

## SUMMARY REPORT

# Inherently Local

**WORLD VISION SOUTH ASIA & PACIFIC**

*This document serves as a summary report encapsulating key findings and insights extracted from a more comprehensive study.*

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Localisation is a broad agenda with the aim of empowering and strengthening local and national actors. However, the definitions of localisation vary within humanitarian and development discourse and among different stakeholders.<sup>1</sup>

Localisation is integral to most development approaches.<sup>2</sup> Enhancing the capacities of both the government and civil society, including at the community level, is a recognised 'end in itself' critical to achieving development objectives.

In the humanitarian sector, where the primary focus is delivering life-saving emergency assistance to complement national systems, localisation takes on a different dimension. For some, it serves as a reminder that international assistance should remain 'subsidiary' to national systems and organisations, only provided as 'necessary'.<sup>3</sup> For others, it seeks to redress inequitable power imbalances which play out among international and national organisations during humanitarian operations.<sup>4</sup> It is also seen as a means to achieve cost savings and enhance aid effectiveness, including minimising cumulative overheads and fortifying national response systems.

In the humanitarian sector, it is generally accepted, as per the Grand Bargain commitments, that international actors should allocate 25% of their humanitarian financing 'as directly as possible' to local and national actors, support the strengthening of local actor capacity and leadership, including promoting their voice and visibility, and ensuring equitable partnerships.<sup>5</sup>

Donors are increasingly incorporating localisation elements into their grant conditions. This includes setting specific targets for direct funding to national NGOs, giving priority to or restricting grants to local and national actors, requiring the inclusion of national partners in grant proposals, and expecting direct grantees to enhance the capacity of local and national entities as part of their grant-related responsibilities.

**Against this policy backdrop<sup>6</sup>, this research is commissioned by South Asia Pacific (SAP) region of World Vision in advancing the Partnership to:**

- (1)** Articulate regional understanding and measurement of localisation
- (2)** Identify elements for a regional localisation action plan
- (3)** Identify evidenced-based localisation best practises and lessons learnt to feed into global localisation practices



<sup>1</sup> See e.g. for an overview of localisation definitions: Barbelet et al., "Interrogating the Evidence Base on Humanitarian Localisation: A Literature Study" and Robillard, Atim, and Maxwell, "Localization: A 'Landscape' Report."

<sup>2</sup> See notably the Paris Declaration, Accra Agenda for Action and Busan Partnership for Effective Development Cooperation: <https://www.oecd.org/dac/effectiveness/parisdeclarationandaccraagendaforaction.htm>

<sup>3</sup> Fabre, "Localising the Response: World Humanitarian Summit, Putting Policy into Practise." And the Grand Bargain Localisation objectives: <https://interagencystandingcommittee.org/grand-bargain> "The Grand Bargain: Workstream 2: Localisation, More Support and Funding Tools for Local and National Responders." "Grand Bargain beyond 2023 (Framework)."

<sup>4</sup> See for example the "NEAR Localisation Policy."

<sup>5</sup> "Grand Bargain beyond 2023 (Framework)."

<sup>6</sup> The SAP region includes the following offices: Bangladesh, India, Indonesia, Nepal, Philippines, Sri Lanka, PNG, Solomon Islands, Timor-Leste, and Vanuatu

### The research focused on the following questions:

- (1) What are the diverse understandings and approaches to localisation that have been used or tested across the South Asia Pacific Region?
- (2) What are considered the best practices in localisation, including the factors contributing to their success?
- (3) What challenges, obstacles, enablers, and potential amplifiers affect localisation, and how can they be effectively addressed?
- (4) How do both internal and external factors, such as the capacities, practices or policies of World Vision and its partners, the recipient governments of aid, and the approaches of donors, either promote or hinder progress in localisation, and what are the most effective ways to address them?

The study spanned four months and was conducted by an internal research team from World Vision, led by an external consultant. Data collection utilised a mixed-method approach, incorporating document and literature reviews, surveys administered to World Vision staff, as well as Key Informant Interviews (KIs) and Focus Group Discussions (FGDs) with World Vision personnel, national NGO partners, donors, and local government officials. Field visits and in-person meetings were arranged at World Vision's field offices in Bangladesh and Nepal, as well as the national offices in the Philippines and Sri Lanka. The findings were subsequently deliberated with SAP regional and country office staff and leadership.

## Localisation Understandings

World Vision's SAP offices are rich in localisation practises, with each office offering unique insights and experiences. With World Vision's strong focus on community development, the World Vision staff who were interviewed **had a strong understanding of localisation, as defined and applied in the development sector**. This understanding encompassed **partnership with and capacity-strengthening of local and community-based organisations**, with success and sustainability defined as the ongoing viability of these community and local structures.

Furthermore, for many staff members, localisation was evident in World Vision's federated structure. In some countries, World Vision International branch offices were replaced by independent national offices governed, and managed by national staff. These World Vision International Field Offices, including their senior leadership positions, were predominantly staffed by nationals.

Across most offices, there was a notable increase in operational partnerships with local and national NGOs, both in development and humanitarian contexts. This trend was influenced by donor and government requirements. However, practices in this regard varied among offices. For instance, one office, in compliance with national government relations, allocated nearly 100% of its budget to local and national actors. In contrast, the level and nature of partnerships for others depended on factors such as funding type (grant or sponsorship), the availability of partners meeting both World Vision's and donor's due diligence standards, and the specific operational context.





## Best Practices and Lessons Learnt

The study was significantly influenced by the humanitarian and donor localisation agenda following the World Humanitarian Summit. Consequently, emphasis was given to localisation expectations and commitments related to funding and capacity enhancement for local and national NGOs across both development and humanitarian initiatives. The following lessons learnt and best practices have been derived from the KILs and field visits, involving World Vision staff, as well as local and national partners.

Regarding best practices, there is a diversity of effective localisation approaches within World Vision offices, which have the potential for wider implementation across the region.

### Some examples include:



**Nepal:** Sets a commendable example with its operational model that facilitates comprehensive implementation through operational partnering modalities. Their systems, practices, and procedures can serve as a model for the identifying and managing of multiple operational partnerships across sponsorship and grant programs. The Nepal Innovation Lab, involving local and national actors in problem-solving exercises, offers examples of mutual learning and co-creation. The office supports its partners in acquiring customised software and support systems to enhance institutional capacities.



**Bangladesh:** Currently implements 10 out of 30 sponsorship programmes directly through national partners, allowing for a valuable post-assessment and gathering of lessons learnt regarding direct implementation versus delivering through operational partnering modalities. The Bangladesh office has worked to sustain support for fragile community structures and increase local partner funding by combining longer-term sponsorship funding with grant financing opportunities.



**Sri Lanka and Philippines:** Have devised models for multi-partner consortia arrangements, including collaborations with smaller local organisations. Both offices engage in extensive processes prior to NGO-mapping and subsequently contract multiple partners, providing either direct financial support (Sri Lanka) or in-kind assistance (Philippines) to bolster these organisations' own activities.



**Vanuatu:** Provides an interesting example of operational funding combined with core institutional investment and technical support, executed through a multi-partner donor/ INGO consortium.

Regarding the nature and quality of World Vision's partnerships, insights from local and national NGO partners have yielded several key points. **In terms of positive practices, the following highlights emerged:**

- World Vision is widely perceived as a trustworthy and equitable partner. Partners value the non-hierarchical nature of the relationship, with some regarding World Vision as a 'genuine partner' rather than a mere 'donor'. Collaborative program design and regular adaptations based on partner and community input were noted.
- Partners commend World Vision for helping to publish their reports and findings, thereby enhancing the partners' visibility and influence within the country.
- The effective synergy between World Vision's technical expertise and direct community experience of partners was acknowledged. With World Vision's support, partners were able to develop a comprehensive approach that exceeded what they could have accomplished on their own.
- Emphasis was placed on capacity-strengthening, both at the organisational and individual staff levels. Capacity was enhanced through joint implementation (learning by doing), shared office space, as well as access to training, mentorship, and coaching.
- World Vision's flexibility, including the ability to reallocate funds in emergency situations, responsiveness to partner inquiries, and rapid disbursement of funds, received high praise.
- It was noted that while World Vision's comprehensive policy requirements may be demanding, they ultimately enhance the partners' own policies and systems.



The partners also raised several areas for **improvement**:

- World Vision contracts were sometimes lengthy, complex, and, in some cases, available only in English. Few partners claimed to fully understand their content, although it was noted that clear verbal explanations were generally provided, and World Vision staff were responsive to questions.
- While World Vision excelled in providing technical capacity support, it offered less general institutional support. Partners identified critical areas such as governance, leadership, financial sustainability, and strategic planning as vital for their long-term viability and needing support.
- In one office, several World Vision software systems were required to be installed and used by partners, including in finance, M&E, and procurement. Given the time and effort put in place using and integrating these systems, and the relative advantages they provided to the NGOs in managing other partnerships, there was a strong request to retain these software systems after the partnership ended.
- Several partners found that administrative cost coverage was insufficient to cover full program costs. There were complaints of too few staff to effectively implement the program or having to pay lower salaries to staff funded by World Vision in comparison to other INGO partners.
- Inconsistent practices were observed regarding the payment of overhead costs. The definition of what constituted overhead expenses differed across offices as well as the funding percentages used.
- Some partners found it challenging to align World Vision's policy framework with the policies and systems of other donors and partners, government regulations, and those of their own organisations. These challenges were particularly evident in Human Resources, where staff had divergent salaries and benefits depending on the conditions of the funding partner.

### **Internal Challenges**

In addition to best practices and lessons learnt, the following common localisation challenges, both internal and external, were identified.

Many within World Vision SAP offices felt hindered by the **absence of a clear localisation definition and strategy**. The lack of clarity on localisation in terms of operational objectives and modalities limited the identification and **scaling of good practices**, as well as the **public promotion** of World Vision's localisation practices.

Similarly, the lack of a consistent and comprehensive localisation **measurement framework**, including a complete set of indicators and systematic feedback from World Vision's NGO partners, hindered the advancement of effective localisation practices and lessons learnt.

This strategy and measurement gap also impacted the realisation of localisation in humanitarian contexts. Opportunities to expand partnerships quickly, including pre-identification of potential national partners and contingency planning, were not maximised. Furthermore, the absence of indicators and data collection masked both, the number of operational partnerships in humanitarian contexts and the impact of capacity-strengthening efforts.

The absence of a localisation definition also raised **concerns** about the potential erosion of World Vision's community-based identity, as well as fears of staff downsizing and/or funding reductions.

It was also noted that a lack of internal clarity on localisation potentially **limited an effective internal dialogue on localisation challenges and effective engagement with donors** across the various Field and Support offices.

However, it should be noted that while there was a strong call for an internal definition and resultant localisation action plan, it was recognised that a localisation strategy needed to consider the highly diverse contexts across the SAP offices, including the numbers and relative strength of civil society actors.

Another internal challenge was the perceived **divide** between World Vision's humanitarian and development approaches. Successful localisation, particularly effective capacity-strengthening, requires the application of development approaches in humanitarian contexts. World Vision's impressive set of community-based capacity-strengthening guidance, partnership frameworks, and measurement tools could be adapted to fit operational partnerships with larger local and national NGOs in both development and humanitarian contexts.

**Effective risk management procedures**, essential for both donors and World Vision, were seen as limiting partnership opportunities, especially given that World Vision's activities were often concentrated in the poorest regions of the country, where civil society actors were scarce. Several offices emphasised the challenge of identifying partners who met World Vision's due diligence requirements.

## **External Challenges**

The primary external challenge to localisation, as perceived by the offices, was the limited presence of local and national NGOs capable of meeting donor due diligence standards in both humanitarian and development contexts. This challenge was exacerbated by increasingly high donor due diligence expectations, a lack of risk-sharing in subcontracting, and the absence of effective contextualisation of localisation requirements.

To some extent, non-existent or weak civil society structures are common in marginalised areas targeted for humanitarian and development support. Identifying partners that meet donor due diligence expectations, possess established systems and structures to manage large international grants, and meet rigorous requirements inherent in sponsorship programming, was seen as a challenge in numerous contexts. Additionally, organisations who did meet these requirements often had multiple donors and partnerships thus results to limited absorptive capacities.

It was highlighted that while donors are increasingly mandating partnerships and effective capacity-strengthening of local actors, partner vetting requirements are not diminishing. On the contrary, several offices reported more stringent donor conditionalities, notably when private sector partners were delegated the management of large funding windows. Likewise, it was noted that donor localisation conditionalities in funding obtained directly in-country were more often tailored to the specific needs and challenges of the country than funding channelled through partners located outside of the country.

Achieving effective localisation, including empowering and enhancing the capacities and leadership of national civil society organisations, particularly in contexts where private giving and national government support are scarce, demands both time and funding. Unfortunately, these critical elements are often not adequately considered in grants, particularly in humanitarian funding. Too often, the focus on supporting local partners to navigate international donor funding conditionalities diverts attention from the essential long-term growth and development of NGOs, posing challenges to both effective NGO strengthening and the achievement of programmatic objectives.



## Recommendations

### RECOMMENDATION **ONE**

#### **Develop a Localisation Strategy, Measurement Framework and Action Plans**

**Develop a localisation definition and strategy** that enable offices to speak with one voice, establish common objectives, and measure progress. Rooted in World Vision's mission to promote sustainable child well-being, the strategy should encompass a broad definition of localisation that spans both humanitarian and development objectives:

- *"Localisation is a process that empowers local actors, strengthens local systems and capacities, and ensures accountability and responsiveness to the communities we serve in both development and humanitarian contexts."*
- The strategy should **default to implementing through or with local and national actors**, setting a **global target of 25% of humanitarian and development grant financing** implemented through or transferred to local and national actors.
- The strategy should emphasise World Vision's technical and institutional capacity building of local and national actors across a spectrum of civil society, including community-based organisations, local and national NGOs, and faith-based organisations, as well as local and national governments. It should promote sharing lessons learnt and advocate for increased visibility, voice, and leadership of civil society actors.
- The strategy should be accompanied by a comprehensive measurement framework, including metrics to capture detailed operational partnership data and mechanisms to gather **partner feedback**.

### RECOMMENDATION **TWO**

#### **Promote equitable partnerships**

To further enhance equitable partnerships with local and national actors, World Vision should consider the following action points:

- Update the partner **health check tools** to encompass both World Vision's and the operational partners' perspectives on the partnerships.
- Create a partners' **overheads policy** and conduct a review of partners' **administrative cost coverage**.
- **Standardise partner oversight, policies, and software systems** across offices, drawing lessons from the Nepal offices and their systems
- Develop software systems that partners can retain after the World Vision partnership ends. For trusted partners, **vet their policies and procedures** rather than requiring them to adhere to World Vision policies.



### RECOMMENDATION **THREE**

#### **Expand the number and scope of operational partnerships**

To expand the number of operational partnerships with local and national NGOs in both humanitarian and development contexts, World Vision could consider the following action points:

- Encourage offices to articulate national strategies towards operational partnerships, set targets, and justify limitations
- Explore the scalability of the systems and procedures implemented by the Nepal office to effectively manage a large number of operational partnerships. Standardise partner oversight, policies, and software systems across offices, drawing lessons from the Nepal offices and their systems
- Review due diligence requirements based on the source and size of funding and local risk metrics.
- Explore opportunities to **substitute or recognise due diligence processes** among INGOs, UN, and Donors, to avoid duplicative exercises on the national partner.
- Develop a tiered-funding approach that includes adapted due diligence procedures and safeguarding mechanisms to **promote direct funding for smaller or higher-risk actors**.

*Specifically in humanitarian contexts, World Vision could consider the following points:*

- In areas with anticipated or recurrent humanitarian needs, pre-identify a **roster of potential operational partners** and establish standing agreements and contingency plans with trusted national partners.
- Explore potential synergies between partner development activities and emergency response needs, such as in psychosocial support, and include flexibility in project agreements to reprogram funds in case of emergencies (up to 20%).
- Develop **emergency mobile teams** of one to two experts for partnering who can identify, run due diligence assessments, contract, and onboard operational partners.



#### RECOMMENDATION **FOUR**

### **Enhance technical and institutional capacity strengthening**

To further increase World Vision's impact in partner technical and capacity-strengthening, consider the following action points:

- **Adapt existing capacity-building tools to suit larger partnering NGOs**, with a stronger emphasis on fostering organisational sustainability and promoting good governance through engagement with governing board members.
- Increase the use of external experts, explore secondments or immersion learning experiences between World Vision and national partners, facilitate peer learning and knowledge sharing through networks of partners.
- Establish a **partner reference centre**, comprising partnership tools and materials, reference libraries, funding opportunities, and communities of practise.
- Implement a targeted approach to partnering with and strengthening women-led local and national NGOs and encourage the formation of a network of women-led organisations.
- Boost **core financial investment in partner organisations**, possibly through the creation of a pooled fund mechanism.
- Promote direct funding to NGO partners through World Vision serving as a sub-grantee, and by fostering operational consortiums.

#### RECOMMENDATION **FIVE**

### **Engage in localisation research and external policy engagement**

To continue developing World Vision's **evidence-based approach** to advancing localisation, consider the following learning agenda:

- Establish a localisation resource centre and conduct workshops across offices to ensure a shared understanding of localisation and facilitate the sharing of best practises.
- **Conduct similar reviews to that of SAP in other regions**, incorporating the findings in the resource centre and publishing external summaries.
- Collect and actively share lessons learnt in **capacity-strengthening for community-based organisations and local NGOs** across offices.
- Develop a series of externally focused documents profiling success stories and lessons learnt in localisation, highlighting the SAP region's extensive experience in localisation across the humanitarian and development sectors, particularly in funding and strengthening community-based organisations and emerging NGOs.
- Engage in donor outreach and briefings on localisation, **showcasing NGO partners** on the international stage and actively share partner stories and perspectives.

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