RESEARCH BRIEF

Surveying the Aid Ecosystem: May 2026 Snapshot

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KEY FINDINGS

Aid delivery is still getting worse. May 2026 data show a decline in every program delivery measure. The pace has slowed since October 2025, but nothing has recovered.

Operations are stabilizing but not recovering. Access to data has stabilized but not recovered, while the ability to purchase and deliver goods continues to decline, albeit at a slower pace.

New funders are not filling the gap. Local donors and social enterprises showed a slight rebound, but long-term financial sustainability fell further than any other item in the study.

Some relationships have started to recover. Trust from local partners, trust from recipient communities, and connections with new partners all edged up in the most recent period but remain below their pre-2025 levels.

About this Research:

AidTrack is a multi-wave pulse survey of humanitarian and development practitioners. We have surveyed hundreds of humanitarian and development practitioners across international NGOs, local and national organizations, UN agencies, private sector contractors, and USAID. Respondents spanned field leaders and staff, operations managers, and senior leadership, working across a range of countries and sectors.

The survey tracks six dimensions of the aid ecosystem: partnerships and collaboration, information and knowledge access, financial and organizational stability, internal organizational dynamics, supply chain and logistics, and program delivery. Respondents rated each dimension on a five-point scale from 'worsened a lot' to 'improved a lot,' supplemented by open-ended questions.

Wave 1 ran from September to October 2025 (n = 164) and asked about change since January 2025. Wave 2 ran from April to May 2026 (n = 267) and asked about change since October 2025. This research was approved by the George Washington University Institutional Review Board. More information is available at our website, or contact us at aidtrackproject@gwu.edu.

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TWO WAVES, ONE TRAJECTORY

In our previous brief, we reported that USAID's dissolution caused real, measurable, and broad damage to the aid ecosystem. Now, we describe further changes measured through a second wave of the survey conducted six months later, in May 2026.

The second wave asked practitioners the same survey questions about changes in six areas of the aid ecosystem: funding, partnerships, supply chains, information, program delivery and intra-organizational relations since October 2025. The results are uneven. We found aid delivery, operations, and finances for humanitarian and development organizations continue to worsen. They are sliding more slowly than before, but none have rebounded to pre-2025 levels. Relationships are different. After deteriorating sharply in the initial shock, they have stopped degrading and some relationships have begun to recover.

FINDING 1: AID DELIVERY IS STILL GETTING WORSE

Every measure of aid delivery continued to decline in Wave 2 of the survey (Figure 1). None recovered. The ability to maintain programs took the largest hit, followed closely by programming coverage and reach. These measures capture the effects of aid disruptions on the people aid is meant to serve. The second segment of each line is shallower than the first, which means the decline slowed, and accountability to communities nearly leveled off, but none have started to recover to pre-2025 levels.

FINDING 2: OPERATIONS ARE STABILIZING BUT NOT RECOVERING

Operational measures, including access to information and the ability to purchase and deliver goods, declined in Wave 1 but have started to stabilize in Wave 2 (Figure 2). Access to data has stayed roughly the same in the last six months, while supply chain operations continue to decline, albeit at a slower pace than recorded in Wave 1. There are no signs of recovery. This worsening operational capacity helps explain the continued decline of aid delivery and programming.

Figure 1: Aid delivery and programming

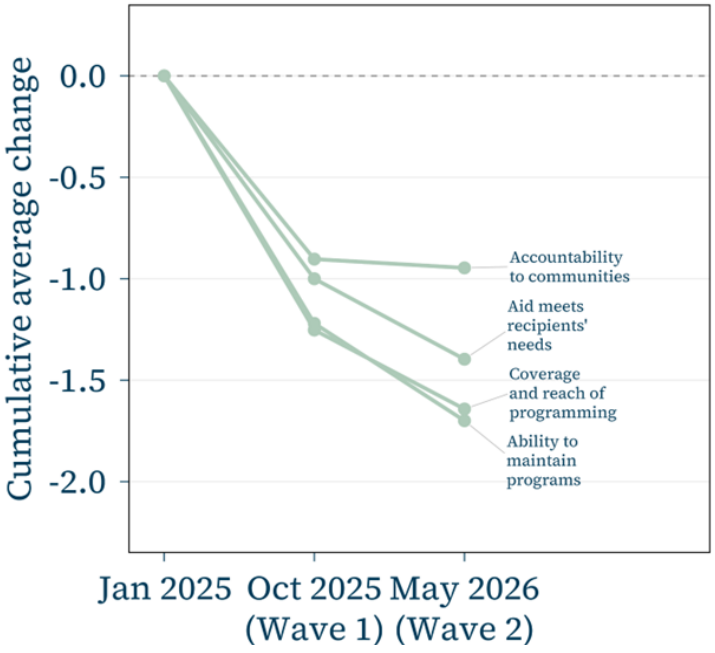
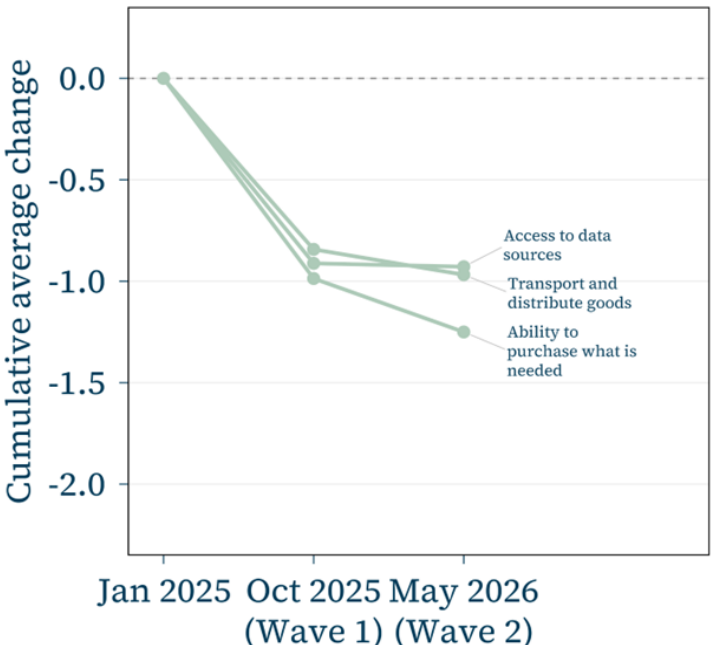


Figure 2: Operations and supply chain



Average reported change from baseline of pre-January 2025 to October 2025 (Wave 1), then from October 2025 to May 2026 (Wave 2). Change is measured in each wave, on a scale from +2 (improved a lot) to -2 (worsened a lot).

FINDING 3: NEW FUNDERS ARE NOT FILLING THE GAP

The funding picture shows a clear split (Figure 3). Relationships with foundations, emerging government donors (e.g., China, India, Brazil), and local funders declined the least in Wave 1 and leveled off or even improved slightly in Wave 2. Relationships with local donors and social enterprises were the only funders with whom relationships improved in the most recent period.

The other half of the picture shows continued deterioration. Relationships with traditional government donors (e.g. U.S., U.K., E.U.) kept declining, and long-term financial sustainability fell further than any other item measured, more than twice as far as any relationship measure. Organizations are finding new money at the margins, but it is not enough to gain long-term financial stability.

FINDING 4: SOME RELATIONSHIPS HAVE STARTED TO RECOVER

Relationships tell a somewhat different story (Figure 4). After a sharp drop in Wave 1, trust from local partners, trust from recipient communities, and connections with new partners all edged up in the most recent period, largely driven by improvements for local NGOs. Collaboration with national governments stayed flat.

These measures also fell less to begin with. On the shared axis, the relationship lines sit well above every other domain, and they fell about half as far as aid delivery. All four remain below where they started: while recovery has begun, it has not been completed.

Figure 3: Financing and funder relationships

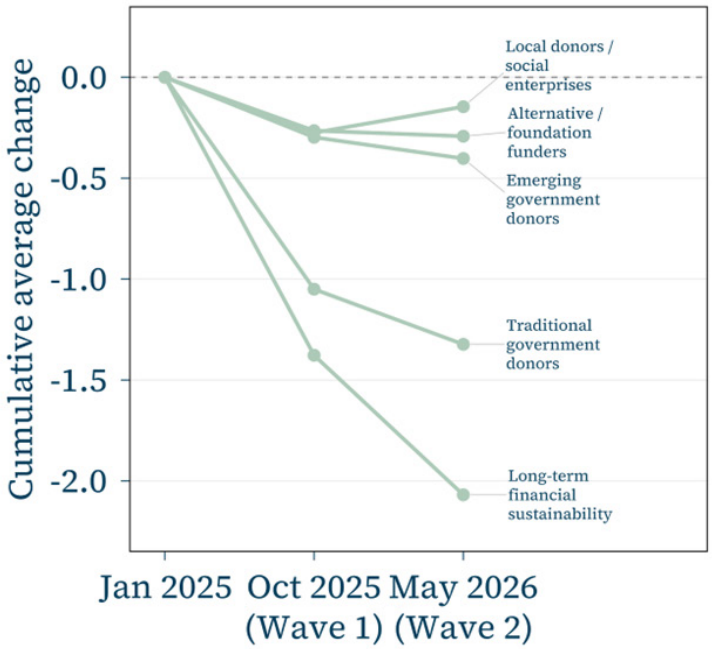
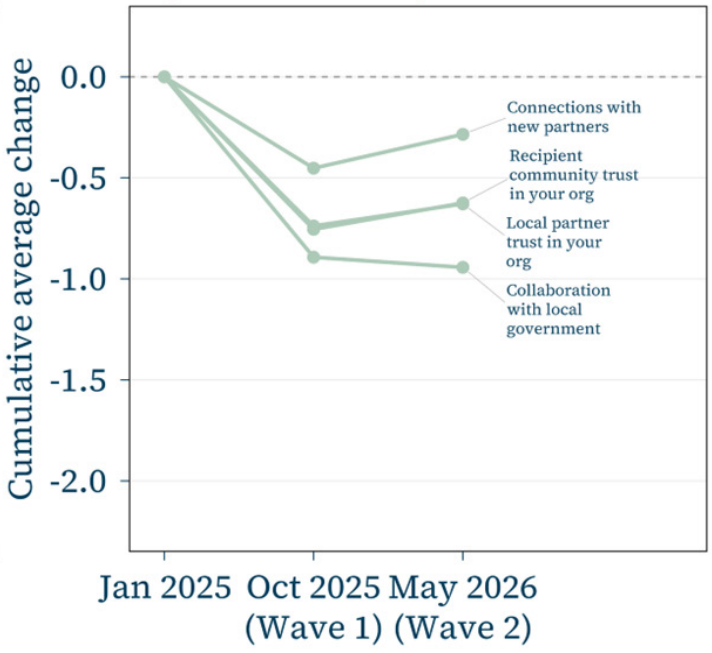


Figure 4: Relationships and trust



Average reported change from baseline of pre-January 2025 to October 2025 (Wave 1), then from October 2025 to May 2026 (Wave 2). Change is measured in each wave, on a scale from +2 (improved a lot) to -2 (worsened a lot).

WHAT COMES NEXT

Beyond this snapshot, we continue to develop more detailed analyses and interpretations of these data and what they reveal about changes to the aid ecosystem. Wave 3 will continue to track changes in relationships, funding, operations, and aid delivery. We welcome partnerships with organizations active in foreign aid: please contact us at aidtrackproject@gwu.edu if you would like to learn more.

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