FROM ASPIRATION TO REALITY

A Learning Study and Conversations
with Partners on the Localization Agenda

OXFAM
Pilipinas

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About the publication:
This publication provides an overview of Oxfam's localization strategic agenda by outlining its vision, objectives, and strategic approaches to promoting locally-led humanitarian and development efforts. It serves as a guiding document for stakeholders, including partner organizations, donors, and community groups, to understand Oxfam's commitment to equitable and sustainable local engagement.

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LIST OF ACRONYMS

CSO	Civil Society Organization
DEPP	Disasters and Emergencies Preparedness Program
HCT	Humanitarian Country Team
ICVA	nternational Council of Voluntary Agencies
IFRC	International Federation of Red Cross and Red Crescent Societies
INGO	International Non-Governmental Organization
ICR	Indirect Cost Recovery
NNGO	National Non-Governmental Organization
OECD	Organisation for Economic Co-operation and Development
PINGON	Philippine INGO Network
SOGIE	Sexual Orientation and Gender Identity Expression
TSC	Transformative Systems Change

CONTENTS

INTRODUCTION

Localization is a transformational agenda that challenges Oxfam Pilipinas and its partners to rethink how their identities, roles, positions, and work in the humanitarian and development sectors in the Philippines and beyond. Given Oxfam Pilipinas' and their partners' particular circumstances, for the localization agenda to be substantively fulfilled, it has to be a collective or shared agenda; it requires effective collaboration and mutual learning.

Therefore, while there is considerable focus in this learning initiative on the Oxfam Pilipinas journey of transformation into a national organization, this internal agenda needed to be located within the broader terrain of localization struggles in the Philippines and beyond, i.e., how Oxfam Pilipinas' internal transformation can influence the pace and scale of localization writ large. It is important to see how Oxfam Pilipinas' and partners' localization decisions, journey, and experience can provide strong lessons for other relevant organizations.

Localization is not only a national or local agenda, but also a global and international one. It is about being effective globally and harnessing global resources to serve local objectives. Localization does not mean becoming development "hermits", but rather engaging with the wider humanitarian and development sectors and sharing its insights and learnings as OPH.

Localization is a long journey and, some would say, aspirational in nature but it is important to celebrate incremental gains and be appreciative of building on what has already been achieved, not only by Oxfam Pilipinas and their partners but all other organizations and movements working on the localization agenda. Oxfam Pilipinas need contextualize their localization agenda within their strategic scope/scale and focus and be mindful of their unique identity and affiliation as Oxfam Pilipinas. They also need to continue to improve their strategic partnership model and capacitate their staff and people they work with at the community level to enhance their respective contributions to realization of localization.

Oxfam Pilipinas has a unique opportunity and responsibility to advance localization in the Philippines and beyond, and to be a leader and a learner in the process. Localization is a transformational leadership responsibility that requires strategic, adaptive, transparent, and fair leadership and management thinking and practice.

LOCALIZATION – headlines in a long story

1.1. Localization – the bigger picture

Localization, as an agenda in development and humanitarian work, is not new. The May 2016 humanitarian summit "grand bargain" was simply a peak moment, specific to the humanitarian sector, in the long and broader history of localization struggles and aspirations, specially as framed within the box of mainstream "development and humanitarian aid" industry. This framing underpins such efforts as participatory learning and action in the 1980s, decentralization and good governance in the 1990s, doing development differently and shifting the power in the early 2000s, and more recent permutations such as decolonization of aid, etc.

It is important to recognize, however, that there is a wider space of development and humanitarian discourse and praxis outside of the formal aid industry. Such recognition will also entail a wider understanding of development organizations to include social change and social movement organizations of various types and sizes Recognizing these "off-industry" efforts and realities will contribute significantly to the enhancement of the quality, scope, and relevance of localization debates and practices.

The substantive aspiration underpinning the "localization" agenda is, in effect, not new. While this study is focused on the localization agenda in the formal aid industry frame, it is important to privilege the views and perspectives of "local" actors, vis-à-vis the particular views, perspectives, or interests of "non-local" actors.

1.2. Localization – overview of trends and narratives

This section is a summary of current trends and narratives on localization in the Philippines and beyond, categorized under four main headings, i.e., (a) conceptualization of localization, (b) practice frameworks and dimensions of localization, (c) progress and bottlenecks, and (d) localization agenda priorities.

1.2.1. Understandings

Despite formal commitments and years of discussions by global and national organizations and formations, "localization" remains a complex and multifaceted concept with no universally accepted definition.[1] At its core, however, it is understood to be about **power** and **shifting power**.

> **Power at the center.** The localization agenda represents a recognition of power imbalances and gender inequalities within the development and humanitarian sectors. It seeks to shift power dynamics and put local communities and actors at the heart of these systems. Localization strives to transfer the locus of power from international to local actors while fostering greater accountability among all stakeholders.
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> **A complex landscape of terms and interests.** Localization involves a complex array of associated terms, such as locally led development, community-driven development, decolonizing aid, anti-

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[1] See also Annex 2.

racism in development and re-imagining the role of international NGOs. These terms reflect the multifaceted nature of localization, encompassing not only a transformation in power dynamics but also a broader perspective on development.

Method, outcome, or both. There remains an ongoing debate surrounding whether localization is primarily a method, an outcome, or a combination of both. However, the core focus of this debate is the promotion of locally led practices and the empowerment of local authorities and civil society. While the debate persists, the fundamental objective remains clear: to transition towards locally led practices where local actors—governments and civil society primarily—play a central role in decision-making and implementation.

Beyond aid effectiveness. Localization goes beyond the scope of aid effectiveness, extending its reach to encompass resource allocation, representation, decision-making, and the redistribution of power. Its goal is to enhance aid effectiveness by ensuring that interventions are contextually relevant, responsive, and aligned with the needs and priorities of local communities and stakeholders.

1.2.2. Frameworks and dimensions

The humanitarian and development communities have converged on a number of practice frameworks, dimensions, and indicators/markers for localization, with varying degrees of details and particularization.

Genuine partnership. At the heart of localization is the establishment of genuine and trusting relationships across key stakeholders in the development and humanitarian systems. These partnerships should be based on mutual respect, open communication, and a commitment to equitable decision-making processes. Acknowledging the primary role of local actors is fundamental in building sustainable partnerships.

Funding and financing. Localization efforts have to address the infirmities in the current funding/ financing structures and mechanisms to effect greater access by local actors and a substantive shift of global development and humanitarian resources towards local entities and actors. In practical terms, donors of all categories should make available long-term, flexible, predictable, and sufficient funding (including financing core operations), to their local partners.

Capacity development and knowledge sharing. Localization emphasizes the importance of capacity development and knowledge creation across the entire system, with the understanding that capacity development is bi-directional or multi-directional. All development and humanitarian actors —in the Global North and in the Global South—need to continuously develop their capacities and competencies. A common capacity framework should guide these efforts, with particular focus on supporting proximate (local) leaders.

Participation and representation. Localization promotes the active involvement of local actors in decision-making and action. Such effort extends to policy and practice development, coordination mechanisms, and genuine movement building. Organized participation and generational engagement are essential for sustainable development and humanitarian outcomes.

Gender responsiveness and inclusion. An integral part of localization is addressing the specific needs and priorities of women and other marginalized groups. Embracing feminist principles ensures that localization efforts are not only inclusive but also sensitive to gender inequalities and promotive of women's rights.

Shared standards and frameworks. Localization encourages adherence to co-developed policies, standards, and institutional frameworks. A co-created vision of success ensures that local

perspectives are taken into account.

Visibility and credit sharing. Recognizing and promoting the contributions and roles of local actors in humanitarian and development initiatives is vital. This includes giving credit where it is due and ensuring that local stakeholders receive due recognition for their substantive contributions.

1.2.3. Progress, successes, and bottlenecks

There are notable localization efforts or successes, but these remain small-scale, and the pace of progress is considered generally slow, with a dearth of data/evidence to measure progress. There is no indication of significant systemic change that signal a tipping point. Another significant concern is the shrinking of civil society space.

Institutional priority. Many development and humanitarian organizations at various levels have formally adopted the localization agenda as a key institutional priority and have declared their intention to develop appropriate policies and practices. However, despite declarations prioritizing localization, many international actors remain lacking in effective localization strategies and continue to grapple with understanding local contexts as well as the reality that existing asymmetric power dynamics and rigid approaches persist.

Shifts and innovations in resource transfers. Some countries and donor organizations have initiated larger and more substantial grants to local actors, in some cases providing them with increased opportunities for multi-year funding. These resource allocations reflect a growing recognition of the competence and effectiveness of local organizations. In some places (the Philippines, for instance), national and international organizations have cooperated to develop innovative financing mechanisms aimed at more flexible, accessible, responsive, and sustainable funding. However, despite some notable efforts in this direction, the overall flow of resources to local actors remains remarkably low. For instance, only a minority of the Grand Bargain signatories are meeting the agreed 25% threshold of resource transfers. Challenges include short-termism in funding, inappropriate accountability mechanisms, and risk aversion among donors. At the same time, due diligence requirements can be overly burdensome for local organizations.

Building genuine partnerships. Several international non-governmental organizations (INGOs) have developed innovative, strategic partner-led models. These models encourage greater participation from local actors in joint assessments, planning, and decision-making processes, enhancing the effectiveness of humanitarian and development interventions. On the other hand, many local organizations still feel undervalued within existing partnerships with international organization. Many international organizations still approach partnerships from a project/transactional perspective while issues related to visibility and credit sharing persist. Building trust and recognizing the contributions of local partners remain key areas that require further attention.

Representation. Leaders from the global south, including women, are now better represented in various discussion and decision-making spaces, both at the international and national/local levels. Increased representation potentially improves diversity of perspectives and ensures that the voices of local actors are heard. However, systemic and institutional barriers—including power imbalances, insufficient incentives for participation, and even practical issues such as language—continue to hinder progress. While there may be more local actors in various platforms, the quality of their participation can be compromised by these persistent barriers.

Capacity development. Recognizing the importance of capacity development, both national and international actors have prioritized building the skills and capabilities at the local level. Such investment is crucial for long-term sustainability and effectiveness. However, many capacity development efforts remain short-term and unsustainable. Inadequate resourcing, limited staff capacity, and high turnover rates further compound capacity development challenges. Many international organizations prioritize

augmenting their internal structures over building the capacities of national and local actors.

Contextual challenges. In certain contexts, shrinking civil society space poses a significant obstacle to localization efforts, limiting the ability of local organizations to operate effectively and independently.

1.2.4. Priorities

Localization remains a critical but evolving concept in humanitarian and development efforts, with significant progress yet to be realized. Various actors and stakeholders in the localization agenda have identified different areas of concern and action that they consider urgent and critical for the localization process to move forward substantially.

Shifting mindsets, practical action. The journey towards effective localization in the development and humanitarian systems hinges on several critical priorities. First, there is a pressing need for a substantive shift in institutional and organizational mindsets, especially among but not limited to international organizations and donors, translating localization rhetoric into concrete actions. To support local actors, establishing risk management functions within international organizations is paramount, along with contextualization of approaches to better suit local contexts.

Equal, ethical partnerships and aligned incentives. Second, it is imperative that relevant organizations continue to establish equal and complementary partnerships, anchored on the recognition of the centrality of local/national actors, and with aligned incentives for all stakeholders. Such partnership should be ethical as well, promoting mutual respect, transparency and accountability while working within agreed ethical guidelines and code of conduct.

Community engagement and cultural sensitivity. Third, meaningful community engagement by involving local communities in decision-making processes, project design, and implementation is essential to the localization process. Such approach ensures that interventions are customized to meet the specific needs and preferences of the people they aim to serve. Community engagement also requires cultural sensitivity among international organizations, i.e., awareness of and respect for local customs, traditions, and belief systems in order to build trust and ensure relevance of development and humanitarian efforts.

Capacity development. Fourth, invest in long-term, pro-active capacity building and leadership development for local organizations and individuals, particularly supporting initiatives that enable local actors to manage minor crises that can escalate into major disasters. It is important that capacity development is likewise directed at international organizations or actors. The promotion of learning networks and platforms for knowledge sharing and collaboration among local and international actors will help to facilitate exchange of best practices and innovative solutions.

Gender equality, women leadership, and feminist perspective. Fifth, ensure that gender equality and women's empowerment are central to localization efforts. It includes promoting the participation of women and women's rights organizations in decision-making, development of women leaders, and addressing gender-based violence and the specific development and humanitarian needs of women and girls.

Advocacy and policy influence. Sixth, empower local organizations to engage in advocacy and policy influence at regional and national levels. Their insights and experiences can shape policies that are more responsive to local needs.

Protection of civil society space. Seventh, while national and local development and humanitarian actors include public, corporate, and civil society entities, there is a particular need to ensure that all localization stakeholders work to reverse the shrinking space hampering civil society to operate and promote the protection of development and humanitarian workers and activists.

Building a robust evidence base. Finally, establish robust monitoring and evaluation mechanisms that involve local actors in assessing the impact and effectiveness of programs. This feedback loop can lead to continuous improvement and learning. and the development of a credible evidence base which are important to successful localization. Leveraging technology for development and humanitarian work, inclusive of monitoring and evaluation systems, can enhance efficiency and effectiveness, as well as improve transparency and accountability.

1.3. Oxfam Pilipinas and partners experiences and contributions to localization struggles

Oxfam Pilipinas has been a notable actor in the localization discussions and practical initiatives in the Philippines, underpinned by a perspective that connects the humanitarian and development dimensions of their work (the so-called development-humanitarian nexus), and has supported endogenous development and humanitarian work in the Philippines.

- **Strategic partnerships**
  Oxfam Pilipinas has supported a deliberate strategic partnership approach that is intended to promote transformative leadership. Oxfam Pilipinas' adoption of a strategic and transformative partnership model underscores their commitment to genuine localization and development of local leadership.

- **Localization and local humanitarian leadership**
  Notable achievements include the increased allocation of emergency response funds to partner organizations, reflecting a commitment to trusting and supporting local expertise. Collaborative development of emergency response strategies with these partners has promoted mutual learning and improved organizational systems, ultimately enhancing the sustainability of humanitarian initiatives. Oxfam Pilipinas' support extends to strengthening national coordination mechanisms and enhancing the capacity of partner organizations to engage with these mechanisms. Investing in capacity development and institutional strengthening has proven to be vital for an effective humanitarian response.

- **Capacity sharing, co-learning and co-creation**
  Oxfam Pilipinas has committed to expand spaces for capacity sharing, co-learning, and co-creation of innovative development and humanitarian initiatives with their partner organizations. The co-creation approach is a key element of their strategic partnership model, facilitating mutual learning, fostering innovative thinking and practice, and streamlining organizational systems through reducing redundancies.

- **Feminist perspective, feminist leadership**
  Oxfam Pilipinas' work on localization is also notable for its deep commitment to promoting women and feminist leadership, enhancing the role of women's rights organizations, and ensuring that development and humanitarian programming includes SOGIE (sexual orientation and gender identity expression) orientation.

- **Innovating funding and financing mechanisms**
  Oxfam Pilipinas has continuously explored and implemented innovative funding and financing mechanisms that shift more resources to local partner organizations, even as it is cognizant of the broader challenge of transforming the funding architecture.

CATALYZING LOCALIZATION IN THE PHILIPPINES – key themes in recent Oxfam Pilipinas and partners conversations

2.1. Into a new era - Oxfam Pilipinas as a national organization

Oxfam Pilipinas has decided to become a national organization and the country affiliate of Oxfam International. This transformation journey has meant that Oxfam Pilipinas needed to redefine itself/ its identity more appropriately and more sharply. Oxfam Pilipinas is cognizant[1] of this challenge and has provided for this in their current strategic plan.[2] Insofar as Oxfam Pilipinas is concerned, localization as a transformational agenda is not just "out there"; it is also "in here". While the change process will take time, Oxfam Pilipinas expects to be ready for and adaptive to change as opportunities present themselves. It does not expect "business as usual" to continue indefinitely.

2.1.1. Localizing into, not localizing away

Oxfam Pilipinas' decision to transform itself into a national organization is a decision to "localize into" the Philippine context, i.e., becoming a truly local actor itself, instead of "localizing away" (the option taken by other similar organizations, i.e., just closing shop and working/supporting other local actors from a distance. Oxfam Pilipinas' localization transformation journey is an example of the fluidity of the concept of "local" with layers of "local" coexisting within both local and international contexts. Oxfam Pilipinas is starting to grapple, on a practical level, with the complexity of a dual persona—what it refers to for a time as a schizophrenic identity—as both a national and international organization.

Oxfam Pilipinas is aware of its power and how this affects its relationships with partners and communities. It recognizes the fact that being a national organization with a "global footprint" especially with the powerful Oxfam brand, provides a unique position and opportunity to advance localization in the Philippines and beyond.

2.1.2. Constituencies, stakeholders, and communities

An essential element of (re)defining roles and identities is (re)defining relationships in different spaces, where an organization like Oxfam Pilipinas may be expected to act as a national or international entity, with implications on its legitimacy and accountability. Oxfam Pilipinas has four relationship clusters, (a) Philippine civil society organizations and development/humanitarian actors, (b) Oxfam International, (c) traditional peer organizations, and (d) donor entities. Many peer organizations and donor entities likewise have national and international permutations.

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[1]   According to the May 2021 report (p.33), Local Humanitarian Leadership: The View from Local Actors, "Oxfam in the Philippines' national registration becomes a dou-ble-edged sword on localization. ...Oxfam in the Philippines still defines itself as an international NGO since it is part of an international network. It will also remain faithful to its long-standing policy in the Philippines of not competing with local actors for funding opportunities but to serve as a resource mobilization asset for local partners."
[2]   "As Oxfam Pilipinas, we will be more autonomous in designing programs that will maximize our unique strengths borne out of our decades of experience in the country. ...We will build Oxfam Pilipinas into a national and feminist organization effectively working with partners to realize our strategic commitments towards a just, inclusive and sustain-able society." Oxfam Pilipinas intended to do this by means of: empowering partnership engagements and knowledge-based processes, attracting and retaining best talents, and ensuring accountability, effective mobilization and responsible stewardship of resources, and effective and efficient business processes.

Oxfam Pilipinas has decided that its primary community covers the relevant segments of Philippine civil society which are the main source of its legitimacy and the locus of a collective voice that it seeks on development and humanitarian issues. Oxfam Pilipinas seeks to be an effective and responsible member of this community as it strives to continuously strengthen its role and location within it.

Oxfam Pilipinas identifies the Oxfam International confederation as its second most important community. Oxfam International is the locus of Oxfam Pilipinas' global footprint and network. As a member of this global community, Oxfam Pilipinas is mindful of its aspirations and expectations, including rootedness in a local identity, solid values, relevance and credibility, influence, solidarity and diversity.

2.1.3. Organizational values

Oxfam Pilipinas' work and relationships will continue to be founded on the values of equality, empowerment, solidarity, inclusiveness, accountability, and courage. Oxfam Pilipinas takes responsibility for its action, or inaction, and speaks truth to power.

2.2. Oxfam Pilipinas and partners conversations - key themes

In the light of Oxfam Pilipinas formally stepping into a new era as a national organization and in the context of this current localization study, Oxfam Pilipinas has started conversations with its partners on the latter's expectations regarding the identity, roles and positions of the organization moving forward. The key themes emerging from these conversations—inclusive of those with the partners' inputs during the study's core discussion group, partners' ideas raised during the formal Oxfam Pilipinas launch, as well as relevant ideas from earlier conversations (e.g., the strategic partnership model review)—are captured in the following discussions.

In sum, the main themes are (a) trust and power, (b) bridges and connections, (c) co-creation and innovation, and (d) collaboration and support to partners. These are illustrated in the infographic below:
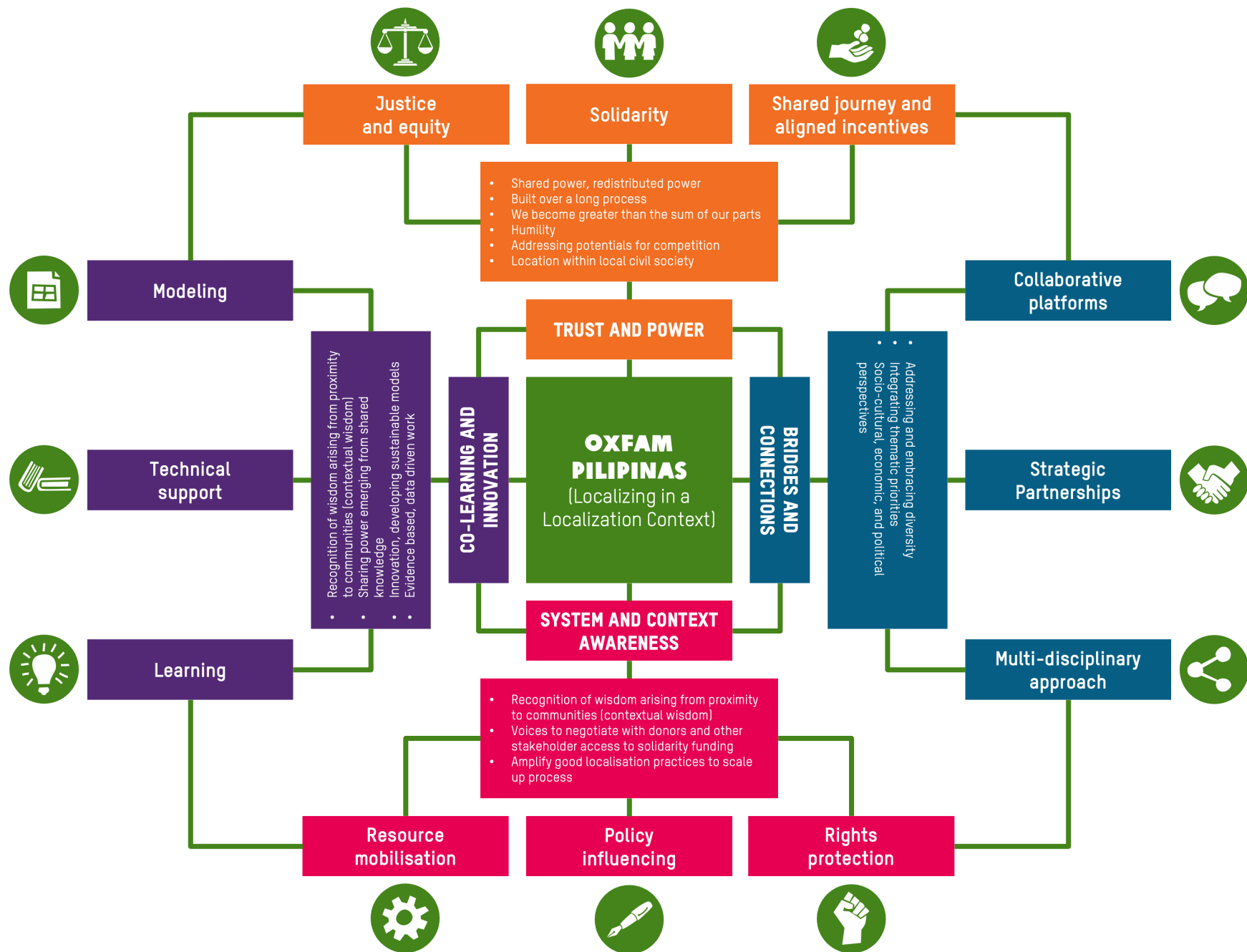
Figure 1: Summary of key themes in Oxfam Pilipinas and partners localization conversation

The diagram centers on OXFAM PILIPINAS (Localizing in a Localization Context).

TRUST AND POWER (top center) connects to:
- Justice and equity
- Solidarity
- Shared journey and aligned incentives

Associated points:
- Shared power, redistributed power
- Built over a long process
- We become greater than the sum of our parts
- Humility
- Addressing potentials for competition
- Location within local civil society

CO-LEARNING AND INNOVATION (left) connects to:
- Modeling
- Technical support
- Learning

Associated points:
- Recognition of wisdom arising from proximity to communities (contextual wisdom)
- Sharing power emerging from shared knowledge
- Innovation, developing sustainable models
- Evidence based, data driven work

BRIDGES AND CONNECTIONS (right) connects to:
- Collaborative platforms
- Strategic Partnerships
- Multi-disciplinary approach

Associated points:
- Addressing and embracing diversity
- Integrating thematic priorities
- Socio-cultural, economic, and political perspectives

SYSTEM AND CONTEXT AWARENESS (bottom) connects to:
- Resource mobilisation
- Policy influencing
- Rights protection

Associated points:
- Recognition of wisdom arising from proximity to communities (contextual wisdom)
- Voices to negotiate with donors and other stakeholder access to solidarity funding
- Amplify good localisation practices to scale up process

2.2.1. Trust and power

Trust and power dynamics are central to the relationship between Oxfam Pilipinas and its partners. Building trust is a long-term process that requires an unwavering commitment to fostering solidarity, equality and justice.

Shifting power. Oxfam Pilipinas and partners advocate deliberately shifting power—encompassing knowledge, resource and influence dimensions—while fostering a truly equitable and sustainable relationship. By consciously and continuously reshaping power dynamics, Oxfam and partners demonstrate trust in each other, and on the part of Oxfam Pilipinas, trust in its partners' capabilities and respect for the latter's contextual wisdom. Such level of trust enables local organizations to lead based on their proximity to affected communities.

Shared journey and humility. By being together in the localization journey, Oxfam Pilipinas and partners can have greater and more profound impact on the issues of poverty and inequality. A fruitful shared journey is based on shared objectives, aligned incentives, mutual learning, and transparency. A shared journey also seeks to address, rather than ignore, potential competitive issues (such as fundraising). Considered key are mutual respect, confidence in each other's capacities and potentials and, most importantly, humility (especially on the part of Oxfam).

2.2.2. Bridges and connections

Oxfam Pilipinas plays a crucial role in bridging diverse actors and perspectives, fostering collaboration among partners and broader stakeholders, including resource providers and policymakers.

Linking thematic priorities and amplifying change. Oxfam Pilipinas integrates its thematic priorities at both the ground and decision-making levels, ensuring seamless information flow to partners, communities, and Oxfam International. Oxfam Pilipinas emphasizes addressing diversity and amplifies locally developed good practices, promoting localization on a larger scale.

Linking approaches and ways of working. Oxfam Pilipinas should continue to work on active citizenship, works with partner organizations alongside vulnerable women and men, supports regional and global campaigns and responds with life-saving aid during emergencies while supporting people to recover their livelihoods, working to find innovative ways to involve vulnerable groups in influencing decisions that affect them at the same time aiding in digital financial inclusion through a robust partnership with the private sector.

Building on strategic partnership. Through open communication and mutual understanding, Oxfam Pilipinas builds bridges among partners and stakeholders to share resources, capacities and learning, promoting knowledge across different sectors and enabling progress at scale. The bridging role stems from Oxfam Pilipinas strategic partnership model, with additional emphasis on open and accountable partnerships with government agencies/entities to enhance transparency and coordination and avoid duplication and fragmented efforts.

Linking gender transformative action. Oxfam Pilipinas also participates in various initiatives to promote gender transformative actions during emergencies, proactive disaster mitigation and preparedness, and community engagement to improve disaster relief and response systems that increase climate resilience.

Linking with donors. The organization leverages its strong voice to negotiate with donors, which significantly benefits partner NGOs.

2.2.3. Co-creation and innovation

Achieving lasting change requires co-creation and innovation. By co-creating innovations and combining global resources with local wisdom, it is possible to generate sustainable development and humanitarian models that empower communities. Shared commitment fuels innovation.

Building on existing ideas. This approach acknowledges that true innovation often involves building on existing ideas and practices rather than seeking purely original concepts. This means scaling up existing ideas to create new ones that are tailored to local contexts.

As an idea entrepreneur, Oxfam Pilipinas should continue the work of aggregating (bringing work to scale), convening, brokering, facilitating and networking (bringing together ideas, actors, institutions, initiatives and disciplines). Oxfam Pilipinas can be an effective international intermediary and interlocutor that amplifies the voice of their partners in regional and global spaces, and leverages its global resources, networks and solidarity to support local actors and actions.

Innovative funding. Oxfam Pilipinas has long championed innovative funding methods and approaches, enhancing access to solidarity funding from its affiliates to bolster partner organizations. It will be useful for Oxfam Pilipinas and its partners to continue developing innovative funding strategies and mechanisms, including professional public fundraising in the Philippines.

This dimension includes making resources accessible to CSOs, while considering a more focused/ niche role for Oxfam Pilipinas in resource mobilization, especially to small NGOs/CSOs. Oxfam Pilipinas can see itself as a locally-based donor partner organization that advocates for accessible resources and simpler processes. Oxfam Pilipinas can develop itself as a local resource mobilization hub by, among others, generating funds locally and facilitating partner access to solidarity funding, reducing dependence on foreign aid, and developing social enterprises.

Systematic approach and platform for innovation. Oxfam Pilipinas has advocated the importance of a proper space for collaborative and innovative work. Oxfam Pilipinas has championed a model of innovation incubation that brings together the strengths of Oxfam International entities and their strategic partners in the Philippines.

2.2.4. Collaboration and support to partners.

In sum, the partners emphasize the importance of strategic collaboration with and appropriate support to partners as key to a successful Oxfam Pilipinas localization agenda.

Collaborative advantage, collaboration that empowers. Oxfam's commitment to collaborating with partners remains strong. Oxfam Pilipinas and partners recognize the importance of effective partnership conversations to enhance partnerships, organizational development, and resource sharing. In its work with partners, Oxfam Pilipinas often plays a supportive role, encouraging open dialog and offering technical support, frameworks and tools without imposing their use, with partners able to maintain their unique perspectives.

Oxfam Pilipinas and partners must redress power imbalances that limit local partners, placing communities at the center as architects of their own development. INGOs can provide appropriate support, including knowledge support and leveraging their global relationships to advocate for local partners without imposing top-down agendas. Systems and requirements must be simplified to build local capacity rather than compliance.

Long-term, focused, and appropriate support. To enhance impact and engagement with partners, it is crucial to provide robust support in terms of funding—including resource mobilization and

access to high quality resources (e.g., solidarity funding). Partnerships should involve core, long-term support focused on empowerment, strengthening local actors to lead while INGOs assist behind the scenes. There must be flexibility to change roles as contexts evolve, with support involving mobilizing resources, providing technical skills, or enhancing organizational capacity. However, progress should be defined by partners and communities themselves.

Interventions should align with local values and build community ownership, investing in institutions and models that sustain impact beyond project cycles. In this sense, the future is localized, and INGOs will be valued partners when they address imbalances, simplify bureaucracy and nurture local leadership.

CATALYZING LOCALIZATION –
a shared agenda and strategic canvas for change

3.1. Shared vision

Oxfam Pilipinas and their partners, building on gains from their strategic partnership and localization experiences to-date, look towards genuine locally led development and humanitarian work in the Philippines and beyond, built on the following elements:

- As a collective of feminist, activist, and learning organizations, a commitment to continue to work **alongside each other**, and other similar-minded organizations, to promote effective and genuinely community-led humanitarian and development action and accountable governance

- As a community of civil society, development-humanitarian, and social movement organizations, a commitment to continue to sharpen and strengthen their strategic partnership relationships to become more **effective catalysts** for realizing the localization agenda from the strategic to practical levels, including the transformation of relevant sections of the development-humanitarian funding architecture

- As a community of transformative organizations, a commitment to continue to contribute their respective strengths, resources and unique value to thecollective effort to address **deep-rooted persistent historical**, **political and cultural challenges** in Philippine society through genuine locally led development and humanitarian initiatives, systems and processes.

3.2. Strategic foci and pathways – catalyzing localization by localizing knowledge, spaces and money

The preceding survey of localization and summary of themes emerging from Oxfam Pilipinas and partners conversations on localization have shone a light on a large number of issues and concerns that need to be addressed to realize the localization agenda. However, three critical, overarching, and interrelated dimensions can be considered as priority strategic foci because (a) they represent domains of power that determine the configuration of power relationships across actors in the development and humanitarian aid sector, i.e., strategic arenas of power, and (b) they are areas where Oxfam Pilipinas and partners already have significant experience and investment, i.e., practical starting points.

The three priority arenas of power are (a) **knowledge**, (b) **spaces**, and (c) **money**. Localizing these arenas of power, i.e., *localizing* knowledge, *localizing* spaces, *localizing* money, signify taking responsibility, seizing opportunities, assuming leadership, and gaining power. These three arenas of power, along with the foundational dimensions of strategic partnerships, shared leadership and shared risks, constitute a **strategic canvas** for localization.

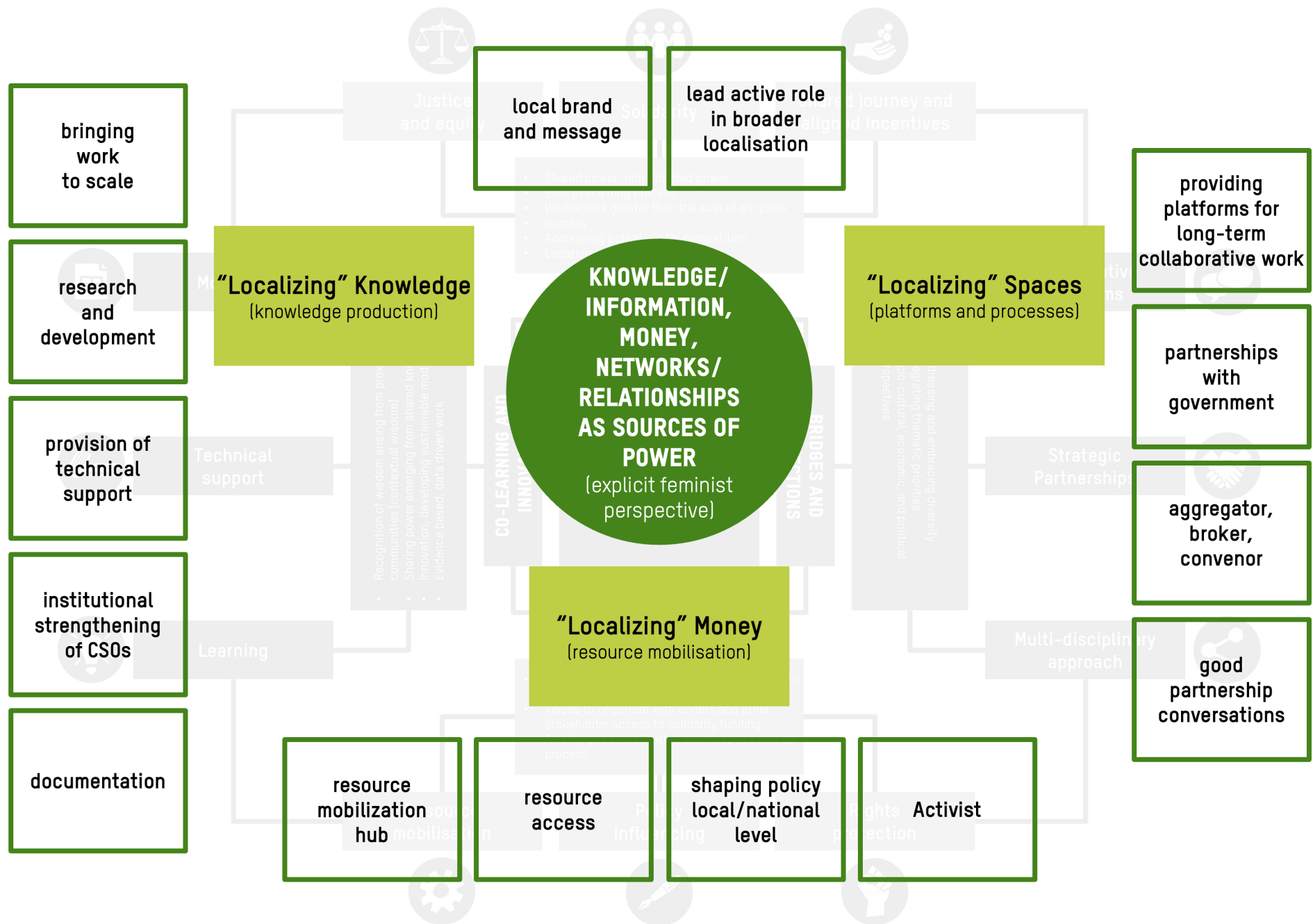These are illustrated in the following figure:

Figure 2: Strategic localization foci and foundation

The diagram contains the following text elements:

Central circle:
KNOWLEDGE/ INFORMATION, MONEY, NETWORKS/ RELATIONSHIPS AS SOURCES OF POWER (explicit feminist perspective)

Green highlighted labels:
- "Localizing" Knowledge (knowledge production)
- "Localizing" Spaces (platforms and processes)
- "Localizing" Money (resource mobilisation)

Left-side boxes:
- bringing work to scale
- research and development
- provision of technical support
- institutional strengthening of CSOs
- documentation

Top boxes:
- local brand and message
- lead active role in broader localisation

Right-side boxes:
- providing platforms for long-term collaborative work
- partnerships with government
- aggregator, broker, convenor
- good partnership conversations

Bottom boxes:
- resource mobilization hub
- resource access
- shaping policy local/national level
- Activist

3.2.1. Localizing knowledge

The change we want to see:

Oxfam Pilipinas and partners want to see local actors, primarily those at the base community level, more substantively involved and represented in mechanisms and processes of knowledge creation, diffusion and articulation, in ways that support their overall struggle for justice and wellbeing.

Pathways to achieving the change we want to see:

- *Participation and representation*
  - Strategic and practical learning agenda developed with local actors – assessing learning and knowledge gaps, resource requirements, mechanisms; relevance to local actors; defining scope of learning and knowledge management
  - Communities as primary learners and knowledge owners, ensuring they benefit from learning and knowledge processes and mechanisms
  - Local knowledge management and learning mechanisms
  - Role and participation of other development organizations, including international actors and not limited to Oxfam International; reaching out beyond/outside the organization's "echo" chambers

- *Accessibility and accountability*
  - Knowledge products and dissemination strategies in language and format that are more diverse and accessible to communities
  - Balancing accuracy and simplicity
  - Deep and expanded pool of spokespersons, particularly women and community representatives
  - Accountability of knowledge workers and managers should primarily be to local actors
  - Generation and utilization of community indicators to assess knowledge and learning initiatives

- *Sources, pedagogy, and learning strategies*
  - Knowledge emerging "in" project, not just "end" project, grounding knowledge and learning initiatives and mechanisms in appropriate local programming work
  - Inter-community learning and exchange plus documentation

3.2.2. Localizing spaces

The change we want to see:

We want to see more presence and/or solid representation of local community actors in spaces of discourse, debate, contestation and decision-making that contribute to their struggles for justice and wellbeing.

Pathways to the change we want to see:

- *"Occupy" existing spaces*
  - Expansion of membership to local partners within existing spaces and networks
  - Include local CSOs in relevant global networks
  - Expanded partnerships, especially in spaces where presence and participation of local actors and communities are narrow or limited
  - Mainstreaming spaces and opportunities in all levels of bureaucratic engagement

- *Opening new collaborative, inclusive, and safe spaces to promote innovation*
  - Promoting spaces to further influence and intensify advocacies and campaigns
  - Innovate and/or enhance existing platforms for learning, capacity building, and collaborative work

- *Support enabling initiatives*
  - Invest in mutual capacity development of Oxfam Pilipinas and partners, especially including local community leaders, around key areas of collaborative work (e.g., strategic negotiation, policy development)
  - Conduct regular partner convening
  - Ensure measures are based on data/evidence, i.e., mapping existing partners' capacities and expertise, regular updating of partners databases

3.2.3. Localizing money

The change we want to see:

We want to see a national funding architecture that facilitates greater access by local actors to official development funds, solidarity money, and corporate private sector financial resources in ways that put real decision making and hard cash in the hands of local actors to robustly support their struggles for justice and wellbeing.

Pathways to the change we want to see:

- *Official development funding*
  - Grow and diversify official development revenue streams/sources
  - Expand accessibility by local organizations, advocate for financing processes and mechanisms that do not discriminate against small local organizations

- *Corporate private sector, local resource mobilization*
  - Integrate resource mobilization in private sector engagement strategy
  - Review funding strategy using the rubrics of corporate social responsibility, tax/fiscal justice, role and responsibility of private foundations/philanthropies

- *Solidarity funding*
  - Work for allocating more resources mobilized from solidarity relationships (i.e., from other Oxfam International affiliates) towards local actors

3.3. Strategic foundation – strategic partnerships, shared leadership and shared risks

Shared localization agenda is founded on strategic partnerships in its many permutations (and implied shared leadership and shared risks) forged through the years between Oxfam Pilipinas and its partners in the Philippines.

3.4.1. Open and accountable strategic partnerships

Oxfam Pilipinas and their partners will continue their current strategic partnership model, i.e., open and accountable partnerships, albeit with some improvements as recommended in the strategic partnership model review in 2023.

In the foreseeable future, there are a number of additional partnership challenges that may include the following:

- The need to constantly revisit and refresh mutual partnership expectations, especially as Oxfam Pilipinas' programming and ways of working evolve as a result of its continuing transformation journey. It will require the continuation of what Oxfam Pilipinas and their partners refer to as "good partnership conversations"

- The need to work out the practical implications of Oxfam Pilipinas localization journey, addressing potential or emergent misalignments between Oxfam Pilipinas and partners' perceptions and expectations of open and accountable partnerships
- The need to deepen partnerships with government agencies and entities to enhance transparency and coordination and therefore avoid duplication and fragmentation of efforts

3.4.2. Shared leadership

The localization journey, inclusive of Oxfam's particular localization transformation demands agility and an unyielding commitment to change, with the appropriate patience and understanding necessary to navigate complexities and uncertainties. Shared leadership requires Oxfam Pilipinas and partners to constantly work out what power sharing will look like in different circumstances.

A number of shared leadership elements were proposed by Oxfam Pilipinas including the following:

- A feminist and consultative leadership approach is fundamental, placing high value on transparency, inclusivity and collaboration with staff and partners, boldly guiding and effectively engaging participants through critical change and transitions.
- Leadership means a commitment to continually explore innovative strategies and initiatives for localization, a clear articulation of Oxfam Pilipinas' commitment to the localization agenda and its role as committed ally to peer and partner organizations and communities.
- Leadership encourages collaboration and forward thinking as Oxfam Pilipinas continues to seek relevance in a constantly changing/evolving world.

Shared leadership also requires the recognition of the implications on Oxfam Pilipinas' organization of its shared localization vision, strategic priorities and pathways, including the following:

- Continuing investment—in terms of time, effort and financial resources—in collective learning and capacity development, including crafting a strategic learning agenda, which is a collective responsibility and accountability
- Continuing investment in the institutionalization of learning, including the conduct of regular assessment of progress
- Deploying resources, especially funds and personnel, in developing and nurturing robust community level mechanisms and processes for learning, knowledge creation and articulation
- Readiness to accept potential resource impacts of the organization's advocacies regarding enhanced local funding and restructuring the funding architecture in the Philippines as well as openness to negotiate and navigate uncertainties that may emerge in the course of pursuing these advocacies, including potential competition over resources and the need for principled and strategic negotiations

3.4.3. Shared risks

Oxfam Pilipinas and partners also need to continue to identify and address different kinds of risks—both persistent (e.g., red tagging) and novel (collective implications of internal Oxfam Pilipinas risks such as loss of staff, short-termism in program and project work, potential dip in funding resources, etc.).

Given that Oxfam Pilipinas has well-established partners, risks can be mitigated. However, there needs to be clarity on who bears the risks especially vis-à-vis financial accountability.

IMPLICATIONS AND CHALLENGES FOR OXFAM PILIPINAS

4.1. Identity, unique contribution

Oxfam Pilipinas is a national organization with a programmatic footprint in the Philippines and a global reach as a member of Oxfam International. Oxfam Pilipinas envisions a just, inclusive, and sustainable society without poverty, where citizens enjoy their rights and are empowered to influence decisions that affect them. The organization commits to be a transformative, innovative, and accountable part of Philippine civil society working for genuinely locally led, feminist, and decolonized developed in the country.

Building and learning from experience, Oxfam Pilipinas will continue to forge partnerships and build on its strengths to co-create and support innovative, empowering, and sustainable solutions, challenge and transform governance and influence decision-makers towards the empowerment of marginalised and vulnerable groups and the promotion of resilience, gender justice, and humanitarian action.

As an activist organization, Oxfam Pilipinas commits to fight inequality, amplifying through campaigns the voices of the marginalised and vulnerable, particularly of women, girls, and people of diverse Sexual Orientation, Gender Identity Expression (SOGIE). It will promote active citizenship to help ensure that citizens can demand accountability from duty-bearers.

Oxfam Pilipinas will continue to work with and enhance the capabilities of communities and the organizations that represent them. This will include a constant role oof providing high quality technical and non-technical assistance to these organizations.

Its affiliation with Oxfam International confers on Oxfam Pilipinas an advantage and at the same time a tremendous responsibility, in terms of resources, relationships and power emanating from the Oxfam brand. The localization agenda includes international dimensions, i.e., being effective globally and harnessing global resources to serve local objectives. Localization does not mean becoming development hermits.

4.2. Organizational core competencies

In order to sharpen its identity and enhance its unique contribution to the collective localization struggle, Oxfam Pilipinas needs to strengthen its organizational core competencies in the manner and direction that allows the organization to contribute more robustly and responsibly as part of the Philippine progressive civil society to the shared localization vision, strategic foci, and pathways.

- *Strategic sensing, seeing around corners*
  - Building organizational capacity for strategic sensing – anticipating disruptive and inflection points in the development and humanitarian sector and beyond, to feed Oxfam Pilipinas' innovative capacity
  - More sustained/regular sense-making with program teams, strategic partners, communities, and other relevant development actors

- *Idea entrepreneurship and scaled up innovation*
    - Idea entrepreneur, voice amplifier and aggregator for scaling up innovative initiatives
    - Effectively managing decentralized sustained, incremental, and breakthrough innovations, moving resources directly to where they are needed for knowledge creation

- *Building bridges, nurturing productive and liberating spaces*
    - Building bridges, connections and engagements beyond current "development" and "humanitarian" circles, driven by a way of thinking outside of silos, boxes and "industries"
    - Clear positioning on national issues
    - Collaborative approach and strategic partnerships
    - Systems thinking and approach - connecting various elements of development and humanitarian dimensions, working to address root causes of poverty and inequality and bringing about systemic change

- *Agile and adaptive leadership role*
    - "Sliding role" as a "local leader": Oxfam Pilipinas recognizes that it has to be agile and wise (strategic sensing, emergent perspective) enough to play different leadership roles, that will differ according to issue, time, and context, always in negotiation with strategic partners in the following manner:
        - Leading from the front – pulling others
        - Leading side by side – collaborative advantage
        - Leading from behind – pushing and letting go
    - Leadership means the courage to embrace the possibility of Oxfam Pilipinas' potential obsolescence in the pursuit of a more genuine localized and community-driven change agenda

- *Organizational resilience*
    - Internal capacity to shift and transform ways of working in a timely and appropriate manner – partnerships, resources, engagements (e.g., partners paying for Oxfam Pilipinas participation and services)
    - Imposed irrelevance or planned obsolescence – Oxfam Pilipinas needs to keep itself relevant and maintain its standards and reputation
    - Being aware of how "business as usual" look like

4.3. Operating model

Oxfam Pilipinas' commitment to localization, as a national organization, will have implications on the way they work, inclusive of internal organizational policies and external dimensions (programming, operations), and how Oxfam Pilipinas is structured. Some of these will be obvious and straightforward; others will be more emergent and unpredictable and can only be dealt with incrementally.

- *Organizational form and structure*
    - Reimagining organizational form and structure is critical, as much as ascertaining cost of doing business (including transitional arrangements)
    - Administrative and transition costs – new operating procedures, governance structures, bank accounts, branding, etc

- *People and culture*
    - Time and personnel implications for both Oxfam Pilipinas and partners
    - People and culture – attract, retain and motivate the best talents to reach their full potential in their organization; a balanced work ethic where staff wellbeing is deemed as important as productivity

- *Operating systems*
  - Due diligence – simplification of systems particularly in terms of due diligence and other compliance systems vis-à-vis partners; in what way will localization simplify or complicate systems
  - Distributed and shared knowledge management system – investment in designing and operationalizing such system, including at the community level (supporting communities in knowledge creation and dissemination of their stories)
    - Knowledge management within Oxfam Pilipinas – knowledge management as a distributed concern/expertise across Oxfam Pilipinas
    - Oxfam Pilipinas technical competencies and services – Oxfam Pilipinas is still a key source of knowledge and expertise for many organizations (including non-partners); can local/national (and even international) CSOs access our resources and services in novel ways?
    - Integrating Oxfam International learning agenda around four Transformative Systems Change (TSC) areas
    - Investing in institutionalization of learning (e.g., handbooks, modules, ordinances) and regular assessment of progress
  - Resource mobilization system
    - Exploring new transformational strategies (led by fundraising team)
    - Redefining Oxfam Pilipinas' role as a campaign organization focused on the calls for fiscal/tax justice, accountable governance, corporate social accountability (rather than being a development or humanitarian organization)
  - Housekeeping initiatives such as updated partners' database and operational audit

- *Costs and sustainability*
  - Cost sustainability – How does Oxfam Pilipinas remain sustainable with given resources? How does Oxfam Pilipinas ensure sustainability without compromising their partnerships, given for example that centralization and coordination work requires resources
  - Resource strategy – income/revenue projection
  - Vis-à-vis partners – complementation (How does Oxfam Pilipinas ensure that it effectively shares power and resources with partners? How does Oxfam Pilipinas ensure that there is no competition over resources?)
  - Vis-à-vis Oxfam International – Oxfam Pilipinas needs to advocate more strongly for equitable resource allocation (e.g., not automatic 50-50 ICR); ICR allocation review (accessibility, eligibility, risk, etc.); review "home donor" rule

- *In-country affiliations and representation*
  - How will Oxfam Pilipinas manage their seats in "international spaces" such as PINGON and HCT? Will other INGOs still consider Oxfam Pilipinas peers and how does Oxfam Pilipinas actually influence them?
  - How much can Oxfam Pilipinas do to influence or change structures, mechanisms and practices of the aid system? Oxfam Pilipinas should serve as a powerful and effective localization example for other INGOs by, among others, simplifying burdensome administrative and compliance requirements that constrain the work of local organizations

- *Strategic communication*
  - Strategic communications strategy that will inform internal and external stakeholders about the shift/transition of Oxfam Pilipinas (highlighting differences in ways of working).

*"Localization begins to feel like a loose thread.
Once you start pulling, you quickly find yourself tangled up in a fabric…
in which fixing one thing seems to require fixing lots of other things too."*

(DevEx Newswire, 22 February 2024)

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ANNEXES

ANNEX 1: THE LOCALIZATION STUDY

Oxfam Pilipinas has recently become a national affiliate of Oxfam International. In light of this development, Oxfam Pilipinas initiated a localization study whose primary aim is to develop a strategic and practical agenda for enhancing and strengthening its role in accelerating and scaling up the ongoing development and humanitarian localization process in the Philippines.
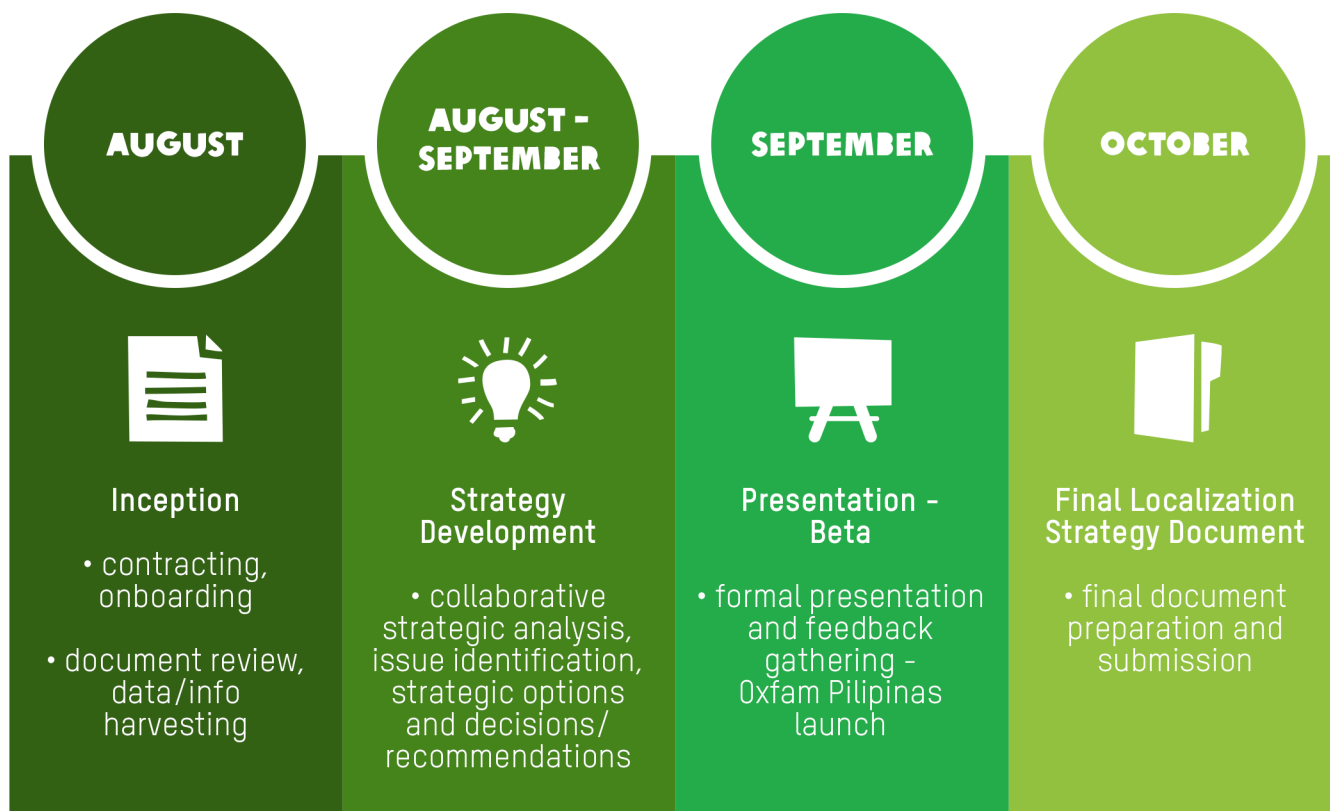
The study has the following specific objectives:

1. Examine key elements in the local contexts, characteristics and practices of program partners and Oxfam Pilipinas that help define and/or influence their understanding of the concept, principles and operationalization of localization and local leadership.

2. Determine both real and perceived immediate challenges and opportunities in pursuing more locally led development and humanitarian interventions in the current Philippine context, and how these can inform innovative, meaningful and effective solutions.

3. Capture emergent insights around key considerations, specific ways forward, and/or contingent formulations in line with defining roles, functions and value-added of Oxfam Pilipinas as a country affiliate, particularly along the following areas and concerns:

   • Strategic partnerships as a continuing model for collaboration on common goals – specifically touching on issues of resource sharing, sustaining partners' and local actors' capacity building, and striving for more holistic relationships with partners.
   • Amplifying the voices and actions of women, young people and other marginalized groups, building their capacities to organize and link up at various levels with other groups, and enabling them to protect democratic spaces and resist injustices.
   • Nurturing organizational cultures that foster courage to speak up in clearer, bolder and more activist voice, especially in campaigning and influencing work, cognizant that the commitment such value engenders is at the heart of meaningful change.
   • Positioning the program partners and Oxfam Pilipinas as active learning hubs and communities of practice for focus thematic areas and/or issues, actively generating and sharing knowledge while promoting diversity in thought, reflection and practice.
   • Oxfam Pilipinas adding to the ranks of country affiliates from the Global South within the Oxfam confederation and strengthening the push for recognition of inequalities between the Global North and Global South NGOs and for concrete actions to shift away from mindsets, structures and practices that perpetuate such inequalities.

4. Inform the on-going transition of Oxfam Pilipinas within the global Oxfam confederation and the local development and humanitarian contexts, towards becoming a national-level organization that strengthens local ownership of programs, enables and elevates local voices, and holds global actors accountable for their localization commitments.

The study is expected to encompass three interconnected dimensions, i.e.,

• Strategic and practical imperatives guiding Oxfam Pilipinas as it progresses on its own localization journey as a southern affiliate of Oxfam International.
• Policy and practice considerations for its strategic partnerships, which are pivotal components of localization and the promotion of local leadership.
• Strategic avenues for advancing encouraging advancements that are already underway within the broader humanitarian and development system in the Philippines and beyond.

In sum, the study is expected to cover a wide range of relevant themes including: (a) understanding of the concept, principles, and operationalization of localization and local leadership, (b) challenges and opportunities in pursuing more locally led development and humanitarian work, (c) the place of women's rights organizations and people's organizations in the localization agenda, (d) organizational cultures that encourage bolder activist voices, (e) learning hubs that continually emerge and harvest innovative practice and knowledge that strengthen localization processes, (f) organizational adjustments that are required of Oxfam Pilipinas as an Oxfam International southern affiliate that more strongly supports localization and local leadership, and (g) interrogating and challenging current funding architecture/system.

The original study road map as proposed is:

AUGUST	AUGUST – SEPTEMBER	SEPTEMBER	OCTOBER
Inception	**Strategy Development**	**Presentation – Beta**	**Final Localization Strategy Document**
• contracting, onboarding • document review, data/info harvesting	• collaborative strategic analysis, issue identification, strategic options and decisions/ recommendations	• formal presentation and feedback gathering - Oxfam Pilipinas launch	• final document preparation and submission

For the study, a core discussion group was formed together with a few strategic partners, peers, and donor organizations who were invited to provide inputs during the inception phase that would confirm the relevance and focus of the proposed study. Post-inception, they were expected to serve as the main reference group to confirm and critique results at key points of the study.

Within Oxfam Pilipinas, the study was anchored by a small core group including the executive director, strategic management team members, and the project coordinator for the study.

The 04 December 2023 meeting

The 04 December meeting was a critical one with the main objective being to agree on the specific elements of the strategic agenda and operational priorities to respond to the earlier mentioned localization concerns for the period 2024-2027, representing the remainder of the current OPH strategic plan.

The December meeting was attended by those who were present in the 03 October 2023 internal OPH face-to-face meeting in order to have some continuity in the discussions.
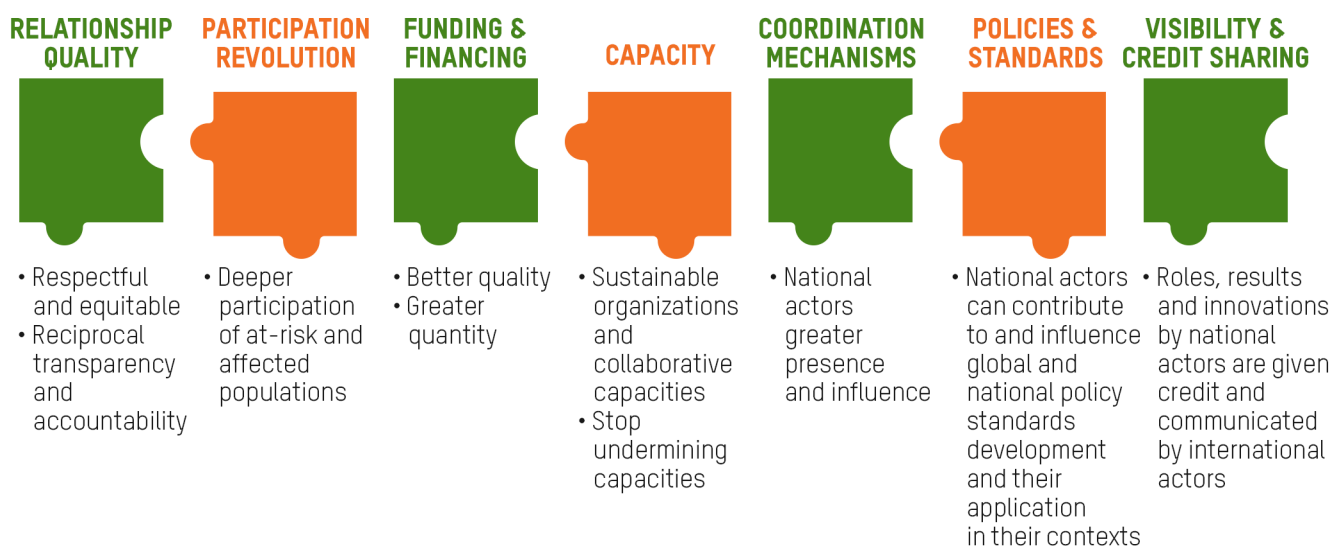
The results of the December meeting were shared on the first day of the OPH mid-year assessment meeting on 05 December 2023. In effect, the localization strategic agenda and operational priorities were expected to inform a strategy review/refresh as OPH moves into the mid-point of the current strategic plan.

ANNEX 2: RELEVANT IDEAS ON LOCALIZATION

Conceptions of "localization" (ODI)

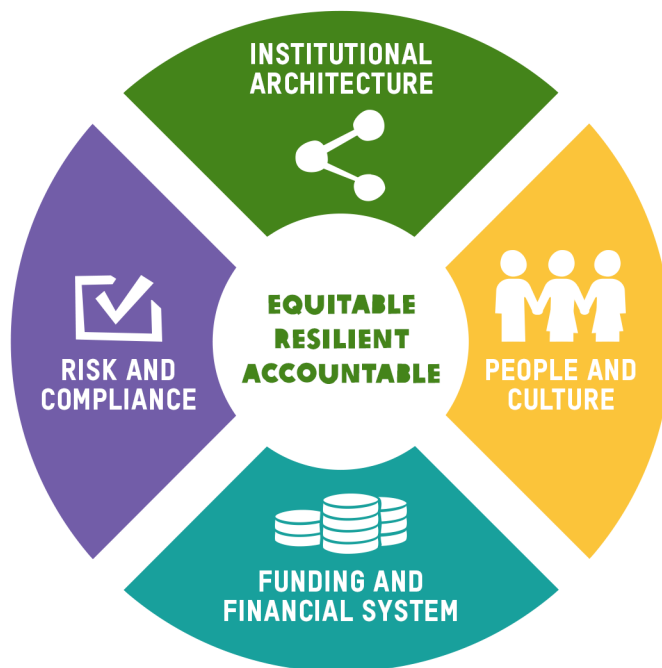| Type of model/approach	Definition of 'local'
Global South movements, networks and funds	• Communities across the Global South • Community-led organizations • Community foundations • Community and other proximate leaders • Local and national civil society organizations in the Global South
North to South funds and funding mechanisms	• Grassroots actors and movements • Local and national organizations based in the Global South • Representatives from Global South country governments • Private sector representatives from the Global South • Organizations rooted in the communities they serve
Global networks	• Local and regional governments across the Global South and North • Community-based organizations • Social entrepreneurs and innovators across Global South and North • Local leadership within developing contexts
Policy frameworks and initiatives	• Local and national non-state actors (headquartered in their own aid-recipient countries, not affiliated to an international NGO) • National and sub-national state actors (state authorities in aid-recipient countries at local or national level) • Local and national organizations from the Global South
Practical and measurement tools	• Local and national organizations from the Global South • Civil society organizations in the Global South • Community-led organizations in the Global South • Global South organizations and partners

Dimensions of localization (Global Mentoring Initiative, DEPP)[1]

RELATIONSHIP QUALITY	PARTICIPATION REVOLUTION	FUNDING & FINANCING	CAPACITY	COORDINATION MECHANISMS	POLICIES & STANDARDS	VISIBILITY & CREDIT SHARING
• Respectful and equitable • Reciprocal transparency and accountability	• Deeper participation of at-risk and affected populations	• Better quality • Greater quantity	• Sustainable organizations and collaborative capacities • Stop undermining capacities	• National actors greater presence and influence	• National actors can contribute to and influence global and national policy standards development and their application in their contexts	• Roles, results and innovations by national actors are given credit and communicated by international actors

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[1] Many humanitarian actors and organizations use this framework to assess localization progress.

Leader perspective on locally-led development (NNGO voices, Humentum, June 2023)

Governance and leadership are key to NNGOs leading and exercising autonomy. Given that these are both strategic parts of NNGO operating models, efforts should focus on creating more autonomy for NNGOS to lead the locally-driven development agenda.

INSTITUTIONAL ARCHITECTURE

EQUITABLE RESILIENT ACCOUNTABLE

RISK AND COMPLIANCE

PEOPLE AND CULTURE

FUNDING AND FINANCIAL SYSTEM

The operational context of NNGOs is restrictive, with many administrative and regulatory requirements meant to curtaill operations and autonomy. Government policy affects the NNGO operating environment and inhibits organizational autonomy and focus on strategic issues.

People capacity is a strategic lever of change. The work that NNGOs undertake depends on their human resource capacity, which has been adversely affected by limited funding and inadequate coverage of operational costs.

Funding access and conditionalities do not support equitable and locally-driven development. In fact, they adversely affect the autonomy and operational capacity of NNGOs.

ANNEX 3: INCEPTION DISCUSSION – PARTNERS CORE DISCUSSION GROUP

Inception Questions
- What is your primary reflection, insight, or question in response to the overview slide deck?
- If we aim for the Oxfam Pilipinas localization study to be relevant and value-adding (in terms of systemic change and practical action), on which two topics/themes should we focus (based on topics/themes mentioned in the overview slide deck)? What topic should we avoid spending time discussing?
- What localization initiative in the Philippines are you familiar with or involved in that has the potential to be a game-changer in terms of systemic change?

Informants	Insight, question based on overview slides	Areas to be prioritised for discussion	Areas that do not need to be discussed	Significant Initiative
Informant 1	What is OP's own definition of localization?	• Power structures inherent in colonial structures and how to address • How Oxfam deals with colonial donor demands		
Informant 2	Comprehensive data useful/critical in assisting the process	• They are all important, but prioritise slides 7, 10, and 11		• Engagement with LGU
Informant 3	How the study can shed a light on how Oxfam transitions in an innovative way, supporting ideation and learning hubs	• What is OP value-addition as national NGO • Place of Oxfam in the funding space, how will Oxfam behave		
Informant 4		• A need for broader and in-depth study of localization and local leadership among OP partners • Levelling off among partners on the implication of localization and local leadership • What is the right timing for localization when there are global crises		
Informant 5	Still largely humanitarian; what has Oxfam learned from the SPM study re its identity	• The place of WROs and POs in the localization agenda • Interrogating and challenging current funding architecture/mechanism		• Oxfam Emergency Response Fund • Anticipatory Action
Informant 6	Usefulness of processes between donor and OP - how local processes are implemented	• Oxfam niche • Visibility and credit sharing	• Overlaps, politics	

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