Sphere

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OPERATIONALISING SPHERE

A PRACTICAL GUIDE TO CONTEXTUALISATION

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1.Introduction

1.1 About this guide

This guide was developed by Aya Yagan and Nabil Kumaim, Sphere practitioners, trainers and consultants. It provides a framework with practical steps and considerations for how to contextualise Sphere standards. It is based on real-world examples gathered by the authors.

The guide also examines different factors – enablers and challenges – which should be considered when contextualising standards.

The authors stress that the unique geopolitical and cultural factors of each context must be carefully considered, as even small differences can affect how assistance is best provided.

However, as this guide demonstrates, there are valuable lessons on how to contextualise Sphere Standards to be learned from the experiences of practitioners around the world.

1.2 What is Sphere?

Sphere is about rights-based, principled, quality, and accountable humanitarian action; and respect for the dignity of all crisis-affected people. Sphere was started in 1997 by impassioned aid workers who wanted to improve the quality and accountability of emergency response. With this goal in mind, they framed the Humanitarian Charter and identified a set of Minimum Standards to be applied contextually in all humanitarian crises. The pilot edition of the Handbook was published in 1998, since when it has been revised four times, most recently in 2018.

Initially developed by non-governmental organisations and the International Red Cross and Red Crescent (IC/RC) Movement, Sphere resources are free and open-source primary reference tools for national and international NGOs, UN agencies, governments, donors, the private sector, volunteers, and many others. Today, Sphere is a global network bringing together and enabling practitioners to improve and sustain the quality and accountability of humanitarian assistance.

Sphere hosts the Humanitarian Standards Partnership (HSP), the Minimum Economic Recovery Standards (MERS) and is joint copyright holder of the Core Humanitarian Standard.

1.3 The Sphere Handbook

Sphere's flagship publication, the Sphere Handbook, is the most widely known and internationally recognised set of humanitarian principles and minimum standards. It puts the rights of disaster-affected populations to life with dignity, protection and assistance at the heart of humanitarian response.
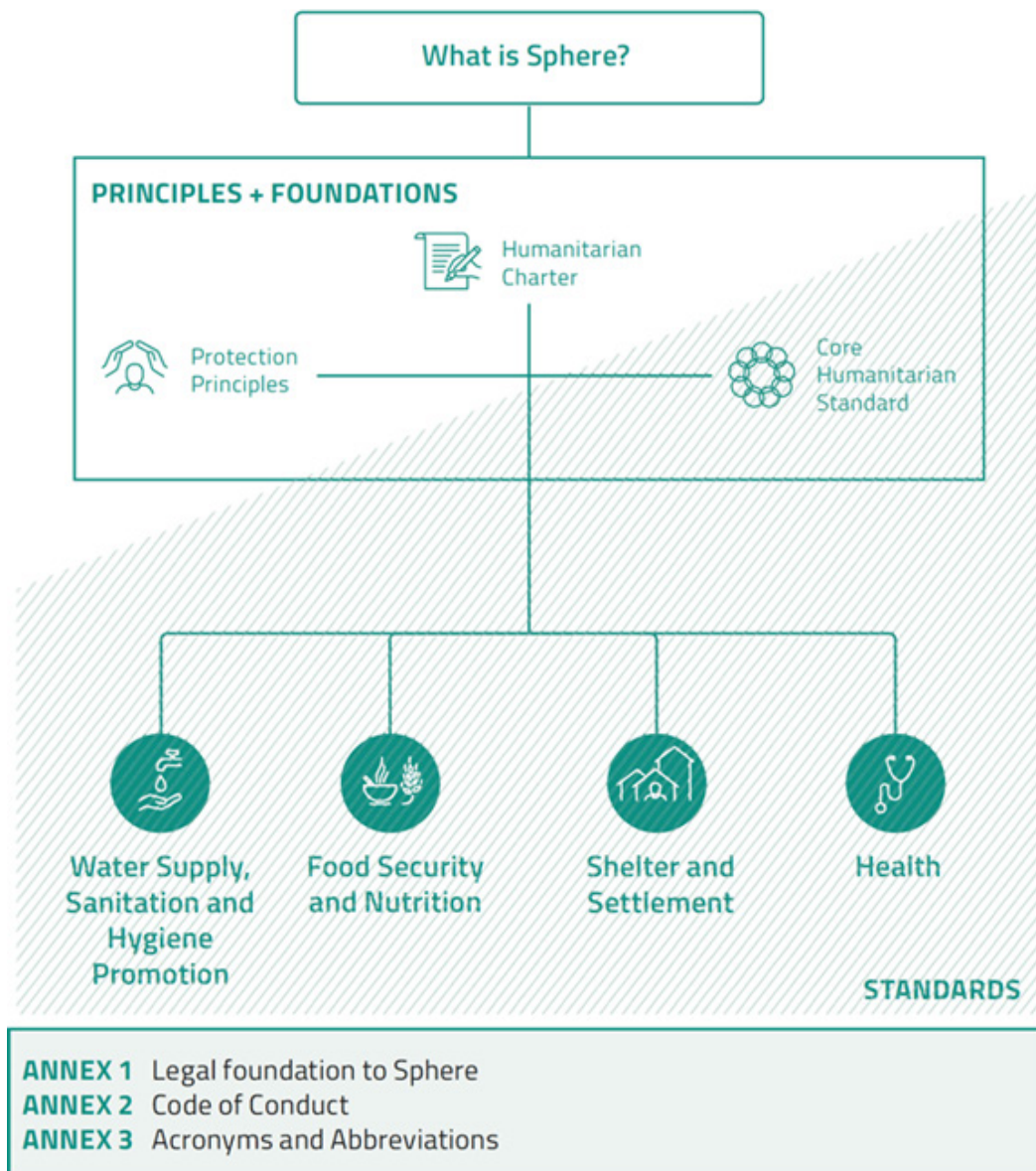

Diagram 1: Sphere Handbook structure diagram, 2018 edition

1.4 Operationalisation of Sphere Standards

The many hundreds of thousands of Sphere practitioners around the world use the information in the Handbook to:

- Respect, and engage with empathy, the dignity, rights and culture of crisis-affected people;

- Advocate for the State (or de facto Authority) to take primary responsibility for humanitarian assistance, protection and security; and for unimpeded humanitarian access;

- Support local leadership, community participation, engagement and ownership of assistance; and

- Ensure quality and accountability by coordinating, communicating, planning and implementing assistance based on The Humanitarian Charter, Protection Principles and Core Humanitarian Standard.

1.5 The Sphere Approach

Related to the operationalisation of standards, **The Sphere Approach** provides a concise, practical, and people-centred framework for humanitarian action, guiding organisations to deliver effective and accountable aid:

The Sphere Approach

1. Understand the context, crisis-affected people's capacities, and humanitarian needs.
2. Ensure people actively participate in decisions and actions which affect them.
3. Aim to reach minimum standards as soon as possible.
4. Strive to do the best possible with the resources available.
5. Share what has been achieved, learnt, and what still needs to be done.

Be guided by the Sphere Handbook as you undertake actions 1 to 5.

While recognizing the challenges and constraints of limited resources, Sphere encourages continuous improvement and transparency by sharing outcomes, lessons learned, and areas requiring further attention.

The **Sphere Handbook** serves as a key reference throughout this process, ensuring that actions align with global best practices in humanitarian response.

1.6 Contextualisation of standards

A dictionary definition of contextualisation is "the process of considering something in its context". In our case, that 'something' is the Sphere Handbook.

Contextualisation is the process of **adapting** information in the Sphere Handbook based on local information and analyses to fit the specific realities of the situation.

Not all standards apply in every context, and there are many approaches to achieving standards. Contextualisation involves selecting appropriate standards; researching and understanding the local context; and selecting, adapting, defining, and/or restating suitable actions, indicators and targets, as appropriate to the situation (→ see _The structure of standards_ below).

There is a misconception that globally defined standards are unhelpful if the standards and/or stated targets cannot be achieved due to limited access or resources. In fact, the opposite is true, because it is in these situations that the understanding and correct application of standards is most critical to providing principled and quality humanitarian assistance.

Sphere Standards define minimum conditions for life with dignity that humanitarian efforts should work towards, even if they can't be met in the short-term, and especially in difficult circumstances. Indicators are important for establishing baselines, deciding priorities, and measuring progress over time.

1.7 Localisation

While its credibility as an advocacy tool is partly derived from its basis in international humanitarian rights, the Sphere Handbook is designed to be adapted to programmatic context. It is neither a rule book nor a 'how to' guide. The correct use of global humanitarian standards, through contextualisation, is aligned with localisation objectives.

Sphere Standards provide a strong rights-based framework for local actors to lead humanitarian response that is appropriate to their context.

Global qualitative humanitarian standards are not a binding set of rules, but rather benchmarks to influence and inform good humanitarian practice.

2 The structure of Sphere Standards

2.1 Minimum Standards are universally applicable

(→ *Refer to* _The structure of standards_ *on page 6 of the printed Handbook.)*

Sphere's Minimum Standards (that is, the standards themselves) are defined in qualitative terms and rooted in human rights, making them universally applicable in every context. To implement these standards effectively, the details must be unpacked.

For example, WASH standard 2.1: Access and water quality is stated as *'People have equitable and affordable access to a sufficient quantity of safe water to meet their drinking and domestic needs'*. Water quality (or 'potability') can be measured objectively, though determining what quantity is 'sufficient' or whether it is 'affordable' depends on the context at national, local, community, household, and individual levels. This process of unpacking the Minimum Standards, Key indicators, and Key actions is known as contextualisation.

2.2 Indicators must be adapted to context

Most Key Indicators in the Sphere Handbook *do not* have associated numerical targets. Of the few that do, one of the best-known targets in the Handbook is associated with WASH standard 2.1: Access and water quantity.

An indicator associated with this standard is the *'Average volume of water used for drinking and domestic hygiene per household'*, and the target associated with this indicator is *'Minimum of 15 litres per person per day'*, along with a reminder to *'determine quantity based on context and phase of response'*.

As noted above, contextualisation of standards often involves **restating targets** in the Sphere Handbook. The reminder, which applies to all targets in the Handbook, should be interpreted as follows:

When setting **long-term** targets, it is critically important they are determined:

- in full consultation and agreement with crisis-affected community members and other stakeholders;

- equivalent to **what constitutes life with dignity** for the people affected by crisis; and

- **NOT** based on constraints such as access or resources.

For example, having consulted with the community, it may be determined that for an affected population to survive and recover with dignity, they require 75 litres of water per person per day, on average, for drinking, cooking and washing purposes.

By contrast, when setting targets for a **phase of response**, it is necessary to be realistic. If the most you can possibly achieve for this affected population, based on the context and available resources, over the next week, is 10 litres per person per day, then this must be the target for the next week.

If your programme subsequently achieves 10 litres per person per day in the agreed timeframe, then the programme will have met its preliminary objectives, **but the standard will still not be met**, so the targets for subsequent phases of the programme should be increased as soon as possible.

(→ Sphere has prepared various materials to help understanding the relationship between standards and targets, including [a microlearning](#) and a [training activity](#).)

3 The importance of contextualisation

(→ Please read this section in conjunction with [understanding vulnerabilities and capacities](#) and [understanding the operational setting](#) in the Sphere Handbook.)

- The context of humanitarian assistance is everything. If the Minimum Standards cannot be met due to contextual challenges, then there should be in place advocacy and/or coordinated operational plans to affect change in the context, and/or to meet and exceed standards when improvements in the context allow. The Sphere Handbook is as useful in these challenging contexts as it is in less severe situations.

- Contextualising the Sphere Handbook is critical because no two humanitarian crises are the same. Every context has unique cultural, legal environmental, social, economic, political and technological factors that affect how humanitarian interventions can and should be carried out. Without adapting Sphere standards to fit local realities, efforts may fall short of meeting the needs of affected populations; be inefficient and/or unsustainable; or fail to respect local practices.

- Contextualisation also ensures that humanitarian responses are as relevant, feasible, and respectful as possible of local contexts while upholding [The Humanitarian Charter](#) and the core principles of humanity and impartiality.

- In adapting actions and indicators to the context, humanitarian actors remain aligned with the Sphere framework while working within local constraints and taking advantage of local opportunities. In this way, the standards are relevant and meaningful, even in resource-limited or challenging environments.

- The necessity of contextualisation also helps identify the most pressing needs, prioritise interventions, and set targets that are both appropriate and reflective of Sphere's underlying principles, ensuring that humanitarian assistance is delivered in the best possible way given the circumstances.

4 Contextualisation framework

The following steps are recommended when contextualising standards:

1. **Understand the local context:** Start with coordinated and thorough crisis-affected and wider community research, assessments and analysis to build a clear picture including conditions, needs, capacities, vulnerabilities and cultural practices. Active, continuous and meaningful engagement throughout humanitarian assistance is vital to understanding the context. *(→ See General contextual factors below for some key influences on the contextualisation process.)*

2. **Assess organisational capabilities:** Be realistic about the organisation's priorities, capacities, and resources, acknowledging any financial, operational, or access-related limitations. Where gaps exist, explore partnerships or joint interventions with other actors to enhance impact. Clearly define both short-term priorities and longer-term goals, specifying the resources, advocacy efforts, and communication strategies needed for each. For longer-term and more sustained, community-driven interventions, ensure that planning fosters local ownership and sustainability from the start.

3. **Select relevant standards:** From the Sphere Handbook (and other HSP handbooks), choose the Minimum Standards that address the most urgent needs of the most affected population. In coordination with other actors, focus on what's most important to avoid overloading the response with unnecessary requirements within the agreed timeframe.

4. **Define practical actions and indicators:** Adapt the Key Actions and Key Indicators, including defining short- and long-term targets, to align with the local context. For example, if water access is limited, implement practical alternatives such as small-scale water purification or temporary distribution points. Select suitable targets for each phase of the response: in the initial response phase, it may be necessary to select targets below Sphere's recommended minimums due to significant challenges or resource shortages. However, this should be for a short period only.

The organisation should then actively advocate for the additional resources and actions by those responsible in order to meet, then exceed, Minimum Standards as soon as conditions allow.

5. **Document shortcomings and limitations:** Always document and – as much as possible, *share* – shortcomings, limitations, and additional resources needed. Ensure accurate reporting that explains why meeting minimum conditions wasn't possible at a given stage, what is additionally required to reach the standards, and how long this will take if those resources are found. Align these reports with advocacy efforts for additional funding or resources to help improve the response and meet the standards.

6. **Leverage lessons learned:** Don't reinvent the wheel. Put some trust in the Sphere Handbook which was written by [authors supported by over 700 experts](). Read through the real-world examples that accompany this guide as these demonstrate what has worked and what hasn't. *(→ see summaries in [Real-world examples of contextualisation of Sphere standards]() below)*. Adapt learning to the context and implement proven strategies.

7. **Set realistic short-term targets but never lose focus on the target required to reach the standard:** Use local data to set practical, achievable targets at a programme level. Consider local population statistics, resource availability, and government data to determine what's feasible. Set milestones that bring the action closer to Sphere's recommended Minimum Standards, adjusting upwards when possible.

8. **Monitor and adjust:** Continuously monitor progress. Regularly review activity planning, indicators, and targets to ensure they are relevant as the situation evolves. Adapt as necessary, based on new data or changing operational realities.

9. **Document and share the contextualisation journey:** Document how quality guidance has been contextualised, including what worked, what didn't, and the key lessons learned. Share this with Sphere and other humanitarian actors to contribute to collective learning and improvement in future responses. This not only helps refine processes, but also benefits the wider humanitarian community by providing practical examples of contextualisation.

5 Real-world examples of contextualisation of Sphere standards

The real-world examples in this guide highlight how the Sphere Handbook has been adapted in diverse humanitarian contexts, showcasing unique challenges and innovative approaches to contextualisation. They emphasise the need for flexibility, local engagement, and strong partnerships to ensure effective local application of global standards. A summary of the real-world examples is provided below, with links to longer blog posts on Sphere's website.

5.1 Contextualizing Sphere Standards for National Disaster Response in Ecuador

In Ecuador, the government transformed from a military-led to a civilian-led disaster response system, embedding Sphere Standards into national law over two decades. Ecuador legally institutionalized Sphere standards through ministerial resolutions, making them a mandatory part of the disaster response framework. Additionally, the government created national coordination hubs based on Sphere's technical chapters for WASH, shelter, and food security.

- Lesson learnt: Legal integration of Sphere Standards into national frameworks by government and civil society promotes sustainable humanitarian responses.

5.2 Contextualizing Sphere Standards for Disaster Preparedness in Gran Chaco, Argentina

In Argentina, the contextualisation of Sphere Standards in the Gran Chaco region reveals how Indigenous knowledge and modern humanitarian frameworks can be combined in a climate-vulnerable region. A key highlight is how Indigenous communities participated in defining their own sanitation needs and disaster protocols, aligning them with Sphere Standards. The integration of ancestral knowledge into national disaster response systems, such as early warning mechanisms, is particularly insightful.

- Lesson learnt: Indigenous knowledge is crucial to successful disaster preparedness and response. It must be integrated into humanitarian response, especially in marginalised communities whose voices may be suppressed.

5.3 Building Community Awareness and Capacity Through Sphere Standards in Northern Syria

In Syria, the contextualisation of Sphere standards focused on building awareness and capacity in schools and local organisations, particularly in the WASH sector. Teachers were trained to implement Sphere standards in their schools, developing practical solutions for water and sanitation challenges despite resource constraints. By engaging both students and the wider community, the project successfully promoted hygiene and sanitation awareness, supporting local communities to advocate for their rights in conflict-affected, resource-limited environments.

- Lesson learnt: Empowering local teachers and organisations to apply Sphere Standards fosters sustainable community capacity building.

5.4 Contextualizing Sphere Standards for Flood Response in Pakistan

Full text: Adapting Sphere Standards in Pakistan's 2022 Flood Response: Lessons from Sindh

In Pakistan, during the 2022 floods, Sphere standards were contextualized to address immediate WASH needs across three of the worst-affected districts—Badin, Dadu, and Mirpurkhas. Norwegian Church Aid (NCA) used Sphere standards to ensure access to safe drinking water, sanitation, and hygiene promotion. One key adaptation involved installing handpumps to provide potable water in areas with brackish groundwater. Women's participation in site selection for water points was vital to achieve both safety and convenience. This case demonstrates how community participation and practical modifications can ensure Sphere standards are upheld in complex, flood-affected environments.

- Lesson Learnt: Community participation, and ensuring those not considered equal are involved in decision making, is essential for adapting Sphere Standards to local needs, ensuring relevance and ownership.

5.5 Sphere Standards to improve mental health in Cianjur, Indonesia

In Indonesia, the 2022 earthquake in Cianjur not only caused physical damage but also affected the mental health and well-being of the people of Cianjur. Human Initiative collaborated with multiple parties to provide psychosocial support services to affected communities at five service points. Their Psychosocial Support Services (PSS) reached not only children but also teenagers, adult men, and adult women. In the post-disaster response phase, the PSS used structured psychosocial methods centred on the local community, such as Psychological First Aid (PFA), Brain Gym, and Peer Support to meet Health standard 2.5: Mental health care.

Photo: Earthquake damage in Indonesia, 2022, MPBI

- Lesson Learnt: Actions to meet standards can be varied, but must be tailored to local realities to have a lasting impact.

5.6 Contextualising Sphere Standards in Democratic Republic of Congo (DRC)

In Democratic Republic of Congo (DRC), BIFERD works in a context of ongoing conflict, displacement and natural disasters. BIFERD has integrated Sphere standards into its strategic plan, operational policies and implementation plans, while linking Sphere to Child Protection and Education in Emergency minimum standards, as well as government policies and UN cluster guidelines. Sphere WASH indicators were adapted to local contexts. For example, in one area water provision was based on an initial target of 7.5, later rising to 15 litres per person per day.

Photo: Children fill containers with water in DRC, BIFERD

- Lesson Learnt: Set realistic short-term targets but never lose focus on the target required to reach the Minimum Standard.

5.7 Contextualizing Sphere Standards in the Syrian Healthcare System

Sphere Health standards were used as the common language for different stakeholders in crisis response to improve and standardise their respective initiatives. Through Sphere training for local humanitarian workers (full and part-time), staff were able to develop a contingency task shifting plan to cope with influxes of patients and human resource shortages. Tasks were

transferred to junior staff to cope with high turnover and limited number of medical practitioners. Trainings were redesigned to more closely reflect real-life environments. New procedures were introduced to share health facility waiting times with the catchment population to provide patients with visibility on the waiting times, per medical specialty, to reduce crowding and violence against health personnel.

Photo: Damaged health infrastructure in Syria, UN News Agency

- Lesson learnt: Sphere standards training is important to provide a common understanding framework to help stakeholders develop shared actions.

5.8 Contextualizing Sphere Standards for earthquake response in Haiti

In Haiti in 2010, when a 7-magnitude earthquake struck, humanitarian organisations from many countries rushed to provide assistance. However, there was little consistency in aid quality and quantity between international actors, or between international and local actors many of whom were not aware of the Sphere Handbook or how to implement it). Each agency, organization or actor involved in the response had their own standards e.g. on the food ration per distribution, or the quantity of water to deliver etc. In some displacement camps, affected people received a surplus of assistance, such that they sold it on, while in others basic needs were not covered.

Moreover, in many instances, the international assistance exceeded the daily amounts of e.g. food or water that the local population was accustomed to. It became difficult to close camps because people were receiving services that they couldn't afford on a daily basis even before the earthquake. The humanitarian actors in Haiti decided collectively to revise the targets downwards across the sectors, while still meeting the standards and applying protection principles. Thus the indicators were contextualised to ensure that local as well as international actors could meet the standards, while avoiding a surplus of supply which disrupted local communities.

Photo: Earthquake damaged building in Haiti, The Guardian

- Lesson Learnt: Rapid assessments aligned with Sphere Standards facilitate the adaptation of multi-agency interventions in evolving disaster contexts.

6 Key factors impacting the adaptation of Sphere Standards

6.1 General contextual factors

- **Local governance and legal framework**: The degree of control and involvement of local governments and national authorities directly influences how Sphere Standards are applied. For example, in Syria, areas controlled by different government authorities and Non-State Armed Groups experienced varied levels of governance, impacting the ability of NGOs to implement policies and standards effectively and uniformly across the country.

- **Cultural and social norms**: The adaptation of certain indicators, such as gender-segregated sanitation facilities or hygiene practices, depends heavily on local cultural norms. In northern Syria and Argentina, adaptation included engaging communities to define their understanding of hygiene and sanitation.

- **Environmental risks:** Flooding, droughts, and landslides can significantly impact the ability to meet Sphere Standards in humanitarian responses. These risks often create physical barriers to accessing affected populations and can damage infrastructure, such as water systems and sanitation facilities, making it difficult to meet the minimum requirements for WASH and Shelter. For example, during the 2022 floods in Pakistan, extensive flooding disrupted water supply systems and delayed the installation of sanitation facilities, hindering the achievement of Sphere standards related to WASH. Similarly, in Haiti following the 2010 earthquake, landslides and environmental degradation made it challenging to provide safe shelter that met Sphere's space and protection requirements.

    Incorporating **Nature-based Solutions (NbS)[1]**, such as reforestation or wetland restoration, can help mitigate these environmental risks. For example, in Ecuador, efforts to restore natural water channels post-disaster reduced future flood risks, enabling communities to better maintain WASH standards in future crises. Integrating such solutions helps build resilience, making it easier to meet Sphere standards in the future, even in challenging environments.

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[1] *Refer to Sphere's NbS Guide: https://spherestandards.org/resources/nbs-guide/*

- **Resource availability**: The scarcity of water, healthcare, shelter, or other essential resources often requires practical adaptations to Sphere Standards minimum standards. In Pakistan and northern Syria, programmatic water supply targets had to be set below Minimum Standards in the initial phases of response.

- **Security and access constraints**: Conflict zones, such as in Gaza or Sudan, present significant security challenges that can hinder adherence to operationalising Sphere, particularly in areas difficult to reach or where conflict disrupts services.

- **Institutional capacity**: The strength of local organisations and governments in responding to crises plays a critical role. In Ecuador, strong local networks and training programs enabled the adaptation of Sphere standards through coordination hubs and national frameworks.

- **Community engagement**: Communities' knowledge, participation, and awareness of humanitarian rights and standards directly influence the effectiveness of Sphere adaptation. Building community awareness, as seen in northern Syria, was key to the successful implementation of WASH standards.

- **Political instability**: Changes in leadership or governance can shift priorities and resources. In Argentina, political changes affected the willingness of government agencies to adopt Sphere standards, particularly in relation to Indigenous rights.

- **Indigenous and local knowledge**: The integration of traditional and Indigenous knowledge, particularly for disaster preparedness, can significantly enhance the effectiveness of Sphere standards, as demonstrated in Argentina and Ecuador.

7 Final word from Sphere

Sphere is grateful to the authors of this guide, Aya Yagan and Nabil Kumaim, as well as all the contributors who shared their real-world examples. If you would like to share your story about contextualising Sphere Standards, or have any further questions or comments about this guide, please contact the Sphere office.

Front cover image: © CWSA: Through Community World Service Asia's HERD project, families in the drought-affected Umerkot district of Pakistan received essential food packages, strengthening food security and aiding recovery.