CAGI

CENTRE D'ACCUEIL DE LA GENÈVE INTERNATIONALE
INTERNATIONAL GENEVA WELCOME CENTRE

NAVIGATING UNCERTAINTY AND A RAPIDLY CHANGING GLOBAL CONTEXT:

A SURVEY OF NGOS IN INTERNATIONAL GENEVA

April 2026

EXECUTIVE SUMMARY

The global NGO sector is navigating an important period of disruption, marked by heightened uncertainty, shifting political priorities and declining public funding, which are weakening the multilateral and international cooperation system.

Findings from a CAGI survey of international NGOs based in Geneva indicate that these organisations are significantly affected by this changing global context. A large proportion remain heavily reliant on public funding, making them particularly vulnerable to recent and substantial budget cuts from key donors.

Half of responding organisations reported a decline in global income between 2024 and 2025, yielding tangible impacts on their operations. One in four NGOs significantly reduced or discontinued programmes, while half implemented cost-saving employment measures, including job cuts, reduced hours, and salary freezes. However, 20% reported increased income over the same period, highlighting an uneven landscape in which NGOs have not all been affected equally.

Looking ahead, the outlook remains cautious. There are early signs of stabilisation, yet many NGOs still expect continued financial and operational pressures over the next three to five years, suggesting that current challenges are not temporary but indicative of a deeper structural shift.

The survey underscores a sector under strain but also in the early stages of transformation. NGOs are actively adapting through cost-containment strategies, strategic repositioning, and the exploration of new approaches to sustainability. These include diversifying donor bases and adopting more collaborative operational models such as shared services and pooled resources.

Faced with reduced staffing and limited financial buffers, the ability of many organisations to sustain and scale these adaptation and transformation efforts may depend, in part, on enabling conditions and targeted support.

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INTRODUCTION

Context and rationale for the survey

Non-governmental organisations (NGOs) are operating in a multilateral and international cooperation system that is undergoing major changes. In this context, the sector faces a convergence of significant challenges. Shifting political priorities, coupled with reductions in funding, are placing growing pressure on their operations and long-term sustainability.

Against this backdrop, the International Geneva Welcome Centre (CAGI) conducted a survey to assess the impact of these global dynamics on international NGOs that are based in Geneva, with a view to informing stakeholders and support evidence-based reflection on the sector's evolution. The survey gathers insights on financial trends, structural and operational impacts, and adaptation measures. It also captures perspectives on how effective transformation and adaptation could be supported and enabled.

Methodology and demographics

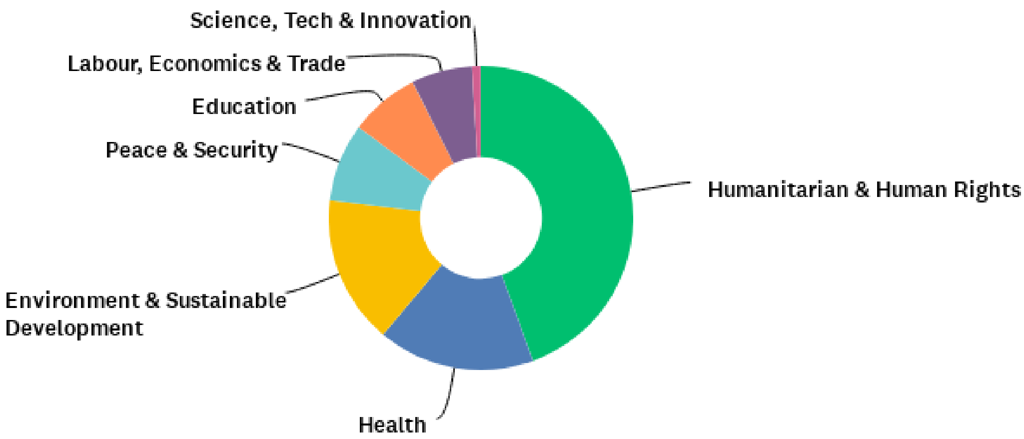
The survey was open from 27 November to 15 December 2025. The invitation to complete the survey was sent to 374 international NGOs that are based in Geneva and registered with CAGI.

A total of 108 NGOs of differing sizes and active in all sectors of international cooperation took part in the survey.

All NGOs in the sample have operations in two or more countries. More than 80% of responding organisations have their global headquarters in Geneva, with the remaining fifth maintaining a representative office.

Most Geneva-based international NGOs are small and medium-sized entities, both in terms of revenue and personnel. The survey sample is no exception, with 75% of responding NGOs reporting less than 5 million CHF in global annual revenue and 85% employing less than 20 staff members in Geneva.

About 45% of respondent NGOs are active in the broad sector of Humanitarian Law and Action, Human Rights and Migration (henceforth the "Humanitarian and Human Rights sector"). The other respondents work in the fields of Health; Environment and Sustainable Development; Peace and Security; Education; Labour, Economics and Trade; and Science, Technology and Innovation. The sectoral distribution of respondents broadly mirrors that of the larger International NGO landscape in Geneva.



Graph 1: Main sector of activity among surveyed NGOs

EVOLUTION IN FUNDING

Structural dependence on public funds

Same as the multilateral system that underpins their presence in Geneva, international NGOs today face an acute crisis in their traditional funding model, long anchored in the international aid policies of a relatively small number of state actors worldwide.

As confirmed by the survey, the public sector is by far the largest source of revenue for international NGOs. A full two-thirds of respondents receive some level of government funds, with over half reporting this to be their largest or second largest revenue stream.

In light of diminishing allocations for international cooperation in many longstanding donor states' budgets, this dependency on public funding is a major source of financial difficulties in the present and of uncertainty for the coming years.

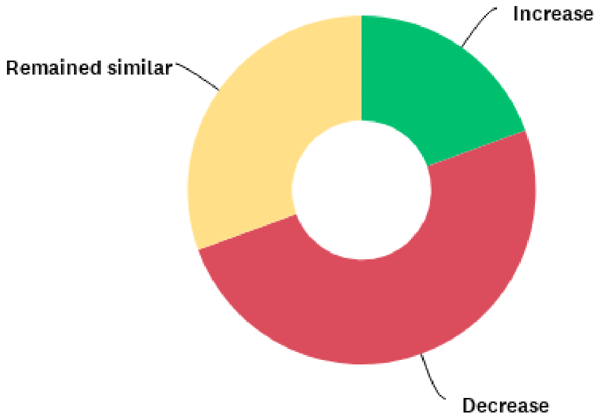
Private donations and membership fees are other important sources of funding reported by NGOs responding to the survey.

Funding reductions across key revenue sources

Among sources of revenue, funds from governments and international organisations saw the most significant cuts, with 70% of respondents reporting decreases in funding from those sectors between 2024 and 2025.

Next hardest hit was membership fees, with over half of NGOs that received this type of funding reporting it to have decreased over the last year.

Erosion of financial stability



Graph 2: Year-on-year evolution in global revenue in 2025 vs. 2024, among surveyed NGOs

Half of the 108 organisations responding to this survey have seen their income decrease in 2025 compared to 2024. More than 40% of this subset experienced decreases of more than 20%.

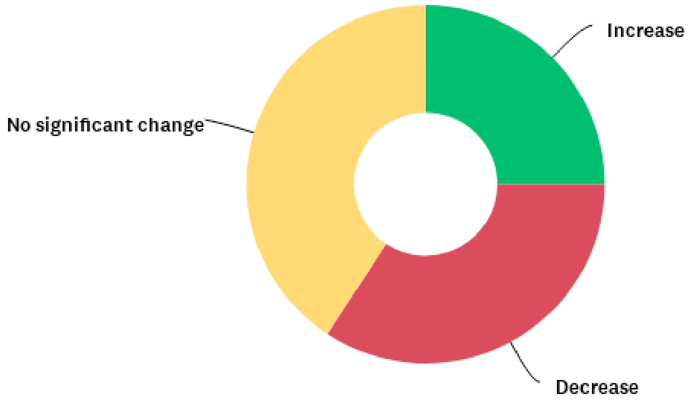
NGOs in the Humanitarian and Human Rights sector are the most significantly affected, with 63% reporting a decrease.

Notwithstanding, 20% of the organisations responding to the survey reported an increase in income for the same period, pointing to an uneven landscape in which NGOs have not all been impacted equally and/or some organisations were able to adapt more rapidly than others.

Mixed funding outlook for 2026: Volatility and early signs of stabilisation

Looking ahead, the perspectives for 2026 remain uncertain for many organisations. Survey results indicate that 35% of organisations are expecting a further reduction in their global income.

At the same time, about one in four NGOs foresee moderate income growth, with more than 40% of these organisations anticipating anywhere from a 10% to 24% increase.



Graph 3: Expected year-on-year evolution in global revenue for 2026 vs. 2025, among surveyed NGOs

The funding outlook is therefore rather mixed for the sector. While some organisations report signs of stabilisation, the sector continues to face significant volatility, with uneven impacts across different areas of activity.

This environment makes strategic planning particularly challenging, as financial uncertainty limits organisations' ability to plan confidently for the medium and long term, consolidate existing programmes, invest in new initiatives, and explore adaptive approaches to partnerships, operating models, and financing.

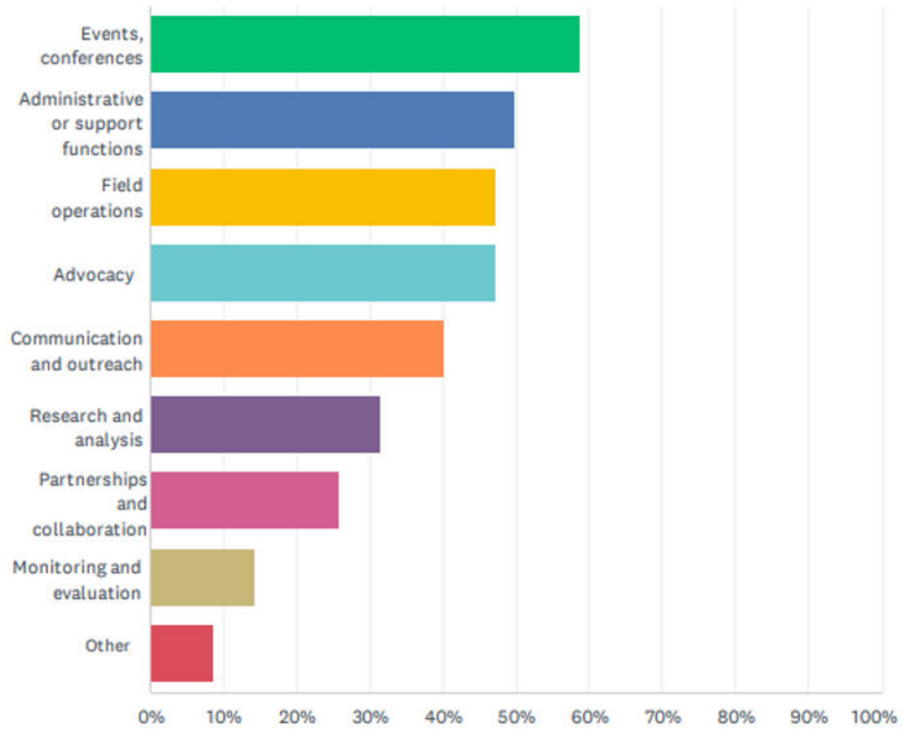
Organisations with limited financial reserves appear especially vulnerable in this context, with reduced capacity to absorb shocks or respond to sudden funding fluctuations. Survey findings underscore this risk: nearly one in four organisations report lacking sufficient reserves to cover three months of their Geneva-based operations—a commonly used benchmark for sound NGO governance. Over time, this may undermine their organisational resilience.

IMPACT ON OPERATIONS AND BENEFICIARIES

The funding trends outlined above—declining income, shrinking reserves, and uncertain financial projections—are already translating into tangible operational adjustments across the sector.

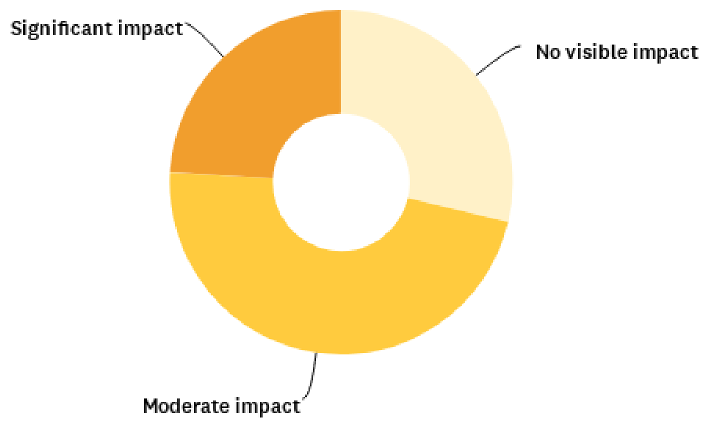
Operational adjustments in response to funding pressure

Approximately one quarter of responding organisations reported that they had to significantly reduce or terminate certain activities or programmes in 2025. A wide range of activity areas were affected, as illustrated in Graph 4 below.



Graph 4: Areas of operations affected by cost-containment measures, among surveyed NGOs

These operational adjustments and financial constraints inevitably carry consequences for the populations served by NGOs. More than two-thirds of respondents indicated that their beneficiaries were affected, with nearly one quarter reporting a significant impact.



Graph 5: Impact of financial constraints on beneficiaries in 2025, among surveyed NGOs

Participation in conferences and multilateral processes

As illustrated in Graph 4, financial constraints significantly affected organisations' ability to organise and participate in conferences and events in Geneva in 2025, a trend expected to continue in 2026. Nearly 80% of organisations that regularly host delegations anticipate reduced capacity to bring delegates, with almost half expecting a major impact. This, coupled with reduction in advocacy work, and communication and outreach activities, risks weakening organisations' visibility and limiting their ability to effectively engage in global discussions and processes.

EMPLOYMENT TRENDS

Financial pressures have had a visible impact on employment across International Geneva's NGO sector.

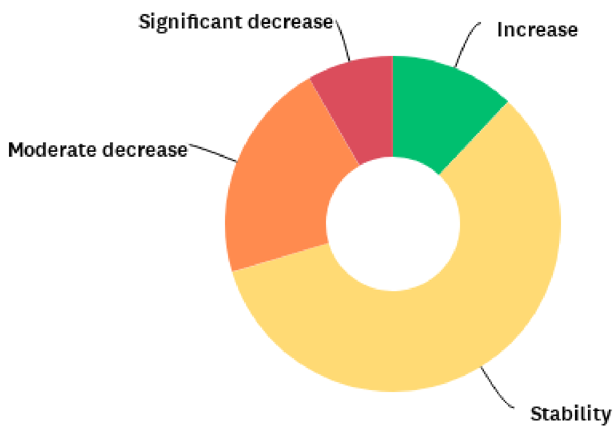
Immediate workforce adjustments in response to financial pressure

Between 2024 and 2025, nearly half of organisations participating in the survey implemented staffing-related measures. 25 % eliminated permanent positions.

Cost-containment efforts also extended beyond headcount and included salary freezes, reductions in working hours or reductions in salaries. Some of these steps have affected both workloads and day-to-day working conditions.

Looking ahead, the outlook remains cautious: nearly 30% of organisations anticipate further job cuts in 2026, signalling that workforce adjustments may continue as financial uncertainty persists.

However, a majority of organisations anticipate a stabilisation in the size of their Geneva-based workforce, indicating that many are looking to consolidate after an initial phase of urgent cost-cutting. 12 % are even forecasting growth.



Graph 6: Expected evolution of Geneva-based staff in 2026-2027, among surveyed NGOs

Uneven impacts across thematic sectors

Perspectives shared by NGOs suggest that the Humanitarian and Human Rights sector may continue to be the hardest hit, with Environmental and Sustainable Development NGOs also disproportionally under stress.

Among the organisations expecting a moderate or significant decrease in their Geneva-based staff over the coming year, over half are from the Humanitarian and Human Rights sector, and more than one in five from the Environment and Sustainable Development sector.

Local authorities' extraordinary measures (LAFONG)

NGOs participating in the survey broadly welcomed the extraordinary financial aid mechanism introduced by the State of Geneva in 2025, aimed at temporarily safeguarding jobs in organisations facing sudden and unforeseeable drops in external funding that left them unable to cover staff salaries and social security contributions. (Geneva state law *"loi 13593 relative aux aides financières extraordinaires de l'Etat destinées aux ONG touchées par le gel de l'aide internationale,"* or "LAFONG"). The measure was recognised as a timely and important signal of support for the sector during a period of acute funding disruption.

Organisations that were able to benefit from the scheme reported that it provided valuable short-term relief and helped preserve key positions while they sought alternative funding.

Several respondents noted that the measure was limited in duration and scope, with the eligibility criteria and administrative requirements included in the law unfortunately narrowing the pool of organisations that were able to access the support.

AN ECOSYSTEM IN TRANSITION

NGOs in Geneva: Stable presence, evolving footprint

Despite ongoing challenges, more than 95% of respondents indicated that their presence in Geneva is not currently in question. This suggests that, while operational models may evolve, the city is likely to remain a central anchoring point for a large share of organisations.

NGOs continue to value their proximity to a dense and diverse ecosystem of international organisations, diplomatic and multistakeholder networks, and peer civil society actors — an environment not easily found in other global hubs. These factors remain the primary drivers behind the strong concentration of NGOs in Geneva.

At the same time, survey results point to early signs of adjustment in organisational footprints. Approximately one in four organisations is planning to downsize its Geneva-based staff, and a similar proportion is considering relocating certain positions elsewhere.

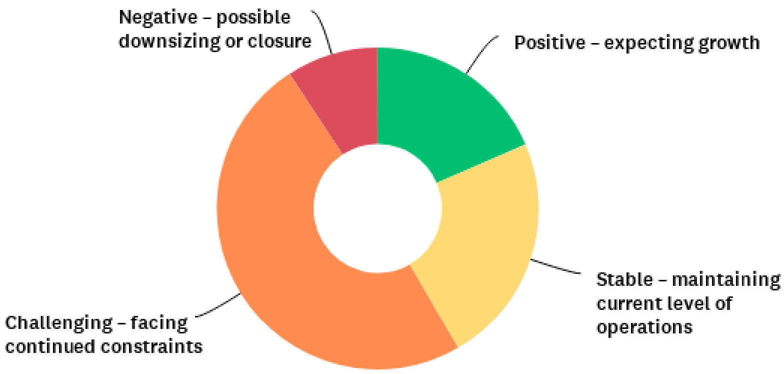
While only a very small number report intentions to close or fully relocate their offices, the findings indicate an emerging pattern: many NGOs intend to retain a strategic foothold in Geneva while progressively adopting leaner operating models.

Rather than triggering a large-scale withdrawal, the current context appears to be accelerating a shift toward more cost-conscious structures, as organisations seek to preserve their presence while adapting to tighter constraints.

Planning amid sustained uncertainty

Organisations' three- to five-year outlook reflects a sector anticipating sustained uncertainty. Nearly half of respondents anticipate continued financial and operational constraints, suggesting that current pressures are not viewed as short-term disruptions but as part of a prolonged period of structural fragility.

Even among those expressing cautious optimism, respondents highlighted the limits this environment places on strategic planning. A global context marked by political volatility and unpredictable funding flows was frequently cited as an important obstacle to long-term forecasting, reinforcing the sense that stability remains fragile and increasingly conditional.



Graph 7: Overall 3- to 5-year outlook among surveyed NGOs

PATHWAYS FOR ADAPTATION AND SUPPORT

Beyond immediate challenges, the survey highlights a range of concrete avenues through which organisations are seeking to adapt—pointing to fertile ground for solution-oriented approaches.

The survey indicates that NGOs are actively taking difficult decisions to ensure organisational sustainability in the face of continuous funding shocks. Many respondents recognise that existing operational and funding models are no longer viable in their current form and that significant changes will be necessary.

At the same time, organisations' responses suggest that their capacity to innovate is constrained by reduced staffing, financial pressure and limited internal resources. As a result, many are looking outwards—to peers, partners, public authorities and other relevant actors—for support in navigating this transformation and identifying new pathways toward sustainability.

Capacity building for donor diversification

Asked where they most need support in the current context of budget cuts and shifting international cooperation dynamics, respondents overwhelmingly pointed to support in diversifying revenue streams to achieve sustainability.

An overwhelming majority (84%) identified fundraising strategy and donor diversification as a priority, followed by partnerships with the private sector (45%) and the development of innovative financing models (35%).

This signals not only immediate funding gaps, but a recognition that traditional funding architectures are no longer sufficient.

Curbing operational costs through collaboration and solidarity

Alongside efforts to diversify revenue streams, many organisations are exploring ways to improve efficiency and reduce operational costs, which two-thirds identify as a significant constraint on their activities in Geneva.

The survey shows strong interest in more collaborative operational models. A significant majority (62%) expressed interest in sharing services or pooling resources, particularly through tangible arrangements such as shared infrastructure or back-office functions.

The interest in resource pooling is particularly pronounced among organisations in the Humanitarian and Human Rights sector reflecting the acute financial pressures faced by these actors.

Many respondents also highlighted the importance of access to pro bono services or preferential rates for professional support—such as legal, consulting, IT, administrative and financial services. More than 90% of organisations indicated that such support would be highly valuable.

For smaller organisations in particular, maintaining access to essential professional services has become increasingly difficult as staffing levels decline and budgets tighten. Collaborative arrangements or subsidised access to such expertise are therefore seen as potentially useful options and a way to maintain organisational capacity.

Access to new ideas, networks and partnerships

In addition to their interest in concrete, cost-saving measures for operational support, organisations also express an appetite for connections and fresh perspectives that can help them develop their own strategies and frameworks in response to a rapidly evolving funding environment.

NGOs have historically demonstrated a high degree of agility and resourcefulness, often delivering significant impact with limited means. The current context, however, is testing these capacities at scale and over time.

In this context, NGOs expressed strong interest in initiatives that facilitate connections with new partners and sectors. Indeed, three in four respondents ranked networking and partnership facilitation as “very useful” or “most useful” forms of support.

Another 37% of respondents rated the development of knowledge-sharing platforms or communities of practice as “very useful” or “most useful”. The more moderate level of interest compared with networking opportunities may reflect the longer timelines associated with such initiatives, at a moment when many organisations must simultaneously manage immediate operational pressures while seeking to rethink their longer-term models.

Strategic planning, resilience and digital transformation

Despite the immediate financial pressures, some organisations also expressed interest in longer-term support aimed at strengthening organisational resilience.

One-third of respondents highlighted the need for support in areas such as strategic planning, organisational resilience and digital transformation.

This reflects a dual challenge for NGOs: stabilising their financial situation in the short term while changing their operating models to remain relevant and effective in a rapidly evolving global landscape.

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