



Female engineer Farah Al Basha oversees construction work at Jordan's sprawling Zaatari refugee camp. Photo: Caroline Gluck/Oxfam

MAKING AID TO JORDAN AND LEBANON WORK

Aid effectiveness in middle income countries affected by mass displacement

Jordan and Lebanon collectively make up less than one percent of the world's economy, but host around 20 percent of the world's refugees. Donors have recognized the scale of the challenges that this presents and acknowledged that humanitarian assistance must be supplemented with multi-year development support. This briefing note presents a preview of key findings from Oxfam-commissioned research in Lebanon and Jordan and concludes that for assistance to succeed in its aim of helping both refugees and poor host communities there is a need for increased democratic ownership, transparency and accountability in donor and government aid policies.

1 INTRODUCTION

Jordan and Lebanon, with respective populations of approximately 9.5¹ and 5.8 million,² collectively make up less than one percent³ of the world's economy. Yet Jordan and Lebanon currently host 4,342,076 registered refugees⁴ – that's the equivalent of around 20 percent of the total number of the refugees globally.⁵ Nearly two million of these refugees have arrived in the last six years alone, fleeing violence in Syria.⁶ The sheer scale and speed of the Syria refugee crisis has put increased stress on already weak government services in Lebanon and Jordan and added pressure to already limited government revenues. National and local authorities are struggling to meet the needs of communities who have seen significant increases in their populations, some of which have increased by as much as 100 percent. But long before the crisis in Syria, Jordan and Lebanon both faced a number of development challenges – high unemployment rates, poverty, governance issues, corruption, and inequality, including stark gender disparities. Although these challenges long predate conflict in Syria, the refugee crisis has exacerbated the situation.

Box 1: The cost of the crisis

By the end of 2015, the total estimated cost of the Syria crisis on the Lebanese economy was \$7.5bn, of which \$1.1bn was increased expenditure due to the higher demand for public services.⁷ The World Bank estimates that hosting over 630,000 registered Syrian refugees costs Jordan over \$2.5bn a year,⁸ part of which is attributed to subsidized services to refugees. Oxfam has calculated that if Jordan were treated as a traditional donor, it would have contributed the equivalent of nearly 6,000 percent of its fair share to the refugee response based on the size of its gross national income (GNI).⁹

Vulnerable people, including refugees, in Jordan and Lebanon desperately need rich countries to show solidarity by providing both developmental and humanitarian aid, in addition to sharing responsibility by scaling up resettlement for the most vulnerable Syrians. Increasing aid is crucial to ensure that conflict-affected Jordanian and Lebanese, in addition to refugees, whether Syrian, Palestinian or others, can access their right to health, education, protection, social protection,¹⁰ water, and employment. Much of the aid that rich countries have provided to Jordan and Lebanon in recent years to help them cope with the refugee crisis, however, has been humanitarian and designed to meet short-term and life-saving needs. While this remains vital, donors have recognized¹¹ that this must be supplemented with multi-year development assistance that benefits both refugees and poor host communities in the form of direct budget support, international development financing – including concessional financing, grants, technical or in-kind assistance – and other modalities which complement the humanitarian response.

Oxfam has worked with two regional research institutes, the Lebanese Center for Policy Studies (LCPS) and the Phenix Center, to determine how regional governments and donors can take stock of lessons from the past and make aid to Lebanon and Jordan more effective. Primary and secondary data were collected by both institutes through desk research; key informant interviews¹² with donor agencies, aid-recipient public institutions and sectoral experts, and former government officials; and focus group discussions with civil society representatives.

This briefing note presents a preview of key findings and recommendations, and concludes that for assistance to succeed in its aims – including addressing the pre-existing structural challenges and the limitations of inclusive development in these countries – integrating democratic ownership, transparency, and accountability into donor and governmental aid policies is necessary. In other words, even a fully funded humanitarian response, paired with long-term assistance and development financing, will not lift refugees and poor hosts out of poverty. Humanitarian and development challenges can be effectively addressed when both donors providing aid and receiving governments adopt a rights-based approach, including a focus on respect for refugee rights and tackling inequality. This means the participation and consultation of all groups is actively sought, there is adequate local ownership, and mechanisms are put in place to hold donors and governments accountable.

Box 2: Aid Effectiveness Principles¹³

Ownership – aid recipients should forge their own national development strategies with their parliaments and electorates.

Alignment – donors should support the strategies developed by aid recipients.

Harmonization – donors should streamline their efforts and ensure coherence among them in-country.

Results – development policies should be directed towards achieving clear goals and progress towards these goals should be monitored.

Mutual accountability – donors and recipients alike should be jointly responsible for achieving these goals.

Shifting towards a long-term approach

In February 2016, at a conference in London, donors to the Syria crisis response pledged multi-year funding for the first time, including a scale up in development financing in the form of grants, concessional loans and non-concessional loans.¹⁴ Donors and regional leaders at the conference also engaged the private sector as the source of new development finance, which is often delivered through donor–private sector partnerships.¹⁵

Box 3: London conference commitments

Donors at the February 2016 London conference pledged a total of \$6bn for 2016. Refugee hosting countries like Jordan and Lebanon also committed to change a range of policies concerning refugees, including making it easier for refugees to renew their residency, a pledge to issue work permits for certain numbers of refugees, and plans to absorb more refugee children into public school systems. Although a welcome step forward, Oxfam argued that funding and policy commitments must be built on – in particular through access to legal status for refugees in neighbouring countries.¹⁶ At the follow up conference in Brussels in April 2017, governments pledged another \$6bn,¹⁷ but fell short of improving refugees' access to legal protection, including by increasing resettlement and other admissions in third countries.¹⁸

In April 2016, the World Bank, with the UN and the Islamic Development Bank, announced a new MENA facility,¹⁹ supported by a package of more than \$1bn – including \$141m in grants, \$1bn in soft loans, and \$500m in guarantees. Using what has been termed 'blended' finance,²⁰ the facility engages the private sector and will allow multilateral development banks to increase financing to Jordan and Lebanon and help leverage additional financing in the coming years. This facility has now expanded its original scope to become a global facility that includes more middle income countries which are particularly impacted by displacement.²¹ The facility is especially important considering Jordan and Lebanon are no longer eligible for the same amount of concessional financing since graduating from lower-middle income status to upper-middle income countries. These new financing opportunities are coupled with the possibility of loosened trade regulations that open preferential access to markets in Europe as a result of recent compacts with the EU.²²

The basis of the aid effectiveness principles were defined in the Paris Declaration on Aid Effectiveness in 2005 and were subsequently expanded in the Accra Agenda for Action in 2008, and a series of the conferences that led to the Busan Partnership for Effective Development Cooperation²³ in 2011. This expanded the principle of 'local ownership' to emphasize the role of local civil society and the importance of 'democratic ownership' in enhancing aid effectiveness. For these new funding opportunities for Lebanon and Jordan to be translated into poverty alleviation, including for refugees, these principles must be adopted.

Oxfam has analyzed current and past aid flows to Lebanon and Jordan looking at five key areas of aid effectiveness: predictability; addressing pre-existing structural problems; transparency; alignment with national plans; and involvement of civil society and marginalized groups, such as refugees.

2 KEY FINDINGS

1. Funding should be predictable to be more effective

Ensuring funds are predictable would allow governments to plan national strategies and set national priorities more effectively, and would enhance citizens' abilities to hold governments to account. The analysis commissioned by Oxfam, however, has shown that overseas development assistance (ODA)²⁴ to Jordan and Lebanon has been unpredictable over the course of the last decade, fluctuating and peaking during times of instability. For example, grant flows to Jordan peaked in 2014, at the height of the refugee crisis, reaching \$1.742bn, before dropping to £1.249bn in 2015.²⁵ On the other hand, while the total ODA commitments allocated to Lebanon increased after the start of the Syria crisis period in 2011 (versus pre-Syrian crisis), ODA commitments to the public sector in Lebanon fell from 41 percent of total ODA commitments in 2005–2010, to 28 percent in 2011–2015, decreasing by \$810m when both periods are compared. In the wake of the Syrian crisis, more aid allocations have been channelled to international NGOs, multilateral organizations, and other civil society organizations (CSOs). Furthermore, in 2014, ODA commitments to Lebanon peaked yet disbursements for the same period fell far short of pledges made, leaving a multi-million dollar gap. This trend continued into 2015.

As with humanitarian financing, following through on pledges is not automatic and last year the combined UN appeals remained just 50 percent funded by the end of 2016. However, pledges made in London in the form of grants came through in 2016, with 5 percent over the original post-conference pledge amount.²⁶ It remains to be seen whether this trend will continue in 2017.

2. Aid flows through loans risk exacerbating existing structural problems

Jordan's public debt has skyrocketed in recent years as it has dealt with the broad impacts of conflicts in Iraq and Syria, the associated massive refugee influxes, and the country's growing dependence on lenders has made it increasingly vulnerable to external influence. The International Monetary Fund (IMF) has intervened several times in the past three decades to reduce the public deficit and promote inclusive growth, and has recently announced new loans for Jordan aimed at helping the country host large numbers of Syrian refugees and weather the severe economic shocks attributed to increased instability in the region.²⁷ Past interventions, which have been paired with trade liberalization and austerity measures, may have inadvertently done the opposite to stated goals, however. Local experts suggest that IMF loans, coupled with the required austerity measures, were one of the leading causes of unemployment between 1990 and 2005.²⁸ Cuts in expenditures and the removal of subsidies, which have contributed to the decrease in fiscal deficit, have disproportionately impacted the most vulnerable which,

without a visible increase in other services and support, may have undermined trust and confidence in government institutions and policies.

Lebanon's public debt steadily increased from 2005 to 2016 from \$39bn to \$75bn²⁹ and its debt has more recently increased to 144 percent of GDP according to the IMF.³⁰ Despite regional and local political and security turmoil resulting from the Syria crisis and the political paralysis which decreased foreign trade, tourism, investment and consumption, the Lebanese real annual growth rate of 2015 was approximately one percent according to the World Bank.³¹ Lebanon's outlook has been unfavourable and the economy's resilience relies on its Central Bank's policies that have maintained financial stability. Extending assistance to Lebanon in the form of loans rather than grants risks undermining this financial stability rather than reaching the intended aim of promoting development, and consequently economic growth and independence.

3. Measures to ensure aid is transparent need to be strengthened

The Financial Tracking Service (FTS) – an OCHA-coordinated, centralized mechanism to track humanitarian funding, which even allows the public to track multi-year commitment – is useful to civil society, to donors and their governments accountable to pledges made at donor conferences and other summits. Although issues around transparency of humanitarian financing remain, long-term financing to Jordan and Lebanon is far more opaque.

The Jordanian government has made efforts to publish funding received towards the Jordan Response Plan (JRP) and often publishes project activity and the work of various institutions related to the Syria refugee crisis. Beyond aid for the Syria response, however, budgetary and expenditure figures, statistics, or information on procedures of individual ministries is either incomplete, out of date, or entirely absent. Watch groups like Transparency International have noted challenges with the country's Access to Information Law, which excludes the principle of self-disclosure, including by public institutions.³²

Similar to the JRP, the Lebanese government has developed the Lebanon Crisis Response Plan (LCRP) to the Syria crisis, against which funding is allocated and reported upon, at least as it relates to humanitarian funding. The Lebanese government has not published a comprehensive database that reports on aid flows through public sector institutions, although some public institutions report on international projects independently. This limits the public accessibility of information and transparency in the scope of foreign aid flows, which sets a weak foundation for accountability. The Lebanese government passed the 'Access to Information Law' only in January 2017 following a decade of consistent advocacy on the issue. An implementation mechanism for the law has yet to be established, however.

4. Where aid disbursements align with a national vision or strategy they are more effective

The analysis commissioned by Oxfam highlighted that the absence of a national strategy in Lebanon may have resulted in aid being more donor driven.³³ While Lebanon has developed ministerial strategies, these strategies don't align with a national unified vision – as one doesn't exist – and it is unclear whether existing strategies were developed with non-governmental local stakeholders. Donor agencies and Lebanese aid-recipient public institutions have adopted different, inconsistent methods of reporting aid flows, which limit the collection of raw data and hamper efforts to determine the aggregated sum of aid flows to the public sector.

A fundamental problem in Lebanon is that a national budget, estimating anticipated government revenues and expenditures for the financial year, has not been passed since 2005 due to political deadlock.

'This country has been completely budget-less, [it is] incomprehensible how this country hasn't had a budget for 10 years. They always come up with proposals for the budget, by the Ministry of Finance, but it is never politically adopted or approved in parliament. They [the government] muddled through, they have their shadow budget and some accounting mechanisms.'

Donor representative³⁴

Despite this, donor funds have continued to provide monetary, developmental and humanitarian support in the country. While this funding is necessary to support stability and meet the needs of people living in poverty, it sidesteps the obligation of the state to ensure a transparent and accountable checks and balance system, and makes it more challenging to provide aid in an effective manner. A comprehensive budget relies on the government's ability to develop a unified strategy for sustainable and durable growth and identify how much money is allocated and spent. When there are multiple budgets, as is the case in Lebanon, the efficiency of resource allocation and public accountability is limited.

Conversely, Jordan has developed various national strategies and action plans, including the comprehensive *Jordan 2025*³⁵ and the more recent *Jordan Compact*,³⁶ on international cooperation to support Jordan in meeting the needs of vulnerable communities affected by the Syria crisis. The latter aims to reframe the response to the crisis as a 'development opportunity', through leveraging greater international financial support and trade concessions. While it will take time to see if these plans will translate into real change for vulnerable people, the existence of clearly articulated plans has not only enabled the government of Jordan to mobilize international support in line with its priorities, it allows a measure of transparency and accountability which are to a large extent absent in Lebanon.

5. Local civil society, communities and marginal groups (including refugees) have not been adequately consulted

Consultation with civil society and communities that aid is designed to benefit, key principles of the Busan Partnership, has largely been absent in Lebanon and Jordan.

Key informant interviews and a focus group discussion showed that in Lebanon the public sector does not engage with CSOs concerning several aid-related mechanisms, which could include consultations on sectoral priorities and project planning in education, water and energy, health, livelihoods and economic development. The priorities identified by the Lebanese government have been determined by the Council of Ministers through strategies prepared by ministries, without consultation of key stakeholders, including for instance CSOs and labour unions. Civil society actors indicated that the lack of transparency limits CSOs' ability to hold the government accountable for development-related shortfalls.

'NGOs should play a monitoring and evaluation role in order to monitor where the money is spent and whether every actor is fulfilling their duties, and report to the donors to put pressure on the government in order to efficiently allocate the funds.'

Lebanese civil society respondent³⁷

In Jordan, civil society representatives and even Members of Parliament (MPs) expressed concerns over the inconsistency in consultations with stakeholders outside government. One former high-level government official maintained that consultations are sporadically held in the context of some select projects. A view amongst many of the MPs interviewed was that 'the House of Representatives does not play a meaningful role in shaping economic policies in Jordan.'³⁸ A member of Jordanian civil society noted, 'the fundamental challenges [of the Jordanian labour market] remain far from donors' priorities, save for some projects here and there which have been implemented by a few CSOs.'³⁹

While both Jordan and Lebanon fall short of meaningfully engaging civil society in determining priorities and shaping development policies, refugees in both countries are particularly marginalized. Though much of new aid to Jordan and Lebanon is meant to help both countries cope with the refugee crisis, refugees from Syria and host communities alike still face challenges. Many refugees are unable to register with the UN and maintain the legal right to stay in the country, let alone participate in determining humanitarian and development priorities and policies.

3 CONCLUSION AND RECOMMENDATIONS

New funds, including development financing, pledged to Jordan and Lebanon at international summits bring new opportunities to help vulnerable communities in Jordan and Lebanon, including refugees, in a new and potentially more sustainable way. Similarly, the new global financing facility created by the World Bank to leverage more funds for refugee hosting countries though engaging the private sector presents another opportunity to reduce poverty. However if the governments of Jordan and Lebanon are to meaningfully take advantage of these opportunities, both they and donors need to take important steps to ensure the aid effectiveness principles are adhered to, particularly transparency, accountability, and meaningful consultation of civil society and marginalized groups, including women and refugees.

Recommendations

Donors and international financing institutions should:

- Commit to disbursing aid on at least a three to six year rolling basis, ideally a six year basis, and make allocations of aid by country over this time period.
- Where possible, ensure long-term aid is allocated and aligned with national development plans and priorities, which in turn link up and contribute to the Sustainable Development Goals (SDGs). If a national strategy does not exist, work with the relevant ministry to develop a national strategy that is inclusive and brings together priorities of national and local authorities, civil society, and local communities.
- Prioritize scaling up funding through grants or concessionary financing over loans to avoid contributing to unsustainable levels of national debt.
- Refrain from attaching economic policy conditions to the aid provided that will disproportionately impact the poor or refugee communities, including cuts in essential subsidized services.
- Ensure domestic accountability mechanisms are enacted and achievable milestones are set by providing sufficient technical and financial support.
- Make direct budget support and other financing conditional on developing robust domestic accountability mechanisms for monitoring aid effectiveness, including strengthening civil society oversight of aid negotiations, provision, and budget allocation. These mechanisms should include special provisions to include communities outside the capital as well as representation from women, refugees, and other marginalized groups.

- Support an enabling environment for civil society within aid recipient countries so that civil society has the ability to advocate and engage with their governments. This could include providing more predictable core support to civil society groups, parliamentarians and media organizations to hold government actors to account.
- Actively and meaningfully consult with civil society, refugees and other vulnerable groups early and throughout various stages of the financing and ensure that there is proactive disclosure of information about their financing and plans.

Governments of Jordan and Lebanon should:

- Ensure ‘access to information’ laws are effective, and include the principle of self-disclosure and robust implementation mechanisms. They should take measures to ensure citizens, refugees, and other marginalized groups are aware of the procedures and are accessible to all.
- Report aid flows transparently through a unitary database that integrates commitments and disbursements by donor, sector, and public aid recipient agencies, and ensure this information is publicly available and regularly updated.
- Facilitate and strengthen mechanisms for civil society participation in defining local and national development priorities and milestones to assess processes in a transparent manner.
- Work to increase the transparency of the negotiation and provision of aid between donors and government.
- Ensure the development and implementation of national poverty reduction strategies are inclusive of women, refugees and other excluded groups.
- Put domestic accountability mechanisms in place, including creating monitoring systems at the national and local levels and integrating CSOs and private sector actors, in order to promote transparency and accountability of aid and as a means of combating corruption.
- With the support of donors, introduce necessary far-reaching domestic policy changes that guarantee the right to legal stay, education and livelihoods for refugees, ensuring the realization of the commitments made in London and the follow up conference in Brussels. This must include setting up clear accessible and affordable procedures for refugees to obtain and maintain valid documentation, registration and residency.

Governments of donors and recipient countries should:

- Ensure that companies and financial institutions that benefit from ‘blended’ financing respect human rights and the environment, including through setting up safeguards and legal frameworks with a grievance mechanism for all such projects. This should go hand in hand with robust monitoring and evaluation of all projects to ensure the ‘do no harm’ principle is respected and that this instrument maximises positive benefits for people in poverty.

- Develop mutual accountability mechanisms, where both parties are held accountable for the outcomes of the intervention and the allocation of aid resources.
- Take measures to ensure development effectiveness principles are applied to all investment leveraged from aid and that ultimately the public sector is not undermined but rather strengthened by these initiatives.

NOTES

All URLs were last accessed April 2017.

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- 3 Calculations based on data from the World Bank World Development Indicators database. <http://databank.worldbank.org/data/download/GDP.pdf>
- 4 In these calculations, Oxfam has followed the UN's practice of including refugees registered both by UNHCR and the UN Relief and Works Agency (UNRWA), set up in 1949 to provide help for Palestinian refugees, who it defines as people 'who lost both home and means of livelihood as a result of the 1948 conflict', and the descendants of Palestinian male refugees.
- 5 Calculated based on the figures in Oxfam (2016). *A Poor Welcome from the World's Wealthy*. <http://policy-practice.oxfam.org.uk/publications/a-poor-welcome-from-the-worlds-wealthy-616919>
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- 12 Names of individuals interviewed have been removed from this paper to protect the identities of those individuals. In several cases interviewees disclosed information with the understanding that their identities would not be revealed.
- 13 See the DCD-DAC section on aid effectiveness on OECD's website at <http://www.oecd.org/dac/effectiveness/parisdeclarationandaccraagendaforaction.htm>. Oxfam's position is that in addition to these principles, for aid to be truly effective in alleviating poverty and addressing inequality, a key focus must be on women's rights and support for women's organizations and civil society more broadly. See Oxfam (2016). *Accountability and Ownership: The role of aid in a post-2015 world*. https://www.oxfam.org/sites/www.oxfam.org/files/file_attachments/bp-accountability-and-ownership-140916-en.pdf
- 14 Predating the London conference, the UN and neighbouring countries had started to look towards long term aid plans. Last year's Regional Refugee and Resilience Plan (3RP), including the Jordan Response Plan (JRP) and Lebanon Crisis Response Plan (LCRP) was a three year multi-country plan designed to meet both short term emergency and long term needs of refugees and host communities. The UN refugee appeals including multi-year country plans was a welcomed first step.
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- 16 Danish Refugee Council, Oxfam, Save the Children (2017). *Stand and Deliver: Urgent action needed on commitments made at the London conference one year on*. <https://www.oxfam.org/en/research/stand-and-deliver>

- 17 At the 'Supporting the Future of Syria and the Region' conference in Brussels in April 2017, more than \$6bn was pledged by various donor countries. More analysis is required to determine exactly how much was pledged as new funds for 2017 or part of previous pledges and commitments. For more information on funds pledged at the Brussels conference, please see: UN (2017, 5 April). *Donors pledge \$6 billion to help support future of war-torn Syria at UN-backed conference.* http://www.un.org/apps/news/story.asp?NewsID=56502#.WPX12_nyuUk
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- 22 See Council of the European Union (2016, 20 September). Joint Proposal for a COUNCIL DECISION, 2016. (Jordan) <http://data.consilium.europa.eu/doc/document/ST-12384-2016-ADD-1/en/pdf>;
Council of the European Union. Joint Proposal for a COUNCIL DECISION, 2016 (Lebanon), <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52016JC0040>
- 23 The Busan Partnership agreement of 2011 represents 'a consensus that a wide range of governments and organisations have expressed their support for. It offers a framework for continued dialogue and efforts to enhance the effectiveness of development co-operation.' Following the agreement, the Global Partnership for Development Co-operation was established to ensure accountability for its implementation. See here for more information <http://www.oecd.org/development/effectiveness/busanpartnership.htm>
- 24 When using the term 'aid', Oxfam is referring to overseas development assistance (ODA). This is technically defined by the Organisation of Economic Development and Cooperation (OECD) as the transfer by official agencies, including states and local governments, of public finances to developing countries, multilateral organizations and international NGOs that is: administered with the main objective of promoting the welfare and the economic development of developing countries, concessional in character and conveys a grant element of at least 25 percent. According to the OECD DAC High Level Meeting Communiqué that was held in February 2016, the definition of ODA was revisited and new components such as human rights, peace, and security were added, as they are viewed. Oxfam excludes the following from this definition: debt relief, educating developing country students in rich countries, redirection and housing of refugees in rich countries and export credits.
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- 32 Rasheed for Integrity and Transparency, Transparency International (2016). *The National Integrity System.* Jordan Chapter. https://www.transparency.org/whatwedo/publication/the_national_integrity_system_jordan
- 33 The priorities identified by some donors in Lebanon include maintaining internal security, promoting employment opportunities, containing refugee migration, extending technical assistance, encouraging good governance, and promoting the inclusiveness of public, private, and civil society sectors.
- 34 Key Informant Interview with donor representative to Lebanon conducted by LCPS, 12 January 2017

- 35 After a consultative process, the Jordan 2025 plan was published in 2015. It states that it 'provides a clear and honest assessment of the Kingdom's current situation; outlines a vision with specific goals to be achieved; and provides a roadmap, including specific initiatives and timelines, to be followed to achieve [Jordan's] aspirations'. See, *Jordan 2025: A national vision and strategy* (2015). http://www.nationalplanningcycles.org/sites/default/files/planning_cycle_repository/jordan/jo2025part1.pdf
- 36 Government of Jordan (2016). *The Jordan Compact: A New Holistic Approach between the Hashemite Kingdom of Jordan and the International Community to deal with the Syrian Refugee Crisis*. <http://reliefweb.int/report/jordan/jordan-compact-new-holistic-approach-between-hashemite-kingdom-jordan-and>
- 37 Focus Group Discussion with representatives of Lebanon civil society conducted by LCPS, 16 December 2016.
- 38 Key Informant interview conducted by Phenix, 10 April 2017.
- 39 Key Informant Interview Conducted by Phenix, 10 April 2017.

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