

Inclusion strategy and roadmap

Outcomes from the inclusion priority topic at the 2021 Humanitarian Networks and Partnerships Week

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Key messages

Progress towards more inclusive humanitarian action has been made in the last 20 years but remains too slow and piecemeal. Gaps and challenges are numerous and require further advocacy, action and engagement to capitalise on inclusion efforts and progress thus far.

A major challenge is the lack of implementation of existing commitments and guidelines. This is compounded by unhelpful assumptions regarding inclusion as an option rather than a core element of humanitarian action, as well as unconscious bias regarding the roles and capacities of certain groups of individuals who remain at the margins of humanitarian action.

To progress towards more inclusive humanitarian action, inclusion actors must continue to unite to identify where common reforms can benefit inclusion across diversities and where specific reforms, actions and advocacy are needed to address distinct needs resulting from intersecting factors.

Support for a more systematic twin-track approach to inclusion - one that includes both inclusion mainstreaming and specific programming - requires greater leadership at all levels of the humanitarian system and investment by donors.

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Introduction

Background

Two important commitments on inclusion were adopted at the 2016 World Humanitarian Summit (WHS): the Inclusion Charter and the Charter for Inclusion of Persons with Disabilities. Since then, momentum around the inclusion of people with disabilities has grown. For instance, the Inter-Agency Standing Committee (IASC) has placed inclusive accountability firmly on its agenda by creating the Task Team on Inclusion of Persons with Disabilities in Humanitarian Action, whose work was integrated in early 2019 into the newly created Results Group 2 on accountability and inclusion. There was also a Global Disability Summit in July 2018; the launch in November 2019 of the IASC Guidelines on Inclusion of Persons with Disabilities in Humanitarian Action; and the creation of a dedicated Reference Group. Other policy discussions, commitments and initiatives have aimed to make humanitarian action more inclusive for women, older people, youth and other diversities.

Inclusion is increasingly being considered in humanitarian policy and programming and there has been an increase in inclusion adviser posts within humanitarian organisations and inclusion-specialised staff deployed in humanitarian responses. The 2021 Humanitarian Networks and Partnerships Week (HNPW) represented a timely opportunity to shape current discourse, policy and practice on inclusion, avoid fragmentation between workstreams and inform the sector on how to move towards more inclusive humanitarian action.

Inclusion at the 2021 Humanitarian Networks and Partnerships Week

For the first time, the 2021 HNPW made inclusion one of its priority topics, with the aim of harnessing current momentum around inclusion to inform a collective strategy to support more inclusive humanitarian action. Objectives included but were not limited to:

- Facilitating further dialogue with inclusion-focused organisations as well as other organisations on defining challenges and identifying ways forward.
- Informing non-inclusion specialised networks and partners on inclusion, current developments and opportunities.
- Widening the inclusion dialogue to consider how best to move towards collective and intersectional approaches without undermining specific inclusion issues.
- Complementing and connecting the dots to other relevant HNPW priority themes and sessions on specific inclusion themes (e.g. disability, older people, gender, etc.) in order to allow for a discussion of the concept of inclusion in humanitarian action at large and what mindset shifts might be required in this respect.

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The priority topic comprised 15 sessions about inclusion and its various aspects over the three weeks of HNPW. A framing session on 20 May, hosted by the United Nations Office for the Coordination of Humanitarian Affairs (OCHA) in cooperation with the UK Foreign, Commonwealth and Development Office (FCDO), Age International, HelpAge International and HPG, aimed to set the scene. Together with representatives from various minority groups, panellists from the International Committee of the Red Cross (ICRC), OCHA, the United Nations Refugee Agency (UNHCR) and HPG contributed to defining what the problems are, what inclusion means and how it fits in relation to key principles and drivers of humanitarian action, particularly the humanitarian principles.¹

About this learning note: highlights from the inclusion outcome session

On 5 May 2021, HPG hosted an outcome session entitled ‘Inclusion strategy and roadmap: “building the bridge” between the status quo and the goal to be achieved’ in order to reflect on the outcomes of the 15 inclusion sessions at the 2021 HNPW. It also aimed to:

- Reflect on challenges and gaps for the inclusion agenda.
- Identify opportunities and next steps to make progress towards more inclusive humanitarian action.
- Discuss commonalities across the inclusion spectrum, where gaps exist and where challenges and obstacles for more inclusive humanitarian action remain.
- Consider how to retain achievements as well as identify opportunities and ways forward to progress the inclusion agenda.

More specifically, its aim was to reflect on how to move away from the challenges of the current fragmented approach to inclusion without diluting the progress already made in areas such as gender equality and disability inclusion. This learning note provides a brief overview of the different inclusion sessions during the 2021 HNPW as well as the highlights of this outcome session.

¹ See Barbelet, V. and Wake, C. (2020) *Inclusion and exclusion in humanitarian action: the state of play*. HPG working paper. London: ODI (<https://odi.org/en/publications/inclusion-and-exclusion-in-humanitarian-action-the-state-of-play>).

A diversity of issues

For the purpose of the 2021 HNPW, inclusion was approached from a number of angles (see Box 1) such as impartiality, equitable access, specific and diverse needs, and participation.

During the HNPW 2021, myriad themes were discussed, demonstrating the multiple elements of inclusion (see Figure 1). These include but are not limited to: mental health and psychosocial support, assistive technology, indigenous people, people of diverse sexual orientation, gender identity and expression and sexual characteristics (SOGIESC), the rights of older people, young people, gender equality and women's empowerment, the link between inclusion and accountability to affected people (AAP), and the issue of meaningful participation of older people and people with disabilities. Some of these topics, such as those about youth, older people and indigenous people, had never been discussed before during HNPW. While topics covered diverse groups of people, disability inclusion remained a key focus of many discussions, reflecting the momentum gained on this issue since the WHS. Some interventions remarked that some issues or groups require more attention and work, in particular older people and people of diverse SOGIESC.

Box 1 The concept of inclusion in humanitarian action

For the purpose of the priority topic, inclusion is understood in a wide manner and includes:

- **Inclusion as impartiality:** ensuring through inclusive assessments and the use of disaggregated data that humanitarian action reaches and focuses on the most urgent cases and those most affected by crises, without discrimination.
- **Inclusion as equitable access:** ensuring that all individuals affected by crises can have equal access to services and assistance.
- **Inclusion as specific and diverse needs:** ensuring that humanitarian responses address the specific needs of individuals and cater to diverse needs, including tailored programmes.
- **Inclusion as participation:** ensuring that all individuals are able to participate in humanitarian responses, including influencing the strategic direction of humanitarian responses; that capacities of all individuals are recognised and harnessed; and that humanitarian responses listen to the voices of those too often marginalised in societies and communities.

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Table 1 The 15 sessions on inclusion during the 2021 Humanitarian Networks and Partnerships Week

Theme	Session
Impartiality	GEO Indigenous Alliance – Towards more inclusive humanitarian action (20 April)
	Disrupting power and organisational culture: taking gender equality and women’s empowerment beyond protection (23 April)
	Inclusion of persons with disabilities in humanitarian action: where are we now? (26 April)
	Upholding older people’s rights in emergencies (27 April)
Participation	GEO Indigenous Alliance – Towards more inclusive humanitarian action (20 April)
	With us and for us: working with and for young people in humanitarian and protracted crises settings (27 April)
	CBi – Gender, disaster management and the private sector: advancing the field through a multi-stakeholder approach (29 April)
	Inclusion and AAP: to link or not to link? (3 May)
	Strengthening inclusion of persons with disabilities in accountability mechanisms (4 May)
Equitable access	Assistive technology provision in humanitarian settings (20 April)
	GEO Indigenous Alliance – Towards more inclusive humanitarian action (20 April)
	Making cash assistance disability inclusive: what do we know from practice in humanitarian response and where do we go from here? (27 April)
Specific and diverse needs	Establishing an inter-agency rapid deployment mechanism for mental health and psychosocial support: what did we do, what did we learn and where are we going? (19 April)
	Strengthening disability inclusion in HNOs/HRPs: what have we learned? (22 April)
	An introduction: what is the evidence for the inclusion of people with disabilities and older people in humanitarian response? (28 April)
	Disability inclusion: lessons from the International Federation of the Red Cross Movement (ICRC & IFRC) (29 April)

Challenges and gaps

While acknowledging that progress has been made towards more inclusive humanitarian action, discussions throughout the three weeks highlighted the many remaining gaps and challenges (see Figure 1). Unfortunately, many of these difficulties continue to be based on unhelpful assumptions that certain groups of people are victims and needy; that people from marginalised groups (be they women, young people or older people) cannot take on leadership roles or be agents of change; or that people with disabilities cannot be the head of a household or use cash on their own.

Figure 1 Gaps and challenges for more inclusive humanitarian action



Lack of implementation of existing commitments and guidance

Tools for inclusion such as conventions, charters, guidelines and reports all exist, but they are not applied consistently and most only focus on a single aspect of inclusion. Guidelines are not being implemented in part because they need to be translated and contextualised in order to be useful in humanitarian responses. This point was raised by some participants who felt that the current inclusion tools were not practical and that many humanitarian responders did not know how to be more inclusive in the responses they were working in. Guidance should be adapted for each sector and individual contexts, including on how best to reflect inclusion in monitoring frameworks. This requires dedicated cross-sectoral advisers and working groups; unfortunately, there is little evidence of what does and does not work in terms of how best to set up such advisory roles and working groups. There is also no formal space for knowledge-sharing and collaboration on inclusion across sectors.

A twin-track approach for mainstreaming and addressing specific needs is lacking

The twin-track approach² is still not happening and it is often misunderstood, with too much focus on mainstreaming and not enough on addressing specific needs. The prevalent discourse continues to be that all people have the same needs and thus their needs must be mainstreamed in all projects. While important, a mainstreaming approach to inclusion should not be to the detriment of people's specific needs. Difficulties in realising the twin-track approach are compounded by unclear roles and responsibilities for addressing specific needs. For instance, in any given humanitarian response there is no clarity on who is responsible for delivering assistive technologies, mental health and psychosocial support or for ensuring that the specific needs of people of diverse SOGIESC are addressed. These tend to be seen as specialised issues rather than a standard to be met in every response.

Another striking example relates to AAP, the roll-out of which is often considered sufficient to address inclusion. AAP mechanisms must always be inclusive in order for people in all their diversities to shape and influence humanitarian responses. However, although interlinked, both AAP and the twin-track approach need to be considered as stand-alone issues, as inclusion requires more than solely AAP to be fully realised.

2 The twin-track approach advocates for both a mainstreaming and a targeting approach. Mainstreaming ensures that all individuals have access to their basic needs in all interventions and on an equal basis with others. Targeting addresses the specific needs of diverse individuals in order to empower them and improve their situation. Adapted from CBM (no date) *Step-by-step practical guidance on inclusive humanitarian fieldwork* (<https://hhot.cbm.org/en/card/twin-track-approach>).

Without dedicated resources and people, some issues and groups are deprioritised

The twin-track approach requires dedicated advocacy and resources. Without these, some issues and groups are deprioritised and hence made invisible in humanitarian responses, particularly older people, people of diverse SOGIESC, and issues such as mental health and psychosocial support (MHPSS) or assistive technology. Some people felt that humanitarian workers should be better trained to be able to understand and respond to the issues specific groups face and which contribute to their exclusion.

Approach to inclusion is too fragmented and lacks an intersectional lens

Approaches to inclusion tend to be too fragmented, creating competition between different elements, issues and diversity factors. Mandate issues and competition for donor funding and interest further fuel a siloed approach to inclusion. Some participants felt that donors need to be encouraged to take on inclusion as a whole rather than focus on specific groups. There also tends to be a lack of intersectional awareness within specific inclusion efforts. For instance, women, youth and older people tend not to be well represented in organisations of people with disabilities.

Such fragmentation contributes to difficulties in implementing existing guidance and commitments. The multiplicity of inclusion-related guidelines can be more confusing than helpful; rather than rethinking how best to approach inclusion and intersectionality, there are separate standards for various inclusion issues. There must be investment to identify common issues and needs across different drivers of exclusion and to determine which issues require specific attention.

Leadership on inclusion is lacking, making inclusion an extra rather than core to the humanitarian endeavour

Humanitarian organisations still do not fully take on their roles, responsibility or ownership of inclusion in line with their commitments of impartiality. Participants felt organisations lack leadership to put inclusion at the core of humanitarian responses, consequently reflecting attitudes that inclusion remains an optional add-on and sometimes even a hindrance, rather than an element of life-saving humanitarian action. This view often prevails when inclusion entails additional costs.

Similarly, inclusion was not seen as a donor priority and has little resource allocation. Where there is leadership with individuals mandated to move forward on inclusion, responses make progress towards greater inclusion, such as for example in Syria with the AAP, PSEA (Protection against sexual exploitation and abuse), Inclusion Strategic Steering Committee. Inclusion is seen as a cost rather than adding value to humanitarian responses. Projects tend to only look at outputs and not outcome, thereby creating bias against the investment case for inclusion to improve humanitarian action.

Not enough data disaggregation, qualitative data or use of data

There is a collective challenge to take on more systems and processes, and to gather and use more data in crisis contexts. Where disaggregated data exists, there seemed to be a gap on how this informs programme design, including with data gathered during programme implementation.

Lack of engagement, empowerment and consultation of organisations representing groups of people who are often socially excluded

This was highlighted by all groups represented at the HNPW, such as lesbian, gay, bisexual, transgender, queer and intersex (LGBTQI) organisations, organisations of people with disabilities, youth organisations, representatives of indigenous people and women's rights organisations.

Overreliance on protection and accountability mechanisms

Inclusion issues tend to be pigeonholed into specific clusters or specific roles and responsibilities under the umbrella of protection. This prevents a more progressive approach that takes into account empowerment, capacity and opportunities. Participants felt it was critical to go beyond the cluster system and challenged the assumption that protection and accountability mechanisms ensure inclusion. Similarly, inclusion of people with disabilities tends to be seen as the remit of the health sector only.

Opportunities and ways forward for more inclusive humanitarian action

In spite of the many gaps and challenges, participants highlighted that there were opportunities and next steps that could help make progress towards more inclusive humanitarian action. Covid-19 has provided the sector with a window of opportunity as issues of inclusion and exclusion have gained prominence due to the pandemic.

To support existing commitments, guidelines and recommendations in humanitarian responses

- Humanitarian Coordinators and members of Humanitarian Country Teams (HCTs) should drive inclusion forward. This can be done by setting strategic objectives on inclusion; maintaining it as a standard agenda item during HCT meetings; and recognising inclusion as a key element for operationalisation of the principles of impartiality and humanity.

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- Deploy dedicated inclusion advisers, including specific disability, gender, older people and LGBTQI advisers, as well as advisers on language and communication, MHPSS and assistive technology in line with the specific needs of the context.
- Increase support and policy direction from the Principals and other entities of the IASC, including through ensuring that inclusion-specific issues are tackled on top of current work and discussions on AAP.
- Ensure that more local actors, including those representing marginalised groups, are invited to participate in discussions affecting their lives.
- Ensure integration of inclusion training within UN agencies and non-governmental organisations (NGOs) and with local actors.
- Create global, regional and national surge capacity and a rapid deployment mechanism for inclusion advisers.
- Learn from pilots and initiatives that support inclusion efforts within coordinated responses to inform future response-wide support. For instance the Syria AAP, PSEA, Inclusion Strategic Steering Committee and the Yemen Inclusion Working Group.

To ensure greater investment in inclusive humanitarian action

- Advocate for greater donor leadership on inclusion.
- Invest in changing attitudes from ‘inclusion is an optional add-on’ to ‘inclusion is integral to life-saving and principled humanitarian action’.
- Dedicate funding for inclusion mainstreaming as well as allocations for programmes addressing specific needs.
- Conduct internal audits of inclusion with donors.
- Ensure dedicated funding for country-level working groups on inclusion.

To adopt a different approach to inclusion that is more intersectional and addresses the fragmentation of the inclusion agenda

- Continue to convene policy and practice discussions that bring the widest range of inclusion issues to the table to inform more intersectional approaches and collective action on inclusion, without jeopardising existing progress or deprioritising specific inclusion issues.
- Learn from disability inclusion and gender equality to inform strategies for inclusion of older people, youth and people of diverse SOGIESC, as well as language exclusion. Review good practices on surge capacity deployment and stand-by capacity, including regional and national models.
- Work collectively to conduct an intersectional analysis of the policy reform agenda on inclusion to identify common reforms that would help achieve progress on inclusion across all forms of inequalities, diversity and marginalisation. Identify specific targeted actions to address distinct needs resulting from intersecting factors.
- Work collaboratively, pulling together shared expertise from inclusion-specialised actors, to inform intersectional analysis of the needs and risks of crisis-affected populations and develop good practices.

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- Build coalitions across inclusion actors to advocate for and provide practical solutions to existing gaps and challenges.
- Consider rethinking current inclusion practices to address both the fragmentation of the inclusion agenda and the lack of implementation of existing commitments and guidelines. This could come through a stronger case management approach to humanitarian responses.

To address internal and unconscious biases and assumptions

- Address the lack of diversity in employment within the humanitarian sector by adopting inclusive human resources and employment policies.
- Learn, link and work with current efforts on racism and unconscious bias to tackle sexism, cis-gender and heterosexual normativity, ableism and ageism.

To support longer-term impact, resilience and preparedness

- Advocate for and address national government policies to support people's rights, through supporting the implementation of conventions such as the Convention on the Rights of People with Disabilities or addressing legal frameworks that discriminate against marginalised groups.
- Adopt inclusive partnership practices to ensure a drive towards more systematic collaborations with specialised and representative organisations. Their participation must be meaningful: people of all diversities should be able to contribute their capacities and agency to inform humanitarian strategies and responses. Dedicated support to allow such organisations to participate in humanitarian coordination must be provided.
- Consider how best to leverage emerging response models and actors, such as private citizens and volunteer responses, local actors and people outside of the traditional humanitarian ecosystem, including human rights groups, women's rights organisations and development actors.
- Ensure more inclusion work is done as part of preparedness work.

To link inclusion with efforts on participation, localisation and other policy processes

- Through community engagement, harness community expertise and knowledge on inclusive crisis response and vulnerabilities while being cognisant that some communities can also be a barrier to inclusion.
- Feed into the Sphere guidelines with an inclusion lens to help operationalise inclusion.
- Work alongside efforts towards more local humanitarian action to ensure that progress is inclusive, involves organisations of people with disabilities (in particular those representing learning and mental disabilities), women's rights organisations, organisations representing people of diverse SOGIESC (in particular representing other populations beyond homosexual men), older people's associations, youth groups, etc.

To go beyond protection and accountability to affected people

- While work on protection and AAP has contributed to more inclusive responses, elements of inclusion are still missing from these approaches, particularly issues of equitable access, meaningful participation and agency of diverse groups.

To strengthen data and information collection and use to inform more inclusive humanitarian responses

- Increase and scale up efforts on disaggregated data collection and usage, while keeping in mind assessment fatigue among crisis-affected populations, followed by effective data sharing.
- Carefully consider what information and data need to be collected to inform inclusive humanitarian action, including the balance between quantitative and qualitative data, demographic data and data on barriers and obstacles to inclusion.
- Improve the training of data collectors to ensure inclusive needs assessments, including through deploying more diverse data collectors.
- Actively monitor and evaluate the operationalisation of impartiality with an inclusion lens to question assumptions that humanitarian responses do not exclude: asking who is not included, who is not seen, who is not being helped and why.
- Map existing inclusion efforts and specific inclusion actors in each context.

Conclusion

Progress towards more inclusive humanitarian action has been made in the last 20 years but remains too slow and piecemeal. Gaps and challenges are numerous and further advocacy, action and engagement are required to capitalise on inclusion efforts and progress thus far. Inclusion is still not considered life-saving. While mainstreaming inclusion into programming has improved, too little consideration is given to the specific needs of various groups. More dedicated advocacy and resources are needed to avoid some groups and issues being deprioritised. Cross-sectoral cooperation must be enhanced to overcome approaches to inclusion that remain largely fragmented due to mandates, donor pressure and other challenges. Humanitarian actors also need to look at a complete picture of each individual or community in their response efforts, as intersecting aspects of diversities, such as age, gender, race or disabilities, may exacerbate pre-existing vulnerabilities and create new ones, especially in crises such as the Covid-19 pandemic or in conflict and displacement situations.

The previous section highlighted a wide range of possible opportunities and ways forward to move towards more inclusive humanitarian action. Critical recommendations include:

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- **To Humanitarian Coordinators and HCTs:** Increase your leadership on inclusion to drive inclusion forward in crisis response. Set strategic objectives on inclusion (making it a standard HCT agenda item), deploy dedicated inclusion advisers, and recognise inclusion as a key element for operationalising the principles of impartiality and humanity.
- **To the IASC Principals and the Operational Policy and Advocacy Group:** Increase support and policy direction to inform Humanitarian Coordinators and HCTs' leadership on inclusion to ensure that inclusion-specific issues are tackled on top of current workplans on AAP.
- **To inclusion-specialised actors and advocates:** Continue to unite to identify where common reforms can benefit inclusion across diversities and where specific reforms, actions and advocacy are needed to address distinct needs resulting from intersecting factors.
- **To donors:** Invest in a twin-track approach to inclusion and dedicate funding for inclusion mainstreaming as well as for specific inclusion interventions. Inclusion audits should also be conducted more systematically.



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