INSO STRATEGIC REVIEW

Building Global Capacity in Humanitarian Safety:
How the International NGO Safety Organisation (INSO) is impacting the humanitarian safety coordination sector

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Acronyms and abbreviations

AECID	Spanish Agency for International Development Cooperation
ANSO	Afghanistan NGO Safety Office
BINGO	Baluchistan INGO Consortium-Security Management Support Project
CAR	Central African Republic
CCO	Comité de Coordination des ONGs
CRS	Catholic Relief Services
DRC	Democratic Republic of Congo
DFID	(UK) Department for International Development
EISF	European Interagency Security Forum
ERO	Emergency Response Operations
FSCO	(UN) Field Security Coordination Officer
GAA	German Agro Action
GANSO	Gaza NGO Safety Office
HR	human resources
HQ	headquarters
ICRC	International Committee of the Red Cross
IHL	international humanitarian law
IMC	International Medical Corps
IOS-Haiti	Initiative ONGs Sécurité, Haiti
INSO	International NGO Safety Organisation
IRC	International Rescue Committee
LoI	Letter of invite
MSF	Médecins Sans Frontières
NCCI	NGO Coordination Committee for Iraq
NCIMU	NGO Forum for NGOs operating in Northern Syria
NGO	non-governmental organization
NRC	Norwegian Refuge Council
NSP	NGO Safety Program
OCHA	(UN) Office for the Coordination of Humanitarian Affairs
PFM	Provincial Field Monitor
RRE	recognized reporting entity
SDC	Swiss Agency for Development and Cooperation
SDS	Service Delivery Standards
SLT	Saving Lives Together
SoS	Scope of Services
SSCL	Safety and Security Committee for Lebanon
UN	United Nations
UNDSS	UN Department for Safety and Security
VHF	Very high frequency (radio)
WFP	World Food Programme

Executive Summary

Background and rationale

This strategic review takes stock of what International NGO Safety Organisation (INSO) has achieved so far by mapping the basic anatomy of the organization and detailing the achievements and impact of the organization at both global and country levels. The rationale for this review is that INSO is currently at a pivotal point in its development. INSO has grown rapidly, establishing six new platforms between 2012 and 2014, and is set to scale up its activities at global level.

Additionally, INSO's establishment of a headquarters (HQ) in Dubai in January 2015 marked the beginning of a significant structural shift in operations. This review provides an opportunity for INSO to examine its development and impact, and better understand how it can achieve its future goals. The review focuses on three core areas of inquiry:

- *How does INSO work?* Examining how the structural and organizational elements have contributed to INSO's impact and what they have contributed to the sector as a whole.
- *What INSO has achieved*? Examining what INSO has achieved and how that can be sustained and improved, and identifying which practices have been less successful and should be discontinued.
- *What should happen next?* Identifying and describing how INSO can further its aim to build global capacity in humanitarian safety.

In total, interviews were conducted with 154 individuals on Skype or in person. Of these, 34% were INSO staff members, 47% were staff of INSO member organizations and 19% were UN staff members, staff of donor agencies, staff of NGO coordination fora and recognized experts in the field of humanitarian safety. Additionally, field visits to four of the seven INSO country offices were conducted: Democratic Republic of Congo (DRC), Iraq, Kenya and Turkey (for INSO Syria).

How INSO works

INSO is an independent NGO focused on safety issues, with its NGO members constituting its beneficiary community. INSO has created a series of replicable sequences and processes aimed at systematically collecting conflict data and other information affecting NGO safety with the aim of strengthening NGO safety coordination, policies and practices. The fact that INSO has been able to successfully apply this model across seven contexts in the space of four years attests to its robustness. While the INSO model improves upon the modes of NGO safety collaboration that preceded it, INSO is unique in character and form. It is not a coordination body, like many other NGO safety platforms, although it does provide some coordination services to NGOs in the countries in which it operates. It is also distinguished by the fact that it is not embedded in or hosted by another NGO. Perhaps most significantly, INSO links platforms across countries for the first time that allows for greater learning and uniformity across contexts. INSO has a transformative agenda, with the aim of creating a new model of NGO security management grounded in humanitarian values.

INSO is strongly grounded in humanitarian principles and oriented towards its member base of NGOs. Gaining NGO trust, which is essential to INSO's operations, heavily rests on cultivating trust from the NGO community and the individual capacities of its staff to generate high quality products and services. INSO's impact and reputation is highly dependent on the development of NGO relations, meaning that recruitment challenges can have unusually profound programmatic and reputational consequences.

Governance and participation

INSO's governance and participation mechanisms consist of a Board of Trustees at global level and Advisory Boards in four of the seven country platforms. The small Board of Trustees has provided significant support in INSO's start-up phase. In Afghanistan, Central African Republic

(CAR), Kenya and Mali, Advisory Boards comprised of member NGOs have been created to inform INSO operations. Where significant time and investment has been directed towards Advisory Boards, they provide a voice for the NGO community and foster a sense of accountability and inclusivity.

Platform establishment

INSO platform establishment is guided by NGO demand. The traditional model of the INSO start-up was geared towards slow and steady progression, as evidenced by start-ups in its first two operations outside of Afghanistan (DRC and Kenya). While threat warnings and basic coordination services can be initiated relatively quickly, it takes new platforms roughly one year to provide the full range of scheduled services. With recent interventions in Syria and Iraq, an Emergency Response Operations (ERO) model was developed to increase the speed with which INSO can establish itself in emergency contexts. The longer-term aim is to establish an ERO team of four expatriates deployable at anytime, anywhere in the world to respond to an emergency. In both cases, INSO conducts on-the-ground assessments to verify the need for INSO in the context, determine the scope of services they will provide and secure funding.

INSO membership

INSO membership is open to all non-profit, non-governmental, humanitarian organizations adhering to the Red Cross Code of Conduct for NGOs and legally registered in the country. Membership application and vetting processes are roughly standardized across all countries, with slight modifications to fit the context. Members are required to sign the INSO code of conduct, which lays out the "ground rules" of INSO membership. The code requires members to: report basic details of any incident affecting the organization; keep all information received from INSO completely confidential; consider the safety of others when asking INSO to embargo or censor any information; and provide INSO with the ability to take punitive action against those that do not comply. While INSO seeks to include national NGOs in its membership to varying degrees across all countries, INSO's membership is comprised primarily of international NGOs.

Information gathering and management

INSO seeks to gather information from a range of sources, governed by written guidance and documented policies. While all members are required to report incidents directly affecting them and encouraged to share more general security information, it takes significant personal relationship building to create the trust required for NGOs to report their own incidents and repetitive messaging to ensure such incident reporting becomes standard protocol. Provincial Field Monitors (PFMs) play a major role in creating the added value required for substantial NGO buy-in. PFMs, usually hired on short-term consultancy contracts, routinely report reliable information covering a broad geographic area and are immediately available to verify incidents. Despite the positive role played by PFMs, there is evidence that INSO is not systematically maximizing their efficiency and effectiveness.

INSO's process of verification, standardized across all countries, lends consistency and reliability, which in turn generates a high degree of trust in INSO reporting. There is tension with evolving incidents between disseminating information quickly and meeting verification standards, but this system works relatively well across all countries and has changed little over time. INSO's information management centers on databases held in each country, which are integral to enabling INSO to generate the evidence upon which it bases its analysis. Unfortunately, INSO has long since outgrown its information management capacities leading to inefficiencies and analytical limitations in the current system. However INSO is now well placed with funding and resources to undertake plans to upgrade the incident information management system into a web-based global database.

INSO products and services

The services INSO provides in each country are governed by a Scope of Services (SoS), divided into scheduled services and request services, created in consultation with NGO members (and where they exist, this is done in consultation with Advisory Boards). INSO sends a range of scheduled reports to INSO's membership (threat warnings, security reports, weekly incident lists, bi-weekly reports and quarterly reports). Scheduled services include regular meetings, including security roundtables (held every 1-2 weeks at regional level) and monthly Country Director meetings or briefings. INSO also provides orientation sessions for newly arrived staff and security training free of charge to NGOs.

On request, INSO will organize security trainings. These are generally conducted by external parties with the exception of INSO Afghanistan, which has established a training unit. It also provides a range of advisory and liaison services, including crisis response, security plan reviews and site security reviews. Some of INSO's most impactful advisory work is what it calls its independent advisory service, which is initiated directly by individual NGO members and covers a range of issues. Some of this advice, usually geared at RSA teams, is tactical, focused on issues such as road travel and general information pertaining to safety conditions related to day-to-day programming. Other advice, generally requested from Country Directors, is more strategic, pertaining to potential expansion to new areas or the modification of safety policies or practices.

What INSO has achieved

Measuring the impact of an enabling agent like INSO is inherently challenging. Additionally, INSO is a relatively young organization and generating the impact INSO strives to achieve takes time. This was evident in comparing the level of impact and achievement in Afghanistan, which has been operating according to the INSO model since roughly 2008, to the platforms established since 2012. As INSO grows, it will be critical to put in place more rigorous and systematic measures for measuring its achievements and impact.

Improving NGO safety awareness

Across all contexts, INSO's reporting has improved – often significantly – upon the reliability, scope and depth of information previously available to NGOs. In transitional and borderline contexts, INSO's reports and advice on emerging threats improve NGOs understanding of rapidly changing dynamics. Particularly with smaller national or international NGOs, which may only be working in a certain region, INSO reporting and meetings can help ensure these agencies have a sense of the broader context including emerging trends and threats at the macro-level. Where agencies had strong internal security capacity, INSO played an important role in supporting this by providing targeted resources for security professionals (such as the weekly incident lists and security roundtables). Many security personnel felt INSO's products and services allowed them to strengthen the evidence base of their work and think more strategically.

Improving NGO safety procedures and policies

All of INSO's reporting emphasizes good practice and sound policy, and NGO members generally felt INSO advice was credible and appropriate. However, INSO places no obligations on its members to follow this advice and the degree to which INSO advice is followed rests on an array of factors beyond INSO's control. Nonetheless, there is strong anecdotal evidence that INSO is having an important impact in this area not only in long-standing programs like Afghanistan but also in newer ones such as CAR. INSO plays a unique role in transitional contexts in helping NGOs improve their security policies in response to a changing security environment. Similarly, INSO plays a particularly important role across all contexts in helping NGOs with less internal safety capacity. This rationale drives INSO to direct its training and some of its other request services towards NGOs with less internal resources devoted to security, although outreach efforts to national NGOs could be improved in many countries and there is significant demand for INSO to expand its training capacity.

Improving NGO safety coordination and information sharing

NGO members across all countries routinely stated that the confidentiality of INSO reporting results in NGOs sharing information that they would not share directly with each other, particularly in more sensitive contexts. INSO's routine meetings have improved coordination among NGO participants, though the ways in which this has taken shape and the degree of improvement varies across countries. Particularly where there are few other effective security or access coordination mechanisms (as in CAR, northern Iraq or Afghanistan), INSO fills a critical gap. The degree to which INSO is able to improve information sharing and coordination heavily rests on the ability to inspire trust and confidence. Where INSO staff built strong bilateral relations with members of NGO staff at all levels and was willing to assist beyond its core services, there was a marked increase on their ability to solicit information and facilitate coordination. Where NGO members feel that INSO fails to understand or respond to their concerns, or where they perceived INSO as taking information without providing tangible added value, NGOs were less likely to share information or support INSO-led coordination.

Improving general humanitarian safety coordination

INSO's achievements and impact on improving wider humanitarian safety coordination has been generally positive. Despite minor tensions at times in some contexts, INSO generally has positive relations with NGO coordination fora. INSO's clearly defined mandate and scope of services, and the positive relationships formed with these fora during the INSO assessment phase, played an important role in fostering collaborative relations. The quality and closeness of INSO's relations with the UN varied significantly within and across country contexts. At minimum, basic information sharing and coordination exists in all countries. In some countries, INSO and UN Department for Safety and Security (UNDSS) have dialogue and close collaboration at all levels. Particularly in these highly collaborative contexts, INSO provides a valuable interlocutor to the NGO community and fosters effective functioning of Saving Lives Together (SLT). At times, there was some misunderstanding of INSO's role and personality clashes. This variance was exacerbated by the fact that there is no formal agreement between any UN agency and INSO on information sharing.

Supporting the expansion of humanitarian access

By nature of its mandate and activities, INSO's impact on humanitarian access is indirect, and given the myriad of dynamic factors that may influence access in a given context, it is inherently limited. Improved access to reliable information can help improve decision-making and strategies on access, but information alone does not result in expanded access (and can even have the opposite effect). Where NGOs are predisposed to expand access, INSO often plays a pivotal role in supporting evidenced-based decision-making and NGO coordination. Where NGOs face threats to access, INSO can play a positive role in coordinating NGOs to deal with the problem at both a tactical and strategic level. Helping NGOs understand why they have been attacked or threatened, so as to then conduct post-incident investigations and modify policies is greatly valued by NGOs. In platforms where INSO leadership is strong, INSO can also deepen understanding of access issues at a strategic level. This role is not always requested and generally requires INSO Country Directors to proactively identify strategic opportunities.

Defending and advancing humanitarian principles

The two core principles related to INSO's work are independence and neutrality. While it was clear in each country that INSO strove to present the conflict in a neutral way and generate a perception of independence, INSO's objectives with regard to humanitarian principles were not always clear to its staff on the ground or its members. In some contexts, there is room for INSO to play a more visible role in advancing humanitarian principles in line with its organizational objectives. NGOs and OCHA appreciated INSO's CAR advocacy work on advancing principles, while similar work may be less palatable to members in other contexts. Globally, this could be advanced through research collaboration as well as increased dialogue on humanitarian principles with donors and policy-makers.

Changing donor perceptions of humanitarian safety and security

Many donors see INSO as providing a replicable model for supporting NGO presence in volatile contexts. As donors at country level receive INSO reports, they drew on INSO reporting for a number of purposes from informing their own security policies to aiding strategic funding decisions. There was a perception (at times, even an expectation) that INSO's presence would allow NGOs to assume more risk. In practice, INSO does not advocate for NGOs expansion. Increased information can facilitate evidenced-based decision-making – but, again, it does not necessarily result expanded access. INSO should seek to shape donor action on humanitarian safety. This includes challenging risk management paradigms, advocating for sustainable initiatives to improve NGO safety capacity and urging donors to fund safety efforts in under-resourced or "forgotten" conflicts. INSO is doing this already, for example with its ability to leverage funding for DRC and CAR, and it will be important for INSO to continue this.

What happens next

The recommendations and options below build on needs identified by INSO management, INSO country level staff and member NGOs. This review recognizes that INSO is already addressing many of these issues. Building on this, these recommendations and options aim to provide INSO with realistic and actionable advice to achieve their long term objectives.

Focus on staff retention and training. The single most important thing INSO can do to improve its program quality and sustainability is to invest in its staff. While planned development of orientation and training in international humanitarian law (IHL) and humanitarian principles is important, this should be accompanied by greater efforts to identify internal advancement opportunities for high-performing expatriate and national staff.

Devote resources to consolidating and improving the performance of existing country platforms. A better balance must be sought between expansion to new countries and improving practices in existing platforms if INSO is to meets its own quality standards and expectations of sustainability. It is strongly recommended that INSO devote more attention inward to consolidating its achievements and improving performance, where needed, to reduce the risk of this concern materializing.

Re-examine and clarify decision-making processes around establishing new country platforms. Committing selection processes to writing would be useful, and consulting more widely can safeguard against over commitment. INSO should take a careful look internally to ensure that it is adequately assessing whether there is in fact internal capacity to start new programs and whether ongoing operations are stable enough before committing to do so.

Improve monitoring of achievements and impact. More robust and systematic means of monitoring and evaluation should be adopted. Annual beneficiary surveys may continue to be helpful but are not sufficient. INSO's achievements should also be measured independently and with a focus on long term impact.

Devote greater resources to staff safety and staff care. There is a strong sense that INSO management cares about the well-being of its staff, but this must be institutionalized. At minimum, INSO should seek to improve its internal security procedures and ensure it has adequate staffing at country level. Because INSO is highly dependent on having appropriate and well-equipped staff, the level of staff care provided has uniquely significant programmatic implications.

Expand INSO's global governance and re-examine the role of the Advisory Boards at country level. A limited governance and advisory structure present more risks than benefits at this stage in INSO's maturity. An expanded, more diverse global Board of Trustees will safeguard internal accountability and INSO's organizational sustainability. INSO should review country Advisory Board regulations and practices, to ensure they play a meaningful role, learn from countries where they work well and transfer lessons to other contexts.

Review and refine the ERO model. The fledging ERO model, developed in 2014, represents a significant innovation in how INSO responds to crises and the speed with which it can establish platforms. The planned expansion of the ERO unit will further improve these operations, and lessons learned should inform revision of the model. INSO would also benefit from committing ERO processes and policies in writing to ensure transparency, consistency and sustainability.

Improve information sharing and learning across programs. Where capacity gaps exist in a country office, there is often another country that has grappled with similar challenges and found solutions. Unfortunately existing practices are not systematically shared across countries. An online information management platform would help facilitate learning and support institutional memory. Additional measures include staff retreats and increased deployments of existing INSO staff from one country to another.

Improve information management capacities, including greater safeguarding of data. INSO's plans to improve global information management systems are much needed but will ultimately take time and significant resources. Creating an information management system that enables greater consistency of reporting across INSO programs and cross-country comparability should be a high priority, with a focus on addressing data protection concerns.

Improve data analysis capacities and means of sharing this data more widely to improve global understanding of NGO safety issues. The creation of a global database will enable cross-country data comparisons that will be of great value to not only NGOs but also to researchers and policy makers. INSO has been relatively closed in sharing data, but should weigh the risks and benefits of sharing this more widely in the future. A consultative mechanism to evaluate research and data sharing plans could aid in this process.

Strengthen strategic relationships to facilitate the sharing of INSO's experience and maximize policy impact. This must be approached strategically and systematically. A simple power analysis of key institutions/individuals and a well-researched strategy for engagement with clear objectives and key messages would aid in addressing reputational issues, increase awareness of INSO's objectives and ensure INSO is maximizing its influence on global humanitarian safety issues.

Expand capacity to share best practices and generate research products, targeting the needs of NGO members and helping them to improve safety policies and procedures. While INSO holds a great deal of useful quantitative data, the evidence and advice it has generated regarding NGO best practice and conflict analysis is what ultimately changes NGO policies. With the added capacity of a Research Director, there will be capacity to capitalize on this. INSO could benefit from the creation of a consultative mechanism, like the advisory group mentioned above, to generate buy-in and provide feedback as it seeks to undertake this work.

Introduction

Since 2011, the International NGO Safety Organization (INSO) has deployed a field safety platform model to seven of the world's most high-risk settings to improve the security data collection, analysis and coordination of non-governmental organizations (NGOs). In the ever more volatile areas in which humanitarians operate, there is a growing recognition by the donors, the UN and NGOs that previous models of security management are no longer working. Yet the wider community is still grappling to find the way forward. INSO has been a pioneer across a number of the most problematic areas, ranging from data collection to access strategies and fostering effective coordination among NGOs. INSO provides daily service to all major international NGOs offering frontline reporting, advisory and coordination services that strengthen operational practice and help facilitate humanitarian access. INSO is set to scale up activities, including platforms in new countries as well as new regional and global level services that will aim to further improve the NGO safety sector both locally and globally.

This strategic review takes stock of what has been achieved so far by mapping the basic anatomy of the organization, to understand how INSO today is different from what had existed before, and detailing the achievements and impact of the organization across both global and country levels. The review focuses on three core areas of inquiry:

- *How does INSO work?* Mapping the basic structural elements and operational sequences with a focus on INSO's impact and effectiveness. The aim is to understand how the structural and organizational elements have contributed to INSO's impact and what they have contributed to the sector as a whole.
- *What INSO has achieved*? Identifying key achievements at both global community and country levels. The overall aim is to understand what INSO has achieved, how that was accomplished, how to sustain and build on successful practices and to identify which practices have been less successful and should be discontinued.
- *What should happen next?* Drawing on evidence from the previous two areas of inquiry, the aim is identify and describe how INSO can further its aim to build global capacity in humanitarian safety.

Each of these was approached with consideration of three critical vectors defined by INSO:

- Program quality, relevance, responsiveness, value for money and sustainability
- Humanitarian access and the safety of aid workers
- Coordination, de-confliction and operational practice

The following report is primarily intended for use by INSO's management and institutional donors to assist with strategy development and planning.

Methodology and approach

One hundred and fifty four individuals were interviewed by Skype or in person across 16 countries, including the seven countries where INSO is operational. Of these, 34% were INSO staff members, 47% were staff of INSO member organizations and 19% were UN staff members, staff of donors agencies, staff of NGO coordination fora and recognized experts in the field of humanitarian safety. Four visits to INSO country offices were conducted: DRC, Iraq, Kenya and Turkey (for INSO Syria). INSO platforms in Afghanistan, Central African Republic (CAR) and Mali were approached through desk review and a smaller number through phone or Skype interviews.

Interviews were semi-structured, and conducted on the basis that nothing would be attributed directly to interview subjects in any identifiable way. In selection of interview subjects, priority was placed on interviewing INSO staff in key positions across all of the countries. Among NGO members, interviews were sought with members of INSO Advisory Boards (where they exist) but diverse perspectives were also sought (i.e. from newer members and less active or vocal

members). Among other stakeholders interviewed, priority was placed on securing interviews with members of NGO coordination fora (depending on the relevance of these fora to INSO operations), relevant UN actors and INSO donors (at country level). What could be achieved was limited by time and logistical constraints, particularly with regard to NGO interviews. One shortcoming is the low number of interviews from national NGOs. Where interview subjects agreed, their names and positions are listed in Annex A; where they preferred to be interviewed anonymously, they have not been listed.

Table 1. Interview subjects by country (indicative)

Country	*INSO staff*	*NGO members*	*Other (UN, donors, etc.)*	*Total*
Global	10	11	7	22
Afghanistan	3	7	1	10
CAR	5	4	4	13
DRC	10	12	5	24
Iraq	5	9	4	17
Kenya	7	10	3	19
Mali	4	6	2	12
Syria	8	14	3	25

Approximately a quarter of all interview subjects were able to speak about their experiences with INSO across multiple contexts. In practice, this meant that some interviews primarily intended to focus on one specific country platform ultimately focused on multiple INSO platforms. This was most relevant to case of INSO Afghanistan (approximately at least 19 additional interviews yielded information of relevance to INSO Afghanistan), where staff of NGO member organizations or INSO staff in currently based in another location has also worked in Afghanistan.

The consultants reviewed any relevant reports or other documents in the public domain as well as documents provided by INSO. This included organizational and strategy documents, donor reports and job descriptions as well as operational/program documents, including SoS, Service Delivery Standards (SDS) and other guidance documents. Samples of each report type from the seven countries were also reviewed. An online survey of staff and members was also conducted. Response rates were fair but not representative: 302 staff of NGO member or stakeholder organizations completed a member survey and 33 INSO staff completed a separate staff survey. Survey results were useful in some respects, and allowed those not interviewed but eager to feed into this process a chance to do so. While not heavily quoted or drawn upon on this report, the results have been provided to INSO management separately.

Section 1: How INSO Works

This section describes the key working parts of the INSO model in theory and practice, placing its development in the larger context of how NGO safety has evolved since its inception. It examines how INSO's structural and organizational elements contribute to INSO's performance and how INSO functions as part of the wider humanitarian sector. It draws heavily on INSO documents and interviews with INSO staff, comparing written policy and guidelines with practice at the country level. It also compares and contrasts between various INSO platforms in order to highlight areas in need of improvement, best practices and areas for learning across platforms.

The INSO model

INSO evolved out of the Afghanistan NGO Safety Office (ANSO), established in 2002. ANSO was among the first of many field-based NGO safety platforms that emerged during the past fifteen years, and this development can be seen as part of a larger shift in how the humanitarian community addresses safety and access. Part of this was born of the changing dynamics of humanitarian action in the post-Cold War period. The boom in humanitarian funding, guided in part by the political prerogatives of donors, led to the expansion of aid agency presence into more

dangerous areas. The growing risks aid workers faced necessitated that the aid community needed to do more to protect their staff, giving rise to a proliferation of security staff positions and a more general professionalization and expansion of NGOs and UN security apparatus.[1]

At the same time, the humanitarian community became increasingly atomized with a dramatic increase in the number of aid agencies and diversity of their approaches. Secondly, while NGOs have long valued their independence from the UN, NGOs have been increasingly resistant to UN-led coordination perceiving the UN as overly politicized. The Joint Operating Principles in Liberia provides an early example of how this materialized and the desire for separation from the UN grew over time, particularly after 9/11 and with the introduction of integrated UN missions. These two factors, in part, have contributed to a growth of NGO-only coordination fora regionally and globally (as with European Interagency Security Forum, EISF, established in 2006, the Interaction Security Advisory Group, established in the late 1980s, and others). Finally, the marketization of aid (for example, through the use of competitive tenders and new contracting practices) increased organizational insecurity and created new forms of competition between agencies while undermining opportunities for collaboration – the so-called "NGO scramble."[2]

In short, coordination and common practice became more difficult to achieve just as it was critical to work together to address common safety threats to aid workers. The UN, in part, responded to these difficulties with the development of SLT in 2006, aimed at improving coordination between the UN and INGOs. Operational NGOs responded in a less systematized and more context-specific manner. In essence, they sought to identify local and contextual solutions to the problem, including what were initially *ad hoc* cooperative structures aimed at establishing basic information sharing. ANSO, like many other field based platforms, was initiated as a project hosted by an international NGO (the International Rescue Committee, or IRC). ANSO's establishment was followed by NGO safety platforms in Iraq (NGO Coordination Committee for Iraq, NCCI) in 2003; Yemen (the INGO Safety Advisory Office, ISAO), Quetta (the Baluchistan INGO Consortium-Security Management Support Project, BINGO) and Somalia (the NGO Safety Program, NSP) in 2004; Haiti in 2005 (Initiative ONGs Sécurité, IOS-Haiti); Gaza in 2008 (the Gaza NGO Safety Office, GANSO); Pakistan in 2011 (PAKSAFE); and the Safety and Security Committee for Lebanon (SSCL) and others in recent years.

These platforms have been either hosted by or embedded in other NGOs or coordination fora, in response to the circumstances on the ground. They have divergent approaches, offer varied services and have diverse memberships. Some include only NGOs (like ANSO and, later, INSO) while other include the UN or are open to all (including private contractors and the military); some focus primarily on coordination while other offer systematized reporting of security incidents or crisis response services; some have had relatively short life spans (i.e. BINGO and IOS-Haiti) while others have endured. A common feature is that they do not dictate or place rules on NGO behavior (as UNDSS does with UN agencies), but rather seek to share information, advise and encourage collaboration. In this way, platforms allow each member NGO to determine the safety approach that works best for them and is consistent with their organizational positioning.

In its early years, ANSO provided reporting and coordination functions for the NGO community but, like many other field platforms at the time, its reporting was not systematized and ANSO's performance varied with staff turnover. In 2006, with the appointment of a new Director (now the INSO Executive Director) ANSO entered a period of significant transformation, focused on the expansion and professionalization of services. The processes and structures created during this period would become the basis of the INSO model. The core objective was to improve the quality, scope and sustainability of ANSO's services. Key components of this transformation included: greater emphasis on humanitarian principles; reorganization of staffing; reconfiguring ANSO

[1] C. van Brabant (2001) *Mainstreaming the Organisational Management of Safety and Security: a review of aid agency practices and a guide for management*. London: ODI.
[2] A. Cooley and J. Ron (2002) "The NGO Scramble: Organizational Insecurity and the Political Economy of Transnational Action," *International Security* vol. 27, no. 1.

relationship with NGO community (primarily through the establishment of a Steering Committee, which would later be replaced by an Advisory Board); and development of new systems for data collection and dissemination. By 2008, many of what would become core INSO services were in place, including scheduled service reports, advisory services, and orientation and training services. This represented a significant advance in the development of NGO safety platforms that few others pursued, with the exception of NSP in Somalia that underwent a similar process of standardization and transformation.

A longer-term aim, from the outset, was to transition ANSO to a stand-alone NGO with presence across multiple contexts. Being hosted by another NGO presents sustainability constraints, including being subject to the host organization's strategic priorities and timeline for presence. While ANSO did not face this, there is always the potential that the hosting NGO may come under unique scrutiny or criticism given that the substance of the platform's reporting and a danger that the hosting NGO may influence the content of the platform's reporting. For ANSO, there were issues around travel and security restrictions as well as tension between the requirement to follow host organization administrative procedures, such as with recruitment, and the ability of ANSO to meet its needs through these processes. While a framework agreement that imposed mutual obligations on German Agro Action (GAA) and ANSO alleviated some of these challenges – and was an important tool that other platforms later used– it did not resolve the fundamental limitations of being hosted.

While the initial idea for INSO developed in 2007, it was not until 2010 that INSO's development began in earnest. GAA initially agreed to support INSO's development by contributing a portion of indirect costs recovered from ANSO to the project, but GAA later reneged and withdrew from hosting ANSO. Start-up costs were personally financed by the ANSO Director (subsequently the INSO Executive Director). INSO was legally formed in February 2011 and the ANSO program was handed over to INSO on July 1, 2011.

INSO's primary goal, much like that of other platforms, is to improve NGO safety coordination in the field. However, the primary driver of INSO's creation was a desire to innovate and address what it saw as the "systematic weakness" and structural faults in the existing terrain of NGO platforms.[3] INSO sees itself as driving a new phase in NGO safety platform development, with particular reference to improving program start up, sustainability, fitness for purpose, program quality and standardization.[4] As INSO expanded, the core of the model developed in 2008 remained largely intact. INSO sought to apply the same sequences and processes for collecting and disseminating safety information and encouraging collaboration among NGOs that had been developed in Afghanistan. Databases were set up in each country, forming the backbone of INSO's analytical capacity. These standardized processes enable the creation of a menu, or SoS informational, analytic and coordination services in each context. A SoS is created for each country. Based on an assessment and agreed with NGOs it sets firm parameters for INSO's work. While the SoS is tailored to each context, its form (divided into scheduled and request services) and the master menu of options (i.e. what INSO will and will not offer) is consistent, thereby creating familiarity and sense of continuity for those who encounter INSO in different contexts.

INSO's strict membership requirements exclude non-NGOs, its code of conduct and, to some extent, the role of Advisory Boards has also remained constant. INSO management places great importance on this orientation towards NGO in other policies and procedures, and sees the fact that it provides its services free of charge to its members as integral to demonstrating its commitment to its beneficiary NGOs. Indeed, this is recognized by members as an important factor in gaining trust and ensuring INSO is reaching NGOs who cannot afford to pay for such services. INSO is strongly field-focused and decentralized, which has allowed it to adapt its model

[3] INSO document (2011) *International NGO Safety Organisation: An introduction to the new charity dedicated towards providing safety and security services to humanitarian aid agencies.*
[4] Ibid.

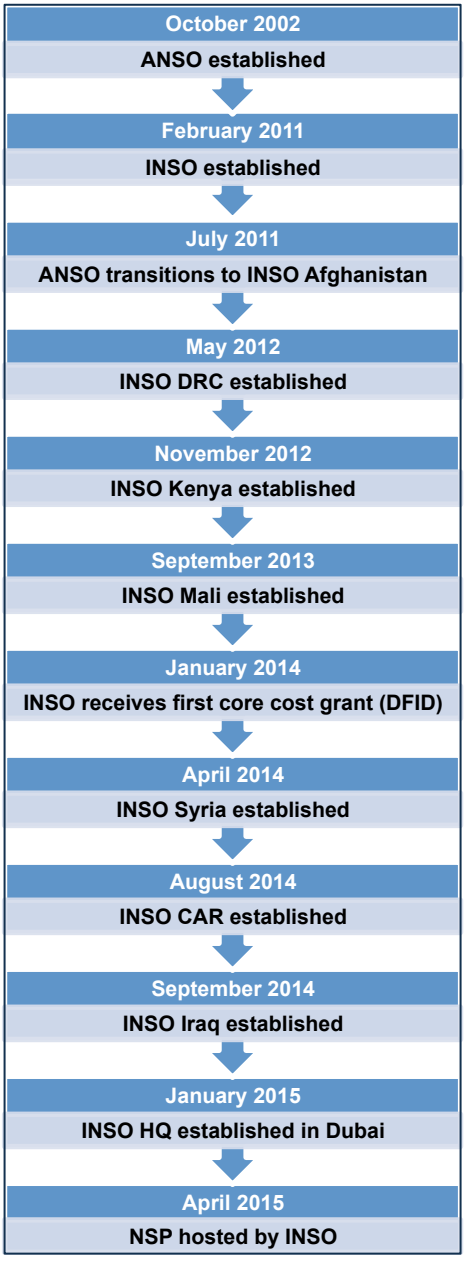
to context in other ways that enable it to meet the unique needs of specific NGO communities. The core elements of this model are explored under "Key operational processes and sequences."

While some of these elements may be found in other NGO safety platforms, INSO is unique in character and form. It is an independent NGO focused on safety issues, with its NGO members constituting its beneficiary community. It is not a coordination body, although it does provide some coordination services to NGOs in the countries in which it operates. Its standardization of processes addresses prior NGO safety coordination platform issues around uniformity and sustainability. It is also set apart by that fact that it is not embedded in or hosted by another NGO, which furthers sustainability and fitness for purpose.[5] INSO places high value on its independence, seeing it as essential to allow staff to operate with maximum efficiency and insulating the wider NGO community from any potential negative consequences of its work.[6]

Perhaps most significantly, INSO linked platforms across countries for the first time creating the original globally standardized NGO safety platform. The safety platforms that had developed in the early 2000s had done so largely independently and there appears to have been limited learning/collaboration across these platforms, especially early on in their development when the sharing of experiences could have been immensely useful. This meant that many platforms were essentially starting from zero, rather than building upon or adapting what may already be working elsewhere. Some aid workers and experts argue that each context requires a unique response (for example, what works in Afghanistan will not work in Yemen or South Sudan). The INSO model has adapted its original concept to new contexts and its rapid expansion demonstrates that it is sufficiently robust and flexible to work in diverse operating environments.

The most significant changes to INSO's structure and operating model have occurred since the beginning of 2014. INSO's first core cost grant, from the UK Department for International Development (DFID), has allowed it to rapidly expand to new contexts with three new platforms (Syria, CAR and Iraq) established since April 2014. It has also facilitated the development of a new model for ERO and the creation of a HQ, which will allow it to establish systems and functions to support its rapidly expanding footprint. Additionally, there is now potential for it to play an important role at global policy level in transmitting the extensive knowledge and expertise gained across the contexts in which it operates.

Figure 1. Timeline of Key Events



[5] However, in some countries, international NGOs act as INSO's grant holder where its donors are unable to fund INSO directly. Nonetheless, INSO is a legally and operationally independent NGO

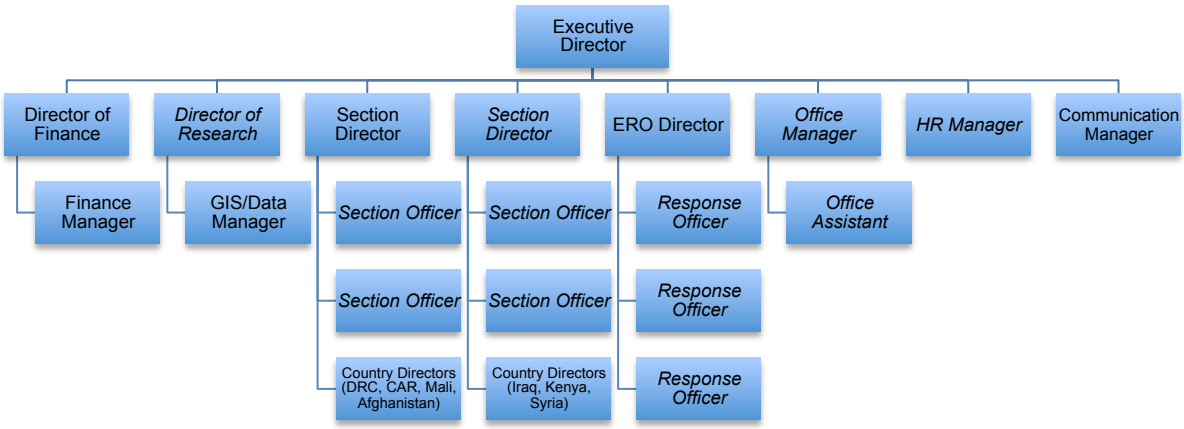
[6] INSO internal document (undated), *Staff Guidance Document on Platform Structure and Memberships.*

Staffing and structure

Staffing and structure at global and country level

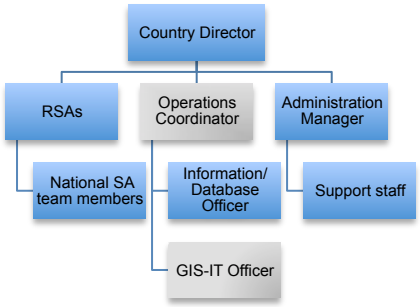
On January 1, 2015, INSO established a HQ based in Dubai. Prior to this, INSO had two HQ staff to support country functions beyond the Executive Director position. This had resulted in a significant deficit of support to country platforms.[7] Aiming to rectify this, the proposed HQ organizational chart marks a substantial shift in INSO's structure (depicted in Figure 2, with positions in italics vacant as of April 1, 2015). As this review makes clear, HQ support functions are urgently required to ensure that INSO is able to efficiently support its field platforms and maximize its strategic impact.

Figure 2. Proposed HQ Organizational Chart



Each country is configured slightly differently according to the scale/scope of programming and resources available (with some variance in titles across countries). In general, an expatriate Country Director supervises two or more expatriate Regional Safety Advisors (RSAs) along with an Administration Manager. In larger operations, an Operations Coordinator supports the Country Director. RSAs, generally expatriates, manage teams of national staff and supervise PFMs.

Figure 3. Illustrative Country Office Organizational Chart



There is some evidence that INSO is still struggling to get the balance of country-level staffing right, particularly in smaller country operations. This merits further attention to maximize coverage, efficiency and, ultimately, impact. INSO's intentional field-focus and decentralized decision-making structure give country teams significant autonomy to undertake initiatives based on their assessment of the context. There is a strong *esprit de corps* and INSO staff see their colleagues as hard working, capable and principled. A spirit of improvisation and innovation used to meet NGO needs was evident, particularly in newer platforms. Even in instances where INSO staff were frustrated or disappointed, they were heavily invested in improving the organization and in its success.

Recruitment, training and retention

[7] INSO internal document/proposal to donors (2015) *Building Global Capacity in Humanitarian Safety – Phase II*, p. 7.

INSO staff, at all levels, have a range of backgrounds including humanitarian NGO program, NGO security and military or other security experience. While INSO has sought to recruit existing staff members for new operations in some instances, most staff are new to the organization and recruited externally. The majority of Country Directors have been externally recruited, with an emphasis on recruiting those with prior experience in managing humanitarian NGO operations and a conscious decision to avoid recruiting ex-military officials for this positions (although there have certainly been exceptions). Humanitarian leadership experience is critical to gaining the trust of member NGOs; Country Directors are perceived as understanding the challenges facing their members and having a firm grip on humanitarian principles.

Recruiting RSAs is challenging due to that fact that a unique combination of skills is demanded of RSAs. RSA positions are not the equivalent of the position of a security advisor at an NGO as the demands of the position and INSO's approach are different. Ideally, RSA will have analytical skills, understanding of humanitarian principles, understanding of humanitarian and development operations in volatile contexts, in addition to significant security experience. It is extremely rare for newly hired RSAs (or national staff on RSA teams) to have all of these capacities in sufficient measure. In practice, recruitment generally privileges analytical ability and humanitarian experience over security experience, but staff do come from a wide variety of backgrounds. Some INSO staff have military or NGO security backgrounds, which can present as many advantages as challenges. There was a perceptible knee-jerk reaction among some NGO members towards some INSO staff they felt as too "military" minded, while others were appreciated for the security expertise they brought to their role. In general, INSO staff with military or security backgrounds are required to have at least some humanitarian experience – which is critical to ensuring that they are able to effectively interface with the humanitarian community.

INSO addresses these challenges by seeking to recruit balanced RSA teams with a mix of backgrounds and skills, and considering team composition alongside individual profiles in recruitment. In some teams, for example, the RSA may be strong on analysis and writing while other team members may have more expertise in "hard" security skills. Where it works well, team members are able to provide a full package of services, work in an interdisciplinary way and learn from one another. In recruitment of national staff in particular, focus is often placed on ensuring an advantageous balance of various ethnic or tribal groups or staff with pre-existing expertise in complementary geographic areas.

There is not yet any systematic orientation or training program, although INSO recognizes this as a gap and aims to develop this. New staff members receive on-the-job mentorship and training from their supervisors. While the SDS serves as a guide, the degree to which INSO staff members receive the needed support varies and depends on time and capacities of their managers. As explored later on, this has presented difficulties when INSO staff were expected to perform functions for which they do not have relevant expertise or capacities or where RSA teams are not sufficiently balanced. As INSO addresses orientation and training needs, it should ensure that the needs of existing staff and national staff are also assessed and addressed.

A significant degree of INSO's impact rests on the quality and appropriateness of its staff. The online survey found that members were generally satisfied with the quality of INSO staff, with 85.4% ranking the expertise of INSO staff as excellent or good. Several examples demonstrated the significant value added by having experienced INSO employees deployed to new country programs; however, a handful of examples demonstrated the operational difficulties created by turnover and recruitment gaps as well as the substantial damage done to INSO operations and reputation when staff were ill-qualified or ill-prepared for their role. Thus, improving staff retention and development efforts would yield important advantages in program quality and consistency. This review did not extensively cover human resources (HR) practices or have HR data to draw upon such as average retention rates so there are limits to the depth of this analysis. In general, expatriate RSAs generally serve one-and-a-half to two years in their postings. While national staff retention rates are generally longer than expatriate ones, many national staff explained their

career progression was likely to be hindered by an "expat ceiling" past which they could not advance. National staff promotions to RSA roles in Kenya and Afghanistan are encouraging but INSO should seek to formulate potential career trajectories for national, as well as expatriate, staff.

Key operational sequences and processes

INSO establishment

Assessment and decision-making

INSO platform establishment is guided by NGO demand. Initially, input on where INSO should establish new platforms was sought at a forum convened EISF, which influenced the choice of DRC as the site of the first new INSO program in May 2012. At present, a letter of invite (LoI) is required from at least six NGOs requesting INSO's presence.[8] In other models of NGO safety platform start up, the onus falls on the NGO community – usually already overburdened with addressing the humanitarian crisis at hand. That INSO is able to assume this burden of responsibility enables faster start up, but the LoI requirement demonstrates buy-in from NGOs. The LoI requirement also ensures that NGO needs, rather than requests coming from donors or others, drive INSO's presence.

INSO decision to establish new platforms is generally based on the subsequent assessment and INSO's own capacity. INSO ultimately decided not to establish a platform due to lack of need/appropriateness in only one instance (Jordan) where a LoI was submitted and a scoping mission was undertaken. To some extent, the Board of Trustees have been consulted in these decisions but ultimately it is at the discretion of the Executive Director. On the one hand, this has allowed INSO significant flexibility. On the other, this opens up the risk that INSO may expand beyond its capacity or end up with portfolio that lacks strategic coherence. Clearer written guidelines regarding intervention criteria may mitigate this risk.

In-country assessments usually range from one to three months, which focus as much on the appropriateness of the intervention as on building NGO relations. If an assessment determines INSO's presence is appropriate, an advisory board is finalized and funding is sought before presence is established.[9] The assessment period also focuses on beginning to put in place critical pieces of the INSO infrastructure that help set the scope of its activities and parameters of NGO participation, including the SoS and advisory board. While the SoS may change over time, it lays out exactly what NGOs can expect of INSO, and helps INSO to manage NGO requests and expectations over the longer term. In countries where advisory boards have been established early on, such as in Kenya, they have played an important role in providing advice and support through the start-up phase and by acting as advocates with the wider NGO community (discussed in further depth under the section entitled "Governance and participation").

Once INSO decides to establish a platform in a given country, it must register with the host government. In general, it has been able to do this without major delays or a problematic level of scrutiny regarding its mandate. In interviews, many external actors felt INSO would struggle to establish itself in more sensitive contexts or where host governments were distrustful of NGOs. This fear has not materialized. Indeed, INSO operates in a number of contexts that would be deemed "sensitive" and has not had trouble registering with host governments.

The one exception is Turkey, where the government rejected INSO's first attempt at registration. It is important to note that many other NGOs have similarly struggled with Turkey's registration process. INSO started operating unofficially while it resubmitted its registration, as many other

[8] In practice, the implementation of this model has varied. The number of NGOs required as signatories to the LoI has decreased over time, not all countries have had a LoI (Iraq being the exception) and the recent introduction of ERO funding has allowed establishment to start prior to donor commitment of funding (such as in CAR).
[9] INSO public document (undated), *Frequently Asked Questions on Getting Started*.

NGOs have done while awaiting their registration to be approved. According to informal conversations INSO staff had with Turkish officials, the initial rejection also appears to have stemmed from, first, INSO applying for permanent rather than temporary registration, and secondly, from a lack of knowledge about INSO's mandate and objectives (as opposed to larger, more established NGOs). The second attempt included renewed relationship building with all relevant government actors involved in the registration process, focused on repeatedly explaining INSO's objectives and activities. Registration was approved in approximately six months, which is considered a relatively fast approval in the Turkish context.

Models of platform establishment

INSO's traditional model of country establishment was geared towards slow and steady progression, led by the Country Director with support from other INSO staff deployed on a short-term basis. The Country Director leads operations (logistics and hiring) as well as the task of cultivating membership and establishing services. Building the trust of NGOs, and persuading them to report incidents, requires INSO to demonstrate added value. It's a Catch 22: in order for INSO to gain buy-in, it must generate quality reporting and services; in order for INSO to generate quality reporting and services, it must have some degree of buy-in by NGOs. First, this demonstrates the importance of NGO buy-in through mechanisms like the advisory board. As covered below under "Governance and participation," advisory boards in DRC and Kenya played a critical role in helping create early buy-in and legitimacy. Secondly, this underscores the importance of getting the recruitment profile right for leadership positions – which INSO has improved upon and refined over time. Country Directors were more likely to succeed where they had pre-existing networks in the NGO community and NGO management experience, as was the case with the first two INSO country offices established beyond Afghanistan (DRC and Kenya). Thirdly, it points to the importance of the HQ support functions that INSO is now putting place. Start-up in CAR illustrates some of the persistent gaps, and the potential for INSO to improve the speed and efficiency of start-up processes. ERO funding was initially used and sped up establishment, but the lack of logistical support is a major stumbling block, which is made even more time-consuming by the formidable logistics challenges of working in CAR.

Table 2. Comparative speed of establishment

Country	*Date of NGO request*	*Date of first report*	*Approx. speed*
CAR	April 24, 2014	August 18, 2014	4 months
DRC	January 25, 2012	August 1, 2012	7 months
Iraq	June 24, 2014	October 2014	3-4months
Syria	January 23, 2013	April 7, 2014	14 months

INSO has also sought to improve upon its responsiveness with the development of a second mode of establishment, the ERO model. The ERO model, used in Syria and Iraq, represents a significant advance in reducing the time frame required for INSO platform start-up and responsiveness to NGO requests for support. Previous INSO platform establishment has been delayed by the need to secure funding. Since the beginning of 2014, INSO has been able to draw on available ERO funding for start-up. A LoI is not required for an ERO but there must be a humanitarian trigger and a specific request voiced by members of the NGO community (as was the case in Iraq). An assessment is carried out and followed with the deployment of the ERO Director for approximately six months, who assumes responsibility for all aspects of start-up. During the ERO period, an "INSO lite" menu of services is provided consisting of daily threat warnings and security reports, weekly incident reports and weekly security roundtables. The longer-term aim of the ERO model is to establish a team of four expatriates deployable at anytime, anywhere in the world to respond to an emergency. Overall, the degree to which INSO has been able to reduce start-up time has led to greater responsiveness and high expectations among NGOs that INSO will react to requests for support quickly.

Coordination and avoidance of duplication

INSO has initiated platforms in contexts where no similar or comparable services exist. However, INSO has been invited into contexts where there was already an NGO entity seeking to provide some degree of safety information and coordination services. These include: Turkey/Syria, where GOAL had hired two security officers to provide safety information for the broader community; CAR, where the Comité de Coordination des ONGs (CCO) was providing humanitarian coordination and security advice, and; Iraq, where NCCI provides a degree of security reporting from Baghdad. In all of these contexts, INSO's menu of services is preferred by NGOs over what existed before and positive relations have been established with the NGO fora.

Table 3. INSO Country Advisory Boards

	In place	Planned
Afghanistan	X	
CAR	X	
DRC		
Iraq		X
Kenya	X	
Mali	X	
Syria		X

Syria was a peculiar case in that the DFID, at different levels, funded both the GOAL initiative and INSO to operate out of Gaziantep. In interviews with NGO and donor stakeholders present at the time, there were varying perceptions of how INSO sought to resolve this potential duplication. Some saw INSO as overly aggressive and critical of the GOAL initiative, even if they recognized that INSO provided a more comprehensive, sustainable option. The GOAL disbanded its initiative shortly after INSO's establishment, with GOAL and other NGOs preferring INSO's model for reasons of independence and sustainability. INSO presently works closely and productively with the NGO Forum for NGOs operating in Northern Syria (NCIMU), which provides some security-related support to NGOs.

In CAR, the CCO security section was staffed by one expatriate during INSO's assessment. INSO was widely seen as consultative and amenable to working together. However, the CCO security component was not meeting NGO expectations and finally collapsed during INSO's assessment when the expatriate left CCO. In perceiving the INSO model as more sustainable and able to provide a broader range of services, NGOs exerted pressure on INSO to launch operations ahead of schedule. CCO's 40-member NGOs became INSO members with CCO helping INSO register with the government and initially hosting INSO staff in its offices. INSO maintains a close relationship with CCO, collaborating on advocacy and coordination.

In Iraq, NCCI had little presence in the north when the 2014 crisis emerged but provides significant security reporting in Baghdad, where it is headquartered and where its dedicated security staff are based. At present, INSO's efforts have focused on the north with plans to expand coverage in the central region covering Baghdad. NCCI has indicated that it sees their roles as complementary, given that INSO can offer more comprehensive safety services, and is eager to see INSO take a cooperative – rather than competitive or critical – approach to expansion.

The only instance where INSO has assumed responsibility for a pre-existing security platform is its recent agreement to host the NSP in Somalia. NSP previously operated as a project hosted by the Danish Refugee Council and was transferred to INSO on April 1, 2015. INSO has assumed the role that the Danish Refugee Council previously played but what this means over the long term for any adaptations or rebranding of NSP as an INSO platform is unclear. Although NSP was not covered in this review, there are important synergies between INSO Kenya and NSP with regard to regional security threats. NSP's structure and outputs are similar to that of INSO with much that each organization can learn from the other. Additionally, this transition is aided by the fact that the INSO Kenya Country Director is a former Director of NSP.

Governance and participation

Global level governance and participation

Table 4. INSO Membership Composition

Country	Total members	International	National
Afghanistan	241	70%	30%
CAR	40	100%	0%
DRC	81	93%	7%
Iraq	54	100%	0%
Kenya	163	89%	11%
Mali	80	87%	13%
Syria	49	96%	4%

A Board of Trustees, consisting of the INSO Executive Director and two additional members, governs INSO globally. The two additional members are both NGO senior managers with extensive experience in humanitarian operations. The Board of Trustees essentially fulfills a legal requirement, but also acts as a sounding board for the Executive Director on programmatic direction and expansion. While a lean board of trustees may have been beneficial during the start-up phase of INSO, a limited governance structure presents more risks than benefits at this stage in INSO's maturity. This is true both in terms of safeguarding internal accountability but also external perceptions of how INSO is managed. An expanded and more diverse Board of Trustees would have the added benefit of providing greater support to the Executive Director, including on issues of fundraising, communications and strategic advice on specific areas of INSO's work. INSO's global governance should be reviewed and expanded as a priority, although precise structures and mechanisms that INSO could put in place merit careful examination.

Country level governance and participation

The role of the Advisory Board is broadly defined as to advise the development of INSO in the country, including: to establish, amend or update the SoS; to discuss services users, and; to approve the appointment of the INSO Director. Afghanistan, CAR, Kenya and Mali all have Advisory Boards comprised of NGOs in place. DRC initially had an advisory board but this was disbanded in 2014 due to the lack of participation by board members. There are plans to establish Advisory Boards in Iraq and Syria. Board composition reflects INSO's membership: board members are self-selecting and predominantly international NGO members. Donors or others (such as UNDSS) can be listed as observers or authorized participants of the Advisory Board meetings. This provision is important in that it allows for broader participation from the humanitarian community, but keeps the advisory structure grounded in its membership.

Predictably, some Advisory Boards are more active than others and, as members are institutional rather than individual, participation fluctuates with staff turnover. While boards can be instrumental in the start-up phase, as is the case with CAR, this can wane later on, as in DRC prior to the disbandment of its board. Much of this depends on how active the Country Director is in strategically cultivating relations with board members. Overall, the Advisory Board plays an essential role in ensuring transparency and accountability to its beneficiary community. Boards make NGO members feel they have a voice in how INSO conducts its programs but they also benefit INSO operations. In DRC, Kenya and CAR, Advisory Boards played a critical role in assisting with INSO's establishment and lobbying on behalf of INSO with the wider NGO community. As with the LoI, the boards provide a safeguard to ensure that INSO is acting in accordance with the broader NGO community's needs and wishes.

Beneficiary vetting and registration

Membership in INSO is open to all non-profit, non-governmental, humanitarian organizations adhering to the Red Cross Code of Conduct for NGOs and legally registered in the country. Those wishing to register with INSO are generally required to fill out a standardized beneficiary form as well as provide a covering letter from the Country Director and proof of registration in the country. The ease and appropriateness of the registration process was ranked highly in the online survey, with 76.8% ranking the ease of registration as excellent or good and 75.2% ranking the appropriateness of registration standards as excellent or good. Many were unsure about the

process, which is to be expected given that not every staff of a member organization is likely to be familiar with the process, and 0% of the responses ranked either factor as poor or inadequate.

Once NGOs formally apply to INSO, they are vetted with the same standardized process across all contexts. Vetting falls into three tiers:[10]

1. Members of INSO in another country (generally registered without asking for additional documentation).
2. Partners of an existing INSO member in the country, which receive pooled funding or are UN Clusters members (required to submit additional documentation).
3. Organizations with no formal links to INSO, the UN or INSO members (required to submit additional documentation and subjected to a thorough background check).

This vetting process plays an important role in shoring up trust among the membership, by weeding out political organizations or others who NGOs may worry about sharing information with. In the online survey, 66.5% of members drew a strong correlation between INSO's membership and the platform's neutrality. INSO is transparent in its decisions and communicates the reasons for rejection to unsuccessful applicants, and may undertake these decisions (where appropriate) in consultation with its Advisory Boards. Additionally, the vetting procedure is standardized across all contexts while there are unique concerns in each country. In DRC, few national organizations are members due to concerns about the neutrality and independence of such organizations. There are similar concerns in Syria but OCHA's list of vetted Syrian and diaspora NGOs provides a helpful guide in vetting applicants. However, it is important to stress that INSO generally encourages membership among national NGOs – even if international NGOs comprise the majority of its members. It is less often the case that INSO rejects national NGO applicants and more commonly that INSO struggles to garner national NGOs interest, as they may face language barriers or do not feel they have the capacity to participate in INSO's work.

All members are required to sign INSO's code of conduct. The code requires them to report the basic details of any incident affecting their organization, to keep all information received from INSO confidential and consider the safety of others when asking INSO to embargo or censor information.[11] The code was a critical step in INSO's development in that it sets the terms of its relationship with member NGOs. It places strong obligations on members to report incidents and adhere to confidentiality – both of which are essential to the INSO model. Knowing that all members are obliged to report and respect confidentiality improves collective trust. The code also gives INSO grounds to penalize those that breach the code. Organizations may be subject to a verbal/written warning or a temporary/permanent suspension. In practice, few organizations have been suspended and INSO is generally able to resolve issues through dialogue with NGOs.

Source development and verification

INSO's source development process provides significant added value over other models and has improved the quality of INSO's data and analysis. INSO seeks to gather information from a range of sources, including NGO members to host government, embassy contacts, personal networks and PFMs. The fact that INSO is able to solicit information and confirm reports with a wide variety of sources greatly improves the timeliness and comprehensiveness of its reporting and analysis. The degree to which INSO relies on one source type over another varies with context but significant internal attention has been placed on systematizing source cultivation, with written guidance in place.[12]

While NGOs are required to report any incident affecting them as per the Code of Conduct, it takes significant relationship building to create the trust required for NGOs to feel safe doing so and repetitive messaging to ensure reporting incidents to INSO becomes standard protocol. The

[10] INSO internal document (2011) *Annex III – Applicant Vetting Tiers, NGO Registration V1 2011*.
[11] INSO internal document (2011) *Annex IV INSO Code of Conduct, NGO Registration V1 2011.*
[12] INSO internal document (undated) *Minimum Standards in Source Development.*

difference between Afghanistan and other contexts was striking: NGOs interviewed reported that they routinely reported security incidents to INSO as a matter of either *de facto* or *de jure* standard operating procedure in Afghanistan, whereas this was much less common in all of the other operating contexts. In the start-up phase and in contexts where NGOs are less willing to share information, like Syria, reliance on other sources of information plays a much stronger role.

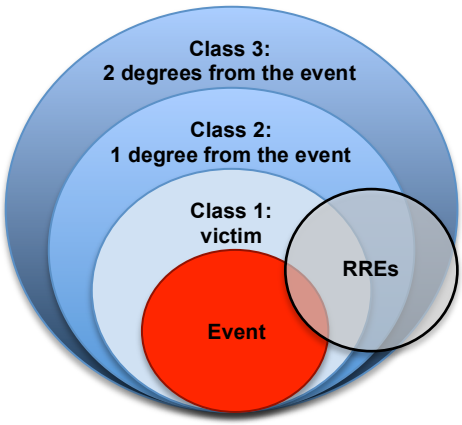
The role of PFMs, a fairly unique feature of the INSO[13], is essential to broader geographic coverage and improving the speed of reporting. PFMs are required to routinely report all reliable information and are immediately available to verify incidents. The majority of PFMs are hired as employees, although some are hired on short-term contracts (dependent on country context). PFMs play a major role in creating the added value required for substantial NGO buy-in. In interviews with members, they routinely pointed to INSO's value lying in the fact that it was not just recirculating information NGOs reported but had its own network of sources that provided a broader picture of the conflict. In DRC, which introduced PFMs fairly late (approximately a year ago), incident volume nearly doubled almost immediately. PFMs can be particularly valuable during start-up, as in Syria, as their reporting provides an inducement for NGOs to invest in supporting INSO.

There is flexibility across countries in how PFMs are allocated, contracted and managed. The PFM system works well when guided by experimentation and creativity, and refined through trial and error. In some countries, they do not disclose their association with INSO to their sources nor do they meet face to face with INSO staff. In others, PFMs regularly visit the office, represent INSO in meetings with government officials, and participate in INSO security roundtables. However, some practices merit examination and there is evidence that INSO is not systematically maximizing the efficiency and effectiveness of field monitors. The internal logic as well as the reason for discrepancies in PFM management between countries is not always clear. In some cases it was because the precise role of the PFMs was not clear to the country team, leading to sub-optimal PFM management. Additionally, the requirement that PFMs not be NGO staff, media activists/reporters or associated to parties to the conflict has not always been adhered to. The rush to get information during start-up has led to a bending of the rules in some instances, and exposed INSO to greater risk of information manipulation or reputational risk. The potential damage of the former is generally mitigated by verification processes but there would be great value in reviewing PFM systems in each country and sharing experiences across countries.

INSO relies on the same model of source verification across all countries, with verification based on the proximity of sources to the incident:[14]

- Class 1 comprises of victims, is taken as inherently valid and subject to minimal verification depending on circumstances.
- Class 2 requires at least one other Class 1 or Class 2 verification; barring that, two verifications by recognized reporting entities (RRE).
- Class 3 reports are verified by: one Class 1 report, two Class 2 reports, three Class 3 reports or two RREs.
- Reports from RREs are verified by: another RRE report, one Class 1 report, one Class 2 report or two Class 3 reports.

Figure 4. INSO Source Verification Model



There is a fine balance between disseminating information quickly and ensuring it meets verification standards, particularly with regard to threat warnings. When INSO did report the details on an evolving situation incorrectly, NGOs were understanding of minor mistakes and as

[13] Few field safety platforms employ a similar mechanism, with one notable exception being NSP.
[14] INSO internal document (2012) *Minimum Standards in Verification, v. 2.*

long as any factual inaccuracies were later corrected. Related to this, there is often pressure on INSO to address or report rumors (even if this means reporting them as "unconfirmed rumors"). Rumors and conspiracy theories are difficult to disprove by nature and rife in conflict environments. INSO addresses them through meetings or bilateral discussions, but rightly sets a firm boundary in refusing the report or further their circulation.

This standard model has worked well across contexts with little modification. NGOs appreciate INSO's rigorous verification measures, particularly where they understand the intricacies of the process. The process itself creates a strong level of consistency in reporting which in turn helps to generate trust. Robust verification is integral to ensuring a sound evidence base, which informs INSO's analysis and advice. It also garners confidence from UNDSS and other security professionals, with many using INSO reports to verify their own information.

Information management

INSO has relied on roughly the same system of information management since its inception, based around Excel databases held at the country level. Weekly incident lists, which contain basic data on each security incident record and include verified incidents not reported in threat warnings or security reports, are coded and transferred into the database each week. Coding lends a degree of uniformity across the diverse contexts in which INSO operates. This system is straightforward and fairly uniform, and presented a cost-effective solution to data management early on in INSO's development. However, INSO's information management needs have outgrown its systems, particularly in high-incident volume contexts, with the current system limiting options for data usage and inhibiting analysis. While Excel is a useful tool for storing data, it is a poor tool for analysis. Problems range from the near total lack of data protection to discrepancies in data collection across countries. INSO's plans to upgrade its information management systems and create a global database will yield important improvements in efficiency as well as broaden the options available to INSO for analysis and cross-country comparability.

Table 5. Average Incident Volume

Country	Average weekly incident volume
Afghanistan	600-690
CAR	45-65
DRC	90-120
Iraq	400
Kenya	60-100
Mali	45-65
Syria	1260

Despite the limitations, INSO's databases are the cornerstone of their ability to generate evidenced-based analysis. They enable INSO to generate statistics on demand for NGOs to inform tactical and strategic decisions. It also provides an evidence base for private advocacy with donors and parties to the conflict, to urge them to change behavior or adopt policies that would contribute to NGO safety and access (although INSO's stance on confidentiality precludes the public use of these figures, limiting their impact in this respect). INSO encourages NGOs to develop their own databases, which is an important measure in enabling NGOs to build their own independent systems of safety data management and analysis. INSO is also increasingly using this data in mapping, which is particularly relevant in contexts where NGOs are largely working remotely or subcontracting the bulk of their work. Mapping Syria and Iraq are prime examples of this, where report recipients may be responsible for managing work in locations they cannot visit.

Scheduled services

Threat Warnings

Threat warnings pertain to significant incidents that require immediate action from NGOs and/or that are likely to directly affect NGOs. This could include a complex attack in a major city, armed clashes on a road routinely travelled by NGOs or the launch of a major offensive or military operation. Threat warnings are broadly transmitted through two of the four generally available mediums: email, SMS, Skype and very high frequency (VHF) radio.[15] A standardized INSO

[15] Generally, there are likely to be three available mediums in any given country. Not all countries have VHF services operational and not all have established regional or national Skype groups.

template is used to issue email warnings, including the extent of basic information available,[16] analysis and recommendations and contact information for the relevant RSA. Time takes precedence over detail, with platforms establishing targets (from the receipt of a report through verification and dissemination to NGOs) ranging from three to twenty minutes. As these are ongoing, complex events, RSA teams monitor the situation and issue corrections, updates and "all clear" notices as needed.

In a survey of members, threat warnings were seen as the most useful service with 93% reporting that they found them valuable. In most countries, this system works relatively well. Even where information is initially incomplete or incorrect, it is usually quickly corrected and NGOs appreciate having some timely information rather than waiting. The September 2013 Nairobi Westgate attack is one example. While the initial report contained some inaccuracies regarding the nature of the attack, several NGO interviewees reported that the information prevented them or their staff from traveling to the mall or the surrounding area. The threat warning system represents a significant advancement in terms of speed and efficiency over what had been in place (if anything) in these contexts prior INSO's establishment. In DRC and CAR, there was a phone tree among NGOs, which is a comparatively slower means of sharing information. Particularly contexts where mobile coverage is strong, these threats warnings allow managers to relay comprehensive information to staff in real time and ensure that none of their employees are in danger.

Table 6. Key products and primary users

Product	Primary users
Threat warnings	Country Directors; program staff; operational staff; security personnel; donors; UN
Security reports	Country Directors; program staff; operational staff; security managers; donors;
Weekly incident lists	Security personnel; UN
Bi-weekly reports	Country Directors; security personnel
Quarterly reports	Country Directors; program managers; security personnel; donors; UN

Security Reports

Security reports provide a snapshot of ongoing trends in an easily readable and brief format. Security reports, transmitted via email, pertain to incidents or events that are unlikely to immediately affect NGOs but are generally useful for NGOs to know about. INSO provides basic information about the event and advice, as appropriate, and devoting greater space to analysis than in threat warnings. This could include analyzing what a recent abduction of a high level figure in an armed group means for security in the area, or examining an attack on private contractors and linking this to operational advice for NGOs. In Syria and Iraq, a special kind of security report, subtitled "Status of Conflict," is periodically issued to provide specific details on conflict developments in a specific location (usually an individual governorate).

They allow INSO to remind NGOs of best practice, taking the macro implications of a given trend and relating it to specific incidents. Examples include reports from DRC around robberies that enable INSO to remind members of safe routes and best practice in dealing with criminality, to reports from Afghanistan on incidents in which NGOs have been targeted by the insurgency that have allowed INSO to reiterate the need to talk to all sides in the conflict and gain acceptance in order to facilitate safe access. While INSO's longer narrative reports focus on broader analysis of trends and enable reflection, security reports bring evidence to bear in allowing NGOs to put specific incidents into the broader context in real time.

[16] "Basic information" will be defined as pertaining to who, what, where and when.

Weekly incident list

Weekly incident lists are compiled in a standardized Excel sheet containing all incidents previously reported in the week's threat warnings and security reports as well as all other verified incidents. The weekly incident list is sent to NGO members via email. The weekly incident list is not as much a report as it is a tool aimed at supporting independent analysis and encouraging NGOs to build up their own internal systems of safety data management. The format and content are geared towards enabling NGOs to create their own databases of security threats, to which they can add their own information or coding. Incident lists are particularly useful to NGOs with dedicated security staff who are already gathering similar information. If compiled as INSO advises, the weekly lists allow them to then generate their own security reports and statistics. Of the NGO survey respondents, 88.8% ranked their quality and relevance as excellent or good. In practice, these are used for internal analysis as well as to inform a wide range of policies and processes, from evaluating security rules or movement to a certain area to helping inform needs assessments of new areas.

Bi-weekly and quarterly reports

In contrast to threat warnings, security reports and incident lists, bi-weekly and quarterly reports seek to provide greater analytical depth and context. The bi-weekly report provides individual analysis, key data and an overview of trends for each of the regions, provinces and/or governorates covered. The quarterly report focuses on longer term trends, analysis and statistics, presenting the full weight of INSO's qualitative and quantitative analysis. The fourth quarterly report generally functions as an annual report, covering trends of the previous year and providing an outlook for the coming year. Each country quarterly report is structured slightly differently, with a general overview, an overview of the relevant conflict(s), analysis of the impact of insecurity on NGOs and thematic overviews of relevant themes (i.e. armed group activity, the state of the conflict, trends in criminality).

One issue that merits further examination, in efficiency terms, is the appropriateness of the scheduling of analytical reports, mainly centered on bi-weekly reports. All bi-weekly reports average around 12-14 pages.[17] In interviews, the bi-weekly was broadly seen as these least utilized of INSO scheduled services with most finding the quarterly reports more useful. In some countries, there was overreliance on generating the same statistics for each period and a lack of meaningful analysis to accompany the numbers. In countries covering less geographic scope and with lower incident volumes, there is a strong case for this to be reflected in reporting schedules (with the aim of freeing up staff time to develop sources and conduct greater field travel). Another issue is reporting language, although this varies across countries. Impartiality and neutrality in language is critical, and INSO avoids inflammatory or partisan language. Yet in some instances, its terminology is seen as exclusionary and more commonly associated with military operations or spy craft than humanitarian work. Military terminology is useful in describing some events and trends, but has limits. INSO must be careful to avoid using overly technical and military language where it may obscure analysis and be hard for its core audience of NGOs to understand.

Nonetheless, NGOs are highly appreciative of INSO analytical products, with 72.8% of online survey respondents finding them valuable and 87.4% ranking their quality and relevance as excellent or good. Quarterly reports, seen as particularly useful by Country Directors and Program Managers, were widely seen as a critical snapshot of the security situation – and unique, in that there is little else out there that specifically captures these threats on a regular basis from the NGO perspective. The quarterly report allows INSO to discuss broad trends with a focus on the implications for NGOs. NGO members used these reports not only to inform their

[17] INSO DRC which covers two eastern provinces and produces a bi-weekly report, averaging around 12 pages with 5-6 pages devoted to each province (meaning each of the two RSA must produce 5-6 pages of analysis every two weeks). By contrast, Afghanistan's reports cover all 34 provinces – with a much higher incident volume than DRC – with half or one-third of a page devoted to each province (meaning each RSA must produce 2-3 pages of analysis).

own analysis but drew upon them to fulfill internal or donor reporting requirements. These reports play a meaningful role in helping NGO Directors and program staff, primarily focused on the demands of day-to-day programming, to keep an eye on larger trends and developments which may impact operations. Confidentiality limits impact; one could imagine that sharing this analysis more widely would have both positive and negative impact, as when the ANSO quarterlies were publicly available in Afghanistan. They help create a shared understanding among the humanitarian community of the risks they are facing, so often absent in many contexts but an essential precondition for effective coordination among NGOs in addressing key issues.

Security Roundtables and Country Director Meetings

INSO's RSA teams facilitate security roundtables at regional level, usually on a bi-weekly or weekly basis, lasting around 90 minutes. Roundtables cover the security events of the previous period, often corresponding to the release of the most recent scheduled report (either the weekly incident list or the bi-weekly). Attendees are comprised mainly of those responsible for managing security, which is generally security managers, but in some contexts Country Directors and Head of Sub-Offices also attend. Attendance is limited to INSO members but in some contexts, OCHA, UNDSS and/or International Committee of the Red Cross (ICRC) may also attend.

While INSO provides a briefing, the main aim is to generate discussion among participants. First, limiting meeting attendance to INSO's membership and holding meetings in a confidential space makes NGOs feel freer to speak frankly. This results in more NGOs reporting incidents and providing information, either in the plenary or on the meeting margins (i.e. coffee breaks, after the official meeting closes). Secondly, these meetings are one of the few, if not the only, coordination meetings dedicated to NGO security personnel. It provides an important forum for them to compare notes and learn how others are responding to security threats. Generating this discussion requires active facilitation, including asking individuals to contribute on key issues or events prior to the meeting. However, this is sensitive territory as individuals were often dissatisfied if they were called upon during the meeting without giving prior consent.

INSO holds monthly Country Director meetings to discuss trends and thematic issues. However, not all countries have stand-alone Country Directors meetings. In Kenya, DRC, Syria and Iraq, INSO Country Directors provide a security briefing as part of existing Country Director meetings. This works well in some contexts where Country Director buy-in is already strong but less well in other contexts. Like the roundtables, the importance of these meetings is that they provide a safe, confidential space in which to discuss access and safety-related issues at strategic level. There is a risk that if INSO's only regular interaction with Country Directors is through a broader meeting, this opportunity will be lessened or lost. INSO proposing a stand-alone meeting may appear as just another obligation to Country Directors with a multitude of meetings to attend. Where INSO conducts independent meetings (even in high pressure, meeting-laden environments), they are well attended and highly valued by participants. This time must be used well to be valued, which requires more than just a discussion of key security events and trends. When it works well, the meeting serves as a critical avenue for INSO to engage decision-makers and allows them space they would otherwise not have to discuss critical safety and access issues. Where possible, INSO should claim the space to provide these meetings independently.

Orientation services

Most countries conduct regular orientation sessions for new expatriate arrivals working for NGOs. In general, the sessions cover an introduction to INSO, historical/political background and an overview of the conflict, including key actors, basic trends, driving factors and threats to NGOs. The service is provided on a "first come, first served" basis and orientation sessions are announced to the membership via email. Where orientation is provided, it is highly valued by participants, who range from Country Directors to program, operations and security personnel. Many found that the contextual and security overview covered issues not included or covered in great depth in the orientation provided to them by their organizations. Orientation also allows

INSO to inculcate incoming staff members to INSO, reminding them of their organization's obligation to report incidents and providing an overview of what services INSO can provide.

Request services

Training services[18]

Where INSO has the capacity to do so and NGO demand exists, INSO provides security training in response to specific needs. The provision of training benefits also INSO, as it enables them to leverage their experience to build confidence among NGOs. In general, INSO does not have the internal capacity to provide training directly and contracts training from specialized training organizations on an *ad hoc* basis. CAR, DRC and Mali have recently provided security training through third party contractors, funded by donors and provided to members free of charge. The exception to this approach is INSO Afghanistan, which has long directly provided training and expanded this in June 2014 with the creation of a training unit and new trainings. Demand for INSO to provide or organize training exists more generally across all countries but other platforms have either lacked capacity or been reluctant to do this where other resources exist.[19]

Crisis response

When requested, INSO provides assistance to NGO management in dealing with urgent situations, including medical evacuations, fatalities, armed attacks and kidnappings. Even when active in countries that do not include crisis response in their SoS, INSO tends to be called upon to assist in these instances anyway (i.e. in DRC, INSO increasingly provides advice on staff kidnappings). INSO does not attempt to directly provide extractions or hostage negotiation services and NGOs are aware of these limitations, but INSO does play a liaison and referral function. This includes liaising with armed forces (i.e. government forces, NATO missions or UN peacekeeping missions) to assist in evacuation, recommending the best course for medical evacuation or connecting NGOs with others who may have relevant expertise or experience.

Beyond facilitating access to support services, INSO plays a useful role in linking up NGOs in the midst of a crisis with other NGOs who may have experiences similar events in the past. This creates important opportunities for NGOs to help one another and has strengthened overall coordination among NGOs in many contexts. This is particularly relevant where NGOs have had staff members abducted and are able to learn from others that have experienced similar events. Finally, INSO provides support and an independent perspective during a protracted situation or in assisting an NGO to conduct post-incident investigations that few other actors would be able to provide. Unfortunately, crisis response procedures could be clarified and many INSO staff members felt they would benefit from training and tools. In most instances, the Country Director plays a significant role so it is unlikely that an RSA will ever handle this alone. Nonetheless, the need for crisis response training and tools should be addressed because it is a need consistently voiced by RSA teams across multiple countries.

Security plan and site review services

INSO provides desktop reviews of country-specific security management documents. INSO does not provide any official "clearance" through this process but provides recommendations and feedback on the plans that a NGO already has in place and referrals to resources, trainings and templates. Site reviews of NGO facilities are provided in a similar way. RSAs and/or RSA team members generally conduct a walk-through of the NGO premises together with NGO staff members, providing verbal feedback, and committing their recommendations to writing.

[18] Note that in some contexts, such as Afghanistan or CAR, training is listed as a scheduled service. In the vast majority of contexts, it is listed as a request service.
[19] INSO Kenya is in a difficult position because its grant holder is a training organization (RedR), and this is one instance that merits re-examination as both demand and internal training capacity exist.

Security plan and site reviews enable INSO to build relationships with individual NGOs, particularly smaller ones that may not actively attend INSO meetings. They also provide an opportunity to reinforce the need to include reporting security incidents to INSO in standard procedures as well as reinforcing best practice. However, two issues arose with regard to security plan reviews and site reviews, similar to with crisis response: the perceived lack of systematized tools and the lack of internal capacity. In most instances, there is someone on the RSA team with the capacities to cover this. Where this is not the case, INSO has been forced to turn down NGO requests to conduct site reviews (as in northern Kenya). INSO should consider circulation of existing tools and creation of new guidelines, in addition to training and support targeting capacity building for these specific activities (ideally, during staff orientation).

Independent advisor service

INSO provides advice to NGOs on specifically requested topics and trends. This includes advice on travel routes, security data on specific areas, information on key trends or contact details for training, security or medical resources. There are limits on what RSA teams and Country Directors can provide in addition to their regular duties and the provision of scheduled services, but independent advice is by far the most widely used and of the highest impact among INSO request services. Particularly with the advisory component of their work, there is a risk that NGOs become overly reliant on INSO but INSO generally manages this well by drawing firm boundaries.

The most requested advice is bespoke reports or information pertaining to a specific trend or geographic area. In some areas, this includes the generation of specific statistics or data analysis. Some of this advice, usually geared at RSA teams, is tactical, focused on issues such as road travel and general information pertaining to safety conditions related to day-to-day programming. Other advice, generally requested from Country Directors, is more strategic, pertaining to potential expansion or the modification of safety policies. At times, this has grown into more formalized reports. One example of this is Kenya's development of Area Briefs (inspired by a similar product created by NSP) that provide an overview of the safety conditions, the NGOs working there, key contacts and other information specific to NGO operations.

At the Country Director level, the INSO Director provides an important sounding board on policy and strategy issues. Particularly with smaller international NGOs (where the Country Director may have less security expertise and/or less organizational resources to draw upon), Country Directors appreciated being able to approach INSO to talk through security issues. These issues ranged from top-to-bottom security reviews to dealing with the aftermath of an attack on staff. Within this, the confidentiality, atmosphere of non-judgment and the context-specific advice that INSO was able to provide was seen as particularly valuable. In this and other ways, INSO is able to cultivate a safe space whereby Country Directors can discuss issues that they might otherwise be reluctant to admit that they are struggling with. Additionally, Country Directors placed high value upon INSO's advice as being specifically aimed towards NGOs, aligned with humanitarian principles and grounded in the operational context – factors that they often found lacking in advice from their HQ or from private security firms.

Section 2: What INSO Has Achieved

This section examines INSO's achievements and impact since its inception in 2011. The aim is to understand what has been achieved (against core INSO objectives) and how this was achieved. It seeks to identify how successful processes can be built and to identify which processes have been less successful and should be discontinued. It looks primarily at country level achievements, with reference to global level achievements where appropriate.

Understanding INSO's achievements and impact

To date, INSO has used a limited range of tools to assess its impact. This has included online beneficiary surveys conducted on an annual basis at country level and the collection of NGO testimonials. INSO has not been subject to any external reviews or evaluations, nor has it conducted any systematic internal reviews prior to this one. As there was relatively little documented evidence to draw upon, this review focused on ascertaining achievements primarily through individual interviews with member NGOs and other stakeholders. These interviews primarily focused on understanding how members use INSO products and services.

Measuring the impact of an enabling agent like INSO is inherently challenging. This is further limited by the fact this INSO is a relatively young organization, and generating impact of the nature INSO strives to achieve takes time. This was evident in comparing the level of impact and achievement in Afghanistan, which has been operating according to the INSO model since roughly 2008, to that of the country platforms established since 2012. Particularly at such an early stage in organizational development, much of INSO's energy has been forward-looking and focused on its rapid expansion rather than examining longer term impact. As INSO grows, it will be critical to put in place rigorous and systematic measures for gauging its achievements and impact. INSO management recognizes this to some degree; indeed, one of the factors driving this review is the challenges that INSO has faced in understanding and measuring its impact.

Key achievements and areas of impact

Improving NGO safety awareness

Across all contexts, INSO's reporting has improved upon the reliability, scope and depth of information previously available to NGOs. In all countries where INSO has established a platform, there was no comparable organization previously providing the same scope and quality of services that INSO provides. In providing member NGOs with access to timely, relevant and accurate safety information and analysis, INSO has elevated NGO awareness of security risks and mitigation measures.

Data collection systems and processes are at the core of this impact. PFMs represent an integral part of INSO's model, in that they enable INSO to improve the scope, geographic spread and speed of its reporting. As discussed above, this could be optimized through a country level review of PFM management. The development of the database, in particular, has aided in allowing INSO to generate reliable data-driven analysis on key trends, events and geographic areas. With regard to threat warnings, INSO information plays a vital and immediate role in limiting NGO exposure to high-risk situations. INSO increases awareness at the tactical level through these alerts, but its analytical products and data help create a more complete picture of the threats facing NGOs. The quarterly reports, in particular, encourage NGOs to be forward looking and prepare for emerging or potential threats (whether in relation to specific events, like the 2014 presidential elections in Afghanistan, or with regard to trends, such as an increase in kidnapping of NGO staff in DRC).

In transitional and borderline contexts, INSO's reports and advice on responding to emerging threats support NGOs to react to rapidly changing dynamics. The provision of information targeted to NGOs alone may do this to some degree, but INSO maximizes its impact where it is forward thinking and proactive. A good example of this was found in Mali, with new actors entering the conflict and an increase in fighting south of Gao. Agencies interviewed felt that they were better able to respond to the situation because INSO provided timely analysis and relevant advice on how NGOs should modify their practices. In a relatively stable operating context like Kenya, NGOs particularly turn to INSO for analysis and advice in the aftermath of crises or spikes in violence. INSO has drawn upon its own evidence-based analysis to increase understanding of the threat presented by Al-Shabaab and help NGO members contextualize the implications of the major attacks (for example, after the Westgate attacks and more recently with regard to attacks on the coast and in the north east).

Particularly with smaller national or international NGOs, that may only work in a certain region, INSO reporting and meetings can help ensure these agencies have a sense of the broader context including emerging trends and threats. They may have a better sense than INSO of the micro-level but they may have some degree of tunnel vision when it comes to their programming. However, this is generally true regardless of the size of the organization. NGO Country Directors felt that INSO briefings, bi-weekly reports and quarterly reports allowed them to get an easily accessible and timely snapshot of the larger context and broader security threats. This is particularly relevant in bifurcated contexts like Syria (where, for example, many NGOs working from Turkey on northern Syria may not have as much awareness of conditions in the south) or where NGOs may have established long-term footprints in specific regions that they consider relatively safe (as in Afghanistan and Kenya).

Where agencies had strong internal security capacity, INSO played an important role in supporting this. By providing systematic information on incidents and trends, INSO produces targeted resources for security professionals. The weekly incident lists were seen as particularly important where security personnel utilized them as intended. Security managers routinely reported that they were able to use these lists to feed their own databases and used this information to generate statistics and otherwise conduct their own analysis of the situation. Many felt that this system allowed them to bring more complete evidence into their work. For example, it allowed them to quickly generate reports based on their databases (of which INSO information comprised a major input) to inform program staff or guide assessments. INSO reporting also provided an important verification mechanism and an independent source against which to compare their own analysis. Having INSO data and reports generally reduced their information gathering workload. In turn, this allowed them to be more proactive, respond faster to program needs and focus on more strategic or long-term issues.

Some INSO staff and NGO members felt that INSO's ability to have an impact in this area is hindered by the length of time it has taken to start up in new contexts (Syria and CAR being prime examples). In practice, INSO is able to begin disseminating some degree of tactical information with relative ease and speed. However, everything else that makes INSO perform well and have sustainable impact on NGO policy at field level (i.e. the features that set it apart from other NGO models and private security contractors) requires substantial time, strategic leadership and long-term effort. INSO is not a quick fix but rather a long-term solution. NGO buy-in and trust evolves slowly, based on consistent performance and outreach, as do the qualitative analysis and advisory services that have the most profound strategic impact on NGO operations.

INSO has only recently begun intervening in the onset stage of crises (as with Iraq) and the ERO model is shortening the length of time it takes for INSO start up. This could prove to be a double edged sword if rapid deployments to new contexts may have knock-on effects on the quality of existing programs if INSO's expansion outstrips its capacity. INSO staff strongly felt that the organization was significantly stretched and expressed a desire for INSO to turn inwards and focus on consolidating existing programs. The development of the HQ structure – when fully staffed and functional – will provide additional capacity. In the meantime, INSO must be watchful that its expansion does not endanger or undermine the sustainability of its achievements to date.

On a positive side, the adaptations of the ERO model have allowed INSO to establish itself fairly quickly and begin providing very basic information (the INSO lite menu of services) at an early stage in its development. While scale up still requires some time, there has been an immediate impact on improving access to information about security threats in Iraq and CAR.

There is the potential for INSO to do more with its analysis, particularly with regard to regional and cross-border analysis. While INSO Kenya and NSP already enjoy a close relationship, the INSO-hosting of NSP presents a strategic opportunity to generate more regional analysis of security threats and enhance NGO understanding of this bigger picture in terms of linkages between development in Kenya and their effects in Somalia and vice versa. Linkages between

INSO Syria and Iraq will also be important to exploit, and could provide the same sort of macro view of a number of cross-border and regional issues that is currently lacking. There are many options for the shape this might take, whether through deeper analysis in existing reports or through special reports or discrete research on key contextual issues, such as specific armed groups operating across both contexts or on the specific risks and issue pertaining to dealing with displaced populations. Again, this underscores the importance of INSO's global presence in linking safety platforms that can have added benefits in terms of strengthening NGO understanding of the risks they face.

Improving NGO safety procedures and policies

All of INSO's reporting emphasizes good practice and sound policy. Threat warnings and security reports often contain policy and procedural advice, which is elaborated upon in bi-weekly and quarterly reports. NGO policy and procedure is routinely discussed in relation to specific events and trends at security roundtables and Country Director meetings (or, where stand-alone meetings do not exist, as part of INSO briefings to Country Directors at existing meetings). Finally, INSO provides informal advice on a wide range of issues, from recommendations of which satellite phones to purchase to supporting NGO managers deal with abductions of their staff. In general, INSO policy advice was viewed as credible and appropriate. INSO's analysis is rarely seen as alarmist or its advice controversial, as both are generally linked to humanitarian principles and established best practice. In the online survey, 77.2% of NGO members ranked INSO's relevance and impact on improving NGO safety policy and practice as excellent or good.

While INSO routinely provides policy advice, it places no obligations on its members to follow this advice. The degree to which INSO advice is followed rests on an array of external and internal factors, including but not limited to: the availability of resources required to follow INSO's advice; a given NGO's risk profile and risk threshold; and donor requirements or pressures to work in a certain area or in a certain manner. Nonetheless, there is strong evidence that INSO is having an important impact in this area. In an online survey of 302 members, 66% answered that INSO products and services had resulted in changes to their security policies and procedures. The affirmative response percentage was comparable in both countries where INSO has had a long-standing presence, like Afghanistan, and in newer platform contexts, like CAR, indicating that INSO can begin to have policy impact surprisingly early on in its operations.

As with raising awareness, INSO plays a unique role in transitional contexts by helping NGOs improve their security policies in response to a changing security environment. Similarly, INSO plays an important role across all contexts in helping NGOs with less internal safety capacity. This rationale drives INSO to steer training and other request services towards NGOs with less internal resources devoted to security. INSO has been (and should remain) cautious that they are not substituting for functions that individual NGOs need to develop internally in order to manage their security responsibly, but instead supporting sustainable and institutional capacity development.

While security plan reviews are less requested than site reviews, both services have helped NGOs to improve the policies and procedures in place to keep their staff safe across all contexts – albeit in different ways. Site reviews are particularly useful in transitional and borderline contexts where security may be worsening and NGOs do not feel that they have sufficient internal capacity to make appropriate decisions about site security alone. NGOs in Kenya, for example, routinely reported that INSO site reviews helped them to adjust their policies and practices in ways they would have not otherwise probably done. Site reviews were also used to address criminal threats, and bolstered NGO confidence that they were taking appropriate measures to guard against crime. In Bamako and Nairobi, NGOs commonly requested INSO site reviews after a criminal incident or in response to the perception of increased criminal activity.

However, a diverse range of NGOs operating in volatile contexts also drew upon these services. Smaller international NGOs operating in Afghanistan approached INSO for site reviews and security plan reviews because they felt confident that they would be assisted in a non-judgmental

and professional way. This is particularly true where agencies felt that they were not managing security well, and were consequently reluctant to ask fellow Country Directors or their HQ staff for advice. Yet this service, as well as plan reviews, was also drawn upon in Afghanistan by NGOs with heavy internal security structures. They felt that INSO provided a helpful independent check on their own internal processes and decisions.

Related to this is the impact INSO has had with its training services. INSO Afghanistan provides a good example of this. It provides much more comprehensive and frequent training services than other INSO platforms, but it demonstrates the potential for INSO to expand its training in other countries. INSO Afghanistan has routinely provided training (for example, radio training to guards, drivers and radio room operators) in the past and many NGOs send their staff to these trainings regularly, feeling it improves their capacity. In June 2014, INSO Afghanistan established a training unit with a full time expatriate staff member dedicated to developing a training curriculum and facilitating trainings. The training is geared towards institutional, rather than individual, development and focuses on practical goals, including how to conduct risk assessments and develop a security plan. As of February 2015, INSO Afghanistan had conducted ten trainings so it is too soon to gauge the impact of this specific activity but this could provide important capacity building to organizations that may not otherwise have access to these services.

More broadly across all platforms, INSO's training has impact in three key areas – and this impact could be enhanced through further development of training services. First, INSO fills an important gap in transitional or borderline contexts where a high proportion of NGOs do not have significant internal security structures or appropriate resources dedicated to raising internal security awareness. INSO's presence in these countries/regions has coincided with deteriorating security and a recognition by NGOs of a need to re-evaluate their approach to managing their own safety. INSO alone cannot provide a sufficient solution to this problem. NGOs must still find ways to improve their own internal mechanisms, systems and capacities, yet many struggle to find ways of doing this on their own (particularly where donor funding may not yet be forthcoming to support such activities). This is where INSO, to the extent its capacities allow, can provide support.

Secondly, INSO provides contextually-tailored training geared at building the institutional capacity of organizations that may not otherwise have access to this kind of support. This is the case for INSO Afghanistan's radio training and the reason why INSO Afghanistan has geared its efforts towards national/local NGOs and smaller international NGOs. Thirdly, interview subjects frequently commented that many security trainings that expatriate staff receive prior to deployment (if, in fact, they receive any all) were devoid of context and overly militarized. Many felt that trainings focused on contextual information, when practical advice and analytical tools would be much more useful than the simulated kidnappings and generalized warnings that they felt characterized their security training experiences to date. This disconnect has fed the positive feedback for INSO's orientation services. Participants praised the fact that orientation trainings in South Kivu (DRC) included practical advice and demonstrations on road safety and mitigating the risk of being targeted for crime. It also indicates an opportunity for INSO to draw on its experience to create an alternative model of security training that better meets the needs of NGOs.

While INSO's membership is primarily comprised of international NGOs, national NGO staff strongly requested INSO provide more support and training to help them build adequate security structures and policies. INSO Afghanistan's new training program was seen as a positive example of how INSO could approach this, even if international NGOs also draw upon this service. However, smaller or national NGOs must first be aware of the gaps in their capacity and that there are resources available to address them before they ask for help. INSO can maximize its impact with national NGOs by providing more support and empowerment of national staff to reach out to national NGOs where national staff are not already playing this role. INSO may also be able to play an advocacy role with donors or international NGOs that subcontract their work to national NGOs. For example, several interview subjects in Afghanistan and Syria pointed to instances where international member NGOs of INSO had refused to fund any security expenditures for subcontracting national NGOs.

Improving NGO safety information sharing and coordination

INSO is seen as playing an important and impactful role in improving NGO coordination, with 71.8% of members responding to the online survey ranking the relevance and impact of INSO's NGO coordination work as excellent or good. However, improving coordination among the wider humanitarian community is a formidable task and many factors lie beyond INSO's control. Some of these factors are systemic. In an atomized environment where NGO value their independence and where a degree of competition for funding exists, NGO cooperation – let alone, coordination – is difficult to achieve. Cooperation, as discussed here, should be seen as distinct from coordination in that it is more a*d hoc* and informal, allowing each agency to develop its own approaches, while coordination is inherently more structured and can be geared towards achieving a common approach.

The dilemma is that creating at least a minimum of collaboration is important to ensuring the safety of all and thus in everyone's best interest, though it may conflict with agency desires for independence, territoriality and funding concerns. INSO's model helps address the chronic collective action problems, at least with regard to safety, that plague emergency response across contexts.[20] Further, the sharing of information and the analytical products INSO produces contribute to a shared understanding of the security context among NGOs, which is an essential precondition for effective coordination and collaboration.

There are several key components of INSO's work that lead to greater sharing of information among NGOs than would otherwise occur. The first is confidentiality. NGO members routinely stated across all countries that the confidentiality of INSO reporting results in NGOs sharing more information than they are likely to share directly with each other, particularly in more sensitive contexts like Syria. In practice, NGOs are likely to know who's working where so most INSO members can generally identify an unnamed NGO mentioned in an INSO report through deduction. Nonetheless INSO withholding NGO names and, on request, withholding non-essential details or delaying the public reporting of an event provide a level of comfort that results in greater information sharing.

Secondly, while there is a systematic component to information dissemination (i.e. organized meetings and scheduled reports), the degree to which INSO is able to improve information sharing rests on establishing relationships. Where INSO was able to gain confidence and build strong institutional relations with members, there was a marked increase on their ability to solicit information and facilitate coordination. Numerous NGOs reported that they had not reported incidents to INSO or attended their meetings until INSO staff reached out to them directly. This ranged from everything to getting an informal coffee together to proactively contacting an NGO to offer support on an issue they felt the NGO might be grappling with. Some INSO country offices, particularly newer ones, have sought to address the need to build bilateral relationships in a systematic way. In Syria, both expatriate and Syrian staff members have set targets for the number of NGOs or other stakeholder they aim to contact each day. Where it works well, INSO has been able to establish itself as a trusted interlocutor and advisor to NGOs because INSO is able to persuade NGOs that sharing information will not only benefit them but the wider community.

Where NGO members feel that INSO fails to understand their concerns, where they feel INSO staff are not responding to their needs as desired or where they perceived INSO as taking information without providing any tangible added value, they were less likely to share information or support INSO efforts to coordinate. Mali provides an instructive example. The initial Country Director struggled to gain the confidence of an NGO community that was both demanding of and defiant towards INSO. His replacement was able to significantly improve the situation by building positive relations with NGOs, in part due to his INSO experience in other countries but also with

[20] See T.G. Weiss and P.J. Hoffman (2011) "The Fog of Humanitarianism: Collective Action Problems and Learning-Challenged Organizations," *Journal of Intervention and Statebuilding* vol. 1, iss. 1.

respect to his manner and other qualifications. NGOs in turn became rapidly more supportive and participatory.

Third, responsiveness is essential to gaining the trust required for effective cooperation. Being willing to assist beyond INSO's core mandate when requested, as INSO has done repeatedly in CAR, is routinely rewarded with greater NGO support. There are many gaps to fill in CAR, in comparison to donor resource-rich environments like Syria, and INSO CAR has sought to balance its own limitations with a desire to be responsive to NGO needs. Nonetheless, INSO CAR has played a powerful role in coordinating on key humanitarian safety issues. One example is the leading role that INSO CAR assumed on addressing the risks presented by the use of armed convoys with its members and on drafting a common NGO position on armed convoys. Yet the case of CAR also demonstrates INSO's limits and affirms the need to invest more in providing support to initial start-up. The set-p of CAR has struggled because the operation was not provided with enough support and resources to meet NGO expectations, and it is difficult not to think that its impact would have been much greater had INSO CAR been given greater support in the start-up phase. Nonetheless, CAR illustrates that when INSO surpasses expectations it is generally rewarded with greater NGO participation as well as acceptance of INSO's limitations.

INSO has improved NGO coordination by using this shared understanding to bring NGOs together on critical issues. While INSO's scheduled meetings have helped improve coordination among NGOs on safety issues, the ways in which this has taken shape and the degree of improvement varies across countries. Where there are few other effective humanitarian security and/or access coordination mechanisms (as in Afghanistan and CAR), INSO is able to fill a gap that few actors otherwise could. Across the majority of countries, security roundtables provide a forum for security professionals to meet where no other similar forum would exist. Both at the tactical level (security advisors at roundtables) and the strategic level (at meetings of Country Directors), INSO provides an important forum for them to compare notes and learn how others are responding to security threats. The dedicated Skype groups initiated by INSO in Syria, for example, provide another outlet to stimulate discussion and share information in real time.

The true value lies in interaction, either during the meeting discussion or on the margins (as with Skype discussion). These meetings are important not because of the information that INSO provides (which can otherwise be generally gleaned from its written reporting) but for the relationship building and information exchange. It is often through finding ways to widen the debate or gently challenge conventional thinking or practice that INSO is best able to demonstrate this usefulness and impact policy at the strategic level.

Improving general humanitarian safety coordination

INSO's achievements and impact on improving wider humanitarian coordination on safety and security issues have been positive. Much as the UN has sought to do in recent years, INSO focuses on an enabling approach to security management that focuses on "how to stay and deliver" (as opposed to "when to leave"). However, as the "To Stay and Deliver" and numerous other studies have pointed out, this requires collaboration and functional information sharing across a wide range of actors, including both the UN and NGOs.[21] While the UN and NGOs may have different approaches, finding ways to work together is essential and SLT aims to provide a "vital informational and strategic link" between the UN and NGOs.[22]

Particularly evident where UNDSS-INSO relationships are close, INSO provides a valuable interlocutor for the UN to the NGO community and fosters effective functioning of SLT. Rather than attempting to foster relations with hundreds (if not thousands) of individual NGOs, field security platforms like INSO provide a single reliable means of sharing information with the wider NGO community. INSO, as an independent actor, can at times circumvent the tensions that

[21] J. Egeland, et al. (2011) *To Stay and Deliver: Good Practice for Humanitarians in Complex Security Environments.* New York: OCHA.
[22] J. Egeland, et al. (2011), p. 33.

undermine effective UN-NGO safety coordination. This was demonstrably the case in integrated mission contexts like Afghanistan and DRC, where such tensions can run high. NGOs were often appreciative of INSO's efforts to foster coordination with the UN, where they were aware of such efforts. Much of this collaboration happens bilaterally and fairly discreetly between INSO and UNDSS, meaning that not all NGOs were fully aware of the extent of this relationship or the nature of these efforts. In the online survey, 43.4% of NGO members ranked INSO's efforts at coordination with the UN as excellent or good while 29.1% responded that they were unsure.

INSO emphasizes the need to coordinate with, in particular, with UNDSS and OCHA to Country Directors and RSA teams and INSO staff have worked hard to establish positive relations with UN counterparts. RSAs are expected to have relations with their DSS counterparts (usually Field Security Coordinator Officers, FSCO) and the INSO Country Director with a higher-level manager within DSS. UNDSS and OCHA receptiveness is mixed and highly dependent on personalities, as no formal agreement exists with either entity regarding collaboration. These relationships are also influenced by the degree to which UNDSS interacts with NGOs and by NGO expectations of UNDSS. Across contexts, this ranges from wanting more UNDSS support and advice to a desire to keep significant distance from the UN in general. At a minimum, a basic level of information sharing and coordination exists in all countries. In some countries, INSO and UNDSS have productive dialogue at all levels and INSO routinely attends Security Cell and Security Management Team meetings.

In these instances, UNDSS officials reported that they shared more information with INSO than they had in the past with individual NGOs. UNDSS staff felt confident that INSO would pass on this information in an appropriate way to the NGO community and protect UN sensitivities around confidentiality. Even where dedicated SLT officers existed in the past (as in Kenya), they generally worked closely with INSO to fulfill their objectives. Other DSS staff, who have a full workload in dealing with the UN community alone, felt that INSO enabled them to fulfill vital SLT objectives where they might otherwise struggle to do so (either because of capacity constraints or because they felt uncomfortable directly sharing some information directly with a large number of NGOs).

At times, there was some misunderstanding of INSO's role. Many UNDSS officials expressed frustration that INSO could only advise NGOs and not otherwise compel them to follow certain security rules. In some instances, there have been acute tensions with UNDSS. One example was a camp setting (Dadaab in Kenya) in which INSO recently established presence. INSO was providing analysis and advice to NGOs that varied from the analysis and advice that UN actors were providing. In this instance, a major UN agency had subcontracted significant work to the NGOs and had a vested interest in them continuing operations. In one crisis instance, there was a specific frustration that INSO would not pass on UNDSS advice to NGOs. Tensions have since eased and INSO has fostered better relations with the UN officials in the camp over time. In general, however, UNDSS officials that understand INSO's role have respected INSO's position in this regard. In part, this is an issue of UNDSS-INSO relationships becoming more settled over time. In Afghanistan, INSO has well-established field/national level information sharing and coordination have become ingrained practice.

INSO's willingness to take the initiative is critical to maximizing its achievements in this area. One example of this was found in DRC. In South Kivu, INSO worked with UNDSS to encourage member agencies to put in place evacuation plans and facilitated a walk-through at evacuation points. There was not necessarily an expressed NGO desire to do this, but the need to do this was identified together by INSO and UNDSS in response to a sense that most NGOs did not have adequate knowledge of evacuation points or appropriate plans in place. NGO members appreciated INSO's initiative, and were particularly positive about the nature of INSO and UNDSS collaboration. INSO can have a substantial impact where NGOs have not yet necessarily identified a need but where INSO sees a gap or potential problem and where INSO can team up with the UN to help NGOs address it.

A written formal agreement outlining the respective roles of UNDSS and INSO as well as the expectations of information sharing and coordination would help alleviate the issues that arise with turnover or around specific issues of contention. This would benefit both parties. INSO can help facilitate the realization of SLT's objectives. Additionally, UNDSS information sharing benefits INSO's members and INSO's sharing of information with UNDSS helps benefit UN staff. While INSO is willing to formalize this working relationship, UNDSS's appears less willing or able to do so.

INSO-OCHA relationships were generally positive but very much depended on the role that OCHA played at country level. In CAR, for example, there was close collaboration between INSO and OCHA, particularly on civil-military issues. At a minimum, there was basic information sharing and attendance at OCHA coordination meetings in most countries. In areas where OCHA may, for example, have deployed an Access Unit (such as in Syria and Iraq), there is strong rationale for a close relationship. Further development of close relationships should be encouraged in these contexts.

INSO generally has positive relations with NGO coordination fora on the ground, which is helped by the clear delineations of INSO's mandate and SoS. Early on in INSO country platform establishment and especially in emergency response settings, there can be tensions as INSO seeks to define its role (as in Iraq and, to some extent, early on in operations in Mali). In CAR and Syria, INSO established strong relationships with NGO coordination fora early on. As INSO sought to develop its capacity in Syria, it was seen as supportive of the NCIMU's security training and general coordination efforts. In CAR, INSO and the CCO have had very close, collaborative relations, demonstrated by their initial co-location and joint advocacy efforts. In CAR, INSO was seen as providing complementary capacities in areas of work that the CCO did not have the capacity to undertake. Where there may be the danger of duplication or a degree of competition, INSO must negotiate relationships carefully – but not at the expense of fulfilling its objectives to provide relevant and timely security advice.

In recent years, INSO has had relatively limited role in key NGO safety and security at the international level, such as EISF and Interaction. In part, this is a consequence of strategic decisions to focus resources inwards in the initial stages of INSO's organizational development. To date, INSO has been very focused on its field operations and on supporting operational NGOs with little priority placed on engaging at the global policy level. At times, there have been tensions or misunderstanding between INSO leadership and key individuals involved in these global fora. The low level of interaction is puzzling given the increasing role that INSO is playing across the most volatile contexts in which NGOs work, and the policy influence of these fora. If INSO seeks to play a larger role in influencing global NGO safety policy, it will be beneficial to build closer strategic relationships at the global level in the coming years.

Supporting the expansion of humanitarian access

INSO's impact on humanitarian access is indirect, by nature of its mandate and activities, and inherently limited, given the myriad of dynamic factors that may influence access in a given context. Expanding humanitarian access is not part of INSO's mandate. Rather it aims to enable safe access through providing information, facilitating coordination and supporting NGOs to improve their capacity to navigate challenges to access. Humanitarian access, defined as humanitarian actors' ability to reach populations affected by crisis, as well as an affected population's ability to access humanitarian assistance and services, is constrained by a wide array of factors. These range from bureaucratic restrictions on the movement of personnel or supplies and poor infrastructure to direct interference in humanitarian activities and attacks on aid workers. Improved access to reliable information should in theory help improve decision-making and strategies on access, but information alone does not result in improved access.

Where NGOs are predisposed to expand access, INSO can play a strong role in supporting evidenced-based decision-making and NGO coordination. In countries like CAR and Mali, where so little reliable information is available, INSO plays an important role in providing evidence to

support decision-making. In the case of Kenya, INSO has played a responsive role in supporting NGOs seeking to expand access. The Country Director has facilitated an informal discussion group of NGOs looking to re-establish, restructure and expand operations in and around the northeastern town of Mandera, which borders Somalia. It has provided a forum for NGOs to share experiences and approaches but has also provided written analysis and tools, primarily through the provision of a new product (the abovementioned Area Brief). In the Mandera case, as in many similar examples, INSO did not push NGOs towards intervening in Mandera. A spike in security in Mandera actually resulted in INSO advising one expatriate to postpone plans for travel to the area (as it turned out, Al-Shabaab executed a complex attack near Mandera during the proposed timeframe for the trip). The Mandera case helps illustrate the role that INSO can provide in providing enough evidence and advice to help NGOs feel confident in assessing the risks related to access constraints.

Where NGOs face threats to access, INSO can play a role in coordinating NGOs to deal with the problem at both a tactical and strategic level. Assisting NGOs to understand why they have been attacked or threatened, to conduct post-incident investigations and modify policies and behaviors is greatly valued by NGOs. Convening special meetings to talk through trends or events (i.e. upcoming elections, a discernable trend toward attacking NGOs) can help NGOs share experiences within the confines of a safe space and help NGO managers feel confident in their decisions. At a strategic level, INSO can play an important advocacy role – although it has been somewhat reluctant to do this publicly in many contexts. In CAR, INSO has played a strong public role in communicating key threats to access and has even issued public statements regarding harassment of NGOs by troops under the command of the UN Multidimensional Integrated Stabilization Mission in the Central African Republic (MINUSCA).

Where INSO leadership is strong and the platform is working relatively well, INSO can devote resources to deepening the understanding of access issues at a strategic level. This role is not always requested and generally requires INSO Country Directors to proactively identify opportunities and take initiative. INSO research in DRC on the perceptions of armed groups is a good example of this. The research challenged NGO's self-image and their beliefs about how they were perceived, but it was nonetheless highly appreciated by NGOs. This research was a stand-alone initiative and making the final report public or more widely circulated the findings could have deepened the impact, but it shows the potential for INSO to use independent research to inform policy.

Defending and advancing humanitarian principles

The review examined the two core principles related to INSO's work as independence and neutrality. There was a clear demonstration in each of the countries that INSO strove to present the conflict in a neutral way and generate a perception of independence among its members and external actors. INSO is extremely careful with its reporting language and advice not to portray any preference for particular conflict outcomes. In its advisories, for example, it routinely emphasizes the need to establish dialogue with all parties to the conflict and avoid visible alignment with any one actor. It examines the adherence to principles when approving member applications and does not approve membership of, for example, for-profit contractors of NGOs that INSO feels are too closely aligned with a party to the conflict.

Humanitarian principles, and their interpretation among NGOs, are varied and often nebulous. It is clear that INSO management and staff value humanitarian principles and see them as central to their objectives. Various staff members interpreted this in different ways, and some were hard pressed to articulate the relation of INSO's work to humanitarian principles. This is also true of its members, who range from those that self-identify as highly principled Duntantists to more Wilsonian organizations that see themselves as applying the principles in a more flexible way and development organizations who would not classify themselves as neutral.

The online survey found that 79% of respondents rated INSO's adherence to humanitarian principles as either very strong or strong, there was relativity to this perception evident in

interviews. The degree to which INSO was seen as advancing principles was directly related to the organizational positioning of the individual being interviewed. Organizations like Médecins Sans Frontières (MSF) and ICRC were generally less likely to see INSO as "highly principled" but nonetheless recognize INSO's orientation towards humanitarian principles. Others, particularly multi-mandate organizations, felt INSO was highly principled. Some even felt it was principled to point of exclusivity, and would have welcomed a broader base of membership. Yet when asked about INSO's relevance and impact on advancing humanitarian principles, just over half (54%) ranked INSO's work as excellent or good. Nearly a third (29.8%) were not sure, likely indicating a lack of understanding of objectives or role with regard to advancing principles that often came across in individual interviews.

If INSO management sees the organization as grounded in humanitarian principles, it must more clearly define these principles in the application of its work and seek to indoctrinate its staff more comprehensively in these. INSO staff come from a wide range of backgrounds and experiences, necessitating a systematic approach. Policy documents for staff clearly articulating INSO's core principles and how these are applied in practice would be helpful. Proposed INSO orientation for all new expatriate staff in IHL and in humanitarian principles would also address this need, but care should be taken to extend any training developed to national staff.

In some contexts, there is room for INSO to play a more visible role in advancing humanitarian principles. In principle, INSO does not share data and analysis beyond its members and rarely issues public statements. During the troop surge in Afghanistan, ANSO played a very strong role in countering narratives of international troops' success. Underpinning this was the concerns that this was ultimately putting NGOs at risk by lulling them into a false sense of security. While controversial with some of its members, ANSO provided a strong public humanitarian counter narrative. ANSO subsequently became quieter and gradually removed its reports from its website. INSO has retained this posture, remaining relatively conservative in sharing its data analysis beyond its members and rarely issuing public statements.

This unwritten policy merits examination on a country-by-country and case-by-case basis, and the decision to undertake more visible work should be guided by the "do no harm" principle. A clearer, more nuanced policy would ultimately benefit INSO by raising public awareness of its objectives and achievements. This could have a multitude of positive impacts, ranging from improving its pool of applicants to advancing humanitarian principles. While engaging with the media in a high profile way is a high-risk proposition, greater openness may prove more feasible and desirable in some contexts and on global trends. INSO-branded public statements about the conflict in Syria may not be welcomed by members in that country, for example, but INSO's public advocacy work in CAR has been requested and appreciated by its members. INSO should examine the benefits of strategic information sharing with or communicating key messages on background to the media (on selected issues and/or with sector-specific outlets like IRIN).

At global level, this could be advanced through greater openness to academics and humanitarian researchers as well as increased dialogue on humanitarian principles with donors and policy-makers. One low-risk option would be to share its quarterly reports on the INSO website or generate a summary report, covering all countries, which includes key data and provides a global outlook on threats to humanitarian operations. In the future, INSO should investigate the possibility of allowing limited or open access to the global database it aims to create. Finally, generating research and engaging with policy makers at global level to provide evidence of the effectiveness of humanitarian approaches to security management would also increase impact.

Changing donor perceptions of humanitarian safety and security

Donors increasingly see INSO as providing a replicable model for supporting NGO presence in volatile contexts. Some donors remained hesitant to provide funding alone for INSO operations, as with DFID in Syria, and stated they would always likely require co-funding. Nonetheless, donors broadly saw INSO as having a positive impact. In transitional contexts like northern Iraq, donors saw INSO as essential to helping NGOs (particularly those with less security capacity)

manage dynamic security risks. Many donors informally solicited opinions of INSO from their grantees and these were generally positive. There was a slight disconnect between funding INSO and actively supporting INSO on the ground to the fullest extent possible. For example, not all donors encouraged their grantees to seek membership in INSO and not all of them knew how many of their grantees/sub-grantees were INSO members (the Spanish Agency for International Development Cooperation, AECID, in Mali was a distinct exception).

As donors at country level are on INSO distribution lists, they drew on INSO reporting for a number of purposes. Security advisors at donor agencies routinely drew upon INSO reporting in much the same manner as NGOs: at a tactical level, to inform their own plans and movements, and at a strategic level, to verify their own analysis of trends and emerging threats. In Kenya and other contexts, INSO has provided on-the-ground support to donor agencies in planning field visits and assessing future funding plans from a security perspective. Donors routinely drew upon INSO reports and analysis to fulfill their own internal reporting requirements. Some donor staff attended INSO security roundtables and other meetings, while others felt it was more beneficial to maintain distance and allow attendance to be limited to NGO members.

Donors routinely used INSO as a resource in strategic and future planning. Many saw INSO as a source of evidence regarding both risk but also access issues and this shaped the ways in which they invested in humanitarian action. In Afghanistan, Mali and Syria, donors reported that INSO's analysis enabled them to understand where access was constrained and informed their decisions of how to best fund organizations working in difficult areas. In newer country platforms like Iraq, CAR and Syria, this resulted in donors being eager to see INSO generate deeper and more forward-looking analysis. In Syria, donors used INSO as a verification source for NGO reporting on access constraints and felt INSO reports were a useful secondary resource for oversight. There was a perception (at times, even an expectation) that INSO's presence would allow NGOs to assume more risk. In Iraq, this materialized in donor frustration with the heavy concentration of NGOs in Erbil and a desire to see them working closer to the frontlines, which donors expected INSO's presence to facilitate. In practice, INSO does not advocate for NGOs to expand to new areas for the sake of expansion alone. As summarized above, increased information can only help facilitate informed decision-making – and does not necessarily result in the expansion of access. Ultimately, INSO information about access constraints may also temper donor expectations that NGOs could or should expand to volatile areas.

Donors are increasingly encouraging INSO to establish new operations in volatile contexts. As with any NGO, INSO needs to be careful that it does not begin to follow donor agendas, which are often driven by geopolitical security concerns and manifests in a check-box approach to risk mitigation in conflict contexts. In particular, sharing information with some donors may present unintended risks or compromise INSO's acceptance by NGOs and this should be approached with caution. Securing funding from a government donor agency, where that government is active in or has a vested interest in the conflict, should also be approached with extreme caution and careful consideration of contextual factors. INSO, to date, has been very cautious about all of these issues. This has ensured its credibility with NGOs, and should remain so.

INSO can maximize its impact by seeking to proactively inform donor agendas, especially through more creative uses of the evidence base it has generated in each country (as with the example of ANSO cited above). INSO also has a unique role to play in gently challenging donor perceptions of risk and risk management paradigms, where they are inadequate or ill-conceived. INSO can also play an important role with donors by directing their attention to "forgotten" conflicts, as it has done in CAR. The example of CAR demonstrates the importance of the ERO model in this respect in enabling INSO to intervene in contexts without relying on donor prerogatives. INSO was able to access its ERO funding to start up quickly in response to NGO demand in CAR, rather than waiting for donor funding to be secured in a context that has generally been poorly resourced and ranked low among the international community's priorities.

It also means raising emerging security issues and NGO capacity gaps with donors that is geared at garnering funding for long term and sustainable initiatives to improve NGO safety capacity. Various INSO platforms have done so in seeking donor funding specifically for training initiatives, but INSO should think beyond periodic or *ad hoc* funding for trainings and raise awareness of strategic or systemic gaps. Finally, INSO can and should demand more of its donors on the ground. This would include systematically reminding donors to encourage their grantees to join INSO and routinely report relevant security information.

Section 3: What Happens Next

This section examines how INSO can further develop its ability to build global capacity in humanitarian safety. It includes key recommendations, at country and global level, of where INSO should leverage its influence and develop its capacities over the next three to five years. These recommendations are specifically directed towards: improvement of performance of country level platforms; improving and sustaining NGO participation; improving international and country level cooperation on humanitarian safety; and, how it can best contribute to the quest for more accurate global humanitarian data and its application in practice.

The recommendations and options presented below build on needs identified by INSO management, INSO country level staff and NGO members. This review recognizes that INSO is already seeking to address many of these issues, particularly through the establishment of its HQ. This advice seeks to constructively build upon these efforts and provide INSO global and country management with realistic and actionable options.

Country level

Focus on staff retention and training. The single most important thing INSO can do to improve its program quality and sustainability is to invest in its staff, particularly given the unique nature of recruitment profiles. As most countries have core HR capacities in place, recruitment and retention should be core priorities for the HR Director when s/he is hired at the HQ. There should be greater efforts to identify internal advancement opportunities for high-performing staff, including positions in other countries or short-term deployments. The planned development of orientation and training in IHL and humanitarian principles is important. Any orientation and training INSO develops for expatriates should be extending to national staff or complemented by the development of similar training for national staff. To address gaps in capacity, the mobile RSA model used in Afghanistan could be adapted to cover multi-country contexts (such as the francophone countries) or other core functions (such as the Operations Director).

Devote greater resources to staff safety and staff care. This covers a wide range of policies but, at a minimum, INSO should seek to improve its internal security procedures and ensure it has adequate staffing at country level to guard against burn out. Few INSO offices had an established security plan, which worried some staff members and should be urgently addressed. The risk of burnout, leading to high turnover, is significant in some contexts. There is a strong sense that INSO management cares about the well-being of its staff, but this sentiment must be more thoroughly institutionalized in realistic and appropriate policies. INSO's generous R&R policy can help with this, but only if organizational capacities allow expatriate staff to genuinely have time off without unduly overburdening others. Additionally, leave policies and other benefits for expatriate staff in some countries were not meaningfully consistent with leave or other benefits for national staff. For example, national staff – who are on call essentially all of the time – were allocated the minimum number of leave days required by national law in some contexts.

Improve monitoring of achievements and impact. More robust and systematic means of monitoring and evaluation should be adopted. There is some good practice to draw upon inside the organization and the new capacities INSO is developing can aid in this effort (particularly the role of Section Director). Additionally, there may be things that INSO can learn from similar organizations in measuring effectiveness (such as NSP or other field-based safety platforms).

Annual beneficiary surveys will be helpful but not sufficient. INSO's achievements should also be measured independently and in a manner that looks at this over the long term. Contracting independent consultants to conduct independent reviews on a routine basis (for example, once every 3 years) is advisable. Independent reviews should feed into programming planning/budgeting processes and focus on addressing specific challenges and achievement of longer term goals.

Re-examine the role of the Advisory Boards. Advisory Boards are critical mechanisms for accountability and relationship building – but only where they exist and where they function well. INSO should consider reviewing its practices in this area, to make any adjustments to ensure boards play a meaningful role, learn from countries where it works well and transfer these lessons to contexts where board functioning could be improved. The role of Advisory Boards has been powerful during start-up, where they have been initiated at the inception of the platform. INSO should consider whether or how this could be integrated into the ERO model. In some countries, a shift from institutional to individual board membership governed by fixed terms could yield more meaningful participation. The role of these boards should remain advisory in nature but there may be room for specific members to play a larger role as advocates for INSO at country and global level.

Improve information management capacities, including greater safeguarding of data. INSO's needs have outstripped its information management capacity. INSO's plans to improve global information management systems are welcome but will ultimately take time and significant resources, which INSO now has. Creating an information management system that enables consistency of reporting across INSO programs is important, provided that this new system adequately addresses data protection concerns. An integrated information management system also presents exciting opportunities for deepening INSO's analysis and range of analytical products. Considering the unique nature of INSO's data sets, this could also yield cross-country comparisons that have the potential to help the humanitarian community better understand the prevalence of certain risks at the macro level.

Improve information sharing and learning across programs. Existing practices are not systematically shared across countries and communication across countries is presently too limited to facilitate this. Tools and ideas are often shared through bilateral relationships (i.e. staff who might have met or worked together in another country) and, to some degree, through Country Director retreats. Where INSO capacity gaps exist in a given country, there is almost always another country that has grappled with similar challenges and found a solution. An online platform with all key programmatic documents and tools for each country could help facilitate this learning and support institutional memory. Country Director retreats are important but this should be extended to RSAs, with small groupings of RSAs convened for short annual or bi-annual retreats. Deploying existing INSO staff from one platform to another may also help spread best practices.

Critically examine the language and messaging in INSO's programs and public materials. Several INSO staff, NGO members and external actors critically commented on two related aspects: INSO reporting language and the language that INSO uses to describe itself. In its description of its own work, terminology like "source development" or referring to its programs as "operations" may give an undesired impression of INSO as an intelligence gathering organization. INSO should review its reporting language, job titles and public messaging to ensure that it is using the language of the humanitarian community where possible and appropriate.

Global level

Devote resources to consolidate and improve the performance of existing country platforms. INSO staff articulated a strong desire for INSO to focus its energies inwards on existing programs. Many countries were struggling with start-up or with recruitment gaps, but expect the new HQ support functions would alleviate this. The Section Director and Section

Officer positions can provide an important source of support. Institutionalizing program planning review processes is recommended. INSO Kenya's recent internal review was appreciated by staff and resulted in concrete internal changes geared towards improving responsiveness and quality. It is strongly advised that INSO adapt the model of country-level strategic reviews developed in Kenya to all countries and conduct these reviews on an annual basis. Section Directors and other relevant HQ staff should be present at these reviews, to the extent possible. While each country has specific needs and areas that could be improved, the management of PFMs should be reviewed across all countries. Each country needs latitude to implement this model as contextually appropriate given the high potential value added by PFMs, but a review would help identify country level weaknesses, reputation or security risks and facilitate the sharing of experiences across all countries.

Re-examine and clarify decision-making processes around establishing new country platforms. At present, there seems to be little limitation of where INSO can or will establish new platforms. The LoI requirement should be strictly adhered to because it tangibly demonstrates NGO commitment to INSO presence, which is important even as the ERO model lightens this commitment somewhat. Committing selection processes to writing would be useful, and consulting more widely on these choices should safeguard against the risk of overcommitting. The absence of clear parameters, at least in theory, presents potential for programmatic drift and over commitment.

Expand INSO's global governance mechanisms to improve buy-in, accountability to its membership and sustainability. INSO has outgrown its limited global governance structure. This is true both in terms of safeguarding internal accountability but also external perceptions of how INSO is managed. An expanded and more diverse Board of Trustees would have the added benefit of providing greater support to the Executive Director, including on issues of fundraising, communications and strategic advice on specific areas of INSO's work. INSO's global governance structure should be reviewed and expanded as a matter of priority. The precise structures and mechanisms that INSO could put in place merit careful examination, but it is recommended that INSO look towards other NGO models of governance and seek to adopt a structure in line with *de facto* industry models.

Review and refine the ERO model. The planned expansion of the ERO unit will help improve efficiency and ensure that country start up functions more efficiently. ERO operations in Iraq and Syria can provide initial evidence in what has worked well and what has not, and INSO should seek to critically examine these experiences in refining the model. A key requirement should be established on commitment from NGOs to INSO's work, comparable to the LoI in longer-term start-ups, and it is advisable to include some modified Advisory Board structure or NGO steering committee. These two elements of the INSO are integral components of ensuring that INSO is acting in accordance with the needs of the NGO community. INSO would greatly benefit from committing ERO processes and policies to writing to improve transparency, consistency and sustainability. This could take the form of already established INSO tools, such as an ERO version of the SDS covering the key logistical, legal and programmatic aspects of start-up.

Improve data analysis capacities and means of sharing this data more widely to improve global understanding of NGO safety issues. The creation of a global database will enable cross-country data comparisons that could be of great value to not only NGOs but also to researchers and policy makers. INSO should weigh the risks and benefits of sharing this with select individuals or institutions in the future. A consultative mechanism to evaluate options for conducting research and sharing its data more widely could aid in this process on maximizing impact, increasing buy-in and avoiding duplication. This could include an advisory group comprised of a mix of experts in conflict research, protection issues and humanitarian analysis.

Strengthen strategic relationships to facilitate the sharing of INSO's experience and maximize policy impact. As this review has shown, INSO has substantially innovated with regard to NGO safety and access management. It should seek to share these lessons, and its

analysis, more widely. Greater engagement at the global policy level could yield positive impact on the ground as a better understanding of INSO among NGOs at HQ level may encourage NGOs that have been reluctant to share information. This must be approached strategically and systematically, given INSO's strong field focus and the recognition that this must take priority. A simple power analysis of key institutions/individuals and a well-researched strategy for engagement with clear objectives and key messages would aid in addressing reputational issues, increase awareness of INSO's objectives and ensure INSO is maximizing its influence on global humanitarian safety issues. Potential interventions include research and policy products, but also wider and broader engagement with donor governments, research organizations and academia.

Expand capacity to share best practices and generate research products, targeting the needs of NGO members and helping them to improve safety policies and procedures. While INSO holds a great deal of useful quantitative data, the evidence and advice it generates regarding NGO best practice is what ultimately changes policy. This applies to a wide range of areas, from documenting its training practices to conducting independent research on the perceptions of armed groups (as INSO has done in DRC). With the addition of a Research Director, there will be significant capacity to capitalize on the knowledge and analysis generated at country level. A consultative mechanism, like the advisory group mentioned above, would aid significantly as INSO seeks to expand its work in this area. INSO should also seek to draw upon the expertise of members, member-linked organizations or others, such as ICRC and MSF Crash and the Center for Humanitarian Dialogue, to assist in this effort.

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Annex A: Interview List

Barry Abdoulaye
FSCO North Kivu, UNDSS, DRC
Bérangère Adamantidis
Coordinatrice, Goma, MSF Belgique, DRC
Emile Adjibi
FSCO South Kivu, UNDSS, DRC
Sam Al-Emadi
Deputy Operations Advisor, INSO, Iraq
Banu Altanbas
Country Director, INSO, DRC
Joseph Aluochodet
Security Manager, African Medical and Research Foundation, Kenya
Arjika Anaby
Deputy RSA North, INSO, Mali
Craig Anderson
North Field Officer, NCCI, Iraq
Majid Arab
SA Counterpart Assistant North, INSO, Turkey/Syria
Romain Baheneka
RSA National Counterpart, South Kivu, INSO, DRC
Ross Baillie
Acting Country Director, INSO, Afghanistan
Sospeter Baitwa
Logistics Manager, Norwegian Refugee Council (NRC), DRC
Pierre-Yves Barrea
Head of Sub-Delegation, South Kivu, ICRC, DRC
Richard Masinike
Administrator, South Kivu, INSO, DRC
Jean Paul Belekoua
RSA Deputy South, INSO, CAR
Scott Bolingher
SA North, INSO, Turkey/Syria
Olivier Bourgoin
Country Director, INSO, CAR
Matthias Bischoff
Security Advisor, Deutsche Welthungerhilfe, Turkey/Syria
Anne Marie Brinkman
Country Director, IRC, CAR
Dan Browne
Security Manager, Erbil, IMC, Iraq
Bedaiko Buahene
Head of Sub-Office Hatay, OCHA, Turkey/Syria
Lane Bunkers
Country Director, Catholic Relief Services (CRS), Kenya
Will Carter
Team Leader, ACCESS Project, World Food Programme (WFP), Afghanistan
Lloyd Cederstrand
Coordination and Response Division, OCHA, New York
Valerie Ceylon
Country Director, ACTED, Kenya
Michael Chilla
Security Advisor, CARE, Kenya
Christian Chirhuza
RSA National Counterpart, South Kivu, INSO, DRC
Philippe Conraud
Country Director, DRC, CAR
Anne Coolen
Country Director, Management Systems International, Mali
Joana Costa
Acting Project Director, GANSO, Gaza
Emily Dakin
Coordinator, NCIMU, Turkey/Syria
Olivier David
Country Director, NRC, CAR
Niek de Goeij
Country Director, CRS, Mali
Benoit De Gryse
Country Director, INSO, Turkey/Syria
Charlotte Demars
Security Information Analyst, UNDSS, Kenya
Stéphane Devys
Coordinateur, Kivus, Première Urgence-Aide Médicale Internationale, DRC
Isabelle d'Haudt
Expert, European Commissions Directorate General Humanitarian Aid and Civil Protection (ECHO), Kenya
Boly Diene
Civil-Military Officer, OCHA, Mali
Nick Downie
ERO Director, INSO, Global/Iraq
Laurent Dumas
RSA South, INSO, CAR
Jeffrey Duricko
Deputy Director for Operations, IRC, Iraq
Fabrice Eggman
Security Advisor, NRC, Iraq

Eric Esudero
RSA Central, INSO, Mali
Larissa Fast
Fellow, USAID Global Development Lab, Washington, DC
Co-founder, Security in Numbers Database, Global
Alan Fellows
Senior Analyst, Security Information and Operation Center, UNDSS, Afghanistan
Peter Frederick
RSA Mobile, INSO, Afghanistan
Firuze Gencaslan
Country Administration Manager, INSO, Turkey/Syria
Hind Ghorayeb
Regional Security Information Analyst, UNDSS, Amman
Hugo Gimberat
Head of Sub-Office, Bukavu, Cooperazione Internationale, DRC
Steve Gordon
Security Advisor, Mercy Corps, Turkey/Syria
Sylvain Groulx
Country Director, MSF France, Turkey/Syria
Richard Guerra
Humanitarian Advisor, DFID, Iraq
Waqo Gufu
RSA Counterpart, Isiolo, INSO, Kenya
Naseer Habib
RSA East, INSO, Afghanistan
Lamees Hafeez
Operations Manager, Syria Relief, Turkey/Syria
David Haines
Country Director, Mercy Corps, Afghanistan
Trustee, INSO, Global
Ronnie Hamada
SA Counterpart South, INSO, Turkey/Syria
Jalal Hammadeh
SA Counterpart Assistant South, INSO, Turkey/Syria
Karima Hammadi
Assistante Tecnique, ECHO, CAR
Chase Hannon
Former RSA, INSO, Afghanistan
Duncan Harvey
Country Director, Save the Children, Kenya
Gihan Hassanein
Information and Communications Officer, INSO, Global
Denise Holland
Area Manager, South Kivu, NRC, DRC
Marianne Huber Glünz
Director of Cooperation, Swiss Agency for Development and Cooperation (SDC), Afghanistan
Salha Issoufou
Country Director, MSF France, Mali
Arun Jegan
Operation Coordinator, INSO, Turkey/Syria
Dave Johnson
Country Director, RefugePoint, Kenya
Patrick Kakesa
RSA National Counterpart, North Kivu, INSO, DRC
Alexis Kamanzi
Civil-Military Coordinator, OCHA, CAR
Christine Kariuki
Administration Manager, INSO, Global
Thomas Kaye
Global Security Manager, Transparency International, Berlin
Denzyl Kennedy
International Safety and Security Manager, CARE, Afghanistan
Gérard Kerrien
Assistant Country Director, Concern Worldwide, DRC
Julius Kiprono
RSA Central, INSO, Kenya
King Kituka Ngongo
RSA National Counterpart, North Kivu, INSO, DRC
Douglas Knight
Assessments Coordinator-Humanitarian Affairs Officer, OCHA, Iraq
Olivier Krins
Humanitarian Coordinator, CCO, CAR
Maxime Lecoute
Head of Sub-Office, Bukavu, MSF Spain, DRC
Serge Lecomte
RSA, South Kivu, INSO, DRC
Barbara Lecq
Humanitarian Advisor, DFID, CAR
Nic Lee
Executive Director, INSO, Global
Roselinder Maima
Information Assistant, INSO, Kenya
Patrick Malach
Country Director, INSO, Mali
Olga Martin

Project Officer, Regional Office, AECID, Mali
Tom Mather
Country Security Manager, International Medical Corps (IMC), Turkey/Syria
Frank McManus
Country Director, IRC, Turkey/Syria
Mohamed Mechmache
Country Director, Oxfam, CAR
Pete Medway
Director, IMC UK, Global
Trustee, INSO, Global
Sabir Memlawal
Chief Administrator, Japan Volunteer Center, Afghanistan
Desire Mirindi
Humanitarian Affairs Officer Assistant/Security Focal Point, South Kivu, OCHA, DRC
Terri Morris
Humanitarian Advisor – Syria Crisis, DFID, Turkey/Syria
Jean Baptiste Mparara
Assistant to the Director, INSO, DRC
Fabian Mürner
Security Advisor, SDC, Kenya
Feras Mustafa
Access Manager, NRC, Turkey/Syria
Tomas Muzik
Section Director, INSO, Global
Prasant Naik
Country Director, NRC, Afghanistan
Christina Northey
Country Director, CARE, Afghanistan
Emmanuely Okongo
Operations Officer, INSO, Kenya
Rima Othman
RSA North, INSO, Iraq
Aris Piker
Security Focal Point, DRC, DRC
Laura Penes
Deputy Country Director, Terre des Hommes Italy, Iraq
Basile Pissalidis
Security Director, Interaction, Washington, DC
Youssif Qassab
Deputy Operations Advisor, INSO, Iraq
David Querol
Director, NSP, Kenya
Gavin Raymond
Security Advisor, Oxfam, Iraq
Lisa Reilly
Executive Coordinator, EISF, Global
Mohammad Rezk
Safety and Security Officer, CARE, Turkey/Syria
Emmanuel Rinck
Country Director, INSO, Kenya
Javier Rio Navarro
Head of Office, ECHO, Iraq
Nathan Ronaldson
Former trustee and employee (various positions), INSO, various/Global
Anne Roussel
Information Officer, INSO, Mali
Marcus Sack
Security Coordinator, NRC, Mali
Kambiré Sanzan
Coordinateur Site Goma, Médecins du Monde, DRC
Aneta Sarna
Country Director, Solidarités International, Kenya
Joachim Schmitz
UNDSS, New York
Zakaria Shemaly
SA Counterpart North, INSO, Turkey/Syria
Sean Sherwani
Information Officer, INSO, Iraq
Sara Shinkfield
Country Director, Hagar, Afghanistan
Miroslav Skoumal
RSA North Kivu, INSO, DRC
Rod Slip
Security Advisor, Oxfam, Iraq
Hector Ros Soto
RSA North, INSO, Kenya
Abby Stoddard
Partner, Humanitarian Outcomes, New York
Jacques Suire
RSA North, INSO, CAR
Camille Tanchoux
Director of Finance, INSO, Global
Pablo Traspas
Country Director, Center for Victims of Torture, Kenya
Aissata Touré
Field Security Officer, CARE, Mali
Lawrence Tucker-Gardiner
Director, Safety and Security Committee for Lebanon (SSCL), Lebanon
Ellen van der Velden
Country Director, MSF Holland, DRC
Olivier van Eyll
Coordinator Général, Alliance for International Medical Action (ALIMA), Mali

Philip Wardi
Safety and Security Manager, IRC, Iraq
Chris Williams
Director, Security Unit, CARE, Bangkok
Simon Worrall
Country Director, NRC, Turkey/Syria
Tina Yu
Country Director, Save the Children, Iraq