
MA Paper 9: Cover Note for the Evaluation of the IATI Strategic Plan (2020-2025)

I. Introduction and Context

The [Independent Evaluation of the IATI Strategic Plan 2020–2025](#), conducted. It represents a timely and comprehensive assessment of IATI's progress, effectiveness, and institutional resilience as it concludes its current strategic cycle. Commissioned by the IATI Secretariat under UNDP's Sustainable Finance Hub, the evaluation provides a critical reflection on IATI's achievements, challenges, and lessons learned over the five-year period.

The evaluation comes at a pivotal moment for IATI. The period from 2020 to 2025 has been one of rapid change and uncertainty across the international development and humanitarian landscape. The COVID-19 pandemic, escalating climate-related crises, and shifts in global political priorities have profoundly influenced how development finance data is collected, shared, and used. These shifts have also reshaped the expectations placed on IATI—as both a data standard and a multistakeholder partnership—to deliver credible, comparable, and actionable data for decision-making.

The evaluation underscores that IATI has consolidated its position as a central actor in the global transparency ecosystem. Over 1,700 organisations now publish to the IATI Standard, and the quality and accessibility of this data have improved significantly through major infrastructure upgrades such as the IATI Validator, the Datastore 2.0, and ongoing Registry enhancements. Yet, despite notable technical progress, the evaluation concludes that IATI's Strategic Plan did not fully deliver the transformational change envisioned in 2020.

This cover note distills the evaluation's key findings, cross-cutting insights, and recommendations, offering a strategic framing to inform the forthcoming MA discussion. It aims to help Members reflect on IATI's performance, institutional trajectory, and the reform priorities necessary to strengthen its sustainability, relevance, and impact in the next strategic cycle.

II. Purpose, Scope, and Methodology

The evaluation's purpose was to assess the relevance, effectiveness, efficiency, and sustainability of the Strategic Plan 2020–2025 and to provide actionable recommendations to guide the design of the next strategic framework. The evaluators reviewed IATI's progress against its three Strategic Objectives—(1) Improving the Quality of Data Published to IATI; (2) Promoting the Use of IATI Data; and (3) Strengthening the IATI Community and Partnerships.

The evaluation employed a mixed-methods approach, combining quantitative analysis of IATI performance data with qualitative interviews and document reviews. The process included

consultations with a broad range of stakeholders, including members of the Governing Board, Secretariat staff, Technical Team, IATI publishers, data users, and representatives of partner initiatives such as the OECD-DAC, OCHA FTS, and UNCTAD.

This comprehensive methodology ensured that the evaluation captured not only institutional performance but also the perceptions and experiences of the wider IATI community. The evaluators also examined alignment between IATI's strategic priorities and the evolving needs of the development and humanitarian transparency landscape.

III. Major Findings

1. Effectiveness

The evaluation finds that IATI made meaningful progress in delivering on its core objectives, particularly in improving data quality and accessibility. Major achievements include the operationalization of the IATI Validator, the redevelopment of the Registry, and the modernization of the Datastore. These upgrades have contributed to a more robust data ecosystem that supports the integrity and usability of IATI data.

The rollout of the Data Quality Dashboard marked a turning point in how IATI measures and communicates data quality, shifting the focus from compliance to usability. This has enabled the Secretariat and Members to better understand data gaps and to target capacity support accordingly.

However, challenges remain. By 2023, only 13.8% of publishers met the quarterly publication frequency target, falling short of the Strategic Plan target of 70%. Moreover, the evaluation notes that improvements in data quality have not been matched by comparable growth in data use. The usability and impact of IATI data at country and sectoral levels remain constrained by limited technical capacity and awareness among potential users.

2. Relevance

The evaluation highlights that IATI continues to occupy a unique niche within the global transparency architecture, complementing other systems such as the OECD CRS, TOSSD, and OCHA's FTS. Its open-data standard remains a critical enabler of comparability and interoperability across diverse reporting frameworks.

Nonetheless, the evaluation observes that the Strategic Plan 2020–2025 did not fully anticipate the shifts in global development financing, including the rise of climate finance, blended finance, and South-South Cooperation. As a result, while IATI's mandate remains relevant, the scope and direction of its strategic objectives require recalibration to ensure that IATI keeps pace with the changing aid and finance landscape.

The evaluators also note that IATI's advocacy and policy positioning have not been sufficiently visible in global policy fora, limiting the initiative's ability to influence transparency norms beyond its technical community. This gap presents an opportunity for IATI to strengthen its leadership role in the next strategic cycle.

3. Efficiency and Institutional Performance

The evaluation commends recent efforts to strengthen IATI's institutional capacity, particularly the appointment of an Executive Director in 2024 and the consolidation of technical operations under a single partner. These steps have improved operational efficiency and accountability.

However, the evaluation identifies persistent challenges in governance coherence and Secretariat resourcing. Decision-making structures are sometimes fragmented, and the delineation of roles between the Governing Board, Secretariat, and technical partners remains uneven. The evaluation recommends clearer governance protocols and enhanced Secretariat capacity to manage complex, multi-stakeholder processes.

4. Sustainability

Financial sustainability emerged as a major concern. The evaluation finds that IATI's business model is at risk, with reserves projected to decline significantly by 2026 unless corrective action is taken. Membership fees have remained unchanged since 2016, and reliance on donor contributions has limited flexibility in resource allocation.

To ensure long-term viability, the evaluators recommend exploring alternative financing mechanisms—such as revising the fee structure, introducing paid technical services, and diversifying partnerships with foundations and the private sector.

IV. Cross-Cutting Lessons and Emerging Themes

The evaluation draws attention to several cross-cutting themes that transcend individual objectives:

- **The Need for Strategic Prioritization:** IATI's expansive agenda has sometimes diffused focus and stretched Secretariat capacity. Future strategic planning should emphasize prioritization around core functions—data quality, data use, and interoperability.
 - **Balancing Technical and Policy Functions:** IATI's identity as both a technical standard and a policy platform needs to be better integrated. Future governance structures should facilitate stronger linkages between data governance, user engagement, and policy advocacy.
 - **User-Centric Design and Co-Creation:** The success of IATI's tools depends on their usability and alignment with stakeholder needs. A more participatory approach—through design sprints, user testing, and iterative feedback—will help ensure tools are functional and accessible to a diverse user base.
 - **Regionalization and Local Ownership:** The evaluation underscores the importance of regional engagement, citing the growing partnerships with the African Development Bank and other regional bodies. Strengthening data-use capacity at the country level remains essential to sustaining impact.
 - **Adaptive Management and Change Readiness:** The evaluation notes that IATI has sometimes struggled to adapt quickly to new opportunities or challenges. Strengthening risk management and institutional agility should be core priorities in the next strategic cycle.
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V. Strategic Implications for the 2026–2030 Plan

The evaluation provides a robust evidence base to inform the design of the forthcoming IATI Strategic Plan 2026–2030. It calls for a shift from incremental improvement to transformational change, anchored in four strategic imperatives:

1. **Reaffirming IATI’s Vision and Purpose**

The next Strategic Plan should articulate a clear and compelling vision of IATI’s role in the evolving transparency and finance data ecosystem. This includes positioning IATI not only as a repository of data but as a platform for insight, coordination, and accountability.

2. **Rebalancing the Strategic Framework**

Future objectives should be streamlined to focus on high-impact priorities. Data quality and data use must be treated as mutually reinforcing pillars. IATI should embed data-use targets and metrics that go beyond publication frequency to measure influence and value creation.

3. **Ensuring Financial and Institutional Resilience**

The Secretariat and Board should consider a revised membership model, sustainable funding options, and clearer governance protocols to enhance accountability and agility. Resource mobilization should be aligned with strategic priorities, including multi-year partnerships and cost-recovery mechanisms for technical services.

4. **Advancing Interoperability and Partnerships**

IATI’s leadership in the data ecosystem depends on its ability to foster interoperability with other systems and frameworks. Deepening collaboration with OECD-DAC, UNCTAD, and OCHA—among others—can create efficiencies, reduce duplication, and expand IATI’s reach.

5. **Embedding Learning, Innovation, and Risk Management**

The next Strategic Plan should incorporate learning and adaptive management as continuous functions. The evaluation stresses that major infrastructure or tool changes must be managed through clear risk frameworks and user-centric consultations, ensuring that improvements respond to real needs rather than internal technical imperatives.

VI. Recommendations for Board and Members’ Consideration

The evaluation’s recommendations can be summarised under three broad headings: strategic direction, institutional strengthening, and sustainability.

● **Strategic Direction:**

- Simplify the next Strategic Plan to focus on a limited set of transformative objectives aligned with IATI’s core purpose.
- Prioritize data use as a central outcome, with clear indicators to track how IATI data informs policy and programming decisions.
- Strengthen IATI’s positioning and visibility in global policy processes related to aid effectiveness, financing for development, and climate transparency.

● **Institutional Strengthening:**

- Clarify roles and decision-making processes across IATI’s governance structure to improve accountability and efficiency.
- Reinforce Secretariat capacity to manage cross-cutting initiatives and sustain technical innovation.

- Introduce a monitoring framework that links Secretariat performance with strategic outcomes.
 - **Financial Sustainability:**
 - Revise the membership fee model to reflect current economic realities and ensure equitable contribution across Members.
 - Diversify income streams through new partnerships, paid services, or voluntary contributions earmarked for innovation.
 - Establish a financial sustainability plan with clear targets for reserve replenishment and donor diversification.
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VII. Conclusion

The evaluation of the IATI Strategic Plan 2020–2025 serves as both a mirror and a guidepost. It reflects the initiative’s achievements in consolidating its systems, expanding its community, and enhancing the quality of data. Yet it also lays bare the structural and strategic challenges that must be addressed for IATI to realize its full potential.

As IATI prepares its next Strategic Plan, the evaluation invites Members to engage in a deeper reflection on what kind of organisation IATI needs to become. Sustained relevance will depend on the ability to link transparency with tangible impact—to ensure that the availability of open data translates into accountability, informed decision-making, and better outcomes for people and the planet.

The Secretariat expresses appreciation to all stakeholders who contributed to this evaluation and welcomes the Members’ feedback and discussion during the 2025 Members’ Assembly. The findings and recommendations contained in the report will serve as a cornerstone for shaping the 2026–2030 Strategic Plan and guiding IATI’s evolution into a stronger, more resilient, and more impactful global partnership.

Annex:

- Independent Evaluation of the IATI Strategic Plan 2020–2025 (Borisova & Hurley, March 2024)