However, persistent challenges remain. A significant portion of IATI data still suffers from issues related to quality and completeness. As of 2023, only 13.8 percent of publishers met the recommended quarterly publication frequency—far below the 70 percent target. Furthermore, the IATI Standard is seen by many stakeholders as overly complex and ill-suited to rising financing modalities such as climate finance and blended finance. Despite some increases in data use, IATI data is still under-utilised relative to potential and IATI is not widely-

known. The Strategic Plan did not articulate a sufficiently ambitious or focused strategy for either data quality or data use.

## **Relevance**

The Strategic Plan introduced a clearer results framework and was welcomed by members as an important tool to move away from year-on-year planning cycles. IATI continues to be a highly relevant actor in the global development landscape, with its open data standard offering timely and granular data as a complement to other platforms such as OECD's Creditor Reporting System, TOSSD, and OCHA's Financial Tracking Service.

Nonetheless, the evaluation found that the Strategic Plan lacked a compelling long-term vision. The Theory of Change underpinning the strategy failed to reflect critical shifts in the external environment, particularly the erosion of global political commitment to aid transparency and aid effectiveness. IATI's low visibility and limited engagement in global policy forums also constrained its strategic influence during much of the Strategic Plan period.

## **Institutional Efficiency**

Institutional efficiency has seen both progress and setbacks. The appointment of an Executive Director in 2024 marked an important step in strengthening governance, clarifying accountability, and improving internal management. The transition to a new technical partner, Open Data Services, also enhanced technical capacity, though both of these changes incur higher financial costs (UNDP no longer sponsors any staff positions under the new institutional arrangement).

Despite these recent improvements, overall implementation of the Strategic Plan was uneven. By 2023, only 47 percent of output targets had been achieved. The shift in institutional arrangements, including governance transitions and the establishment of a new hosting model, cost over \$1 million and contributed to the depletion of IATI's financial reserves. The Governing Board has often operated outside its intended strategic oversight role, becoming involved in operational matters. Stakeholder engagement has remained limited to a narrow circle, with platforms like IATI Connect not fully meeting their potential as tools for dialogue and collaboration.

## **Sustainability**

IATI's financial and institutional sustainability is now at risk. The current business model is no longer viable: membership fees have not increased since 2016 and have been eroded by inflation, while reserves have declined. Membership has not increased substantially, and several key members have disengaged or reduced their participation. The collection of fees has historically been inconsistent and inefficient. Unless significant changes are made, the initiative could face insolvency by 2026.

While there has been some progress in strengthening national ownership—reflected in the increasing use of IATI data by governments—its integration into national systems remains

limited and uneven. Sustained engagement, technical support, and clearer alignment with country systems are required to ensure that the benefits of aid transparency are institutionalized and contribute to broader development effectiveness.

## **Conclusions**

Overall, the evaluation concludes that IATI's Strategic Plan catalyzed incremental progress but fell short of achieving transformational change in data quality, data use, or member engagement. The governance model, financial structure, and strategic orientation were not fully aligned with the level of ambition articulated at the outset of the Plan. While the demand for transparency and open data remains high, IATI's current trajectory will not enable it to meet that demand without bold reforms.

## **Recommendations**

To ensure its long-term relevance and effectiveness, a series of strategic reforms is recommended. First, its financial model should be redesigned to ensure sustainability. This may include introducing specific 'fee-paying' member services, revising the fee structure, and pursuing new sources of voluntary funding. Second, governance arrangements should be strengthened to ensure strategic focus and political engagement, including more transparent Board appointments, the engagement of Board members with a high public profile, and a clearer delineation of roles.

Third, IATI should position itself more visibly as a leader in the global transparency ecosystem by developing strategic partnerships and actively participating in advocacy through global forums such as the UN Financing for Development process, the COP climate summits, and SDG reviews. Modernizing and simplifying the IATI Standard will also be essential, particularly to accommodate climate-related and private finance data. Furthermore, IATI should prioritize interoperability with other systems to reinforce its value as part of a broader data ecosystem and seek to be a leader in efforts to create more unified and consolidated data systems for development finance.

Finally, deeper engagement at country level is required. National ownership and system integration must become core priorities, supported by targeted capacity building and peer-to-peer learning. The next Strategic Plan should focus on enabling these shifts while articulating a clear vision of IATI's long-term role and impact.

## **Lessons Learned**

Several overarching lessons emerge from this evaluation. Strategic plans must aim for transformation, not just incremental improvement. Quality data and meaningful data use must be pursued simultaneously and supported through outreach, incentives, and capacity building. Ownership of IATI must be clearly defined and actively nurtured across all member groups. Above all, visibility and value creation are fundamental to sustainability—

demonstrating impact and maintaining relevance must be at the heart of IATI's future strategy.



# Introduction

## IATI description and headline data

The International Aid Transparency Initiative (IATI) was established in 2008 to improve the transparency of aid, development, and humanitarian resources to increase their effectiveness in tackling poverty. Since then, the IATI Standard, a framework for publishing data on development cooperation and humanitarian action, has been widely adopted by donor governments, multilateral institutions, and NGOs. IATI aims to provide comprehensive, accessible, and high-quality data to improve decision-making and accountability in development and humanitarian efforts. IATI is an open voluntary initiative established for the “common good”.

Since it was founded, the initiative has grown from a statement of intent by 14 donor signatories at the Third High Level Forum on Aid Effectiveness in Accra, Ghana in 2008 to become a global initiative and an open data standard with more than 1,000 publishers and 107 members across multiple constituencies – CSOs, aid providers, partner countries and private sector organizations. By the end of 2023, 1,550 organizations had voluntarily published data on their development and humanitarian resources and activities. Since the Grand Bargain agreement at the World Humanitarian Summit in 2015, more humanitarian actors began publishing to IATI. By the end of 2023, organizations had published data on over 97,000 activities identified as specifically responding to humanitarian crises, in 204 countries and territories. Through IATI data, users can see how over 153,000 activities are contributing to the UN Sustainable Development Goals (SDGs).

The period covered by this evaluation is the current life cycle of the IATI Strategic Plan, from 2020 to 2025. During this period, the external context in which IATI operates has seen significant change. The COVID-19 pandemic, the growing impacts of climate change, and rising levels of conflict and political instability have led to development setbacks, and a rise in poverty and debt levels. This has led to an increased demand for development and humanitarian assistance, and for climate-related resources. At the same time, these resources have not kept pace with growing need, due in part to budgetary pressures in major donor nations, making it more important than ever to increase transparency and optimize the use of available aid.

The development finance landscape has also become more complex, involving a multiplicity of actors, including public and private, international and domestic, as well as an increasingly complex range of new and innovative financial instruments and approaches. Maximizing the efforts of all actors and interventions in this context requires greater coordination at national, regional and global levels, with a key role for data driven policy formulation and implementation. However, this increased fragmentation and complexity also makes it more challenging to compile accurate and timely data, and for development actors to access and use data from different sources and combine it to build an overall picture of the resources available. The increased importance of South-South Cooperation, and the entrance of new “donor” countries, also continues to blur the traditional, and increasingly outdated, distinction between provider countries and partner countries.

The current period is also characterized by growing polarization, rising nationalism and authoritarian trends. This means that IATI is operating within an increasingly turbulent geopolitical landscape. Expressions of this include increased global competition between countries, a decline in support for multilateralism and an uneven commitment to open governance and transparency. Political

commitment to aid and the aid effectiveness agenda is on the wane. These challenges demonstrate the need for renewed global commitments to cooperation, transparency and accountability, showing that IATI's vision remains highly relevant in today's current turbulent times. However, the reality is that the current context only makes it harder to mobilize more aid funds for development and humanitarian action, as well as ensure continued political support – and resources – for initiatives such as IATI.

The rise of digital technology, Artificial Intelligence (AI) and the push for open data have similarly transformed the context in which IATI operates. There is a growing recognition of the value of transparency and open data in driving accountability and improving development outcomes. While IATI's mandate to provide high-quality, accessible data is highly relevant in this context, it also faces competition from other new data standards and technologies unhampered by legacy. This includes initiatives such as the "Total Official Support for Sustainable Development" (TOSSD) measure of donor development effort developed and led by the OECD. In this context, it is vital to understand IATI's place, its comparative strengths and unique offer vis-a-vis others within this fast-evolving landscape.

## Description of the IATI Strategic Plan

The IATI Strategic Plan 2020-2025 outlines IATI's vision, mission and goals to enhance the transparency and use of data on development cooperation and humanitarian action. This was the first time that IATI had developed a Strategic Plan, which resulted from the recommendations of an institutional review conducted by the Members in 2018.

IATI's vision, mission and goals were articulated as follows:

Vision	Mission	Goal
Development and humanitarian communities share good quality information on their activities and results, and use the information to work together more effectively towards achieving sustainable development.	To amplify efforts across the development and humanitarian communities by making the connections between organizations, their financial flows, programmes and results more visible, enabling them to manage international development efforts effectively and efficiently to contribute to the 2030 Agenda for Sustainable Development, and monitor the actual progress achieved on the ground against original intentions.	To support better decisions and better development outcomes through the publication and use of good quality data on development resources, activities, pledges and results.

To deliver on these, the Strategic Plan outlined three key objectives:

1. Drive a significant improvement in the quality of data published to IATI
2. Promote the systematic use of IATI data by development and humanitarian actors
3. Strengthen the IATI Standard to support objectives (1) and (2) by consolidating its technical core, maintaining its infrastructure and reinvigorating its community of publishers and members.

The Strategic Plan also identified three cross-cutting action areas:

1. **Interoperability:** increase the interoperability of the IATI Standard with other data standards and initiatives
2. **Outreach:** Alignment with the 2030 Agenda for Sustainable Development
3. **Communications and user experience:** review ways to provide better multilingual support to publishers and users

## Theory of Change and results framework

The Strategic Plan is anchored in IATI's Theory of Change (ToC) which explains how the initiative's activities will lead to the change and overall impact that IATI aims for. This is defined as "sustainable development outcomes are achieved." The ToC was developed as part of a consultative process with members and was approved for the period 2016-2023.

Additionally, IATI developed a "Strategic Plan Results Framework". The Results Framework translates the IATI Strategic Plan into a set of measurable targets that demonstrate how the IATI membership, secretariat and Board will deliver on the agreed mandate and vision through to 2025. The Results Framework articulates three high-level outcomes, each of which is accompanied by associated outputs, indicators, baselines (where available), and targets for the 2020-2025 period. The three high-level outcomes are as follows:

- Outcome 1: Significant improvement in the quality of data published to IATI
- Outcome 2: IATI data is systematically used by development and humanitarian actors for decision-making
- Outcome 3: The IATI Community of members, data users and publishers are increasingly engaged to maximise impact

Using the Results Framework, the evaluation analysed the extent to which IATI has delivered on its strategic objectives, and examine the factors that contributed to – or hindered – success. It also looks at the robustness and the validity of the assumptions underlying the ToC.

It was originally intended that the Strategic Plan would be subject to a mid-term review. However, this was delayed firstly because of the COVID-19 pandemic and subsequently postponed due to the changes to institutional arrangements, to be replaced by this evaluation. Throughout the Strategic Plan period, annual results reports to the Members Assembly were published, which this evaluation will draw on alongside the outputs of the Results Working Group.

## Purpose, Objectives and Scope of the evaluation

Against this backdrop, the primary purpose of the evaluation was to review the implementation of Strategic Plan objectives (2020-2025) within the context of its mandate, strengthen IATI's accountability to its key stakeholders, and enable drawing of key lessons learnt to support transformation of the initiative.

The following were the specific objectives of the evaluation:

- Assess IATI's effectiveness to deliver its Strategic Plan 2020 – 2025, including the relevance of its IRRF in terms of its unique mission, mandate, comparative advantage in the broader development cooperations.
- To assess IATI's performance in delivering on its Strategic Plan objectives (2020-2025), while identifying contextual, strategic and institutional factors that are positively and/or negatively affecting results.
- To formulate recommendations for IATI's consideration in the next Strategic Plan (2026-2030) based on key lessons learnt.

The scope of the evaluation was the full period of the Strategic Plan 2020-2025, looking at results achieved up to 2024 where data was available. It examined the effectiveness, efficiency, relevance and sustainability of the Strategic Plan to the Initiative as a whole (including the Members Assembly, the Governing Board and the Secretariat). In accordance with the Terms of Reference, the evaluation did not include the standard evaluation criteria of Impact or Coherence. The measurement of impact for IATI would be complex and long-term, and would be outside of the methodologies and level of effort available to this evaluation. It was also not necessary to meeting the purpose and objectives of the evaluation, and so it was not a gap. The criterion of coherence, while not examined explicitly, is commented on within the context of other criteria – especially in relation to leveraging partnerships.

The primary intended users of the evaluation are the Governing Board, the Secretariat and the Members Assembly to inform the development of the next Strategic Plan based on lessons learned from what worked and what needs to be improved in the current Strategic Plan to better position IATI as a strategic initiative.

## Evaluation questions

Inception phase interviews were conducted with representative members of the Secretariat and the Governing Board (see annexes) to further understand the background to, and needs of, the evaluation. These interviews highlighted key areas for the evaluation to prioritize data collection and analysis, within the overall evaluation framework. Specific areas for attention by the evaluation included:

1. The strategic positioning of IATI in a changing political and economic landscape for development and humanitarian work; including the core identity of IATI and whether the current ability of IATI to effectively advocate at a high-level matches with the ambition of the Strategic Plan.
2. The implications of the positive change in having an Executive Director in place on other ‘unfinished’ elements of institutional reform, so that IATI’s overall strategic capabilities are aligned with what is needed to deliver the Strategic Plan.
3. Reviewing the strategic prioritization between making progress in data quality vs data use, including the experiences gained in how data quality and data use interact (or not); and how this varies across different thematic areas.
4. The consequences of the long-period of having not updated the core standard for IATI, and the case for prioritizing an upgrade (or not).
5. The immediate and medium-term financial sustainability of IATI, especially the risk of illiquidity by 2026 that represents a possible crisis for the Initiative.

## Evaluation approach and methods

The evaluation used a **utilization-focused** approach, focusing on being as useful as possible to the IATI membership in understanding the merit and worth of the current Strategic Plan and setting out lessons for the next Strategic Plan. To do so, it applied a **theory-based approach**, interrogating whether the Theory of Change of the Strategic Plan was valid and whether IATI has delivered on the change that was envisaged in terms of the outputs and outcomes of the Results Framework.

The Evaluation was guided by the UNDP evaluation principles as stated in the policy<sup>2</sup>, which are fully aligned with OECD and other international evaluation guidelines. Among others, the following key principles were upheld: (i) high ethical standards and norms; (ii) independence, impartiality and credibility; (iii) high technical competence and rigour; and (iv) evaluation processes were transparent and fully inclusive of all stakeholders.

### Data sources

In terms of approach and methodology, the Review used **qualitative set of methods** for data collection supported by selected **quantitative data** from a survey and desk review, including:

1. **Document Review:** Analysis of IATI's Strategic Plan, annual reports, meeting minutes, policy documents, and other relevant materials. This provided a comprehensive understanding of the planned activities, the progress made towards achieving the objectives, and any challenges encountered during implementation.
2. **Stakeholder Interviews:** Engaging with IATI members, partners, donors, and users of IATI data. This provided insights into the experiences and perspectives of IATI's stakeholders, including their views on the relevance and effectiveness of the Strategic Plan, the factors that have influenced its implementation, and the impacts it has had.
3. **Anonymized Survey:** Descriptive statistics of the perceptions of IATI members in relation to the effectiveness, efficiency, relevance and sustainability of the IATI institutional arrangements.
4. **Mini case studies:** Examples of specific initiatives or outcomes to provide more detailed insights. This helped to identify successful strategies and approaches, as well as any challenges and lessons learned.
5. **Comparative Analysis:** Benchmarking against similar initiatives or organizations to identify strengths and areas for improvement. This involved comparing IATI's Strategic Plan and its implementation with similar initiatives or organizations to identify best practices and areas where IATI could improve its approaches.

### Data collection procedures, instruments and sampling

The following section describes the sample of evidence that was used under each of the data collection methods. Given the overall qualitative methodology of the evaluation, the overall approach to sampling is to generate an illustrative view of the diverse perspectives of members and stakeholders in the Initiative.

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<sup>2</sup> [United Nations Development Programme - Evaluation Policy \(undp.org\)](https://undp.org/evaluation-policy)

## Desk review

The evaluation conducted a comprehensive desk review of 41 IATI documents relating to the Strategic Plan, governance of the initiative, and example case studies of IATI impacts. Documents included IATI Strategic Plan, 2020-2025 (IATI Strategic Plan, IATI Strategic Plan Results Framework, IATI ToC cover note 2020, ToC Assumptions 2020, IATI Theory of Change 2020); IATI Annual Reports; IATI Financial Reports; IATI Strategic Plan Results Monitoring Reports; IATI Workplans; IATI Governing Board minutes; IATI Board Q3 2024 Paper 3 IATI Financial Sustainability Analysis & Plan Sept 2024; SIGNED LOA with annexes 30 Sept 2023; IATI Institutional Arrangements Report - November 2021; and IATI Institutional Review - Final Report - 18 June 2018.

Evidence from the desk review was used to triangulate primary data from the key informant interviews and survey, to both enrich and validate the findings, as well as to identify areas where the perceptions of stakeholders may differ from the historical record.

## Initiatives to benchmark IATI

The evaluation looked at both comparator *initiatives* as well as comparator *data sites* in an attempt to understand where IATI's comparative advantage lies and lessons learned from the experiences of others. As agreed with the IATI secretariat, the evaluation compared IATI with two other initiatives and four data sites. These include: i) **Initiatives:** Open Contracting Partnership (OCP); Extractive Industries Transparency Initiative (EITI); ii) **Data sites:** OECD Creditor Reporting System; OECD Total Official Support for Sustainable Development (TOSSD); OCHA Humanitarian Data Exchange (HDX); OCHA Financial Tracking Service (FTS). The table summarizing these comparisons is included in the Findings section.

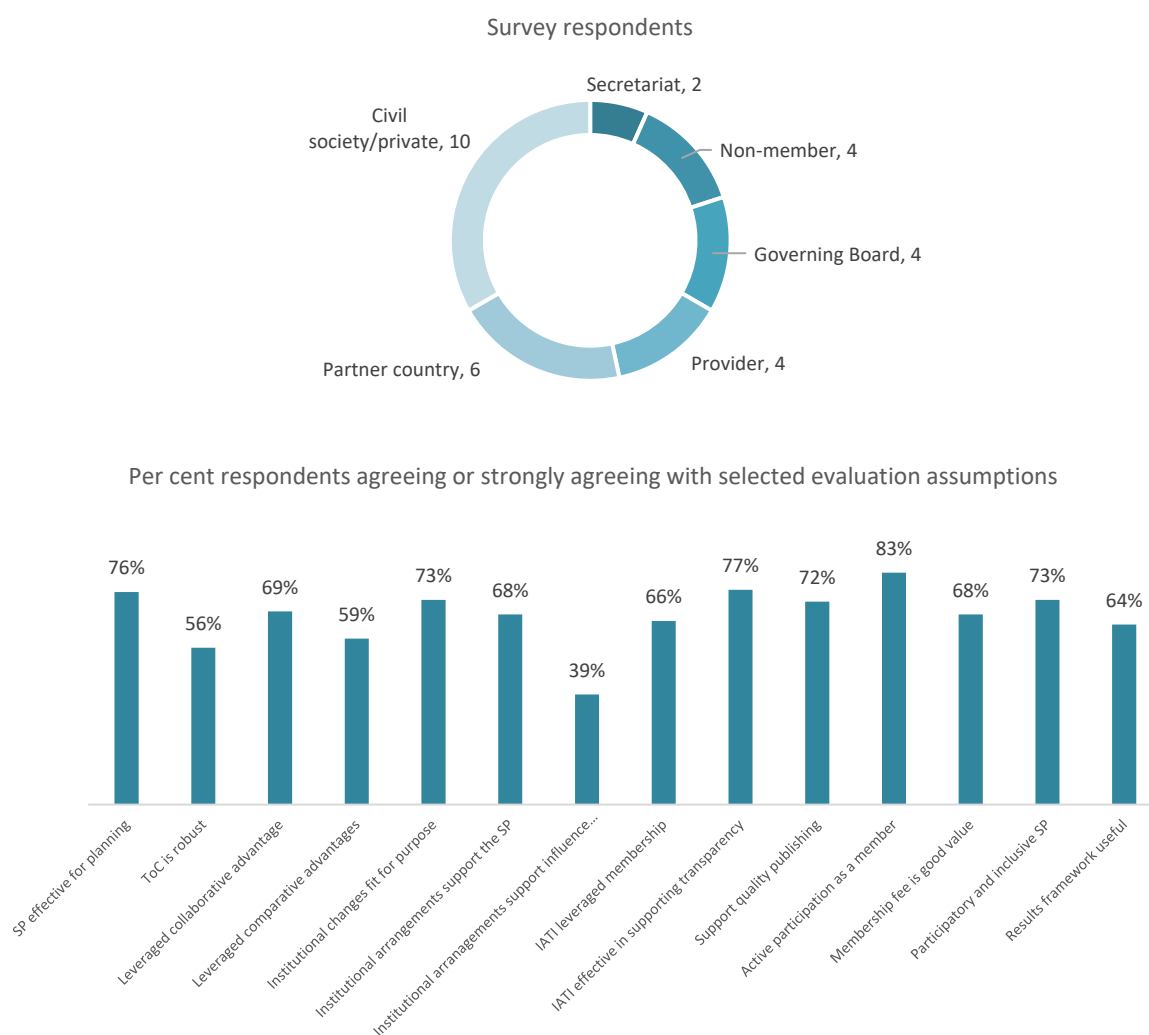
## Key Informant Interviews

Confidential stakeholder interviews were conducted with an illustrative sample of stakeholders from across the various IATI constituencies. Interviews were semi-structured and based on the template included in the annexes. Interview questions were derived from the Evaluation Matrix.

All interviews were conducted over Zoom or Teams, and were transcribed into notes by the evaluation team. The notes were maintained in a private database only available to the independent evaluators. Each interview was reviewed by the evaluation team and manually coded as to whether it provided evidence to support or refute the evaluation assumptions. This data is summarized in the annexes.

## Web-based survey

A web-based survey was undertaken, sent to all Members of IATI, including the members that also serve on the Governing Board or the Secretariat. Members were requested to provide one response per Membership organisation (rather than individuals). The evaluation team also worked with the IATI evaluation focal person to send the survey to non-members that are familiar with IATI standard and data use. The survey received 30 responses. 83% of respondents considered themselves to be 'active' members.



## Stakeholder participation

IATI stakeholders were provided with multiple opportunities to engage with the evaluation. This included sharing updates on the evaluation process in IATI Connect, the IATI newsletter, the IATI WhatsApp group, via IATI social media channels and the Chair's email.

During the Inception Phase, interviews were conducted with 11 stakeholders from the Governing Board, Secretariat and a selection of members (see annexes).

During the Data Collection Phase, additional interviews were conducted with 24 stakeholders representing a mix of the constituencies (see annexes). The web-based survey was completed by 26 members and 4 non-members.

Three "caucus group" open meetings were scheduled with each of the main constituencies providing an opportunity that five partner countries, five civil society members, and eight providers joined to engage with the evaluation.

Evaluation findings, conclusions and recommendations were validated through presentations and discussions with the secretariat (for factual accuracy) and Governing Board.



## Data analysis

The evaluation developed findings, conclusions and recommendations using qualitative approaches to **triangulate evidence** from the data collection methods above to validate the findings and ensure their reliability. These approaches included realist synthesis (summarizing the evidence that exists) and descriptive statistics of evidence from the survey (numbers and percentages).

Draft findings and conclusions were tested and refined in consultation with IATI, while recommendations were co-developed to ensure ownership and sustainability of the required changes. The methodology ensured a comprehensive and balanced assessment, incorporating diverse perspectives and triangulated data.

## Ethical and gender considerations

In terms of ethics, the evaluation was conducted by an independent team and all primary data collected from interviews and the survey was treated as confidential. The findings only presented evidence that was anonymized. Where interpretation was needed beyond the languages that were spoken by the evaluation team, the IATI secretariat was requested to provide an independent outside interpreter. The evaluation did not engage adolescents or young people below the age of 18.

In terms of **gender, equity and human rights**, the evaluation subject related to transparency, which is a human rights principle. The process of the evaluation, the use of evidence and the products of the evaluation was shared openly. The evaluation criteria of effectiveness and relevance were both considered from a gender and equity perspective, especially in terms of whether IATI initiatives to support the SDGs have contributed to advancing the Leave No One Behind agenda.

## Limitations and constraints

Limitations inherent to the evaluation design and methods include the absence of options to use a statistical sampling frame that would allow the evaluation to express the degree of confidence in each finding. For example, the responses to the web-based survey most likely contain a bias towards the views of active members, rather than the average view of all members. For this reason, the evaluation used purely qualitative methods to analyze data, using quantitative sources of evidence when available to triangulate and interrogate the qualitative data (such as from interviews). This aimed to establish a fair and balanced view on merit and worth, rather than to ascribe statistical certainty. The reliance on multiple lines and level of evidence to test each assumption was the main way of mitigating the methodological limitations.

Constraints to the evaluation mainly relate to the time available to the evaluation team and the availability or willingness of key stakeholders to participate. For example, several of the IATI members who have left the initiative or reduced their engagement were approached but declined to be interviewed. Evidence from interviewees primarily covered Africa and Europe, with lower levels of representation from other regions. The response rate to the survey was circa 25% by the time it closed, which was the level that was targeted, but still represents a gap in coverage that should be considered.

# Findings

## 1. Effectiveness

*Evaluation Question: How effective has IATI been in delivering its mandate and achieving strategic objectives, and results as stated in its strategic plan and associated results framework; what factors facilitated or hindered the achievement of the objectives?*

### - Outcome 1: Significant improvement in the quality of data published to IATI

**Key finding: The Strategic Plan enabled some improvements to data quality and there is more satisfaction with IATI's technical tools, but some "persistent" challenges with data quality have been difficult to overcome**

There is a widely held view that data quality has improved over the last few years. Overall, there seems to be a fairly high degree of confidence in IATI data, and that IATI has built-up more trust in its data over recent years. Several members report that they trust the data since they themselves are a publisher, and have confidence in the quality of their own data.

At the same time, there seems to be some concern that recent progress on data quality may now be at risk following the announcement by Publish What You Fund (PWYF) that their annual Aid Transparency Index (ATI) report will not happen in 2026. Several IATI data publishers were clear that the ATI represents a major incentive to report high quality and timely data to IATI, and that this incentive is now lost. This suggests the IATI Secretariat will need to take a more proactive role to engage publishers in the future to ensure that data quality (and perceptions of data quality) do not decline.

Over the Strategic Plan period, IATI has clearly seen some successes in its efforts to continuously improve its technical tools, launch new tools and improve the accessibility of its technical tools. These efforts have been broadly well received by the IATI community. Several interviewees report that the user-friendliness of IATI platforms has improved. The survey indicates that 74% of respondents are happy with the suitability and usability of IATI's technology in a fast-changing landscape. IATI has also largely met its annual targets on user satisfaction with its technical tools. User satisfaction with key IATI technical tools is particularly high for the IATI Validator, which in 2023 sustained a high satisfaction score (87.5%), above the target of 81.0%. Several interviewees, especially those within aid administrations in partner countries, also report a high level of satisfaction with the Country Development Finance tool, launched in 2021. According to a 2024 report by Development Futures Lab which studied IATI's database and user interface, "by harmonizing its tools, IATI has developed an integrated ecosystem that enhances data usability [...]."

At the same time, Development Futures Lab also points to continued limitations with some technical tools, such as the d-portal which is unable to distinguish between different types of development actor, or easily allow for comparisons between regions, countries or snapshots in time. They also point

to a lack of clear role amongst IATI's different technical tools, including the Country Development Finance tool, d-portal and Datastore. While these tools aim to serve different purposes, their overlapping functionalities and inconsistent user interfaces can confuse users, especially those new to the platform. It can also hinder their ability to quickly locate the data they need.

Progress has also been more uneven when it comes to "persistent" data quality challenges, such as timeliness, inconsistency, incomplete data etc. IATI annual reports show clearly that consistent, forward-looking and timely data remain challenges for the majority of constituencies. For example, only 13.8% of active publishers published at least quarterly in 2023. This represents a decline from the 15.6% achieved in 2022, and was significantly below the Strategic Plan target of almost 70% for 2023. Similarly, in 2023, 75% of publishers published data in all mandatory fields, well below the 94% target for that year. IATI reports that publishers often report the bare minimum required fields. Regular engagement with publishers is essential to resolve these longstanding challenges, as recognized by the IATI secretariat. However, capacity constraints mean that its ability to engage all publishers on these challenges is ultimately limited.

Data quality also appears to be better amongst aid providers than smaller organisations, which can be attributed in part to the different incentives to publish data which face different constituencies; whereas non-profit organisations are often mandated by their donor partners to report on IATI (and therefore see it as largely a compliance exercise), larger donors place a higher emphasis on high quality data in part to achieve a higher score on the Aid Transparency Index and/or because they intrinsically believe in the value and importance of aid transparency.

The slower progress on key metrics such as the timeliness of IATI's data and forward expenditure plans, which are seen as a key comparative advantage of IATI data, diminishes its impact and usefulness in the eyes of several interviewees. Some also report that the data "requires a lot of work" to clean and use.

Additionally, the IATI Standard is not considered especially "user-friendly" or well suited to the more complex array of financial flows and financial instruments in use today. Most interviewees report the Standard is in urgent need of an update. The review of the IATI Standard, a commitment set out in the Strategic Plan, has not happened. For example, there is currently no systematic way to report effectively on climate finance in IATI. Reporting on the SDGs/Agenda 2030 is also weak. The need to simplify fields and drop those that are not being used was also mentioned as important. Some CSOs (as well as self-professed technical specialists), describe it as incredibly complex, especially for smaller organisations which need to "wade through myriad fields" and work out which ones are relevant to them. It was suggested that a simpler IATI Standard (some interviewees recommended a 'modular' approach) could enable more organisations to participate, and that complexity also makes it more difficult to bring new members and publishers to the initiative.

Some members expressed frustration that updates to the Standard had not been prioritised, with key challenges identified as the instability and delays caused by changes to the institutional arrangements as well as the need to secure approval for changes to the Standard from the wider membership. Some work on changes has now started. In 2024, a Standard Stewardship Working Group (SSWG) met to address omissions in the standard upgrade process and report back to the IATI Board. Based on

recommendations from the SSWG, the IATI Secretariat has started to take forward updates to the Standard in 2025. This was viewed positively, though many members felt it should have been implemented much earlier. Similarly, work to develop a “Data Quality Index,” another commitment within the Strategic Plan has also not advanced. While this was started, it was out on pause in 2022 to focus on the transition to new institutional arrangements in what was an exceptionally disruptive period for IATI. Governing Board minutes indicate that it was intended for the contribution to the 2024 Aid Transparency Index to generate inputs to the Data Quality Index, but the challenge of an affordable ‘universal’ (for all publishers) measure of data quality remains elusive. The interoperability of IATI data with other data standards and initiatives remains limited. Some interviewees expressed frustration that data quality conversations had failed to “move forward” to any significant degree over the Strategic Plan period.

- **Outcome 2: IATI data is systematically used by development and humanitarian actors for decision-making**

**Key finding: Over the Strategic Plan period, data use has increased and there have been some successes in “new” use cases of IATI data, but the Strategic Plan did not catalyse a step change in IATI data use. Incremental improvements in data use are seen rather than any real transformation. The Strategic Plan did not articulate a strategic vision for data use.**

Data use increased among partner countries, the main original intended users of IATI data, and IATI has largely met its Strategic Plan targets for data use by this constituency. In 2023, IATI reported that 19 partner country governments systematically used IATI data to support decision-making, surpassing its target of 14 for that year. This is up from just six in 2021. Examples include Nigeria, Cameroon, Malawi, Liberia, Lesotho, Sierra Leone, and the Democratic Republic of the Congo which used IATI data in various ways to prepare development cooperation reports, analyze total resource flows, and integrate IATI data into key planning documents, such as medium-term expenditure frameworks. Nigeria and Liberia have developed useful development cooperation dashboards, which are used to track projects in real-time and build trust between different stakeholders in society.<sup>3</sup> The Gambia reports that it uses IATI data to prepare annual aid bulletins and to support budgeting and policy decisions. Outside Africa, IATI data was also used as an input in the development of the 2023-2027 Pacific Cooperation Framework. IATI also met its 2023 target on the number of partner country governments referencing IATI data in national development policies and other government documents, at 11 versus a target of 10. Several partner countries also report that IATI data has helped to elevate the issue of transparency politically within their country - an important achievement.

New uses of IATI data are also in evidence. IATI has also successfully developed new partnerships with several so-called “thematic communities” which are new users of IATI data, such as the Global Alliance for Food Security (GAFS) and the Education Cannot Wait (ECW) initiative which sit within the World Bank and UNICEF respectively. In 2023, IATI partnered with the GAFS to use IATI data to track, monitor and respond to food and nutritional insecurity. In a context in which acute food insecurity is on the

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<sup>3</sup> See: Liberia Project Dashboard: <https://liberiaprojects.org/> and Nigeria Development Cooperation Dashboard: <https://nigeria.emergently.com/>

rise, the partnership presented an opportunity for IATI to demonstrate both relevance and impact. IATI's "real-time" data was described as the main added value for the World Bank, while the technical support provided was also well-regarded. IATI has also partnered with representatives from Indigenous Peoples and Local Communities (IPLCs) to raise awareness of IATI data and show how it can be used to track funding to IPLCs. The partnership between HDX and IATI to develop a "COVID-19 Funding Dashboard" to track financial commitments and spending on responses to the pandemic in real time using IATI data is also an example of an important collaboration. This was helpful to see who was actually delivering on their commitments or not, track recipients of aid and the sectors being funded. According to several interviewees, collaborations with thematic communities show that IATI data is relevant and that it can develop more strategic advocacy-oriented collaborations. IATI should also replicate these over the next Strategic Plan period.

IATI data has also been picked up and used by several journalists in both partner and provider countries. In Kenya, it was reported that IATI data has been used to cultivate conversations with the Ministry of Finance and the Governors of various counties, and that IATI data lends "credibility" to a story. It has also been used in the Kenyan press to show the potential impact of the recent abrupt shut-down of USAID on beneficiary countries. It was also used by CNN to draw attention to aid funds being used in Ghana to benefit religious organisations that have campaigned against LGBTQ+ rights. These show that IATI data can be used in powerful and impactful ways to tell compelling and relevant stories about aid.

IATI has also largely met its Strategic Plan targets on data literacy and capacity for data use of partner countries, publishers and CSOs. The IATI secretariat has clearly strengthened its efforts to build data literacy and capacity for data use, and in some years exceeded its annual targets. For example, in 2022, IATI reports that it supported 50 partner country governments on IATI data versus a target for that year of 25; in the same year, 70 CSOs were reached versus a target of 23. Several representatives of partner countries and CSOs in Africa report that they have appreciated this training.

Despite some successes, use of IATI data still falls far short of potential. While IATI reports important successes in IATI data use in partner countries such as Liberia and Nigeria, these countries appear to be the exception rather than the norm and do not represent the systematic use of IATI data amongst partner countries. Strategic Plan targets on the numbers of partner countries that integrate IATI data into national aid management systems were also relatively modest - to achieve 5 by 2022 (met) and 10 by 2023 (not met). One interviewee reported, "in Africa, you don't yet see real data use". IATI reports that some members and organizations still struggle to understand how to fully leverage IATI data for improved outcomes. For some members, it's not clear what they're being asked to do beyond publish their data to IATI. A few CSOs see it as a simple "compliance" exercise required by donor partners.

More favourable opinions of IATI can be noted amongst partner countries versus donor countries and CSOs, but this may represent some selection "bias" in the interview sample since those partner countries most engaged in IATI were also more responsive to requests for information and an interview. Use by journalists and the media is also fairly limited, especially when compared to the OECD data systems. The Strategic Plan did not however establish any specific targets for data use by

external partners, such as the media. Overall, any improvements in data use over the Strategic Plan period have been more marginal rather than transformational.

Despite heavy investments in technical tools, interviewees universally report that these are under-utilised. They are not perceived as especially intuitive while another key barrier to data use is a lack of awareness. IATI has not met any of its annual targets on numbers of unique visitors to its website, and in most cases, results are substantially below the target set for the year. IATI, despite its status as an established initiative, is simply not well-known. For many, IATI's credibility in terms of data quality is not the main challenge, but the lack of awareness. Interviews almost unanimously report that IATI has been very "internally-oriented" over the Strategic Plan period. Many interviewees feel there has been a disproportionate focus on data quality versus data use over the Strategic Plan period, although the evaluation noted in several Members Assembly minutes that a Data Use Working Group was supported during the early period of the Strategic Plan.

As noted above, IATI has achieved some successes regarding perceived improvements in data quality and key technical tools. However, many interviewees also question why further improvements to technical tools are needed if the data is not then used. "What's the point?" in the words of one interviewee. Instead, it was suggested that the more partner countries and stakeholders know about - and use - IATI data, the more pressure there will be on publishers to continually improve data quality.

Despite UNDP and UNOPS' role as hosts of IATI, UN agencies do not appear to know about or use IATI data systematically, particularly at the country level, despite multiple potential entry points. For example, the UN development system supports partner countries to develop "Integrated National Financing Frameworks" (INFFs). INFFs are a tool to help countries strengthen financial planning processes, and mobilise and align more financing with the SDGs. So far, they have been implemented in 80 countries worldwide, including many that are heavily aid-dependent. In theory, IATI data could help to inform such exercises, by providing access to real-time and historical data on development and humanitarian aid flows to a country. In practice, there is little evidence that IATI has played a role in most INFFs. Overall, UNDP is not seen to have effectively leveraged its links to country offices, many of whom remain largely uninformed about IATI or do not see its relevance. IATI also does not appear to be integrated into the service offers of UNDP's Sustainable Finance Hub (SFH), established in 2019. Its role as a "bridge" to country offices and partner country governments has not been realised.

**- Outcome 3: The IATI Community of members, data users and publishers are increasingly engaged to maximise impact**

**Key finding: The Strategic Plan set out IATI's aim to "reinvigorate" its community of members and publishers. There is evidence of a "positive direction of travel" but member engagement is not seen as strategic.**

IATI has improved in its ability to serve as an effective network and a platform for exchange between different actors and partners. The IATI Secretariat has accelerated capacity building efforts within the IATI community, through both virtual and in-person sessions, as well as strengthened online platforms and Communities of Practice for community and knowledge exchange in an attempt to more actively

engage members. Regional capacity-building workshops in Nigeria, Kenya and Rwanda appear to have been particularly well-received by members in those regions and were described as important mechanisms through which skills can be developed and awareness increased within Africa.<sup>4</sup> IATI's free virtual online training for civil society on how to access and use IATI data was also mentioned as a valuable resource. There has also been an effort to develop materials in multiple languages to increase accessibility. Overall, 70% of survey respondents report that IATI effectively supported stakeholders to publish and use high quality data and to raise public awareness.

At the same time, IATI is not seen to engage its members strategically. A key strength is universally reported as IATI's broad-based and very committed multistakeholder membership. Many members feel however that IATI does not leverage these strengths effectively and does not engage its members strategically. This includes on both policy/strategy issues as well as practical issues. For example, it was suggested that IATI could better leverage in-kind contributions from its members, for example to co-organise (and in some cases fund) workshops, seminars or other events. It was also suggested that IATI needs to better understand what different constituencies want from IATI, then engage members in developing strategies and plans to deliver on these priorities.

To support an active and engaged membership, IATI invested significantly in the development of IATI Connect. However, feedback on the platform is mixed. While it appears to function effectively for stakeholders engaged in IATI's work on a day-to-day basis, it has been less successful in engaging members for whom IATI is not a primary focus. This suggests the need for further refinements to ensure that the platform serves a broader range of members effectively. While expensive, the in-person Members Assembly remains the most valued opportunity to engage by the widest range of members, with some interviewees suggesting more frequent regional-level, topic-specific or constituency-specific events would be welcomed.

A lack of follow-up between meetings was explicitly mentioned as a challenge. While the regional workshops in Africa are appreciated, it is not clear the extent to which these initiatives, and the online courses, are translating into increased data use and awareness since this is not being tracked. This has implications for efficiency, which are discussed further below.

Though many members can be described as "passionate" about IATI, overall members are not seen to effectively "promote" IATI at either national or international levels. All of the survey respondents who were members reported that their organisation actively participates in IATI and its Communities of Practice. Despite this high level of self-reported engagement and many members' stated commitment to IATI, in reality most do not appear to actively "champion" IATI externally and have not brought new members to IATI. Some interviewees attribute this to a simple lack of resources and a low prioritisation of IATI. Others felt the secretariat had previously not been managed well which had led to a lack of trust. Several describe IATI as a "hard sell" within their organisations because its value proposition is not clear.

### **Key finding: The Strategic Plan did not help to catalyse new members to the initiative**

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<sup>4</sup> A workshop was also held in Bangkok in 2022, but the evaluation sample did not cover any participants in this workshop so it is not included in this list.

During the Strategic Plan period, IATI successfully expanded its membership, reaching 107 members by 2023—an increase from 94 members in 2019. Although this fell slightly short of the target of 114 members, it represents an important gain and highlights ongoing interest in IATI’s mission.

At the same time, several members have also left the initiative (such as the International Finance Corporation) or scaled back their active engagement (e.g. the Gates Foundation). Membership has also not expanded in regions like Latin America, the Middle East, South Asia and Small Island Developing States (SIDS), where data needs are high. It has been reportedly difficult to engage new providers of development cooperation, such as those in the Middle East. Several interviewees also mentioned Development Finance Institutions (DFIs) and the private sector as underrepresented within the IATI community, but increasingly important to engage in view of their important roles as finance providers.

Overall, several members expressed the concern that IATI may potentially lose more members than it can recruit over the next few years due to a combination of budgetary pressures on member organisations and the failure of IATI to sufficiently demonstrate its benefit and added value. Some interviewees describe limited incentives to join IATI as a member. This has implications for financial sustainability, which are discussed further below.

## 2. Relevance

*Evaluation Question: How well did the strategic plan position IATI to respond to its mandate, to the 2030 Agenda, and to the evolving development cooperation and humanitarian landscape?*

**Key finding: The Strategic Plan was generally well-received by members, but was not seen to articulate a “strategic” vision for IATI**

IATI’s first Strategic Plan is generally seen favourably by members. Over 73% of survey respondents indicated that they felt the Strategic Plan supported IATI to plan its work more effectively. Most interviewees also indicated they welcomed the shift away from annualised work plans to enable improved medium-term planning. 60% of respondents also felt the results framework was useful for monitoring and reporting on the progress of the Strategic Plan. Similarly, over 63% felt the process to develop the plan was inclusive and participatory.

While support for the Strategic Plan is high, it is not seen to have convincingly advanced an overall strategic vision for IATI. Several interviewees expressed the view that the Strategic Plan strived for marginal rather than transformational impacts and wasn’t sufficiently aspirational. Despite a participatory and open process to develop the results framework, some expressed disappointment in some of the metrics chosen to measure “success” in the results framework, such as traffic to IATI’s website, or numbers of social media clicks and mentions etc. These “results” were seen as fairly “low level” rather than “transformative”. It was suggested that the Strategic Plan did not articulate a strategic vision for data use, and in particular how IATI data would translate into impact. The Strategic



Plan was also structured around three “outcomes” - on data quality, data use and member engagement/improvements to technical tools, however it was suggested that these are “means” rather than outcomes, and that the Strategic Plan should have more clearly set out the “impacts” it wanted to achieve, for example around aid effectiveness or accountability, and then set out how it intended to achieve them.

Members are also divided on the “robustness” of the Theory of Change that sits behind IATI’s Strategic Plan. Just 46% of survey respondents believe that the Theory of Change behind the Strategic Plan has proven to be valid and robust. The Theory of Change can be seen as overly complex with the overall impact “sustainable development outcomes are achieved” poorly defined, difficult to measure, and even more difficult to attribute directly back to IATI. “Sustainable development outcomes” in a country are in reality influenced by many factors, most of which are beyond IATI’s control and mandate.

Several core external assumptions underlying the ToC have proven not to be valid. This includes that political support for the transparency agenda would be maintained and the international community would continue to commit to improving data quality in order to support greater aid effectiveness and the achievement of the Agenda 2030. Many members in donor countries report however that political commitment to both the transparency and aid effectiveness agendas has declined over recent years. For several respondents, the ToC ignores the reality that many factors drive decision-making in aid; it should be recognized that aid decisions are predominantly political, rather than data driven. Additionally, it was assumed in the ToC that more aid transparency would drive trust and public support for aid. In some donor countries, this has proven not to be the case as aid information and data has been used by aid-critics to undermine public support for aid, as well as to sow disinformation about its uses and impacts. This underscores a heightened need to develop a strategic communications plan and the importance of telling compelling data driven positive stories about aid.

In terms of the internal assumptions underlying the ToC, it also assumed that increases in data use would drive dialogue and incentives to continuously improve the quality of data in a “virtuous circle.” In practice however, several members report limited incentives to report to IATI, while for large aid providers, a key incentive has in reality been the need to secure a favourable score on the Aid Transparency Index.

**Key finding: IATI data adds value and complements other data sources but is less well-known. Opportunities for more strategic partnerships are underexplored.**

IATI’s independence is a key comparative advantage and strength, particularly relative to the OECD’s CRS and TOSSD data reporting systems. This independence creates trust with key stakeholders such as partner countries and civil society. Many members interviewed believe that IATI serves as a “Global Public Good”.

There is also a widespread view amongst interviewees that IATI data is complementary to the data provided by the OECD and OCHA (see table x) and that they should not be seen as competitors. Interviewees report that IATI’s data “freshness” and timeliness are its main comparative advantage,

particularly vis-à-vis the OECD data reporting systems. IATI's data also better captures activities, project locations and the main implementation partners, including in particular the important role of NGOs in aid delivery. IATI also has a broader mandate than HDX and FTS, which provide data on humanitarian flows only. As such, IATI paints a more complete picture of how development cooperation and humanitarian aid are being implemented *in practice* on the ground.

The different data sites can be used to tell different data stories, but IATI has not maximised these opportunities. OECD data is useful to look back on - and analyse - broad donor policy decisions on aid but cannot support donor coordination in any practical way as the data is too old and is not sufficiently granular. Here, IATI data has an advantage. FTS provides real-time data on the funds allocated specifically to humanitarian crises, but cannot provide a complete picture of the resources available in a crisis-affected country since development cooperation flows are not tracked. HDX provides datasets that inform coordination and decision-making by humanitarian actors in the field. This includes a significant amount of non-financial information (e.g. data on numbers of internally-displaced persons in a particular crisis area or numbers of food insecure persons). These differences mean that data from the different sites can be used in different ways and to tell "different stories". There is a widely held view amongst IATI members however that IATI has not managed to tell enough compelling stories with its data and show how it is being used in different contexts. In particular, the sector experts consulted for the evaluation consider OECD's data systems to be more visible externally than IATI, and these are more actively promoted and used externally. The OECD launches new data annually, accompanied by accessible analytical reports, data visualisations and press releases, which are all proactively "marketed" externally and are widely used and reported on – not only on the publication date but throughout the year.

More strategic partnership opportunities with other data sites remain underexplored, though work to explore these has recently started. Only about 53% of survey respondents believe that IATI has effectively leveraged its programmatic (mandate to act), operational (capacity to act), and strategic comparative advantages relative to other initiatives. While there are examples of positive collaborations with other data providers, such as with HDX to develop a data portal to track financial commitments for the COVID-19 response in real time, deeper and more strategic longer-term partnerships and collaborations remain an underexplored area. Work has now started to explore these opportunities, and interviews with other data providers indicate a willingness and keen interest to partner with IATI. There are opportunities for not just technical level collaboration on data and the interoperability of various data sites, but also political advocacy around transparency and the continued value and importance of aid. More work is needed, however, to develop a compelling shared/joint narrative. This has implications for the efficiency of the initiative, which are explored in more detail below.

**Key finding: There is a widespread view that IATI needs to expand in scope "beyond aid" if it to remain relevant in the development finance landscape in the future**

There is a clear view amongst the membership that the IATI Standard is no longer well-positioned in terms of the types of data it covers. As the development finance aid landscape evolves in terms of new finance providers and new types of flows, it is clear that IATI must continuously interrogate the

data it reports to ensure it remains relevant and useful. Interviewees widely report that, looking forward, IATI needs to be able to report more effectively on a wider range of flows, with climate finance and private finance flows their main priorities. This appears to be an area where there is a large amount of consensus within the membership. Partner countries in particular report that data in these two areas would make the IATI platform more “valuable and relevant” especially with regard to private finance flows which are seen to be particularly non-transparent and there is a lack of information at the national level. For example, amongst philanthropic foundations, just eight currently report to the OECD while only three publish to IATI, according to a 2025 report from Publish What You Fund (PWYF) on the subject.

Although several members acknowledge that private sector flows are complex, it was also suggested that IATI could “make a start” with just a few critical private sector flows and build from there, such as Foreign Direct Investment (FDI) flows, impact investment, blended finance and flows from Development Finance Institutions (DFIs). In the words of one interviewee, “if IATI doesn’t report the data that people care about, people won’t use it.” If IATI can supplement data on aid flows with data on multiple other sources of external finance, then in the words of one interviewee, “this becomes much more interesting for civil society, the media, partner countries and other stakeholders.”

Several members expressed their aspiration for the Strategic Plan to position IATI to serve as a “universal data hub for development finance.” For some members, IATI has the potential to be the central platform for data alignment and coordination around common international standards. IATI should enable the automatic, quick and easy exchange of data across platforms. As technology advances rapidly, this is seen as central to remain relevant and add value. It was suggested that if IATI can shift from being a “stand-alone” initiative to become a more “universal” data initiative, it will be able to demonstrate continued relevance and added-value. A single integrated system underpinned by common standards would also be far more efficient, transparent (and ultimately fundable).

**Key finding: IATI needs to become more “outward-oriented” and focused on advocacy to position itself well to respond to its mandate. A positive shift is underway however and is especially critical in the current environment.**

IATI has not maximised its role in international advocacy efforts. IATI has not been seen as visible and has not been sufficiently promoted within key political processes or UN forums, such as the UN’s High-Level Political Forum (HLPF), UN Financing for Development (FfD) process, Climate and Biodiversity Summits (COPs) and 2024’s Summit of the Future. It is not seen to have made a noticeable impact on the 2030 Agenda. Multiple interviewees report a lack of high-level buy-in and “political champions” for IATI, both within the UN system as well as more widely.

A shift in strategic orientation to focus more on advocacy and political outreach is clearly underway however - and is essential. Since the appointment of the Executive Director in 2024, a shift is clearly in evidence characterised by an effort to “be seen” in the “right places” such as the UN’s FfD4 process. This shift in orientation to become more “outward-oriented” has been noticed and broadly welcomed by members.

It can be seen as particularly important in the current context. In many so-called “traditional” donor countries, political commitment to aid is on the decline (accompanied in several cases by major cuts to aid). Several interviewees report that transparency and aid effectiveness issues have also been “deprioritised” at the political level. While IATI to-date has not played an effective advocacy role to counter this shift, it is seen as important for the future. Many stakeholders interviewed see an increased role for IATI to counter current political narratives around aid (which present it as “wasteful” or “ineffective” or “poor value for money”). IATI is seen as a potentially important tool to challenge current misinformation about aid.

IATI’s role in international advocacy will be especially important over the next Strategic Plan period. The next five years will be pivotal from a development finance and aid perspective. It will involve a major push from the UN system and international development actors to accelerate progress towards the 2030 Agenda in a context in which many developing countries are significantly behind and aid is under strain. This will include an emphasis on the need to mobilise more resources at scale (from all sources), as well as align and coordinate funds effectively with the SDGs. In this context, IATI’s next five-year plan will cover a particularly decisive period, one in which IATI’s advocacy function arguably becomes even more important in order to demonstrate relevance. Looking forward, IATI will need to “sell” its vision for transparency and aid effectiveness in an extremely challenging external environment.

#### **IATI, EITI and OCP in comparative analysis**

The Extractive Industries Transparency Initiative (EITI) and the Open Contracting Partnership (OCP) were both highlighted by interviewees as important comparator initiatives and ones that have taken a more active role in policy and advocacy than IATI. Their Governing Boards, which incorporate high-profile external stakeholders experienced in their respective fields is also seen to position them well externally as influential and credible stakeholders.

Similar to IATI, EITI’s strength is seen as its independence and its multistakeholder character. EITI is a multi-stakeholder community driven initiative for more transparency in the extractive industries, which draws its members from a wide range of constituencies. This helps to foster a sense of trust in the initiative. In contrast to IATI however, EITI’s Board is Chaired by a high-profile public figure (currently Rt. Hon. Helen Clark) and includes other senior level figures from the public, private and non-profit sectors, as well EITI members. EITI is seen as “opinionated” and very clear in its policy positions. It develops a wide range of publications on different topics. The initiative also sets out a clearly defined set of impacts it hopes to achieve (such as increased tax revenue and reforms to legislation) as well as “softer” measures of influence such as foster dialogue and trust amongst different stakeholders at the national level. EITI has also worked with lots of partners to improve the quality of its data and has secured significant high level support from “champions” across the corporate, philanthropic and public sectors.

The OCP was initially an Open Contracting Data Standard for the disclosure of data about public procurement processes and outcomes. While it still sees procurement transparency as important, OCP has shifted its current strategy to address deeper issues of digital transformation and public procurement reform, with open data and data standards as tools for powering these approaches.

OCP has a stronger focus than IATI on using, analyzing, and visualizing procurement data, making a compelling case for open contracting and better procurement, and linking reforms directly to social impact outcomes. OCP also places a strong emphasis on use cases and impact stories. Similar to EITI, OCP's Governing Board draws on renowned individuals from across government, the private sector, civil society, the technology sector and development organizations.

**Table: Data sites in comparative analysis**

	<b>IATI</b>	<b>OECD CRS</b>	<b>OECD TOSSD</b>	<b>OCHA HDX</b>	<b>OCHA FTS</b>
<b>Data coverage (types flows)</b>	Development and humanitarian aid	ODA, OOFs, some South-South flows on a voluntary basis	ODA, OOFs, South-South and triangular cooperation, support for GPGs, private sector flows mobilised via public funds	Humanitarian aid	Humanitarian aid
<b>Data coverage (types providers)</b>	Bilateral and multilateral aid providers, international organisations, partner countries, aid implementation partners, philanthropies. Small number of private sector publishers.	OECD DAC donors, multilateral organisations, non-DAC donors on a voluntary basis	OECD DAC donors, multilateral organisations, non-DAC donors on a voluntary basis	Accredited institutions and organisations (international organisations, multilateral, bilateral, NGOs)	Humanitarian aid donors (bilateral, multilateral, philanthropies, non-profit entities all on a voluntary basis)
<b>Data timeliness</b>	Real-time data. Can be updated daily, quarterly, annually etc. In practice, some publishers report data fairly regularly, others have not published for several years	Historical data (18 month time lag).	Historical data (18 month time lag).	Real-time data. Can be updated daily, quarterly, annually etc.	Daily
<b>Granularity</b>	High granularity with detailed project-level financial and descriptive/narrative fields of information.	Higher-level aggregate data on providers and activity areas. Useful to understand overall policy direction of aid rather	Higher-level aggregate data on providers and activity areas with some high-level project descriptions	Highly disaggregated data on humanitarian issues (financial and non-financial information)	High level data on the source and destination of funds

	Information on implementation partners highly valued – paints a picture of how aid is being implemented	than how aid is being implemented in practice in the field			
<b>Data validation</b>	Data structured according to the IATI Standard, but is not independently verified by the IATI Secretariat	Highly curated and internally verified. Affects timeliness (data released yearly). Curation leads to high degree of confidence in data. A lack of trust in the ODA measure from some stakeholders means there are concerns data is presented in ways that suit providers' interests	Highly curated and internally verified. Affects timeliness (data released yearly). Curation leads to high degree of confidence in data, however some stakeholders remain suspicious as to the motivations behind TOSSD and concerns that data is presented in ways that serve the interests of providers	Data not verified. Publishers in control of their own data.	Curated by designated focal points.
<b>Data use</b>	Provides a detailed view of how development cooperation is being implemented <i>in practice</i> on the ground by various actors. Can be used to support planning and coordination	Provides a high level view of sectoral and country allocations and how policy priorities shift over time. Cannot support planning	TOSSD has a specific mandate to report on SDG 17.3.1. Data also being used to track progress towards international finance commitments, such as the Global Biodiversity Framework and the Global Compact on Refugees. At the national level, TOSSD data has	Used to coordinate responses to humanitarian crises (some data is private and can be shared only between members)	Provides real-time data on amounts of funds available for different humanitarian crises

			started to be used within a few Voluntary National Reviews (VNRs), though this is at an earlier stage		
<b>Interoperability</b>	<p>The IATI Standard provides a structured XML-based framework for publishing data on development and humanitarian finance, ensuring consistency and interoperability across reporting systems. Its schema, codelists, and attributes create a scaffold that allows cross-referencing with other standards, such as TOSSD, OECD CRS/DAC, FTS, and HDX, by aligning key taxonomies, classifications, and reporting elements. Through structured XML and standardized codelists, IATI can enable seamless data integration, reducing duplication and enhancing comparability across multiple aid and</p>	<p>The OECD CRS/DAC XML reporting structure is designed to standardize the reporting of official development assistance (ODA) and other resource flows, ensuring consistency in how donor countries and organizations report financial contributions. The IATI Standard accommodates OECD DAC/CRS taxonomies by incorporating key classifications such as sector codes, aid types, and financing modalities, allowing publishers to align their IATI data with DAC reporting requirements. This interoperability helps improve data comparability and supports more seamless integration between IATI</p>	<p>TOSSD is compatible with OECD DAC/CRS taxonomies and often used as a proxy for reporting codelists. It plays a crucial role in capturing global SDG tracking by providing a standardized approach to monitoring sustainable development finance. While its structure aligns with major international reporting systems, TOSSD also relies on Excel-based reporting instructions for data submission, making it accessible to a broad range of stakeholders while maintaining alignment with established taxonomies.</p>	<p>Integrates IATI data with the Humanitarian Exchange Language (HXL); a simpler data standard for humanitarian data used on the HDX platform and other organisations to improve the speed and interoperability of general humanitarian data.</p>	<p>FTS provides a structured reporting template, allowing organizations to manually report their financial contributions using an Excel-based format. By aligning IATI data with FTS reporting requirements, efforts are underway to streamline data-sharing mechanisms, reduce duplicative reporting burdens, and improve the accuracy and timeliness of humanitarian financial tracking.</p>



	humanitarian data ecosystems.	and OECD reporting frameworks.			
<b>External visibility</b>	Not seen as visible enough - either at country or political levels.	Highly visible - new data launched annually, accompanied by accessible analytical reports, data visualisations and press releases, which are proactively “marketed” externally and are widely used and reported on by the media, NGOs, researchers etc.	Increasingly visible – actively “marketed” in international forums	Used predominantly by humanitarian stakeholders in the field as a practical resource to support coordination	FTS is often the first port of call for humanitarian organisations to source real-time data and visualisations on humanitarian flows
<b>Membership</b>	Bilateral donors, multilateral institutions, partner countries, civil society and private sector entities on a voluntary basis	OECD DAC members are mandated to report to the CRS; for other categories, reporting is voluntary	In 2024, the International Forum on TOSSD (IFT) was established, a voluntary membership body designed to be more inclusive and open to aid recipient countries, aid providers, and international organisations. Currently there are 28 members of the IFT, drawn from across donor and recipient countries and international organisations.	No membership. Organisations must register to publish to HDX	No membership

<b>Governance</b>	Hosted by UNDP, UNOPS and Open Data Services with a Board composed by representatives of different member constituencies. UNDP hosts the secretariat; UNOPS provides financial and legal services; ODS provides technical support.	Hosted by OECD DAC	Governed by the IFT. The OECD hosts the secretariat.	Hosted by UN OCHA with Advisory Board	Hosted by UN OCHA
<b>Business model</b>	Membership fees differentiated by constituency; fees for some members (mainly partner countries waived). UNDP no longer funds any IATI positions	Assessed contributions from the member countries of the OECD DAC	Membership fees. OECD sets “expected” fee level for different categories of member but members pay what they wish	Grant funded. Largest donor is the Netherlands but there are many bilateral donors and some philanthropies. UNOCHA funds some UN positions.	Funded by overall voluntary contributions to UN OCHA. Integrated into UN OCHA’s budget. No direct fees to use or access the system.

### 3. Efficiency of the Organizational Arrangements

*Evaluation Question: To what extent have IATI's resources been used efficiently in delivering its mandate and expected results of the strategic plan?*

**Key Finding: The changes to the institutional arrangements of the secretariat, especially the appointment of the Executive Director, have been very positive and have clarified accountabilities, but the need remains for reforms to other parts of the Initiative.**

There is widespread consensus among interviewees that the appointment of an Executive Director was a critical and long-overdue decision in the implementation of IATI's Strategic Plan. Stakeholders emphasized that this leadership role has been instrumental in clarifying and strengthening the lines of accountability between the Governing Board and the Secretariat, providing much-needed structure to IATI's internal governance.

However, the transition to new institutional arrangements came at a significant financial cost, forcing IATI to draw on its emergency reserves. The direct expenses related to transition activities in the 2023 Work Plan alone amounted to \$1,006,596. Several members questioned whether these changes could have been implemented in a more cost-effective manner. Furthermore, financial efficiency did not appear to be a primary consideration in discussions on the new institutional framework, including at the Members Assembly.

Stakeholders expressed mixed views regarding whether the current Secretariat staffing levels are adequate to effectively implement the Strategic Plan. Nonetheless, there was near-universal agreement that the overall cost of the current governance structure is too high. Survey respondents were generally more optimistic about the impact of these internal changes on IATI's effectiveness, with 70% expressing a positive outlook compared to 50% of key informant interviewees.

In the absence of an Executive Director for much of the Strategic Plan's duration, the Governing Board assumed a more operational role than originally intended. There is broad recognition, including among Board members themselves, that this must change. Many believe that the Board should adopt a more strategic function to elevate IATI's profile and strengthen its impact. With most Board representatives now coming from a technical background, the composition and influence of the Board is not perceived to carry the necessary political weight to fully advance IATI's objectives. This issue is compounded by a lack of high-level political support for IATI within the UN system, including the absence of clear and visible sponsorship from UNDP, UNOPS, or other UN system entities including the Development Coordination Office or the Office of the Secretary-General (as examples).

Concerns were also raised regarding the transparency and openness of the Board selection process despite the fact that all members were explicitly given the opportunity to stand for the Governing Board. Some members perceive the selection process as predetermined, with only a limited number of positions being genuinely contested through voting. While available documentation does not support this perception, it remains an issue that should be addressed to maintain a strong and engaged membership base. To this end, some members advocated for the inclusion of senior external experts on the Governing Board to strengthen political influence. They argue that such appointments

could also enhance the Board’s active participation and mitigate potential conflicts of interest, ultimately strengthening IATI’s governance framework.

**Key Finding: Over the course of the Strategic Plan period (2020-2025) the institutional arrangements did not sufficiently support the delivery of objectives or enhance the influence of IATI, although recent evidence suggests that this is improving.**

The performance of IATI’s Strategic Plan results framework reveals significant challenges in institutional effectiveness, with only 47% of output targets met in 2023, the most recent year for which data is available. This shortfall indicates that the institutional arrangements in place were not sufficiently aligned with the needs for implementing the Strategic Plan. Particularly at the beginning of the Strategic Plan period, there is universal agreement among interviewees that the consortium was not up to the task of delivering on the plan, and required reform. An institutional working group was established to address these issues, and the MA implemented its recommendations in 2023.

There is consistent evidence from both interviews and survey responses that IATI’s institutional and governance structures are not fully optimized to support the initiative’s impact. Only 14% of interviewees expressed confidence in the current arrangements for driving impact and influence, while survey respondents were comparatively more optimistic, with 45% in agreement. Survey respondents were also notably more positive regarding the institutional arrangements’ role in supporting the implementation of the Strategic Plan, with 65% agreeing. However, interviewee perceptions remained significantly lower.

The implementation of the Strategic Plan was affected by external factors, including the COVID-19 pandemic and the subsequent transition to new institutional arrangements. Both disruptions significantly impacted the timely execution of the plan’s objectives. Analysis of interviews, Institutional Working Group records, and Governing Board minutes suggests that the previous institutional setup failed to effectively integrate the policy and technical components required to deliver the Strategic Plan, and that the delay caused by the transition was, in the end, warranted.

Most interviewees noted that the appointment of Open Data Services as the new technical partner represented a significant improvement in capacity, more effectively meeting IATI’s needs. The potential to further scale IATI’s services to better serve partner countries and publishers – and ultimately a more expanded membership – appears limited, however due to limited resources. Additionally, this transition has come at a higher financial cost. The new technical service arrangement is more expensive than the previous setup. In 2024, IATI allocated approximately \$1.71 million for technical platform support and data quality enhancements, compared to an estimated \$1.34 million in 2022.<sup>5</sup>

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<sup>5</sup> 2022 Revised budget shows: tech support 324,000, and data quality \$261,000, and personnel \$754,000 (reduced from \$981,000 due to DI project closure by year end). Total **\$1.34m**  
[https://cdn.iatistandard.org/prod-iati-website/documents/IATI\\_Revised\\_Budget\\_and\\_Workplan\\_2022\\_June\\_-\\_COVER\\_SHEET.pdf](https://cdn.iatistandard.org/prod-iati-website/documents/IATI_Revised_Budget_and_Workplan_2022_June_-_COVER_SHEET.pdf) and ODS budget in 2024 **\$1.71**, taken from:

Furthermore, since adopting the new institutional structure, IATI has been fully projectized within UNDP, meaning that contributions to staff costs are no longer made by the organization, as they were previously. IATI is not featured in the UNDP Strategic Plan, is not mentioned as a service offer of UNDP's Sustainable Finance Hub, and there is no real indication that UNDP has mobilized its Country Offices to advance the objectives outlined in IATI's Strategic Plan.

Despite these challenges, some recent developments offer promising signs. For instance, IATI's engagement in a side event linked to the 4<sup>th</sup> Financing for Development Conference preparations seeks to address the initiative's absence in the draft document. This effort highlights the ongoing struggle for IATI to secure greater recognition within the broader sustainable development system. Prioritising and accelerating this strategic engagement is seen as a vital shift by many interviewees.

**Key Finding: Useful examples exist of IATI leveraging strategic partnerships to have more efficient impact, but these efforts have been ad hoc and miss overall coherence.**

As discussed under effectiveness (above), there is mixed evidence regarding the extent to which IATI has been able to leverage its growing membership to achieve the objectives of the Strategic Plan efficiently. Survey respondents were relatively positive, with 65% agreeing that IATI had effectively utilized its membership base. In contrast, only 11% of interviewees shared this view. This discrepancy may stem from the fact that survey respondents are more likely to be active members, whereas interviewees included a broader range of perspectives.

Similarly, interviewees expressed skepticism about IATI's success in leveraging external collaborations and partnerships. Despite these perceptions, there are several positive examples of IATI successfully engaging with both members and external partners. The European Commission is hosting a seminar for member states on fostering transparency and aligning on IATI's role. Additionally, the EU has incorporated IATI data into the 'Team Europe Explorer' platform. Publish What You Fund has initiated a series of free seminars on how to navigate and use IATI data. Emergently supports IATI partner countries in integrating IATI data into national planning and budgeting processes and has developed the Country Development Finance Data tool. The World Bank is working to integrate IATI into country preparedness plans for food crises. A further milestone was the 2024 Members Assembly, hosted in Colombia—the first to take place in the Global South.

Beyond these high-profile collaborations, IATI members have also been engaged in strengthening internal capacity (see findings on effectiveness). A total of 33 members have conducted internal training sessions on using IATI data. However, once again these efforts are often ad hoc and not widely visible to all members. Rather than being part of a coherent strategic approach, they rely on individual initiatives, limiting their overall impact.

Several interviewees emphasized that IATI should place greater emphasis on forming targeted thematic partnerships (such as the work with Global Alliance for Food Security) or climate finance initiatives. A more focused and structured approach could enhance IATI's ability to scale its impact and achieve greater effectiveness. While partner countries are generally most positive about IATI support, they are calling for more in-country engagement to raise awareness with ministries. Most provider members and some CSOs express that IATI is not sufficiently engaging and supporting the visibility of transparency among their internal decision makers, for example through presentations and visits. There were positive examples of this from Rwanda, Thailand, Nigeria and Kenya, but they are limited in number.

## 4. Sustainability

*Evaluation Question: How sustainable is IATI's work at global and country level given the increased need for aid, weakening development cooperation landscape, increased open aid data initiatives offering competing services, and significant innovations across the open data and technology space?*

**Key Finding: Ownership of IATI by its members and integration of its data into national systems are central to the long-term sustainability of the initiative, however progress remains uneven and requires continued investment if it is to be sustained.**

A key weakness identified in IATI's Strategic Plan was its low level of integration into national systems, making this a central priority under Outcome 2 of the results framework. Strengthening national ownership of IATI data and ensuring its harmonization with country systems is essential for sustainability, aligning with the broader aid effectiveness agenda.

As discussed under effectiveness (above), according to the measures set out in the Strategic Plan results framework, IATI has surpassed its targets for strengthening national ownership.<sup>6</sup> This denotes accelerating national ownership, which is critical to sustainability. Several countries, including Nigeria, Liberia, Nepal, Bangladesh, Rwanda, Senegal, and Madagascar, have made efforts to incorporate IATI data into their aid management and budget planning processes. However, many of these initiatives have struggled with long-term institutionalization and sustainability due to incomplete data coverage, data quality issues, and institutional capacity.

Despite these challenges, interviewees from partner countries (predominantly in Africa) expressed a firm commitment to IATI, valuing its utility and expressing a strong desire for its continuation (it was hard for the evaluation to get a sense of whether this view is prevalent in other regions). In contrast, providers and civil society stakeholders reported a lower sense of ownership, though many recognized IATI's unique value proposition, particularly its ability to provide real-time data for crisis response—an advantage not widely available in other data initiatives.

For publishers, some interviewees emphasized the interconnected relationship between IATI and the Aid Transparency Index, which incentivizes organizations included in the Index to continue publishing data and improve its quality. This dynamic has provided an additional incentive mechanism for sustaining engagement with IATI, primarily among providers. Several providers suggested a clear incentive mechanism is needed to keep their capitals engaged in IATI given the current economic and political context.

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<sup>6</sup> As of 2023, 11 partner country governments referenced IATI data in national development policies and other government documents, exceeding the target of 10, while 19 partner country governments were systematically using IATI data for decision-making, surpassing the target of 14.

**Key Finding: IATI's business model is in a state of financial crisis and is currently unsustainable.**

A financial sustainability analysis conducted for the Governing Board in October 2024 projected that, under two out of three scenarios, IATI would face bankruptcy by 2026. This dire financial outlook underscores the urgent need for reform.

There is universal agreement among interviewees that IATI's financial model is not viable in its current form and requires immediate changes. Many interviewees, particularly those outside of partner countries, expressed concerns that the added value of paid membership has diminished. While members remain committed to transparency, the success of IATI in creating an open data ecosystem has, paradoxically, weakened the justification for continued membership fees. Some organizations struggle to justify these costs to their internal stakeholders.

One of the structural issues contributing to this challenge is that IATI does not differentiate its service offerings between paying and non-paying members, nor does it provide brand value for being part of the initiative. Several interviewees suggested that IATI should consider offering exclusive services to paying members to better justify the cost of membership.

IATI's financial stability has also been undermined by heavy spending during the Strategic Plan period. Nearly all of its financial surplus and reserves were used to fund the transition to new hosting arrangements and to support the 2024 Aid Transparency Index. This has left the organization in poor financial health. Prior to changes in institutional arrangements, UNDP contributed in-kind staff costs amounting to \$332,000 per year. However, under the new agreement, UNDP did not include any financial contributions to IATI's hosting, further increasing financial pressures, particularly with the added expense of the Executive Director role.

Raising membership fees does not appear to be a viable solution. Few interviewees indicated that their organizations could afford an increase, and several members questioned whether the current fees provide justifiable value. However, 65% of survey respondents still considered the membership fee to represent good overall value. Currently, IATI fees range from a maximum of \$85,000 per year to a minimum of \$1,100. By comparison, TOSSD's recommended contributions range from \$214,000 per year to \$2,140 per year.

The current membership fees were set in 2016. Had they been adjusted for inflation annually, they would have increased by 33% by 2024. Effectively, this means that IATI is now operating with approximately 75% of the real value of membership fees compared to a decade ago. Notably, providers—who contribute the largest portion of IATI's income—have expressed dissatisfaction with the level of engagement they receive, as highlighted in the findings on organizational efficiency.

Further inefficiencies exist in the collection of fees. Civil society members pay between \$1,100 and \$2,200 annually, yet in some cases, the administrative cost of collecting and processing these fees may be nearly as high as the revenue they generate. The exact processing costs vary by member, but UNOPS has attempted to mitigate this burden, including by halving the management fee applied to IATI. Partner country members pay an annual fee of \$2,200, but as of 2024, nearly a third (8 out of 27) had requested fee waivers.



Voluntary contributions, another source of income, have declined in recent years. The reasons for this trend have not been thoroughly investigated, but understanding the decline is essential for IATI's financial planning. Prior to the current Strategic Plan, there had been a decision by the Steering Committee (predecessor to the Governing Board) to shift from voluntary funding to a membership-based business model. The Strategic Plan does not specifically mention nor seek to mobilize voluntary funds. This is likely to be a significant contributing factor to the decline.

The 2024 Financial Sustainability Analysis and Plan for the Governing Board identified key risks to IATI's financial future. One major risk—"sudden loss of membership fees due to political changes or other concerns"—was initially rated as having a low likelihood but very high impact. However, as of early 2025, this risk had clearly materialized and the IATI risk register has been updated accordingly, though the full extent of its consequences remains uncertain. Another significant risk was the "lack of support for proposed revisions to membership contributions," which was rated as medium likelihood but high impact. Evidence from the evaluation suggests that this risk is in fact highly likely, further complicating efforts to stabilize IATI's financial future.

Without substantial changes to its financial model, IATI faces a precarious path forward. Addressing these risks and developing a more sustainable funding structure will be critical for the initiative's long-term viability.

**Key Finding: IATI's technology platform has improved from where it started, particularly for partner countries, but the long-term sustainability of its role as a technology provider is uncertain, and the current data standard is not up-to-date enough to sustain stakeholder commitment.**

There is broad agreement among interviewees that IATI's technology platform and services have seen substantial improvements, particularly for partner countries that rely on IATI for aid management. Substantive achievements include improvements to the Datastore, the launch of the Validator, the usability of the Country Development Finance Data tool, and the free Publisher. According to the survey, the usability of some aspects of the platform has been significantly enhanced, making it more accessible and practical for stakeholders.

However, some interviewees expressed concerns about the long-term sustainability of IATI's role as a technology provider (providing tools such as the Validator or CDFD) rather than merely a technology enabler (providing the standard and training). Given the anticipated constraints on future financing for transparency initiatives, maintaining IATI's position as a direct technology provider may prove challenging.

In addition to concerns about sustainability of the initiative, the IATI data standard itself has not kept pace with the evolving needs of its members. As discussed under relevance (above), the long period

since its last major update has limited its effectiveness in addressing current challenges.<sup>7</sup> As the standard struggles to address the immediate problems for its stakeholders in practical ways, the ability of IATI to maintain their engagement and sustain long-term commitment to the initiative is diminished.

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<sup>7</sup> For example, the standard does not facilitate streamlined reporting across multiple platforms, such as the OECD-DAC, OCHA-FTS, or TOSSD, missing the opportunity to help organizations reduce transaction costs. Furthermore, it does not enable the meaningful exchange of results data between management information systems—an essential function for managing sustainable development, humanitarian aid, and climate finance.

## Conclusions

*Effectiveness: How effective has IATI been in delivering its mandate and achieving strategic objectives, results as stated in its strategic plan and associated RRF; and what factors facilitated or hindered the achievement of the objectives?*

**Conclusion: While there have been advances, particularly around IATI's technical tools, the three main challenges articulated in the Strategic Plan are ultimately all still present – and prescient – five years later.**

Improvements across the three main outcome areas of data quality, data use and member engagement/improvements to technical tools are seen as mainly “incremental” rather than the “significant leap forward” as originally envisaged in the Strategic Plan. Aside from disruptions caused by the COVID-19 pandemic and the transition to new institutional arrangements, a key factor is the lack of awareness of IATI outside of the existing community. The initiative has been seen as very “inward-oriented” over the Strategic Plan period, and members have also not actively championed or promoted IATI externally either. A shift is now underway and this needs to continue. There is a need to engage the membership much more strategically in the next Strategic Plan period, both on strategic advocacy issues and to leverage in-kind support.

*Relevance: How well did the strategic plan position IATI to respond to its mandate, to the 2030 Agenda, and to the evolving development cooperation and humanitarian landscape?*

**Conclusion: The Strategic Plan was a welcome shift away from annualised plans, but it is not seen to have convincingly advanced an overall strategic vision for IATI. There is a sense that the Strategic Plan strived for marginal rather than transformational impacts and wasn't sufficiently aspirational.**

IATI has many strengths on which it can leverage – its independence, institutional home within the UN system, and a committed, diverse membership that continues to see much value in IATI. A stronger focus on political advocacy and more strategic longer-term partnerships are vital to demonstrate IATI's continued relevance and value. They are especially important in the current “aid sceptical” political context. IATI also needs to show how it can support – and indeed be a central player – in efforts to develop tools and models for the automatic and easy exchange of data across platforms and initiatives, which are the future of technology platforms. Looking forward, IATI will need to “sell” its vision for aid transparency in an extremely challenging external environment.

*Efficiency of Institutional Arrangements: To what extent have IATI's resources been used efficiently in delivering its mandate and expected results of the strategic plan?*

**Conclusion: The evaluation of IATI's resource efficiency highlights both progress and persistent challenges. While governance structures and technical capacity have improved, financial sustainability and strategic coherence remain as concerns.**

Institutional arrangements during the Strategic Plan period (2020–2025) did not fully support IATI's objectives, with only 47% of output targets met by 2023. The appointment of an Executive Director improved governance, but structural transitions incurred high costs, exceeding \$1 million in 2023.<sup>8</sup> The shift to Open Data Services enhanced technical capacity but significantly increased expenses.

A lack of high-level political support and a misalignment of governance structures with strategic needs have limited IATI's influence. Membership engagement and partnerships have been inconsistent, with promising but ad hoc collaborations. While initiatives like IATI Connect and the Members Assembly foster engagement, cost concerns persist.

The Strategic Plan did not provide a clear and agreed basis for addressing these issues. To improve efficiency, IATI must adopt a lower-cost financial model, strengthen political engagement, and implement a more strategic approach to leveraging its membership and partnerships.

*Sustainability: How sustainable is IATI's work at global and country level given the increased need for aid, weakening development cooperation landscape, increased open aid data initiatives offering competing services, and significant innovations across the open data and technology space?*

**Conclusion: IATI's sustainability is at serious risk despite progress in national ownership and technology improvements. Without urgent reforms, IATI's future is uncertain.**

While partner countries increasingly use IATI data, long-term institutionalization faces challenges due to data quality issues and financial instability. The organization's business model is unsustainable, with some projections indicating bankruptcy by 2026. Membership fees, unchanged since 2016, have lost value, while spending on governance transitions and declining voluntary contributions further strain finances. At the same time, the highest impact risks in IATI's financial sustainability analysis are already materializing.

Technologically, platform usability has improved, particularly for partner countries, but the IATI data standard has not kept pace with stakeholder needs. Limited integration with other reporting systems and missing support for results data exchange reduce its long-term relevance. To sustain its impact, IATI must stabilize its finances, enhance its data integration capabilities, and adapt to evolving transparency needs. Without these changes, its ability to compete and remain viable in the global aid data landscape is uncertain.

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<sup>8</sup> Financial Report for FY 2023 as presented in Table 2.2 Total Expenditure by activity and personnel for 2023: [MA Paper 3 Financial Reporting FY 2023](#)

# Recommendations

**Recommendation: IATI must undertake urgent financial and institutional adjustments to be affordable and resilient in time for the next Strategic Plan**

**The financial model of IATI must be overhauled to avoid bankruptcy.** In doing so, IATI should carefully review its operational delivery mechanisms to focus on affordability and improved efficiency in financial management and to reduce costs. The initiative should advocate for the explicit inclusion of IATI in UNDP's strategic plan and budget, including as a service option in the Sustainable Finance Hub. Under the next Strategic Plan, IATI should make a concerted attempt to diversify funding sources (grants, voluntary contributions, strategic partnerships).

**Shift the Governing Board to a more strategic role.** Now that institutional changes to the secretariat have been completed, the Governing Board should consider reconstituting to reduce operational involvement and focus on high-level political engagement. This requires high level representation by members, and robust and transparent selection processes. Consider including external experts to enhance governance capacity and credibility.

**Recommendation: Focus on strengthening the value proposition to members and the incentives to publish quality data**

**Give organizations a clear reason to publish and use IATI data.** There are four possible incentives for organizations to publish to IATI: 1) intrinsic valuing of transparency, 2) mandates linked to financing (from donors or recipient countries), 3) internal and external political pressure (such as ATI, or FFD commitments), or 4) cost saving in reporting transaction costs. The first of these incentives is the weakest and should not form the basis of the next Strategic Plan. Instead, it needs to be explicit about building and maintaining strong incentives that make organizations want to (keep) publish(ing) to IATI.

**Give publishers a reason to contribute financially to the sustainability of IATI.** IATI needs to expand and differentiate its membership model, for example through providing exclusive benefits for paying members, such as premium analytics, consulting support, and brand visibility. It needs to strengthen direct engagement with provider members to ensure they continue to see clear value, while improving outreach to underrepresented regions and groups (e.g., Latin America, Small Island Developing States etc).

**Recommendation: Prioritise advocacy and strategic partnerships to promote data use with efficiency and at scale**

**The next Strategic Plan should accelerate work that has started to position IATI within global policy platforms** (e.g. Financing for Development process, COP climate summits). There is a clear view that IATI "can't just be a database" or just a technical standard. This is not compelling enough to sustain the initiative and ensure it can deliver impact. IATI should target structured partnerships with climate finance actors, humanitarian initiatives, and multilateral banks; and leverage these partnerships to enhance data visibility, increase funding, and expand reach.

**IATI needs to have an opinion backed by evidence.** IATI needs to be able take-on the challenges of the moment to clearly demonstrate its added value. In the current political context, this means that IATI needs to make a clear case for aid and for aid transparency. In the current context of aid skepticism, aid disinformation and aid cutbacks, IATI needs to have an opinion backed by evidence which sets out a compelling case for aid, counters hostile narratives and shows the harms that cuts can have on partner countries and vulnerable communities. IATI will need to marshal more use cases of its data and leverage partnerships more strategically to “tell stories” with its collaborators more effectively. This will imply more strategic long-term partnerships with other organisations and initiatives (such as so-called “thematic communities”) as well as with academia, think tanks, data initiatives, and others. It will also need to enhance its communications capabilities.

**Continue to strengthen national ownership and integration into Country Systems.** Deepen the engagement with national governments to ensure long-term IATI adoption, including providing a platform for ongoing technical support, training, and incentives for government use. Much better use needs to be made of UNDP’s country offices to promote IATI adoption in national systems and processes, such as aid information and management systems and INFFs, leveraging work by IATI members to improve harmonization of IATI data with country-level budget and planning systems.

**Recommendation: IATI should play a central role to drive forward the automatic exchange of data and interoperability of different data systems**

**IATI should show leadership in driving forward work to develop a trusted, centralised platform for the automatic exchange of development finance data.** There is a need to address the fragmentation of different data platforms and data standards, while expand the range of flows covered by IATI. IATI can leverage its independent and trusted status to lead efforts amongst various organisations (e.g. OCHA, OECD, UNCTAD, AidData etc.) to develop a “unified” development finance data hub, and develop models for the automatic exchange of data. This will not only lead to huge efficiency gains in data, but is likely to represent an attractive funding proposition, potentially helping IATI to address some of its challenges related to financial sustainability. UNDP, as host organization, enjoys widespread trust and is in a unique position to host such a platform, and has the country level footprint to ultimately make it a success.

## Lessons learned

### **Lesson: Balance data quality with data use.**

The focus on improving data quality has not translated into a significant increase in data use. The lack of awareness about IATI and its value is a bigger issue than just the credibility of data. IATI has learnt the importance of prioritizing outreach, awareness campaigns, and capacity-building to promote data use. Working with partner countries, UN agencies, and other key stakeholders to integrate IATI data into decision-making processes is essential.

### **Lesson: Improving incentives for data publishing**

Several organizations have come to see IATI reporting as a compliance exercise rather than a value-adding activity. This has impacted membership engagement. Providing tangible incentives for high-quality data publishing has been an important lesson for IATI, such as giving recognition, publicizing case studies showcasing impact, and integrating with international rankings like the Aid Transparency Index.

### **Lesson: The importance of a more ambitious and transformational vision for the SP**

The Strategic Plan was functional but lacked a bold, strategic vision for IATI's long-term role. Consequently, while data use has increased incrementally, the Strategic Plan did not drive a transformative shift. A lesson for future strategic plans is to define clear impact-oriented goals rather than focusing only on means (data quality, use, and engagement). IATI must be able to articulate how its data directly contributes to aid effectiveness, accountability, and decision-making.

### **Lesson: It needs to be clear who is responsible for delivering on the Strategic Plan**

While the vision of the Strategic Plan was that it should cover the initiative as a whole (members, secretariat, and Governing Board), in practical terms this has been hard to realise. Members are keen that there shouldn't be specific tasks allocated to them in the SP as this would probably lead to a few leaving or deterring others from joining, but there needs to be more ownership and greater clarity on who should be leading, and how the secretariat can better work with and through members to deliver results.

### **Lesson: IATI can be about more than just ODA**

Aid transparency and effectiveness have been deprioritized in political discussions, making IATI less visible. A lesson from this Strategic Plan is that IATI has been too focused on traditional aid and can expand its scope to include climate finance, private finance, blended finance, and development finance institutions (DFIs). IATI data has a role to play to counter misinformation about aid effectiveness and value-for-money. Data-driven reports and media engagement strategies can help to ensure IATI is seen as a key authority on aid transparency and financial flows, such as philanthropic flows, Foreign Direct Investment (FDI), impact investments, and blended finance.

### **Lesson: Institutional changes have been costly and need better financial planning**

The transition to new institutional arrangements required IATI to use emergency reserves and did not prioritize cost-efficiency. A key lesson from this Strategic Plan is that IATI is not as agile as it needs to be, and that cost-efficiency must be a central consideration in future governance changes.

# Annexes

## TOR for the evaluation

### Terms of Reference

Consultancy: 2 Evaluators for the Independent Review and Evaluation of the IATI Strategic Plan

Project Title: International Aid Transparency Initiative (IATI Secretariat)

Duty station: Home-based

Period of assignment/services (if applicable): Over a 2-month period

### 1. Background

The International Aid Transparency Initiative (IATI) was established to improve the transparency of aid, development, and humanitarian resources to increase their effectiveness in tackling poverty. The IATI Standard, a framework for publishing data on development cooperation and humanitarian action, has been widely adopted by donor governments, multilateral institutions, and NGOs. IATI aims to provide comprehensive, accessible, and high-quality data to improve decision-making and accountability in development efforts.

The IATI Strategic Plan 2020-2025 outlines IATI's vision, goals, and strategic objectives to enhance the transparency and use of data on development cooperation and humanitarian action. This Strategic Plan aims to achieve several key objectives, including:

- **Strengthening Data Quality:** Improving the accuracy, timeliness, and comprehensiveness of data published to the IATI Standard. Ensuring that data is not only available but also reliable and up to date is critical to building trust and enabling effective decision-making.
- **Enhancing Data Use:** Promoting the use of IATI data by various stakeholders, including governments, civil society, and the private sector, to inform decision-making and improve development outcomes. This involves not only making data accessible but also ensuring that stakeholders have the tools and capacity to analyze and use the data effectively.
- **Expanding Membership and Coverage:** Increasing the number of organizations supporting IATI financially as members of the initiative, as well as numbers of organizations publishing data to IATI, including new donors, NGOs, and private sector entities. A broader base of publishers enhances the comprehensiveness of the data available, providing a more complete picture of development efforts.
- **Improving Technical Infrastructure:** Upgrading the technical platforms and tools that support IATI data publication and use. This includes enhancing the user interface, ensuring the system's scalability, and integrating new technologies to improve data management.
- **Fostering Partnerships:** Building strategic partnerships to enhance the impact and reach of IATI. Collaborating with other organizations and initiatives can amplify IATI's efforts and contribute to a global culture of transparency and accountability.

The period covered by this evaluation is the current life cycle of the IATI Strategic Plan, from 2020 to 2025. This period has been marked by significant global challenges, not least the COVID-19 pandemic during the early years of the Strategic Plan cycle which influenced the mandate, the means of delivery and the levels of achievement. Furthermore, increased displacement dramatically increased humanitarian needs, underscoring the critical importance of timely and transparent aid information. The reverberating global impact of the pandemic has exacerbated existing crises and created new ones, leading to an increased demand for development and humanitarian assistance. At the same time, resources have become scarcer, making it more important than ever to optimize the use of available aid.

Moreover, the rise of digital technology, Artificial Intelligence (a.i.) and the push for open data have also transformed the context in which IATI operates. There is a growing recognition of the value of transparency and open data in driving accountability and improving development outcomes. IATI's mandate to provide high-quality, accessible data is more relevant than ever in this digital and open data era.

A further significant factor impacting the achievement of the Strategic Plan objectives has been the transition of IATI Secretariat hosting arrangements between 2022 and 2023. The transition and associated change management from internal to external technical delivery partners was disruptive for 18 months (about 1 and a half years) and resulted in a more accountable, streamlined Secretariat structure. As of 1 July 2023, UNDP hosts the IATI Secretariat and is responsible for IATI's policy and technology services. UNOPS is the Secretariat's service provider of the initiative's legal and operational functions, and Open Data Services Cooperative is the Secretariat's technology delivery partner (contracted via UNDP). In the face of such significant global disruption, IATI also faced challenges from other new data standards and technologies unhampered by legacy.

This evaluation is crucial for IATI to continue adapting to the changing global context and to ensure that it remains effective in fulfilling its mandate. By assessing the progress and effectiveness of the Strategic Plan (2020-2025), this evaluation will provide valuable insights and recommendations that will help IATI to enhance its impact and continue to lead global efforts in aid transparency.



## 2. Purpose and Objectives of the Evaluation

The primary purpose of this evaluation is to review the implementation of Strategic Plan objectives (2020-2025) within the context of its mandate, strengthen IATI's accountability to its key stakeholders, and enable drawing of key lessons learnt to support transformation of the initiative.

The following are the specific objectives:

- Assess IATI's effectiveness to deliver its Strategic Plan 2020 – 2025, including the relevance of its IRRF vis its unique mission, mandate, comparative advantage in the broader development cooperations.
- To assess IATI's performance in delivering on its Strategic Plan objectives (2020-2025), while identifying contextual, strategic and institutional factors that are positively and/or negatively affecting results.
- To formulate recommendations for IATI's consideration in the next Strategic Plan (2026-2030) based on key lessons learnt.

## 3. Scope and Key Evaluation Questions

The scope of the evaluation covers the Strategic Plan 2020 to 2025 as approved by the IATI Governing Board and will also cover interventions implemented during the cycle. The scope encompasses the overarching vision of the Strategic Plan, initiative performance, how the Strategic Plan has been operationalised, the effectiveness of key institutional enablers established, and progress against planned outcomes and sustainability of the outcomes.

Key evaluation questions include:

Relevance:

- How well did the strategic plan position IATI to respond to its mandate, to the 2030 Agenda, and to the evolving development cooperation and humanitarian landscape?
  - How well the strategic plan supported IATI to plan its work to promote transparency of aid data to enhance effective decision making.
  - How relevant and coherent are IATI's strategic objectives, results, indicators, and targets as stated in the Result and Resource Framework (RRF)?
  - To what extent has the Strategic Plan reflected and leveraged IATI's comparative advantage/complementarities with other global initiatives?
  - How has IATI leveraged its programmatic (mandate to act), operational (capacity to act), and strategic (positioning to act) comparative advantages?
  - To what extent has IATI sought and achieved complementarities and synergies through partnerships and its catalytic role?
- How have these efforts strengthened IATI's positioning within the spaces of development cooperation and humanitarian action?

Efficiency of Institutional arrangements

- To what extent have IATI's resources been used efficiently in delivering its mandate and expected results of the strategic plan?
- To what extent are changes to the internal environment underpinned by effective structures, reforms, systems, and business models, making IATI more fit for purpose and helping accelerate progress towards enhancing aid transparency and accountability?
- How effective are IATI's institutional arrangements in supporting the Strategic Plan's objectives?
- Does the institutional and governance environment enable IATI to be influential at the global, regional and country level to maximise strategic impact and drive improvements in aid transparency and accountability?
- How well is IATI's internal institutional capacity (following the transition arrangement of the secretariate align with the needs and goals of the Strategic Plan?
- To what extent did IATI leverage its diverse network of membership to achieve the goal and objective of the IATI SP?
- How efficient are collaborations and partnerships in terms of leveraging and catalyzing the use of resources?

Effectiveness

- Is IATI effectively supporting the enhancement of aid transparency and accountability through the Strategic Plan?
- How effective has IATI been in delivering its mandate and achieving strategic objectives, results as stated in its strategic plan and associated RRF? To what extent has IATI effectively supported stakeholders in publishing and using high-quality data on development cooperation and

humanitarian action, raising public awareness, and establishing practices for monitoring and reporting?

- How and to what extent have new and existing IATI initiatives introduced during the period of the Strategic Plan supported the development of comprehensive and integrated approaches to transparency and accountability?
- What factors may have facilitated or hindered the achievement of the objectives?
- What are the key lessons learned from IATI's support efforts that should be addressed in the new Strategic Plan?
- Has the initiative currently using its assets and comparative advantages to maximum effect and leverage them as part of effective partnerships towards increased transparency of aid?

#### Sustainability

How sustainable is IATI's work at global and country level given the increased need for aid, weakening development cooperation landscape, increased open aid data initiatives offering competing services, and significant innovations across the open data and technology space?

#### 4. Evaluation Principles, Approach and Methodology

The Evaluation shall be guided by the UNDP evaluation principles as stated in the policy<sup>1</sup>, which are fully aligned with OECD and other international evaluation guidelines. Among others the following key principles shall be upheld: (i) high ethical standards and norms; (ii) independence, impartiality and credibility; (iii) high technical competence and rigour; and (iv) Evaluation processes should be transparent and fully inclusive of all stakeholders.

In terms of approach and methodology, the Review will employ a mixed-methods approach, including: Document Review: Analysis of IATI's Strategic Plan, annual reports, meeting minutes, policy documents, and other relevant materials. This will provide a comprehensive understanding of the planned activities, the progress made towards achieving the objectives, and any challenges encountered during implementation.

Stakeholder Interviews and Surveys: Engaging with IATI members, partners, donors, and users of IATI data to gather qualitative and quantitative data. This will provide insights into the experiences and perspectives of IATI's stakeholders, including their views on the relevance and effectiveness of the Strategic Plan, the factors that have influenced its implementation, and the impacts it has had.

Case Studies: In-depth analysis of specific initiatives or outcomes to provide detailed insights. This will involve selecting a number of specific initiatives or activities carried out under the Strategic Plan and conducting a detailed analysis of their implementation, outcomes, and impacts. This will help to identify successful strategies and approaches, as well as any challenges and lessons learned.

Comparative Analysis: Benchmarking against similar initiatives or organizations to identify strengths and areas for improvement. This will involve comparing IATI's Strategic Plan and its implementation with similar initiatives or organizations to identify best practices and areas where IATI could improve its approaches.

The methodology will ensure a comprehensive and balanced assessment, incorporating diverse perspectives and robust data. It will involve triangulating data from multiple sources to validate the findings and ensure their reliability.

#### 5. Evaluation Phases

Phase 1: ToR Development and Onboarding: This phase involves the development of the Terms of Reference (ToR) for the evaluation and the onboarding of the evaluation team. During this phase, the ToR will be reviewed and finalized, ensuring that it accurately reflects the scope, objectives and methodology of the evaluation. The evaluation team will be recruited and briefed on the ToR, IATI's strategic context, and the evaluation process. Initial planning and coordination meetings will be held to align the team's understanding and approach.

Phase 2: Inception and Desk Review: This phase will include consultations with the IATI Secretariat and stakeholders, development of the assessment methodology, and preparation of an inception report. The inception phase will involve reviewing relevant documents, conducting initial consultations with key stakeholders, and developing a detailed methodology and work plan for the assessment. The inception report will outline the methodology, work plan, and data collection tools to be used in the assessment.

Phase 3: Data Collection: Collection of data through document reviews, interviews, surveys, and case studies. The data collection phase will involve gathering qualitative and quantitative data from a range of sources, including IATI documents, stakeholder interviews, surveys, and case studies. This will provide a comprehensive understanding of the implementation and impacts of the Strategic Plan.

Phase 4: Data Analysis: Analysis of collected data, including triangulation of findings and preparation of interim reports. The data analysis phase will involve analyzing the data collected in Phase 2, identifying key findings and trends, and preparing interim reports summarizing the initial findings. This phase will also involve triangulating data from multiple sources to validate the findings and ensure their reliability.

Phase 5: Reporting: Preparation of the draft assessment report, incorporation of feedback, and finalization of the report. Presentation of key findings to IATI stakeholders. The reporting phase will involve preparing a draft assessment report, sharing it with IATI and its stakeholders for feedback, and finalizing the report based on the feedback received. The final report will include an executive summary, findings, conclusions, and recommendations. The key findings will be presented to IATI stakeholders in a final presentation.

Phase 6: Publication and Dissemination: This phase involves the publication and dissemination of the final assessment report. Once this report is finalized, it will be formatted for publication and distributed to all relevant stakeholders, including IATI members and the wider community

## Evaluation matrix

The following evaluation matrix has been developed based on the Terms of the Reference, prioritising the key evaluation questions relating to the criteria of effectiveness, efficiency, relevance and sustainability. Each question is accompanied by a set of evaluation assumptions that will be tested using the data sources described above. Every assumption will use at least two sources of evidence to ensure reliability. The extent to which evidence is found to support or challenge these assumptions will provide the basis for overall answers to the evaluation questions.

Evaluation Criteria and Questions	Evaluation Assumptions	Level of evidence validating assumption		
		KII/FGD	Desk review	Survey
<b>Relevance:</b> How well did the strategic plan position IATI to respond to its mandate, to the 2030 Agenda, and to the evolving development cooperation and humanitarian landscape?	<ul style="list-style-type: none"> <li>The strategic plan supported IATI to plan its work to promote transparency of aid data to enhance effective decision making.</li> </ul>	H	M	H
	<ul style="list-style-type: none"> <li>The theory of change behind the IATI Strategic Plan was valid and helpful</li> </ul>	L		M
	<ul style="list-style-type: none"> <li>IATI's strategic objectives, results, indicators, and targets as stated in the Result and Resource Framework (RRF) are relevant and coherent.</li> </ul>	M		H
	<ul style="list-style-type: none"> <li>The Strategic Plan reflected and leveraged IATI's comparative advantage/ complementarities with other global initiatives</li> </ul>	H	M	H

	<ul style="list-style-type: none"> <li>IATI leveraged its programmatic (mandate to act), operational (capacity to act), and strategic (positioning to act) comparative advantages.</li> </ul>	H		M
	<ul style="list-style-type: none"> <li>IATI sought and achieved complementarities and synergies through partnerships and its catalytic role</li> </ul>	H	M	
	<ul style="list-style-type: none"> <li>These efforts strengthened IATI's positioning within the spaces of development cooperation and humanitarian action.</li> </ul>	M		
<b>Efficiency of Institutional Arrangements</b> To what extent have IATI's resources been used efficiently in delivering its mandate and expected results of the strategic plan?	<ul style="list-style-type: none"> <li>Changes to the internal environment underpinned by effective structures, reforms, systems, and business models, making IATI more fit for purpose and helping accelerate progress towards enhancing aid transparency and accountability</li> </ul>	M		H
	<ul style="list-style-type: none"> <li>IATI's institutional arrangements are effective in supporting the Strategic Plan's objectives</li> </ul>	L		H
	<ul style="list-style-type: none"> <li>Institutional and governance environment enable IATI to be influential at the global, regional and country level to maximise strategic impact and drive improvements in aid transparency and accountability</li> </ul>	L		M
	<ul style="list-style-type: none"> <li>IATI's internal institutional capacity (following the transition arrangement of the secretariate) align with the needs and goals of the Strategic Plan</li> </ul>	H		
	<ul style="list-style-type: none"> <li>IATI leveraged its diverse network of membership to achieve the goal and objective of the IATI SP</li> </ul>	L		H

	<ul style="list-style-type: none"> <li>• Collaborations and partnerships are effective in terms of leveraging and catalyzing the use of resources</li> </ul>	L		
<b>Effectiveness</b> How effective has IATI been in delivering its mandate and achieving strategic objectives, results as stated in its strategic plan and associated RRF; and what factors facilitated or hindered the achievement of the objectives?	<ul style="list-style-type: none"> <li>• IATI is effectively supporting the enhancement of aid transparency and accountability through the Strategic Plan</li> </ul>	H	H	H
	<ul style="list-style-type: none"> <li>• IATI effectively supported stakeholders in publishing and using high-quality data on development cooperation and humanitarian action, raising public awareness, and establishing practices for monitoring and reporting</li> </ul>	H	H	H
	<ul style="list-style-type: none"> <li>• IATI initiatives introduced during the period of the Strategic Plan supported the development of comprehensive and integrated approaches to transparency and accountability</li> </ul>	L	H	H
	<ul style="list-style-type: none"> <li>• There are key lessons learned from IATI's support efforts that should be addressed in the new Strategic Plan (will be addressed in Lessons Learnt section)</li> </ul>	L		
	<ul style="list-style-type: none"> <li>• The initiative is currently using its assets and comparative advantages to maximum effect and leveraging them as part of effective partnerships towards increased transparency of aid</li> </ul>	M	M	M
<b>Sustainability</b> How sustainable is IATI's work at global and country level given the increased need for aid, weakening development cooperation landscape, increased open aid data initiatives offering competing	<ul style="list-style-type: none"> <li>• Countries integrating IATI into national policies and systems</li> </ul>	M	H	
	<ul style="list-style-type: none"> <li>• Long-term memberships of IATI and financial sustainability of the business model</li> </ul>	L	L	M
	<ul style="list-style-type: none"> <li>• Active members (what proportion of members play an active role)</li> </ul>	M	M	H

services, and significant innovations across the open data and technology space?	<ul style="list-style-type: none"> <li>Suitability/usability of the technology underpinning IATI in a fast-changing landscape</li> </ul>	M	M	
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## Interview guides

### Introduction for All Interviews

1. Names, role/positions
2. Date, time, location, conditions
3. Thank you for time
4. Independent Review and Evaluation of the IATI Strategic Plan (2020-2025) -We are independent evaluators commissioned to undertake evaluation.
5. Value very much hearing your experience, impressions, concerns about work of IATI
6. Responses confidential, your input not identified with you in reports produced by the team.
7. Will ask a series of questions: if you don't understand question; if you prefer not to answer or cannot answer; if you change your mind about your answer, tell me.
8. Do I have your permission to continue to interview?

### *Interview questions*

#### **Relevance:**

In your view, how well has the Strategic Plan positioned IATI to respond to the 2030 Agenda, and to the evolving development cooperation and humanitarian landscape? How well placed is IATI to promote aid transparency and strengthen decision-making related to both development and humanitarian aid?

Follow-up questions:

- Has the theory of change behind the IATI Strategic Plan proven to be valid and helpful?
- Did the strategic plan support IATI to plan its work more effectively?
- Are the strategic objectives, results, indicators, and targets in the SP relevant and coherent?
- What are the other major players in transparency that IATI compares to? Has the Strategic Plan helped leverage IATI's comparative/collaborative advantage compared to these other global initiatives?
- How relevant are the services that IATI provides? Do IATI's service offers play to its strengths; i.e. what is its value compared to other sources of data in the market?

#### **Effectiveness**

In your view, how effective has IATI been in delivering its mandate and achieving strategic objectives, results as stated in its strategic plan and associated RRF; and what factors facilitated or hindered the achievement of the objectives?

Follow-up questions:

- Has IATI effectively supported stakeholders in publishing and using high-quality data?
- Has IATI helped raised public awareness and promoted good practices for transparent monitoring and reporting?
- Have IATI initiatives introduced during the period of the Strategic Plan supported the development of comprehensive and integrated approaches to transparency and accountability?



### **Institutional Arrangements/Efficiency**

To what extent do you judge IATI's resources to have been used efficiently in delivering its mandate and expected results of the strategic plan?

Follow-up questions:

- Have IATI's institutional arrangements been effective in supporting the Strategic Plan's objectives; and have the changes made to the internal environment during the SP made IATI more fit for purpose or not?
- Do IATI's institutional arrangements enable it to be an influential player on aid transparency (at the global, regional, and country levels)?
- How effective are IATI's (new) institutional arrangements in supporting the effective implementation of the Strategic Plan; or could they be further strengthened?
- Do IATI's institutional arrangements enable it effectively leverage its diverse membership and foster external collaborations and partnerships?
- Do IATI's institutional arrangement enable it to mobilise and make effective use of resources?

### **Sustainability**

To what extent do you see IATI's work at global and country level as sustainable given factors such as the increased need for aid, weakening development cooperation landscape, increased open aid data initiatives offering competing services, and significant innovations across the open data and technology space?

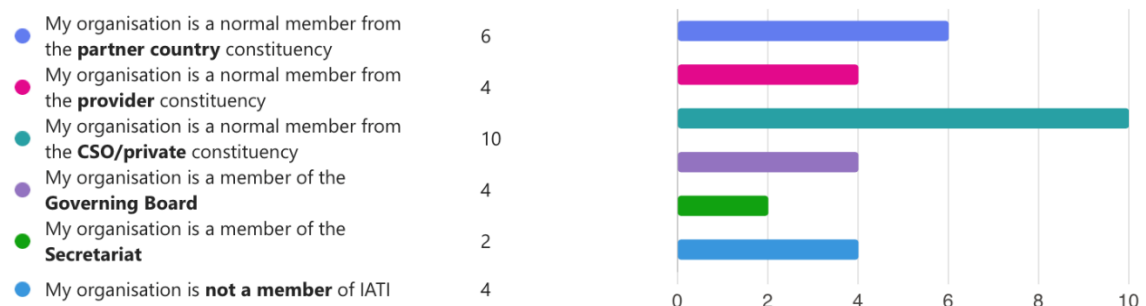
Follow-up questions:

- What does good value / value for money look like for IATI members from their participation in IATI?
- What further reforms could be proposed to strengthen IATI's institutional arrangements to ensure it is fit for purpose and can create long term strategic value?

## Web-based survey

The survey had 30 respondents.

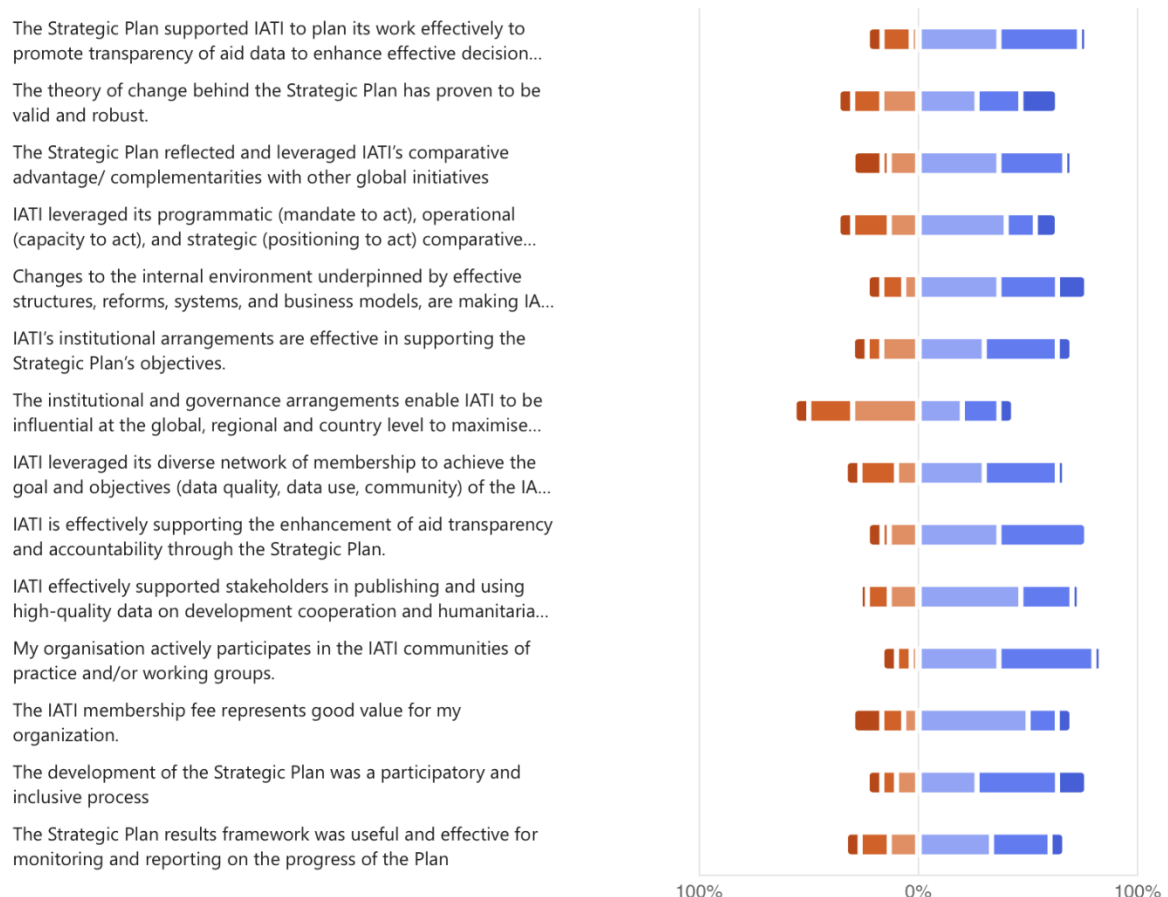
1. Please indicate which statement most represents your organisation

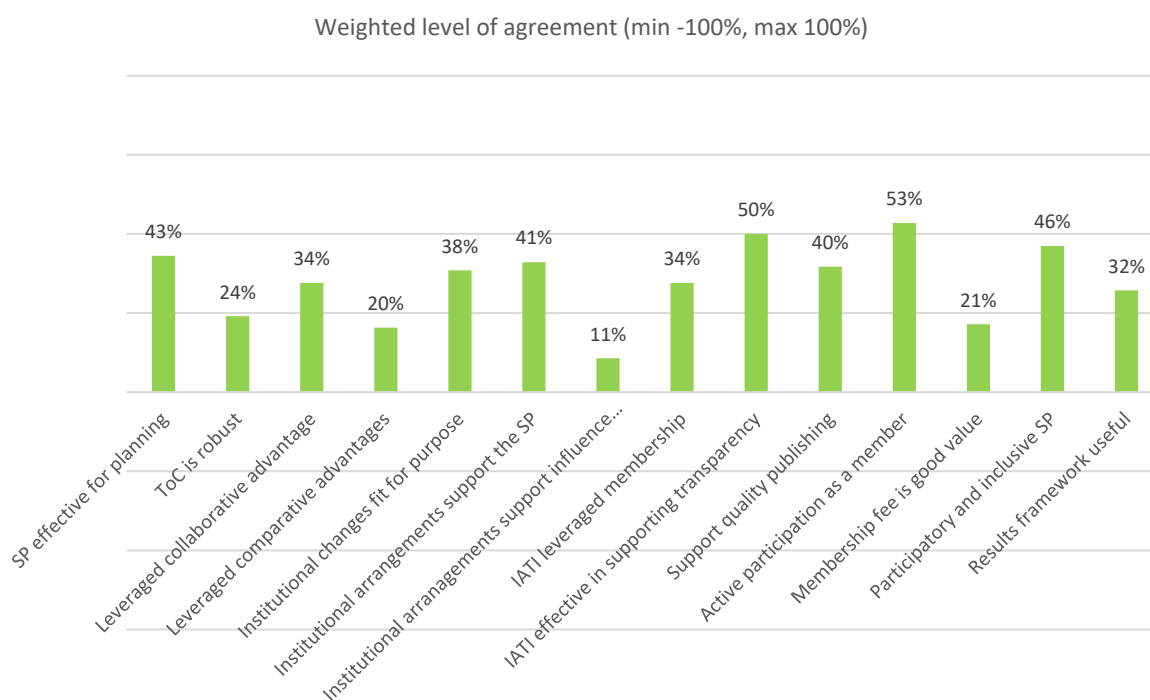


2. Please indicate the extent to which you agree with the following 14 statements

[Mc](#)

Strongly disagree Disagree Neutral Agree Strongly agree Not sure





Here is a summarized version of comments on how the IATI Strategic Plan has helped respondents and organizations advance the aid transparency agenda:

1. **Capacity Building & Institutional Strengthening**
  - Improved transparency, accountability, and financial management systems.
  - Enhanced ability to develop effective programs supporting aid transparency.
2. **Data Management & Reporting**
  - Countries like Lesotho have integrated IATI standards into national aid management systems.
  - Improved tracking, reporting, and analysis of development cooperation flows.
  - Regular publication of Development Cooperation Reports aligned with IATI principles.
  - Enhanced data-sharing with donors for better decision-making.
3. **Stakeholder Engagement & Learning**
  - Participation in IATI forums, workshops, and online dialogues has improved transparency, accountability, and community engagement.
  - Strategic outreach efforts have strengthened commitment to aid transparency beyond individual organizations.
4. **Improving Data Quality & Analysis**
  - Development and use of the IATI data validator have significantly improved data quality.
  - IATI data has enabled policy analysis and advocacy for more effective aid strategies.
  - Tools like the Development Cooperation Landscape (DCL) facilitate better data visualization and stakeholder engagement.
5. **Knowledge & Awareness Building**

- Workshops, such as in Nairobi, have increased understanding of IATI and its objectives.
- IATI data has supported the publication of reports on Development Cooperation Effectiveness.

#### **6. Challenges & Recommendations**

- Some respondents feel that while IATI emphasizes processes and procedures, there should be more support for member states in data usage and publication.
- Without strengthening national capacities, the initiative's impact may be limited.

Summary of feedback on the current IATI Strategic Plan & lessons for improvement:

#### **Weak Areas Identified**

##### **1. Limited Government & Institutional Engagement**

- Lack of strong involvement from governments and national statistical offices to enhance transparency and accountability.
- More private sector participation needed in aid transparency efforts.

##### **2. Challenges in IATI's Role & Implementation**

- Unclear distinction between IATI as an enabler of data tools vs. a direct provider of services.
- Weak approach to ensuring better data use and alignment with sustainable development goals.
- Insufficient response to declining political interest in transparency and changing aid dynamics.
- Over-planning and weak implementation processes, with concerns over secretariat influence.

##### **3. Data Quality, Access & Use**

- Gap between aid transparency efforts and integration into policymaking and planning.
- Need for stronger capacity-building for policymakers to utilize aid data effectively.
- Donor-reported data inconsistencies; need for automated data validation and stronger donor-government collaboration.
- Limited real-time data updates and public accessibility to aid information.
- Need for more sector-specific aid reporting (e.g., education, health, renewable energy) aligned with IATI standards.

##### **4. Governance & Accountability Issues**

- Concerns over IATI being donor-driven, with failures often downplayed.
- Weak governance, with members feeling uninformed and secretariat wielding excessive influence.
- Alleged bias towards UN-driven partner country governments, including regimes with poor human rights records.
- Lack of monitoring on whether IATI improves decision-making in poverty alleviation.

##### **5. Language & Communication Barriers**

- Lack of local language translations, limiting outreach and engagement.
- Weak communication, especially for French-speaking stakeholders, as English is the only working language.

- Insufficient focus on end-users' ability to analyze and use data effectively.

### **Recommendations for the Next Strategic Plan (2025-2030)**

- 1. Stronger Government & Institutional Engagement**
  - More involvement from governments, national statistical offices, and private sector actors.
  - Strengthen IATI's institutional position to influence national policies.
- 2. Improved Data Integration & Usability**
  - Focus on practical ways to integrate IATI data into policymaking and development planning.
  - Enhance real-time data validation and ensure consistency in donor reporting.
  - Increase sector-specific aid reporting frameworks for better transparency.
- 3. Greater Transparency & Governance Reforms**
  - Ensure the IATI secretariat operates with greater accountability to its members.
  - Address concerns about bias in partnerships and donor-driven governance.
  - Develop mechanisms to monitor and measure IATI's real impact on poverty reduction and decision-making.
- 4. Stronger Capacity Building & Training**
  - Conduct more local training, particularly in partner countries, to improve data literacy.
  - Increase outreach and training for civil society organizations (CSOs) to enhance IATI data reporting.
  - Mandatory stakeholder analysis, strategic communication, and risk management sessions for the new plan.
- 5. Language & Accessibility Improvements**
  - Translate materials into multiple local languages to enhance inclusivity.
  - Improve strategic communication to better engage non-English speakers.
- 6. Forward-Thinking & Risk Assessment**
  - Use SWOT analysis to address Strengths, Weaknesses, Opportunities, and Threats.
  - Consider external risks (e.g., future global crises like COVID-19) in planning.

Summary of additional comments on the IATI Strategic Plan:

### **Key Areas for Improvement & Recommendations**

- 1. Stronger Stakeholder Engagement & Political Support**
  - More stakeholder meetings and simplified reforms to encourage broader participation in IATI.
  - Need for IATI to secure high-level political will to back the initiative for long-term success.
  - Stakeholders should be given more opportunities to understand and monitor IATI's initiatives closely.
- 2. Better Integration with National Systems**
  - Future strategies should ensure interoperability between aid data and national budgeting systems.
  - Improved alignment of external financing with domestic priorities for better development impact.

**3. Capacity Building & Training**

- More training on the IATI system to improve reporting effectiveness and transparency.
- Regular online check-in meetings for stakeholders to share ideas and improve collaboration.

**4. Governance & Strategic Clarity**

- The strategic plan should emphasize IATI's role beyond technical aspects, highlighting its policy influence.
- Transparency alone is not enough—there should be a stronger focus on helping organizations become more efficient and effective.
- Some members feel disconnected from IATI's activities, making it difficult to contribute meaningfully.
- IATI should truly function as a community of actors promoting open data and transparency.

**5. Recognition of Internal & External Efforts**

- The IATI Governing Board, member-based subgroups, and Secretariat have played a crucial role in strengthening IATI.
- However, these efforts are not well reflected in the Strategic Plan and should be explicitly recognized.

## List of individuals or groups consulted, and sites visited

### Inception interviewees:

1. Yemesrach Workie, Executive Director IATI
2. Annelise Parr, IATI Manager, UNDP
3. Cody Wallace, IATI Policy and Governance Specialist, UNDP
4. Adriel Dutra Amaral, IATI Project Manager, UNOPS
5. Dan Ioan Bodunescu, Programme Management Specialist, UNOPS
6. Asma Khadhraoui, Senior Project Officer, UNOPS
7. Steven Flower, Director, Open Data Services
8. Jack Lord, Director, Open Data Services
9. Jonathan Glennie, Independent Consultant, Director Global Cooperation Institute
10. Joseph Barnes, Chief of Monitoring, UNICEF
11. Motai Ramokoinih, IATI Board Member from Lesotho

### Data collection phase interviewees:

1. African Development Bank (Provider organisation)
2. Afroleadership (CSO)
3. CanWaCH (CSO)
4. Cote D'Ivoire, Ministry of Economy and Planning (Partner country)
5. Denmark, Ministry of Foreign Affairs (Provider country)
6. Emergently (Private sector)
7. European Commission (Provider organisation)
8. Fields Data (CSO)
9. Gambia, Ministry of Finance and Economic Affairs (Partner country)
10. Germany (BMZ) (Provider)
11. Global Affairs Canada (Provider country)
12. Humanitarian Data Exchange (comparator organisation – non-member)
13. Kenya Association of Freelance Journalists (CSO)
14. Lesotho, Ministry of Finance and Development Planning - Aid Coordination (Partner country)
15. Malawi, Ministry of Finance and Economic Affairs (Partner country)
16. Netherlands Ministry of Foreign Affairs (Provider country)
17. Niger Ministry of Planning (Partner country)
18. Nigeria Ministry of Finance, Budget and National Planning (Partner country)
19. OECD, Total Official Support for Sustainable Development secretariat (comparator organisation – non-member)
20. Oxfam Novib (CSO)
21. Publish What You Fund (PWYF) (CSO)
22. Sierra Leone Ministry of Development Plan and Economy (Partner country)
23. Swedish International Development Cooperation Agency (SIDA) (Provider country)
24. UK Foreign, Commonwealth and Development Office (FCDO) (Provider country)
25. World Bank (Provider organisation)
26. World Food Programme (Provider organisation)
27. Zimmerman (Private sector)

## List of supporting documents reviewed.

### Documents:

#### Internal:

- IATI Strategic Plan, 2020-2025
  - o IATI Strategic Plan
  - o IATI Strategic Plan Results Framework
  - o IATI ToC cover note (2020)
  - o ToC Assumptions (2020)
  - o IATI Theory of Change (2020)
- IATI Annual Monitoring Reports 2022, 2023, 2024
- IATI Board Q3 2024 Paper 3 IATI Financial Sustainability Analysis & Plan Sept 2024
- Institutional arrangements
  - o SIGNED LOA with annexes 30 Sept 2023
  - o IATI Institutional Arrangements Report - November 2021
  - o IATI Institutional Review - Final Report - 18 June 2018

#### External:

- Oxford Policy Management, Evaluating Aid Transparency, Full Report, January 2021
- Development Futures Lab, Data Availability and Usability in Data-Based Decision-Making for Development, February 2025

#### Websites:

- Aid Transparency Index (ATI): <https://sdgfinance.undp.org/>
- Extractive Industries Transparency Initiative (EITI): <https://eiti.org/>
- Humanitarian Data Exchange: <https://data.humdata.org/>
- Integrated National Financing Frameworks (INFFs): <https://inff.org/>
- Open Contracting Partnership (OCP): <https://www.open-contracting.org/>
- Total Official Support for Sustainable Development (TOSSD), OECD: <https://tossd.org/>
- UNDP Sustainable Finance Hub: <https://sdgfinance.undp.org/>
- UN OCHA Financial Tracking Service (FTS): <https://fts.unocha.org/>



## IATI results framework.

### IATI Results Framework: achievements

#### Key:

- Green: target achieved
- Red: target not achieved

Outcome 1: Significant improvement in the quality of data published to IATI					
	Baseline	Target 2020	Target 2021	Target 2022	Target 2023
<b>Outcome indicator 1.1:</b> Percentage of publishers whose Data Quality Index score increases above baseline		N/A	Baseline	20% above baseline	30% above baseline
<b>Outcome Indicator 1.2:</b> Percentage of publishers whose scores in the current IATI Dashboard increase above baseline, or that maintain a score of 100% once achieved	Overall: 0%  Timeliness: 4.5%  Comprehensiveness: 0%  Forward looking nature: 4.1%	Overall: 20% Actual: 37.1%  Timeliness: 23.6% Actual: 36.2%  Comprehensiveness: 20.0% Actual: 22%  Forward looking nature: 23.3% Actual: 19.3%	Overall: 36.0% Actual: 20.7%  Timeliness: 38.9% Actual: 19.4%  Comprehensiveness: 36.0% Actual: 19.2%  Forward looking nature: 38.6% Actual: 14%	Overall: 48.8% Actual: 16.5%  Timeliness: 51.1% Actual: 15.5%  Comprehensiveness: 48.8% Actual: 18.6%  Forward looking nature: 50.9% Actual: 9.9%	Overall: 59.0% Actual: 20.3%  Timeliness: 60.9% Actual: 20.9%  Comprehensiveness: 59.0% Actual: 17.9%  Forward looking nature: 60.7% Actual: 11.8%

Outcome 1: Significant improvement in the quality of data published to IATI						
Output	Output indicator	Baseline	Target 2020	Target 2021	Target 2022	Target 2023
<b>Output 1.a Current and new publishers meet the highest standards of data quality through improved tools and guidance</b>	1.a.i Percentage of data users satisfied with feedback after alerting publishers (via the Secretariat's Technical Team) to issues with their data	Not measured	Not measured	Not measured	Not measured	Not measured
	1.a.ii Percentage of known publishing tools integrating the IATI Validator	0%	0%	Target: 20% Actual: 11.7%	Target: 25% Actual: 20%	Target: 30% Actual: 51.6%
	1.a.iii Percentage of publishers who reduce their number of validation errors; and percentage of publishers who reduce their number of warning types	Baseline: 35.4%	Baseline: 35.4% Actual: 35.4%	Target: 48.3% Actual: 43.6%	Target: 58.7% Actual: 32.6%	Target: 66.9% Actual: 30.7%
	1.a.iv Percentage of users satisfied with IATI technical tools (including IATI Registry, Publisher, Datastore Search, Validator, d-Portal or successor tool)	Overall satisfaction rating: 66%  IATI Registry: 67%  Datastore / Query Builder: 57%  Validator: 74%	Overall satisfaction rating: 70% Actual: 47.8%  IATI Registry: 70% Actual: 51.5%  Datastore / Query Builder: 65% Actual: 19.4%	Overall satisfaction rating: 72% Actual: 75.8%  IATI Registry: 72% Actual: 73.1%  Datastore / Query Builder: 67% Actual: 30.8%	Overall satisfaction rating: 74% Actual: 82.4%  IATI Registry: 74% Actual: 72.7%  Datastore Search: 69% Actual: 82.4%	Overall satisfaction rating: 76% Actual: 77.4%  IATI Registry: 76% Actual: 75%  IATI Publisher (Baseline): 81.8%

		d-Portal: 68%	Validator: 75% Actual: 54.5%	Validator: 77% Actual: 82.5%	Validator: 79% Actual: 96.6%	Datastore Search: 71% Actual: 78.6%
			d-Portal: 70% Actual: 65.7%	d-Portal: 70% Actual: 76.8%	d-Portal: 72% Actual: 79.5%	Validator: 81% Actual: 87.5%
				CDFD: (Baseline) Actual: 75%	CDFD: 77% Actual: 85.2%	d-Portal: 74% Actual: 75.9%
						CDFD: 79% Actual: 73.7%
	1.a.v Percentage of publishers publishing every quarter or more	26%	Target: 41% Actual: 26.3%	Target: 53% Actual: 20.1%	Target: 62% Actual: 15.6%	Target: 70% Actual: 13.8%
<b>Output 1.b IATI Standard strengthened to improve data quality</b>	Output Indicator 1.b.i “Standardised” Standard developed, agreed, and implemented	N/A	N/A	N/A	N/A	N/A
	Output Indicator 1.b.ii Percentage of publishers publishing data in all mandatory fields	86.7%	Target: 86.7% Actual: 86.7%	Target: 89.3% Actual: 76%	Target: 91.5% Actual: 76.9%	Target: 93.2% Actual: 75.1%
	Output Indicator 1.b.iii Percentage of total annual spend reported to IATI by publishers who sign	Not measured	Not measured	Not measured	Not measured	Not measured

	up to a single set of member-approved IATI Publishing Guidelines that specify how data must and should be reported					
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Outcome 2: IATI data is systematically used by development and humanitarian actors for decision-making					
	Baseline	Target 2020	Target 2021	Target 2022	Target 2023
<b>Outcome Indicator 2.1</b> Number of partner country governments referencing IATI data in national development policies and other government documents	2	4 Actual: 4	6 Actual: 6	8 Actual: 8	10 Actual: 11
<b>Outcome Indicator 2.2</b> Number of IATI partner country governments systematically using IATI data for decision-making	-	2 Actual: 4	5 Actual: 6	9 Actual: 8	14 Actual: 19

Outcome 2: IATI data is systematically used by development and humanitarian actors for decision-making						
Output	Output indicator	Baseline	Target 2020	Target 2021	Target 2022	Target 2023
<b>Output 2.a IATI data is regularly accessed</b>	Output Indicator 2.a.i Number of unique visits to d-Portal and the Datastore /	d-Portal: 25,072  Datastore / Query Builder: N/A	d-Portal: 27,500 Actual: d-Portal: 43,419	d-Portal: 30,000 Actual: d-Portal: 53,553	d-Portal: 33,000 Actual: d-Portal: 215,038	d-Portal: 36,500 Actual: d-Portal: 90,201

	Query Builder (excluding developers and testers to the extent possible)		Datastore / Query Builder: N/A	Datastore / Query Builder: N/A  Baseline: CDFD: 1,681	Datastore Search: Baseline: 28,152  Target: CFCD: 4,000 Actual: CDFD: 4,279	Datastore Search Target: 32,500 Actual: Datastore Search: 47,921  Target: CFCD: 6,500 Actual: CDFD: 3,401
	Output Indicator 2.a.ii Number of active tools that access IATI data via the Datastore	0	1	5 Not measured	9 Actual: 29	11 Actual: 29
	Output Indicator 2.a.iii Number of IATI partner country members whose national aid information management systems include IATI data	-	2 Actual: 3	5 Actual: 5	7 Actual: 6	10 Actual: 6
<b>Output 2.b Data literacy and capacity for data use of partner countries, publishers and CSOs is strengthened</b>	Output Indicator 2.b.i Number of publishers directly supported on how to use IATI data	10	15	Target: 18 Actual: 10	Target: 21 Actual: 35	Target: 25 Actual: 33
	Output Indicator 2.b.ii Number of partner country governments directly supported by the			Target: 20 Actual: 21	Target: 25 Actual: 50	Target: 30 Actual: 28

	Secretariat on how to use IATI data					
	Output Indicator 2.b.iii Number of CSOs directly supported on how to use IATI data			Baseline: 19 Actual: 19	Target: 23 Actual: 70	Target: 28 Actual: 45

Outcome 3: The IATI Community of members, data users and publishers are increasingly engaged to maximise impact					
	Baseline	Target 2020	Target 2021	Target 2022	Target 2023
<b>Outcome Indicator 3.1</b> Number of Community of Practice members active on IATI's digital platform (IATI Connect) within the past six months	0	Target: 50 Actual: 89	Target: 150 Actual: 150	Target: 200 Actual: 310	Target: 250 Actual: 295
<b>Outcome Indicator 3.2</b> Percentage of members attending the annual Members' Assembly (in-person or virtually)	63%	65% Actual: 58.8%	67% Actual: 55.6%	69% Actual: 75.3%	71% Actual: 66.3%

Outcome 3: The IATI Community of members, data users and publishers are increasingly engaged to maximise impact						
Output	Output indicator	Baseline	Target 2020	Target 2021	Target 2022	Target 2023
<b>Output 3.a A larger, more diverse IATI membership is created</b>	Output Indicator 3.a.i Number of IATI members	94	Target: 99 Actual: 98	Target: 103 Actual: 101	Target: 109 Actual: 104	Target: 114 Actual: 107

<b>Output 3.b Expanded awareness of IATI and its data</b>	Output Indicator 3.b.i Number of members and publishers providing internal training on using or publishing IATI data		No targets identified.	Actual: 18	Actual: 8	Actual: 7
	Output Indicator 3.b.ii Number of unique visitors to the IATI website (excluding developers and testers to the extent possible)	95,346	105,000 Actual: 57,534	115,000 Actual: 99,309	127,000 Actual: 99,256	140,000 Actual: 74,893
	Output Indicator 3.b.iii Number of impressions and mentions of IATI on Twitter	Impressions: 379,000  Mentions: 671	Impressions: 417,000 Actual: 294,400  Mentions: 738 Actual: 372	Impressions: 459,000 Actual: 301,000  Mentions: 812 Actual: 331	Impressions: 504,000 Actual: 90,709  Mentions: 893 Actual: 322	Impressions: 555,000 Actual: 610,383  Mentions: 982 Actual: 1,080

## Description of comparator data sites and initiatives

### *OECD Creditor Reporting System - CRS*

**Description:** CRS provides financial information on commitments made by DAC members, non-members (on a voluntary basis), and multilateral organisations, as well as market-based and philanthropic private financial flows. It includes bilateral and multilateral ODA figures, in addition to Other Official Flows (OOFs) and private flows.

### *Total Official Support for Sustainable Development - TOSSD*

**Description:** TOSSD provides data on all official resources flowing into developing countries for the purposes of sustainable development, as well as private resources mobilised through official means. It also measures contributions to International Public Goods. Financial information is provided on DAC members and non-DAC members (on a voluntary basis) as well as multilateral providers (MDBs, UN organisations and other multilateral entities). The TOSSD secretariat reports that currently 13 South South Cooperation providers provide data on their resources flows according to the TOSSD Standard.

### *Humanitarian Data Exchange (HDX) – OCHA*

**Description:** The Humanitarian Data Exchange (HDX) is an open platform for sharing data across crises and organisations. Launched in July 2014, HDX aims to make humanitarian data easy to find and use for analysis. HDX reports that it contains 19,691 data sets from 254 locations from 2,092 sources.

### *UN OCHA Financial Tracking Service (FTS)*

**Description:** The Financial Tracking Service (FTS) is a centralized source of curated, continuously updated, fully downloadable data and information on humanitarian funding flows. Government donors, UN-administered funds, UN agencies, NGOs and other humanitarian actors exchange data and information with FTS in order to provide: a timely and continuously updated picture of funding flows into existing humanitarian operations; funding progress against humanitarian response plan and related appeal requirements and information on existing gaps; visibility on who is funding what across humanitarian operations.

### *Extractive Industries Transparency Initiative (EITI)*

**Description:** EITI is a multistakeholder initiative led and supported by a diverse group of companies, governments and institutions, international civil society organisations and foundations who are committed to promoting extractive sector transparency. EITI members commit to and are assessed against the EITI Standard, a framework for disclosure and oversight of extractives sector activities and finance. The EITI Standard is not a data standard, but the initiative does have a policy that sets out how open data can be used to comply with the standard.

### *Open Contracting Partnership*

**Description:** The Open Contracting Partnership (OCP) aims to improve the outcomes of public procurement for people and planet. To achieve its goal, OCP championed procurement transparency and developed the Open Contracting Data Standard for the disclosure of data about public procurement processes and outcomes. It also jointly maintains a separate data standard for infrastructure projects.



# Pledge of ethical conduct in evaluation signed by evaluators



ETHICAL GUIDELINES FOR EVALUATION

## PLEDGE OF ETHICAL CONDUCT IN EVALUATION



UNEG  
United Nations Evaluation Group

By signing this pledge, I hereby commit to discussing and applying the UNEG Ethical Guidelines for Evaluation and to adopting the associated ethical behaviours.



### INTEGRITY

I will actively adhere to the moral values and professional standards of evaluation practice as outlined in the UNEG Ethical Guidelines for Evaluation and following the values of the United Nations. Specifically, I will be:

- **Honest and truthful** in my communication and actions.
- **Professional**, engaging in credible and trustworthy behaviour, alongside competence, commitment and ongoing reflective practice.
- **Independent, impartial and incorruptible**.



### ACCOUNTABILITY

I will be answerable for all decisions made and actions taken and responsible for honouring commitments, without qualification or exception; I will report potential or actual harms observed. Specifically, I will be:

- **Transparent** regarding evaluation purpose and actions taken, establishing trust and increasing accountability for performance to the public, particularly those populations affected by the evaluation.
- **Responsive** as questions or events arise, adapting plans as required and referring to appropriate channels where corruption, fraud, sexual exploitation or abuse or other misconduct or waste of resources is identified.
- **Responsible** for meeting the evaluation purpose and for actions taken and for ensuring redress and recognition as needed.



### RESPECT

I will engage with all stakeholders of an evaluation in a way that honours their dignity, well-being, personal agency and characteristics. Specifically, I will ensure:

- **Access** to the evaluation process and products by all relevant stakeholders – whether powerless or powerful – with due attention to factors that could impede access such as sex, gender, race, language, country of origin, LGBTQ status, age, background, religion, ethnicity and ability.
- **Meaningful participation and equitable treatment** of all relevant stakeholders in the evaluation processes, from design to dissemination. This includes engaging various stakeholders, particularly affected people, so they can actively inform the evaluation approach and products rather than being solely a subject of data collection.
- **Fair representation** of different voices and perspectives in evaluation products (reports, webinars, etc.).



### BENEFICENCE

I will strive to do good for people and planet while minimizing harm arising from evaluation as an intervention. Specifically, I will ensure:

- **Explicit and ongoing consideration of risks and benefits** from evaluation processes.
- **Maximum benefits** at systemic (including environmental), organizational and programmatic levels.
- **No harm**. I will not proceed where harm cannot be mitigated.
- **Evaluation makes an overall positive contribution** to human and natural systems and the mission of the United Nations.

I commit to playing my part in ensuring that evaluations are conducted according to the Charter of the United Nations and the ethical requirements laid down above and contained within the UNEG Ethical Guidelines for Evaluation. When this is not possible, I will report the situation to my supervisor, designated focal points or channels and will actively seek an appropriate response.

(Signature and Date)