



# ABOUT CONCORD

CONCORD is the European Confederation of NGOs working on sustainable development and international cooperation. We are made up of 58 member organisations representing more than 2600 NGOs and are supported by millions of citizens across Europe.

We are the main interlocutor with the EU institutions on sustainable development policy and international cooperation. We are a member-led organisation which means that the members give the strategic direction of the Confederation.

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# WHO STILL HOLDS THE LION'S SHARE?

## Funding Concentration, Shrinking Access and the Narrowing Space for Civil Society

EU development cooperation is evolving in a context marked by geopolitical pressures, investment-driven approaches, and changing expectations about how international partnerships should be designed and delivered. A shift towards a stronger geographic focus, increased reliance on indirect management through pillar-assessed organisations, and the growing prominence of large-scale initiatives such as Global Gateway are reshaping the architecture of EU external action, with implications for all actors.

Building on the first edition of *The Lion's Share*, published in 2023, this second edition expands the scope of the analysis and updates the evidence based on a larger set of programming documents covering the period 2021–2025. The

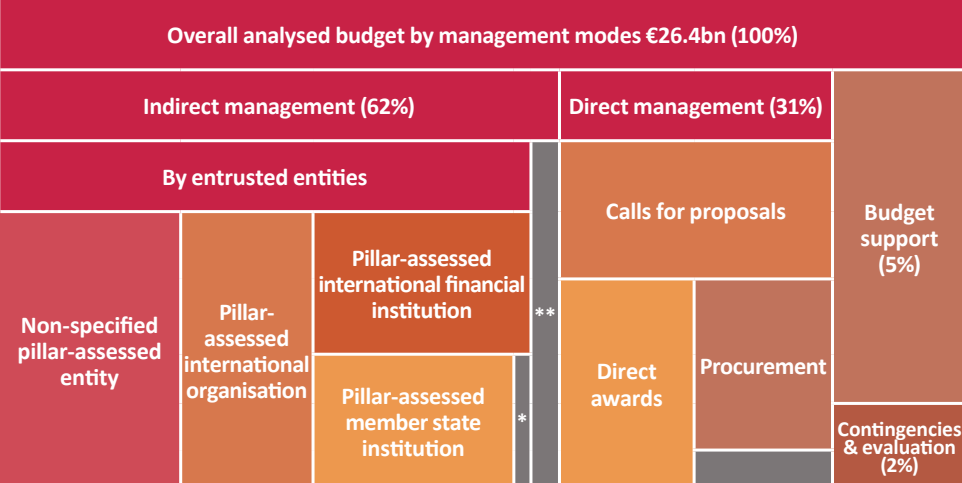
report draws on an **extensive review of EU external action programming documents representing EUR 26.4 billion across both thematic and geographic envelopes**. While the first edition provided an initial assessment of how EU external action funding reaches civil society organisations under NDICI–Global Europe, this second volume examines **whether the trends identified at the early stage of implementation have persisted as the instrument has matured**. Importantly, the report does not seek to assess the overall volume of EU funding allocated to civil society organisations. Rather, it focuses on how funding is structured and implemented, and on the conditions under which civil society organisations can access and participate in EU external action programmes.

The analysis draws exclusively on **publicly available and traceable budgetary data** published by the European Commission and is therefore limited to what can be independently verified through official sources. While this approach does not capture the full volume of EU external action spending, it serves two important purposes. First, it provides a robust indication of emerging funding trends based on verifiable data. Second, it shows the **degree of transparency — or lack thereof — faced by external stakeholders.**

Where funding cannot be assessed, neither civil society nor the public can determine whether, how, or to what extent CSOs are financially supported.

Beyond individual funding figures, **the analysis highlights a broader transformation in how EU external action funding is structured and channelled.** Management modes and the scale of funding and programmes increasingly shape which actors are able to participate as implementing partners.

**Figure 1: Overview of the budget analysed in EUR billion by management modes**



**Indirect management now dominates, accounting for 62% of the analysed budget.** In practice, this results in funds being channelled through pillar-assessed organisations which then decide how and whether funding is passed on to other actors. For **70% of the reviewed funding**, there is no publicly available information to assess whether any resources are meant and ultimately reach CSOs. **Only 10% of the reviewed envelopes is explicitly reserved for CSOs**, while a further **9% is potentially accessible, with CSOs competing with a wide range of other actors.** As a result, civil society access to EU external action funding is shaped not only by eligibility criteria but also by the way funding is structured and implemented. This results in narrow and uncertain entry points for civil society within the overall funding landscape.

Thematic programmes **remain the most reliable source of funding for CSOs.** They are more transparent and significantly more accessible than geographic programmes, with 26% of thematic funding explicitly reserved for civil society. However, their scope is limited. The focus of these programmes remains concentrated on areas such as human rights, civic space and governance, which,

while essential, restrict CSOs' engagement and contribution across the broader range of EU external action priorities.

These findings are consistent with the EU's broader shift towards investment-oriented financing, blended finance and partnerships with pillar-assessed entities to increase scale, speed and geopolitical impact. While the overall architecture of EU external action has evolved, funding mechanisms for CSOs have not adapted accordingly. **Civil society continues to be largely confined to traditional, project-based calls for proposals**, even as geographic programmes—where access for CSOs is most constrained—absorb the largest share of programmable resources.

Civil society is not a homogeneous group, yet EU external action regulations and funding modalities often treat CSOs as a single category. In practice, civil society actors engaged in EU external action span a wide and diverse range of organisations, including local and community-based organisations, human rights and environmental defenders operating in highly constrained contexts, national organisations and networks, as well as international civil society organisations. While these actors fulfil

different roles — ranging from advocacy and knowledge production to service delivery and programme implementation — they collectively bring local presence, contextual knowledge, technical expertise and long-term engagement that contribute significant added value to EU external action. **By failing to translate this diversity of roles, capacities, and contributions into funding modalities that are adapted and effective, current funding frameworks limit the EU's ability to engage with civil society in line with the objectives of its external action.**

Crucially, **there are no ring-fenced allocations or guarantees of predictable funding for civil society within geographic programmes.** The growing emphasis on private-sector engagement, large-scale grants to pillar-assessed entities, and geopolitical objectives risk further marginalising CSOs from direct access to EU funding. **This trend risks reducing CSOs to consultation or dialogue partners, rather than recognising them as independent actors with a right of initiative and a proven capacity to deliver results.** Without safeguards to secure predictable and accessible funding channels, meaningful CSO participation in EU external action may become

increasingly constrained. **As the EU prepares the next Multiannual Financial Framework and a new Global Europe instrument, the focus should be on whether the funding architecture evolves to sustain meaningful participation by all partners.** Strengthening transparency, access to funding channels, and the conditions for CSO engagement will be critical if the EU is to uphold its commitments to an open and pluralistic civic space, community-led and rights-based development, and effective, inclusive international cooperation.

Scan to read the full report:



# RECOMMENDATIONS

The following recommendations set out concrete steps to ensure that civil society organisations are recognised and supported as equal partners in EU external action.

## **1. Make funding for civil society organisations a rule, not an option.**

Establish a minimum share of EU external funding for implementation by CSOs, ensuring predictable space and dedicated resources for CSOs as part of the EU's external action. This should reflect their proven capacity to deliver impactful, inclusive and sustainable results, and to drive locally-led development through the programme cycle.

## **2. Guarantee direct and equitable access to EU funding for diverse civil society organisations.**

Adapt EU funding rules, procedures and grant volume to reflect the diversity of CSOs in terms of size, capacity, and operating context, ensuring proportionate and equitable access for CSOs so that local and community-based organisations can participate effectively.

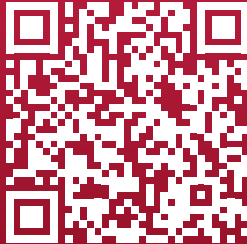
## **3. Ensure transparency, accountability and traceability across the EU's external action funding architecture.**

Publish complete, timely and disaggregated data on all EU external funding, including second-level recipients under indirect management, and include dedicated filters to identify funding allocated to CSOs.

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