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Insights on how publishers publish

Review of findings from over 100 IATI publishers

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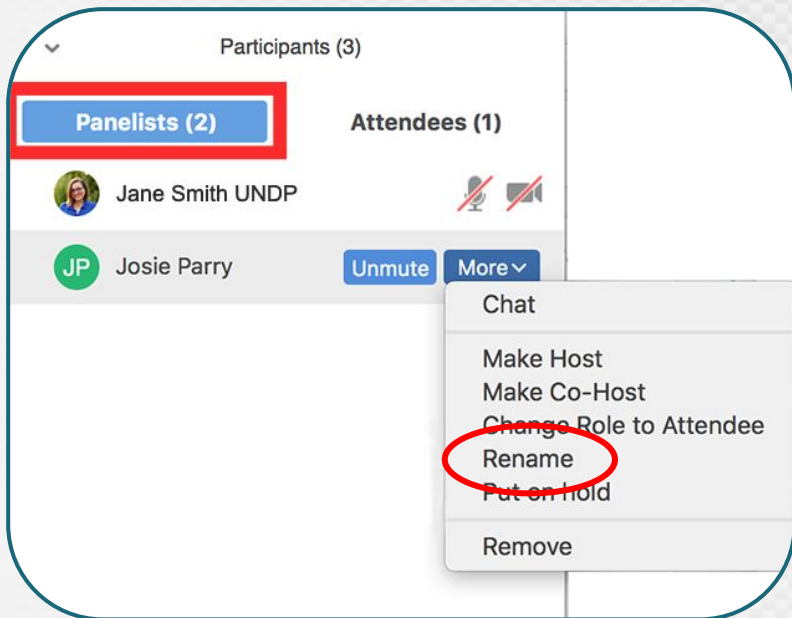
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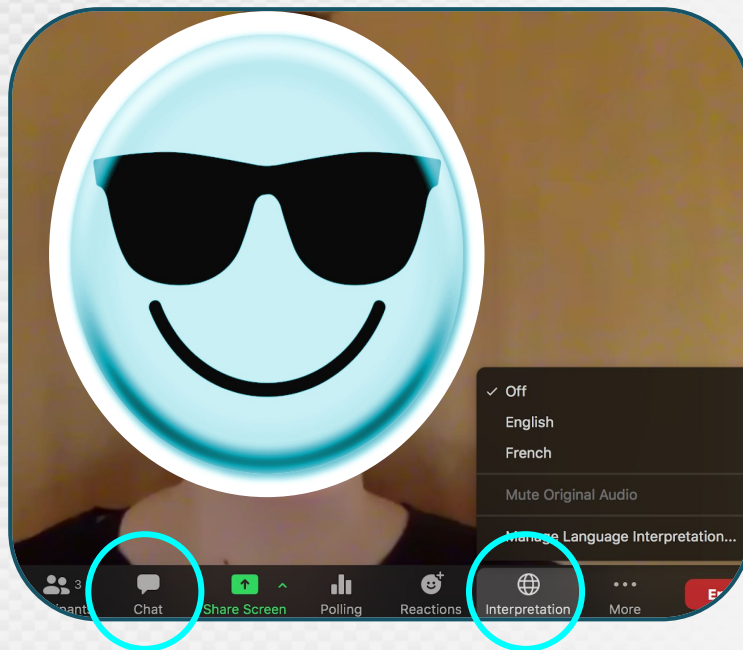
Welcome!

Please make sure your Zoom display name includes your full name and organisation



Ask questions via the chatbox

*Live interpretation is available in
(ENG), (FR), (ESP)*



Agenda

1. Introduction
2. Assessment Methodology
3. Key Findings
4. Breakout rooms - deeper dive on findings by publisher groups
5. Next steps



Introduction

- **First detailed systematic review of 100 publishers**
- **Aim of the review:**
 - Raise specific questions to publishers, based on initial findings
 - Engage with publishers to understand why they publish in a certain way
 - Inform the development of a strategy to bridge the gap between publisher practices and data user needs
- **Importance of analysis in addressing barriers to data use:**
 - Variation in what data publishers do/do not publish; what elements, attributes and codelist they use.
 - Differences in, and lack of information on, how each publisher maps their internal data to the IATI Standard



**Zoom Poll
time :)**



Assessment Methodology



1. **Selection criteria: who was assessed**
2. **Data criteria: what was assessed**
3. **Data retrieval and processing**



Key Findings & Overview Reports

1. Summary report focusing on:

- Validation
- Activities
- Participating Organisations
- Financial information
- Geography
- Sectors, policy markers and SDGs
- Humanitarian
- Finance, flow and aid type
- Organisation file

Overview by publisher group:

- Multilaterals
- Bilaterals
- Development Finance Institutions
- NGOs
- Private Sector and Foundations

Questions raised for each assessment area!



Breakout Rooms

- Deeper dive on findings by publisher groups **(25 mins)**
- Join a room:

Room 1 - Multilateral publishers

Room 2 - Bilateral publishers

Room 3 - Development Finance Institutions

Room 4 - NGOs, Foundations and the Private Sector



Room 1 - Multilateral publishers



Multilateral organisations- Key findings (1)

Participating Organisations

- Most publishers add themselves, other multilaterals and countries.
- However, using a mix of IATI Org IDs, DAC codes, country codes and internal IDs
- Lack of identifying which multilaterals money is being passed on to.

Transactions

- Most transaction dates are valid, not in the future
- Most transactions are not rolling aggregates or aggregated more than monthly
- Many zero valued transactions
- Inconsistency in which transaction types are used e.g. no incoming funds



Multilateral organisations- Key findings (2)

Budgets

- Majority are one calendar year in length
- Some invalid budget dates
- Euro Commission, planned disbursements tend to be better reported than budgets.

Classifications

- Majority use 1 DAC sector per activity
- 10 publishing SDG data
- 7 publishing policy markers



Multilateral organisations- Discussion questions

- How do you find codes for external organisations, to be included as participating organisations?
- How do you allocate sectors to your activities?
- Why do you publish small transaction figures e.g < \$10 (if relevant).
- How should users interpret negative transaction and budget values in your data?
- What does your budget/planned disbursement budget data represent?



Room 2 - Bilateral publishers



Bilateral publishers - Key Findings 1

- **Frequency** of publishing varies
 - Around half of bilateral publishers assessed publish monthly or quarterly
 - 13 publishers out of the total 41 report less than annual
- **Participating organisations** are mostly included
 - Most publishers use their own and other bilateral publisher's reference code, however these aren't always valid codes
 - Narratives are used by all assessed bilateral publishers



Bilateral publishers - Key Findings 2

- Majority of bilateral publishers do not report both **commitments and spend** for all activities
- Reporting **Geographic information**
 - Activities are allocated to one or multiple Recipient Countries/Regions
 - When multiple countries/regions receive allocation, 13 publishers report incorrect percentage allocation



Bilateral publishers - Discussion

- How do you decide how often to publish your data? What are the reasons for not publishing your data at least quarterly?
- How do you decide which activities/projects to publish from your portfolio of projects?
- Please explain why you do not publish both commitments and spend for each activity (if not publishing both)?
- How do you allocate/calculate the percentages when activities have multiple regions or countries allocated?



Room 3 - Development Finance Institutions



Development Finance Institutions - Key findings (1)

- Most Development Finance Institutions still fail validation including some critical errors
- **Frequency** of publication: most organisations update on a monthly basis
- Most **activity files** are divided by country
- **Transactions:**
 - **Transaction types:** outgoing commitments are most commonly used followed by disbursements, interest payments and loan repayment
 - **Negative transaction values** are reported by half of the DFIs and used for different transaction types; 0 value also used.

Development Finance Institutions - Key findings (2)

- **Sub-national locations** are used by most DFIs assessed, including use of geonames (G1) as well as geocoordinates.
- **Sector:**
 - Most use one sector per activity.
 - Most DFIs use their own sector vocab in addition to the DAC
- **Organisation file:**
 - **Total budgets:** most reporting just for 2021 with some up to 2024
 - **Total expenditures:** only 2 out of the 10 DFIs publish total expenditure
- None of the DFIs publish **SDG data** and very few reference policy markers and humanitarian data

Development Finance Institutions - Discussion

- How do you create your XML files? What tools/ systems do you use? Do you validate the data before you publish and if so how?
- When do you add negative transactions? How should users interpret negative valued transactions in your data for the different transaction types (3,5,6) ?
- For comparability across organisations, it is helpful that publishers use a common sector vocabulary. A lot of DFIs use their own. What is preventing you from using DAC codes?
- What is the reason behind not publishing your organisation level data e.g. total expenditure and budgets (if not publishing)?



Room 4 - NGOs, Foundations & the Private Sector



NGOs - Key Findings

- **Frequency** of publishing is quarterly for the majority
 - 8 out of 11 publishers analysed published on a quarterly basis
 - 3 published monthly
- **Activity files** are limited to 1 or 2
 - There is one outlier publisher with one activity file per country(77)
 - Another outlier has one activity file per project (6)
- **Organisation references** in activity file contain occasional errors
 - Some are blank
 - Some contain internal references (a common mistake)



NGOs - Key Findings (cont.)

- **Transactions** contain a variety of errors
 - Provider org not provided
 - Invalid characters or internal references
 - One of the publishers analysed has no transactions
- Majority of publishers do not report **commitments** and **spend** for activities



Foundations and Private Sector - Key Findings

- **Frequency** of publishing is also quarterly for the majority
 - Private sector orgs are mostly publishing quarterly
 - Foundations are mostly publishing monthly
- **Activity files** are 1 or 2 across the board
 - A few outliers are publishing one activity file per country
 - One org has activity files split alphabetically



Foundations and Private Sector - Key Findings (cont.)

- **Transactions** are missing information
 - Details of provider and receiver orgs are omitted
 - Some contain internal references or text rather than numbers
- **Planned disbursements** are not commonly reported
 - Just a handful of the publishers analysed have included this info



NGOs, Foundations & Private Sector - Discussion

- How do you decide how often to publish your data?
- How do you decide which activities/projects to publish?
- If not publishing both commitments and spend for each activity, please explain why?
- Is there a reason not to publish planned disbursements?
- How do you allocate percentages for activities taking place in multiple regions/countries?





**Feedback from
each group
&
actions to take
forward**

Next steps

Read [summary report](#) - Analysis of variation in IATI initial finding and questions

Join IATI Connect's Data Publishing Community

- <https://iaticonnect.org/data-publishing-cop/>

Participate in further direct 1-1 engagements with the IATI Secretariat in November

For questions and support contact the IATI Helpdesk

- support@iatistandard.org

