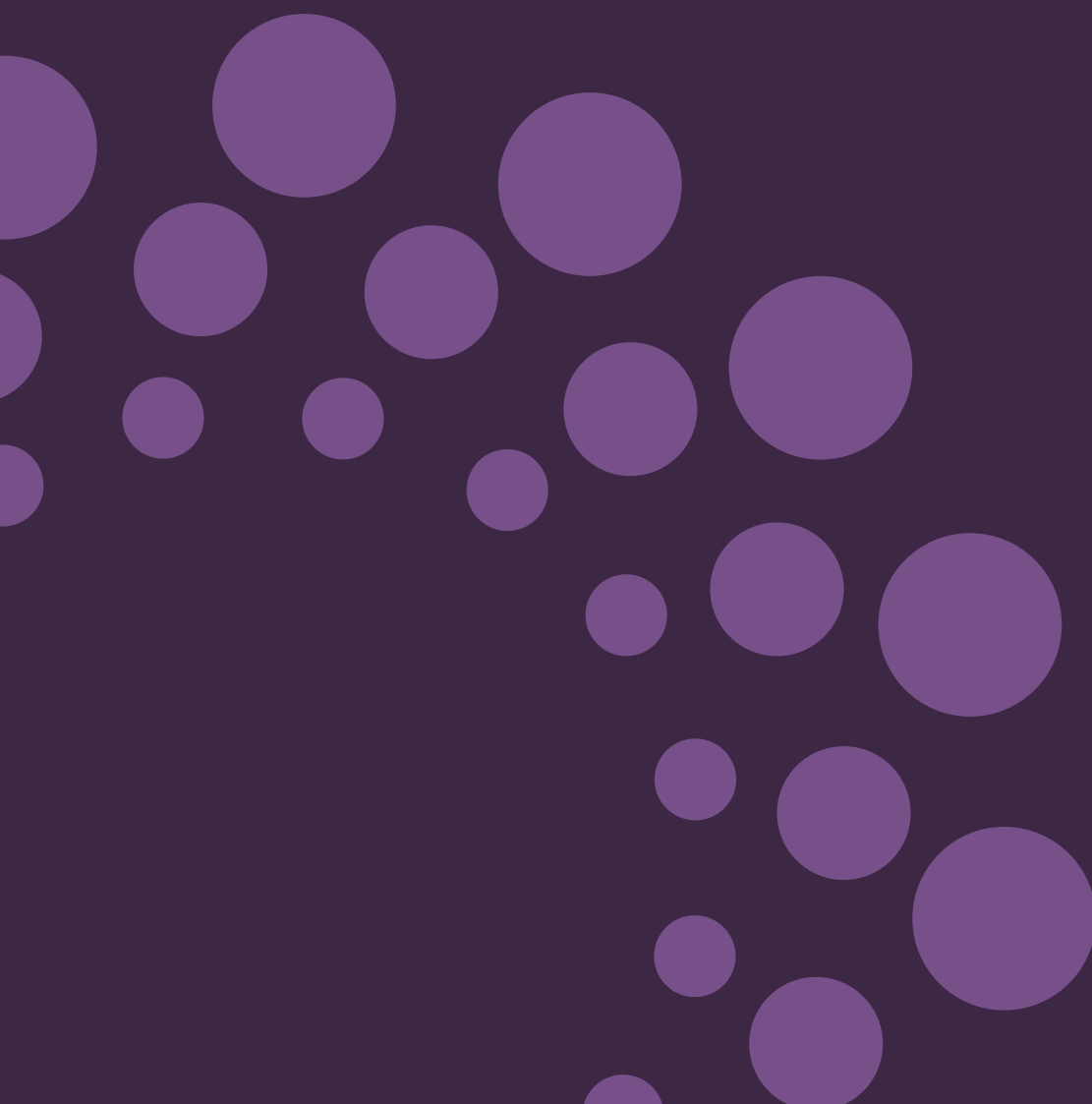

Report

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Landscape Analysis of Civil Society Support Ecosystems in Brazil, Colombia, Mexico, China and Japan



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1. Consolidated summary

This report examines the strengths and challenges of the ecosystem of support for civil society organizations (CSOs) in **Brazil, Colombia, Mexico, China and Japan**. It provides a high-level analysis of the **development needs of CSOs**, their access to support and the relevant factors of their operating context, and **understanding of the support ecosystem**, how it responds to CSO demand and needs, and how it is sustained and resourced.

The findings and recommendations of this analysis are aimed at donors and practitioners interested in investing and working in these civil society support ecosystems, that can be used to inform approaches within such dynamic contexts in the immediate and longer term. The report also highlights actors who play a key role in the civil society support ecosystem, who could be important partners for immediate follow-on work or investment.

Section 1 of this report provides a consolidated summary of findings and recommendations across and within countries. Section 2 provides detailed findings and recommendations for each country.

Understanding civil society support ecosystems

Strong, dynamic civil society support ecosystems can support CSOs to increase their impact and play an essential role in societal advancement. A civil society support ecosystem may also be termed as its infrastructure. Consultants, intermediary or infrastructure organizations, re-grantors, and a host of other actors have an important role to play in the ecosystem. We have defined infrastructure actors as those who *work with CSOs to help them find solutions to their Organizational Development (OD) challenges*.

Healthy ecosystems have a balance between demand for services and supply of quality services, where there is awareness of and equal access to infrastructure actors and appropriate support and an enabling environment for these actors. A key part of the support ecosystem is its consultancy market. Alongside the contextual dynamics influencing supply and demand across the support ecosystem, this report also explores the challenges, needs, and realities for independent, local consultants.

There is increasing understanding of the importance of approaches and support that are rooted in local culture, practice, and knowledge, with appropriate and ethical ways to connect and engage across regions and globally. Such conditions are another indicator of healthy support ecosystems that are more resilient to internal and external shocks and that have more equitable power balances between different actors and across regions.

Approach

This analysis is based on a literature review and 117 key informant interviews with CSOs, consultants, intermediary and infrastructure organizations and others across the five countries. These fed into country level reports and case studies, that were synthesized in this analysis.

The following learning questions framed the approach:

CSO needs, access to support, and operating environment

- What are the main issues that CSOs face in sustaining and developing their organizations and in pursuing their missions?
- How do CSOs seek to develop themselves currently?
- What are the key external trends affecting CSOs and their ability to find solutions to and support for their OD challenges?

The ecosystem of support

- What kinds of support exist for strengthening CSOs?
- Does the supply meet the demands of CSOs' needs? If not, what are the gaps in this support?
- Is the support available both accessible and of high quality?
- How would you describe the market for local consultancy support for OD provision to CSOs? What are the opportunities for consultants to develop their skills, connect with other consultants or networks, and have a collective voice?
- How is OD and strengthening resourced and by whom?

Our country leads provided sampling and scoping strategies that responded to the unique country contexts, ensuring diverse actors and regions were included. Nevertheless, the exercise was constrained by time and resources meaning the analysis reflects a limited set of viewpoints and may under-reflect the perspectives of those working more informally, in the most remote areas or specific niches.

Key findings and recommendations across countries

CSO needs, access to support and operating environment

Across multiple countries, civil society organizations (CSOs) play a unique and essential role within society. Their understanding of the local context and often closer proximity to communities affected by the issues they are tackling, enable them to play an impactful role in bringing about change. Yet they share common struggles related to funding, leadership, and OD. Many smaller and rural CSOs face significant resource constraints, relying heavily on short-term project funding that limits their capacity for long-term planning and sustainability. Many are informal, which, while enabling dynamic and creative solutions to issues they are addressing, also leads to difficulties in attracting funding or professional staff. Larger, urban-based CSOs tend to have better access to financial resources, professional development, and training opportunities, yet even these organizations often grapple with shifting donor priorities, external pressures, and mission drift.

A recurring theme across regions is the need for innovation in advocacy, leadership development, and strategic planning. In some areas, CSOs are struggling to stay relevant amidst political polarization, economic constraints, and growing competition from other sectors such as corporate-led social initiatives and impact investing. Furthermore, leadership deficits contribute to a lack of vision and strategic direction, particularly in organizations run by founders or long-time leaders who are less adept at supporting the organization to grow and evolve. Many CSOs also struggle with navigating complex funding landscapes, where donor demands and shifting political environments pose continual challenges. Ultimately, there is a pressing need for more flexible, long-term funding models, better access to training and capacity-building, and stronger networks to foster collaboration and resilience within the sector.

The support ecosystem

Across various countries, there is a shared trend of fragmented support ecosystems for CSOs, with significant gaps in accessibility and effectiveness. In many cases, support is concentrated in urban areas, leaving rural or smaller organizations underserved, particularly in terms of tailored, flexible, and localized assistance. This issue is compounded by the limited availability of long-term funding, reliance on short-term project-based grants, and a lack of coordination among key actors such as government bodies, international organizations, and local intermediaries. Furthermore, there is often a disconnect between the methodologies used by support organizations and the unique needs of CSOs, which can undermine the relevance and impact of the assistance provided. Challenges also include a lack of integration of local knowledge and a failure to consider socio-cultural contexts in support services.

Additionally, many countries face common issues related to the underdevelopment of local consultancy markets and the insufficient professionalization of consultants. While, in countries like Brazil, there is an emerging generation of local consultants, particularly from marginalized communities, many struggle with limited access to training, mentorship, and networking opportunities, which stifles their professional growth. Furthermore, the sector often relies on international consultants, whose approaches may not align with local contexts. This issue is particularly pronounced in countries like Mexico, Brazil, and China, where the lack of coordinated support networks and the dominance of technical models hinder the sustainability and effectiveness of consultancy services. In some cases, there is also a growing recognition of the need for more flexible funding models, peer learning, and community-driven solutions to address these systemic challenges and foster more inclusive, transformative social change.

Below we provide a summary of the key findings across the five countries. These are accompanied by recommendations for a general, longer-term approach and more immediate actions that could be taken forward in a follow-on, phase 2.

Factors shaping the landscape

Short-term and project-based funding predominates and restricts CSOs' ability to invest in longer-term OD. However, some funders offer more flexible support, and this allows organizations to allocate resources for OD.

- *General Recommendation: Flexible funding approaches of Ford, Oak etc. should be seen as gold standard*
- *Recommendation for Phase 2: Explore how nontraditional funders (Environmental, Social and Governance [ESG], private) can meet the need for more flexible support*

In some contexts, **aging leadership** within civil society (sometimes combined with top-down approaches) is felt to be a barrier to innovation in civil society as well as the support ecosystem.

- *Recommendation for Phase 2: Look in more depth at needs of nascent "startup" or youth-led organizations*

In some contexts, CSOs struggle to access **human resources with the skills** they need, due to resource pressures and competition with the private sector.

- *General Recommendation: Structured professional development offers are needed to build skills within organizations that cannot compete for them*
- *Recommendation for Phase 2: Understand the professional development needs and what realistic offers entail within these specific contexts*

Shrinking civic space places demands on CSO leaders to steer their organizations through complex environments, and undertake strategic advocacy for their own organizations and the wider sector, but they often lack support to do so

- *Recommendation for Phase 2: Understand the nature of demand for advocacy support and challenges in accessing support*

Access to support

While CSOs have many *needs*, funding and other pressures mean that they cannot translate these into *demand* for capacity development services. As a result of weak demand, the **supply of formal capacity development within the ecosystem tends to be fragmented and fragile.**

- *General Recommendation: Support to coordinate and strengthen supply of support and OD services is required as well as stimulating CSOs to translate needs into demand*

As a result of resource constraints, **funders and re-grantors are critical players** in shaping the ecosystem of support for civil society. In countries like Colombia and Mexico, re-grantors, or intermediary organisations, have become a conduit between grantees and relevant and vetted support providers.

- *Recommendation for Phase 2: Explore how funders, re-grantors and intermediaries have and can positively shape access to support*

Ecosystems of support are generally concentrated in urban centers, where larger and better-known organizations are based, resulting in **disparities in access to support, particularly an urban-rural divide.**

- *Recommendation for Phase 2: Explore how disparities in support can be bridged, emphasizing the specific support needs of rural and less well served CSOs*

Funding modalities incentivize **competition, rather than collaboration** within civil society, limiting the possibilities for CSOs to provide mutual support.

- *General Recommendation: Prioritize modalities that promote cooperation between civil society actors*
- *Recommendation for Phase 2: Explore cohort approaches to OD in more depth*

Needs of civil society

Leadership development is a particular need for many CSOs and is not well served by current ecosystems of support.

- *Recommendation for Phase 2: Understand the leadership needs in greater depth and whether there are opportunities and desire to expand the range of leadership development offers (mentorship, peer, networking, etc.)*

Funding and political pressures incentivize short-term planning for survival, and constrain CSOs to a service provision role, such that **CSOs struggle to engage in strategic planning for long-term goals and to mobilize resources to achieve them.**

- *Recommendation for Phase 2: Understand the strategic planning, resource mobilization needs in greater depth and whether there are opportunities and desire to expand the range of OD and professional development offers*

Shrinking civic space in many contexts creates a need for skills to navigate political and regulatory environments and use advocacy strategically (see above).

- *Recommendation for Phase 2: Understand the advocacy needs in greater depth and whether there are opportunities and desire to expand the range of OD and professional development offers*

Opportunities

Informal networks, including volunteer-based models, provide significant support to civil society in some contexts, but are limited by a lack of visibility and sustained support.

- *Recommendation for Phase 2: Map these in more detail and understand learning and support needs in greater depth*

Technology is enabling support to be provided at a lower cost, and to organizations outside of large urban centers in some contexts and there are also examples of scalable and self-replicable models being used to meet needs at lower cost.

- *Recommendation for Phase 2: Explore “frugal” approach to capacity development that can widen access to support and utilize new technologies*

There is a desire to **re-orient support and capacity strengthening to better account for local knowledge and approaches**, which have been undervalued in ecosystems of support where western funding and partnerships have been dominant (whereas in Japan the opposite is the case). Often classism and racism also crowd out local and indigenous knowledge.

- *Recommendation for Phase 2: Identify and learn from support modalities (formal and informal) that promote local knowledge*

Innovative funding models such as community philanthropy are emerging in some contexts and may provide platforms for more equitable and locally responsive markets for support.

- *Recommendation for Phase 2: Map these in more detail and understand their relationship to market dynamics (supply and demand) within specific support ecosystems*

Key findings and recommendations at country level

Below we provide a summary of strengths, weaknesses and recommendations at the country level, along with key partners who could play an important role in a follow on, phase 2. More detail is provided in section 2.

Brazil
Strengths: Diverse range of support actors and increasing diversity in the consultancy market, alongside a growing role of Brazilian philanthropic institutions and intermediary organizations. There is an established ecosystem of training and capacity-building organizations and emerging collaborative initiatives, including South-South exchange opportunities.
Challenges: Fragmented support structures, inequitable resource distribution, and lack of systemic perspective and approaches to CSO development. The consulting market remains niche, with limited coordination.
Recommendations: <ul style="list-style-type: none">➤ Develop research and data on CSO support ecosystems and consultancy markets for CSOs, as well as funders and intermediaries.➤ Create spaces for exchange, collective learning, and professional development, through for example, community philanthropy funds.➤ Establish a learning community for consultants to share best practices.
Key partners: Rede Comuá, Abong, and Iniciativa Pipa

Colombia
Strengths: Colombia is seen as a regional hub for civil society development, with a diverse support landscape, opportunities for professionalization and specialization of local consultants (ex. diálogo de saberes – dialogue of knowledge), and potential for greater networking and collective action.
Challenges: Funding instability, complex procurement processes, and additional barriers for Indigenous and Afro-descendant CSOs.
Recommendations: <ul style="list-style-type: none"> ➤ Promote network-building and fair resource distribution. ➤ Strengthen leadership development and staff livelihoods. ➤ Support grassroots organizations through flexible, long-term funding. ➤ Increase flexible funding to strengthen CSOs and promote learning
Key partners: Civic House, Juntanza, and Civil Rights Defenders
Mexico
Strengths: Diverse support services are available, with effective existing cohort-based support (ex. Acento, Hispanics in Philanthropy, and FONNOR). Regranting organizations and local foundations simplify access to reliable quality OD providers, and there is a growing awareness of the need for tailored approaches that reflect the values and approaches of the organizations they support (anti-colonial, anti-patriarchal, anti-racist).
Challenges: Regulatory changes, a politically hostile environment, and financial constraints limit advocacy and OD.
Recommendations: <ul style="list-style-type: none"> ➤ Collect more information on ecosystem actors ➤ Improve information exchange among funders and intermediaries. ➤ Develop dynamic directories of support providers ➤ Partner with local funders to expand access to OD services for non-urban CSOs. ➤ Explore models to lower OD service costs and increase reach.
Key partners: Hispanics in Philanthropy and Centro de Colaboración Cívica.
China
Strengths: Diverse areas of support are provided, including organizational development and skills training. Innovative, scalable support models are developing and there are emerging philanthropy and funding innovations (SEE, Gingko, Narada).
Challenges: Government oversight, registration barriers, and declining donor support limit CSO operations. Resource scarcity and inadequate infrastructure exacerbate these issues.
Recommendations: <ul style="list-style-type: none"> ➤ Increase the visibility and understanding of available support ➤ Explore gaps in supply and approaches to meet demand, and monitoring to improve support quality ➤ Empower local actors to coordinate and nurture robust support ecosystems ➤ Engage innovative models, like volunteer-based assistance, and explore how support can further meet demand ➤ Explore global connections, with China-focused CSOs, identifying needs, support and networks

Key partners: SEE Foundation, A Better Community, Gong Yi Fang, Moderator, That Spark
Japan
Strengths: Provision of multi-level capacity strengthening (individual, organizational, and sector-wide). The funding landscape for OD is diversifying (corporates, foundations, government, dormant accounts). innovative initiatives like Trust-Based Philanthropy Japan Inc. are looking to transform and advance philanthropy and social investment.
Challenges: Aging leadership, stagnant funding, and limited access to OD consultants, especially outside urban centers.
Recommendations: <ul style="list-style-type: none"> ➤ Draw on global OD consultant training programs to create localised modules and establish a "Talent Bank" for certified trainers. ➤ Further research and advocate for unrestricted, flexible funding and trust-based philanthropy to support CSO sustainability. ➤ Promote agile approaches to organizational and individual growth, similar to social businesses, including support to younger generations who seek to innovate.
Key partners: The NPO Support Center, Trust Based Philanthropy Japan, Japan Fundraising Association, ETIC, Japan Climate Alliance.

2. Country level analysis

Brazil

CSO needs, access and operating environment

CSO Needs

CSOs in Brazil face diverse challenges based on size, location, and focus area. Smaller organizations, particularly in remote areas, experience significant resource constraints compared to larger urban-based entities. With 900,000 CSOs nationwide, 90% lack formal employment structures, and many struggle with sustainability due to limited access to funding and resources. With a 40% increase in CSOs over the past 15 years, competition for resources has intensified, especially for smaller organizations.

Main needs of Brazilian CSOs:

- **Funding Scarcity:** Most operate on limited budgets, often without formal structures, relying heavily on volunteers. Again, it is important to mention that formal and informal structures have their advantages and disadvantages.
- **Administrative and financial weaknesses:** Limited management capacity hinders access to funding.
- **Leadership and training deficits:** Few opportunities exist for leadership development, leaving many organizations without strategic or innovative capacity.
- **Lack of strategic culture:** Focus on survival and short-term goals limits reflective planning and innovation.
- **Well-being challenges:** Political polarization, COVID-19 impacts, and donor demands contribute to the tensions and difficulties arising from managing priorities amidst scarcity and uncertainty.
- **Communication gaps:** Weak communication strategies hinder public engagement and advocacy efforts.

- Need for advocacy innovation: Evolving political contexts demand new approaches to advocacy and networking.
- Territorial networks: Informal networks are locally-led and dynamic but some lack visibility and sustained support, despite their potential.
- Amazon-specific challenges: Organizations face violence and risks tied to environmental and human rights defense.

"One challenge is to keep institutions standing in the Amazon and people alive. Because we are talking about populations that are on the front lines of conflicts. So, there was a demand in this specific political context...and we had to look at institutional strengthening and security."

Regranting organization

Current state of CSO development

Smaller CSOs struggle with short-term funding, low proactivity and skills in fundraising, and limited professional staff, while medium-sized entities have better access to professional development and consulting services. Monitoring and evaluation systems often prioritize donor requirements over an internal strategic and reflective culture. Virtual training has improved access to information and resources, but these opportunities remain fragmented and not always relevant. There are however important spaces for exchange, dialogue and training provided by community philanthropy funds like Rede Comuá and Plataforma Conjunta, a place to gather and share useful information about the institutional development of CSOs.

Access to support

Resources and opportunities are concentrated in urban areas, particularly the Southeast, leaving smaller and rural groups underfunded. However, this is starting to shift with virtual initiatives and community philanthropy. Also, donor demands for short-term, result-focused projects strain organizations. In line with this, the dominant view of CSOs as service providers, rather than transformative entities, limits their impact and potential. And to add to the complexity, in the Amazon, threats to human rights and environmental defenders exacerbate these challenges.

There is insufficient data, information, and knowledge about the field of CSOs and about the ecosystem itself that supports their strengthening. This lack hinders the perception of needs, challenges, opportunities, and priorities for their development. Finally, there are also not enough adequate spaces and forums, autonomous and specific to CSOs – collectives, groups, movements, and networks – for political reflection on their contexts, aims and challenges. This limits the formulation of strategic agendas for civil society and its transformative potential.

The ecosystem of support

Existing support, accessibility and effectiveness

Brazil's civil society support ecosystem consists of diverse actors, at the forefront of which are international organizations, philanthropic institutions, intermediary organizations, and CSOs providing services and consultancies. Additionally, territorial funds, universities, corporations, and the public sector contribute to varying and lesser degrees.

Key financial and non-financial support for CSOs comes from international organizations that have institutional development support as part of their strategies. Brazilian philanthropic institutions, particularly family foundations and community philanthropy groups, also play a role, offering flexible funding. Intermediary organizations such as independent and territorial funds and community foundations provide localized, flexible support. The Comuá Network, for example, brings together 18 of these intermediary organizations. CSOs also deliver an important range of training and support services, but their activities are mostly centered in São Paulo and lack coordinated interaction.

Case study: The Comuá Network

The Comuá Network, created in 2012, is a platform that brings together thematic and community foundations, independent grant making organizations that mobilize resources from diverse sources to support groups, collectives, movements, and civil society organizations working in the fields of socioenvironmental justice, human rights, and community development.

The Comuá Network is composed of 18 funds and foundations, covering a variety of themes: socioenvironmental and climate issues, women's and transgender rights, Black people, people living with HIV/AIDS, human rights, etc. iCS – Instituto Clima e Sociedade - is also part of the Network. Support for institutional development is part of the Network organizations' strategy. By 2024, it is estimated that the set of funds and foundations of the Network will have donated a total of R\$ 1 billion, directly and indirectly.

The consulting sector, including independent consultants and firms, provides crucial capacity strengthening services. Universities with third-sector research centers offer training and mentoring programs, such as NEATS-PUC/SP, FGV/SP, Instituto GESC, FIA-USP. And some large public and private companies integrate CSO strengthening into their ESG strategies. A new player, Plataforma Conjunta, launched in 2023, has rapidly gained traction, sharing over 816 resources with 50,000 users in its first year.

In a 2024 study, Plataforma Conjunta identified 232 CSO support initiatives, with 145 focused on training and 87 offering financial support. However, challenges confronting the ecosystem persist, including the need for greater self-awareness to facilitate its own development, equitable distribution of support (to marginalized groups in particular), improved dialogue between funders and CSOs, and a shift from technocratic approaches toward transformative social action. Increased investment to strengthen social actors in the Amazon, and South-South exchanges are also essential to strengthening the sector. And finally, establishing networks and learning communities for consultants.

The market and development of local consultancy support

The consulting market for CSO strengthening in Brazil is fragmented and niche, with limited growth and research. No unified association or regular learning communities exist, though the Brazilian Association of Fundraisers (ABCR), with 600 members – a mix of consultants and CSO staff, organizes annual events attracting over a thousand participants. Consulting services vary in expertise, approach, and quality, with many professionals engaged part-time. International and philanthropic institutions dominate demand, favoring consultants from São Paulo both for themselves (where they are based) and their partners (who are not).

The consulting market for strengthening CSOs faces many challenges including geographic concentration, lack of collaboration, and limited access for smaller CSOs. The sector is diverse, with a younger generation of consultants emerging from Black, Indigenous, Quilombola, traditional

communities, peripheral groups, and generally marginalized communities. There is also greater recognition of the need for coordinated support in regions like the Amazon, where human rights and forest protection organizations face ongoing threats but where funding to the region is increasing. However, gaps in experience, the dominance of technical models, and a lack of systems-focused approaches persist. Training opportunities remain fragmented, often tool-focused rather than reflective. Mental health and workload concerns are growing, impacting both organizations and consultants. Addressing these issues and connecting the existing and newer generation of consultants is crucial for a more effective and sustainable support ecosystem.

Recommendations

"Within our ecosystem, we have a lack of professionals who serve territorially and nationally, [and who have this] perspective, which is systemic and organizational. This sometimes makes some processes very difficult. The ecosystem of consultants who have this ability to deal with the systemic, with this integral view is missing."

International NGO

1. **Lack of data and information on the eco-system of support to CSOs:** Supporting the development of research, systematization of experiences, and production of knowledge about the ecosystem of support for CSOs.
2. **Lack of spaces and opportunities for exchange, collective learning, and training on institutional development:** Supporting a program of activities to share information and exchange experiences on institutional development of CSOs.
3. **Lack of data and information on the consultancy market:** Supporting the development of research, systematization of experiences, and production of knowledge about the professional field of consulting.
4. **Lack of a learning community where consultants can learn from each other, debate approaches, methods, and tools, and discuss important issues in their field:** Supporting the creation of a learning community for exchange and reflection on relevant topics in the practice of consulting for CSOs.

Recommended organizations for further discussions in Phase 2: REDE COMUÁ, ABONG, PLATAFORMA CONJUNTA, INICIATIVA PIPA

Colombia

CSO needs, access and operating environment

CSO needs

Colombian CSOs face major challenges, primarily unstable and short-term project funding, often channeled through larger urban NGOs. This limits long-term planning. As one interviewee from a grassroots organization explained, the reliance on project funding can make it difficult to "invest in our own organizational structure", as well as to "respond to emerging community needs that don't fit neatly into pre-defined project frameworks" (CSO). Another noted, "navigating the government's procurement system is like a maze" (CSO), reflecting the difficulty of accessing public funds.

Capacity gaps in financial and project management, M&E, communication, and conflict resolution are prevalent. Indigenous and Afro-descendant CSOs also highlight the lack of recognition for local and ancestral knowledge. External actors often prioritize Western approaches, which dismiss the value of traditional knowledge vital to sustainable development. One agroecology advocate noted that universities still teach agronomy, but agroecology is built from practice.

"We need training not just on how to implement projects, but also on how to manage our finances, communicate our impact, and build a strong and resilient organization."

CSO representative

Current state of CSO development

Project-based funding sustains many CSOs but risks diverting them from core missions. Alternative models, such as social enterprises and territorial foundations¹, offer potential but may depoliticize systemic advocacy. Instead, some foundations may prioritize more localized, service-oriented activities. Networking and alliances are a crucial development strategy for CSOs and strengthen advocacy, as seen during the 2016 peace agreement and 2021 protests. Social networks and digital tools have become critical for visibility and international outreach, particularly for geographically dispersed organizations.

Smaller CSOs are often instrumentalized by larger entities for funding access. Valuing and respecting the local knowledge and self-determination of grassroots organizations is essential for their development and for trust-based partnerships. Shifting donor priorities can work counter to this, with the risk of creating mission drift in many organizations.

Access to support

Smaller rural CSOs face significant barriers to funding, including limited access to information about funding opportunities and complex application processes. As mentioned above, with donor priorities changing with global trends, it is difficult to plan long-term when the funding landscape is so unpredictable. The recent suspension of USAID support is a reminder that CSOs need to diversify, so they are more financially sustainable and able to focus on their priorities, including OD.

In addition to this, OD support is scarce in remote areas and access to these opportunities is limited, particularly when the information is shared through informal communications channels, like WhatsApp groups. The available capacity-building workshops also tend to be repetitive and rarely focus on

¹ <https://www.territoriacolombia.org/nosotros>

practical skills like project management or technology use. And ultimately, without funding to implement action, support remains superficial.

The ecosystem of support

Existing support, accessibility and effectiveness

Perceptions about Colombia's CSO support ecosystem vary. While there is strong self-organization despite civil war and inequality, support remains fragmented and lacks strategic coordination. Through organizations like Civil Rights Defenders, Civic House and Redeamérica, Colombia is seen as a regional hub for civil society development and a model for resilience and social change. Mario Roset (Civic House) highlights civil society's potential for developing further in Colombia, particularly if local private resources are mobilized.

The support landscape is diverse, with funding, capacity building, legal assistance, advocacy support, and networking opportunities provided by international NGOs, cooperation agencies, government bodies, corporate foundations, independent consultants. Yet key gaps and challenges persist, including unequal access to resources for smaller, rural CSOs, inconsistent quality of support, lack of coordination, and the failure of short-term programs to address long-term needs. Many initiatives impose external methodologies without adaptation, wasting resources and undermining trust. Recognizing and integrating local knowledge is crucial for relevance and sustainability.

The market and development of local consultancy support

The local consultancy market is fragmented and precarious, particularly for grassroots-focused consultants. Many work informally under unstable contracts and low fees, as organizations lack resources to pay adequately. Rural areas face barriers due to the geographic concentration of services in Bogotá. Consultants also compete with international experts who often dominate funding opportunities. However, hiring local consultants rooted in territorial processes can promote sustainable, culturally sensitive outcomes.

Classism and racism undervalue local expertise, particularly non-academic knowledge from marginalized communities. Consultants also lack spaces for collaboration, limiting their professional growth. Despite challenges, opportunities exist for professionalization, specialization, and "*dialogo de saberes*" (dialogue of knowledge) to enhance local expertise, ownership, and marketability. Networking and collective

action can also promote best practices and increase visibility of the crucial role of consultants within the ecosystem of support to CSOs.

Case study: Civil Rights Defenders

CRD is based in Sweden and has a small office in Bogotá. Its strategy focuses on supporting local civil society organizations while advocating for change at national and international levels. In Colombia, CRD has paid attention to communities and individuals affected by their leadership in struggles for diverse social inequalities focused in complex conflict affected areas. The fact that they focus on defenders is an advantage in terms of the variety of issues that intersect when working with their partners, environmental, education and LGTBQIA+ rights advocate work together in an ensemble proposed by CRD.

One of CRD's strengths lies in its ability to build strong and lasting networks among local CSOs, which can survive outside the intermediation of CRD. By working closely with these actors, CRD has managed to strengthen their capacities, expand their reach, and increase their impact. This network-based approach has enabled CRD to address the complexity of the work of human rights defenders, by effectively and sustainably supporting their livelihoods.

One potential area for development lies in the increased utilization of local consulting firms for research, legal and psychosocial assistance, and communication support. While CRD effectively leverages grassroots CSOs, further integrating local consulting services could enhance the efficiency and sustainability of their work.

Recommendations

A network-building approach is key to ensuring fair resource distribution and minimizing harm. The focus should be on:

Priority areas:

- Supporting organizations working at the intersection of human and environmental rights.
- Promoting funding that strengthens both organizational capacity and the livelihoods of members, targeting groups that support individuals and other CSOs.

Who to work with:

- National and Community Philanthropy: Address the centralization of resources and dependency on international funds by fostering small, long-term donations paired with flexible, committed assistance. Potential partners include Civic House (crowdfunding expertise), Anticolonial Muquytá (network of consultants who provide voluntary grassroots capacity building), and Juntanza (bringing cultural awareness to interventions).
- Leadership Development and Staff Livelihoods: Strengthen CSO sustainability by addressing leadership transitions and resource gaps while supporting members' basic needs. Partners like CRD, CAJAR, Corambiente and Las Andariegas bring expertise in supporting CSOs navigate contextual challenges like armed conflict, gender-based violence, racism, and inequality.
- Cultural Awareness and Local Ownership: Ensure initiatives are locally designed and sustainable by promoting "dialogo de saberes" and safeguarding policies. Invest in grassroots

networks, with organizations such as DANTA, SETAA, Anfibias, Granja Pura Vida, and Resuena fostering cultural respect, technical assistance, and effective communication.

- Civil Rights Defenders (CRD) demonstrates best practices by offering flexible funding for human rights defenders and fostering transnational collaboration. Their model strengthens local CSOs and promotes global civil society learning.

Mexico

CSO needs, access and operating environment

CSO needs

CSOs in Mexico face different challenges based on their size, type, and maturity. While most organizations deal with resource mobilization, adapting to regulatory changes, strategic planning, and leadership development, these needs vary. Start-up and community-based organizations like Tlali and Amigos de la Monarca require foundational support in administration and governance. More established organizations, such as Fundar Centro de Análisis e Investigación and Reforestamos México, and Centro Mexicano de Derecho Ambiental need assistance with leadership transitions, human resources management, and strategic communications and knowledge management. Financial sustainability is a common challenge, as most CSOs rely on project-based funding, limiting resources for long-term development.

"It's not easy to get these development services. We are far from everything, in the Huasteca region. Sometimes there isn't electricity or internet."

CSO representative

Current state of CSO development

In the early stages of their development, organizations tend to focus primarily on program implementation, often relegating OD to a secondary priority. Often, development needs are addressed only when funders provide resources or impose specific OD requirements. A few funders, such as Ford Foundation, the Fund for Global Human Rights, and Oak Foundation, offer flexible funding or core support that allows organizations to allocate resources for OD. Over two decades, some private foundations, bilateral funders and re-grantors² have built a diverse OD infrastructure, with funders playing a crucial role in providing flexible funding and connecting organizations to OD providers. However, access to support varies significantly, with urban organizations having better access than rural ones.

Access to support

External trends impacting CSOs and their OD include:

- 1. Increased regulatory stringency**

The Mexican government's heightened tax enforcement and stricter money laundering regulations have placed CSOs in a precarious position. Changes such as reduced tax incentives, stricter reporting requirements, and increased financial scrutiny find organizations scrambling to improve administrative processes and require them to hire costly tax advisors. The regulations impose heavy requirements, and deficient compliance puts organizations at risk of exorbitant fines.

- 2. Hostile political environment**

A hostile stance from the 2018–2024 administration led to diminished advocacy efforts as CSOs feared harassment and discreditation. Civic space was characterized by verbal attacks to the

² Private foundations that have a history of investing in building CSO capacity include Ford Foundation, The William and Flora Hewlett Foundation, W.K. Kellogg Foundation, Luminare, MacArthur Foundation and Oak Foundation. Among bilateral funders, USAID and the German cooperation agency GIZ have implemented different programs aimed at strengthening CSO capacity.

press, attempts to discredit Mexico’s feminist movement, and closing channels of institutional dialogue. With the same ruling party post-2024, uncertainty remains about whether mistrust and allegations against CSOs will persist.

3. The starvation cycle

Unequal access to OD resources persists, with younger and community-based CSOs disproportionately affected. Also, limited donor support for overheads hampers institutional sustainability as CSOs only allocate a fraction of their funding to organizational strengthening. However, some global funders are encouraging transparency in budgeting and offering general support grants to address these gaps.

The ecosystem of support

Existing support, accessibility and effectiveness

"The main barrier that CSOs face in accessing OD services is cost. Funding from both foundations and government agencies is restricted to programmatic activities and [organisations] are not allowed to use the funds for OD."

CSO representative

Mexican CSOs access OD support primarily through tailored technical assistance and group-based training sessions and cohort-based approaches. Tailored support, though effective, is costly, while training sessions are often standardized and less impactful. A cohort approach, used by regrating organizations like Acento, Hispanics in Philanthropy, and FONNOR, enables peer learning guided by specialists, who supports participants in addressing implementation challenges. This has been proven to have positive results.

Case study: Hispanics in Philanthropy (HIP)

Hispanics in Philanthropy works to advance philanthropy in support of communities in the Americas. It sees itself as a philanthropic catalyst well positioned to mobilise resources and strengthen participation and leadership of traditionally excluded communities. HIP is well known as a regrating organisation that has partnered with various funders, like Oak Foundation and Wellspring Philanthropic Fund, in a wide range of thematic areas.

HIP has crucially focused on strengthening CSOs’ organisational capacity. It has identified and documented valuable lessons on the most effective partnerships between OD providers and organisations. For example, based on a deep assessment of grantees’ needs, as part of its role managing Oak Foundation’s Issues Affecting Women’s Program, HIP built a robust capacity strengthening program characterised by putting grantees in the driver’s seat in choosing the path to enhance their development.

The OD support ecosystem includes nonprofits, private firms, and individuals, with quality varying widely. Regrating organizations and local foundations simplify access to reliable providers through

recommendations. Existing support covers governance, strategic planning, leadership, and more³, but methodologies (and even access) often cater to well-established, urban nonprofits, leaving smaller, community-based organizations underserved. It remains challenging to find providers with tailored approaches that respond to the unique structures and needs of each organization, as well as those deeply familiar with the local context. Even well-established organizations at times find it challenging to identify OD providers in specific subjects who use frameworks that reflect their values, such as anti-colonialist, anti-patriarchal, and anti-racist approaches.

The market and development of local consultancy support

The OD market is fragmented, with urban areas offering diverse services, while rural organizations face limited access. Some providers from the corporate sector offer unsuitable methodologies, leading to poor outcomes, such as financial losses from incorrect tax advice. Regranting organizations play a key role in quality control by curating trusted providers and ensuring alignment with CSO needs.

"In the beginning it took us a while, but over time we managed to find more consultants with the necessary skills and now we work with a number of individuals and organisations... [...] that know how to work with organisations like our partners [...] and some have experience of working in our region."

Representative of re-granting organization

Demand for consultants has grown in areas like strategic planning, leadership, and resource mobilization, with a recent spike in fiscal compliance and technology support. Consultants seek skill development opportunities but rely on funders for professional growth. While international consultants are typically unaffordable, local consultants depend on funders' continued investment in CSOs for steady work. Additional funding for professional development is welcomed, but consultants feel no pressing need for expanded networking activities.

"To increase access to OD services we [OD Providers] could do better with our communications efforts. Regranting organisations are also helping with this by connecting smaller and community-based organisations [to OD services]."

Representative of OD provider

Recommendations

The recommendations highlight two key areas for investment and collaboration with local partners to strengthen organizational development (OD) support:

1. Fragmented market information

- Conduct a survey with OD providers to understand their specific needs, specialties, and methods for targeted skill development.
- Promote information exchange among funders, local foundations, and intermediaries through meetings to improve market transparency and coordination.

³ Based on information gathered through KIIs, existing services are provided in all 15 areas of OD identified by Nonprofit Builder's Action Learning Program, through which GCF grantees have access to development support. Additional areas identified in Mexico's OD landscape include security and risk assessment, strategic vision, conflict management, tax compliance improvement and contracts, and compliance with labor laws.

- Avoid creating static directories, as past attempts have been ineffective. Instead, establish a dynamic program managed by a local partner to gather, update, and share detailed information on OD providers in real time.

2. Inequitable access to OD Services

- Partner with regrating organizations and local foundations to extend OD services to younger and non-urban organizations.
- Consider creating a network of local funders to increase OD access for under-resourced grantees.
- Collaborate with thought leaders to explore innovative ways to address inequities in access, driven by the high cost of OD services and CSOs' limited resources.

These actions aim to make the OD support ecosystem more transparent, accessible, and responsive to the diverse needs of CSOs.

Recommended organizations for further discussions in Phase 2: Hispanics in Philanthropy, Acento Acción Local, Alternativas y Capacidades, Centro de Colaboración Cívica, Corporativa de Fundaciones, Creatura, Ecos, Resiliencia para la Sociedad Civil, Fondo Noroeste y Occidente, and Sureste Sostenible.

China

CSO needs, access and operating environment

“Funding, talent, and operations are the three core challenges [...] fundraising difficulties put organizations on the brink of survival, while staff attrition, particularly the departure of key personnel, further exacerbates challenges in fundraising and operations. [...] real question is whether organizations are strategically and operationally adapting in a timely manner.”

CSO representative

CSO needs

As in all contexts, the needs of CSOs in China have similarities but also vary. In the Chinese context, it is worth noting the varying abilities of CSOs being able to operate based on thematic focus. For example, human rights organizations are a greater target for authorities, some having to go underground, whereas climate-focused CSOs have more space, as climate is a global priority with funding attached. Given the restrictions, many leave China and join the diaspora to continue working on sensitive issues. This changes the CSO landscape and corresponding consultant market.

CSOs in China face challenges that vary depending on their stage of development. Mature organizations often struggle with leadership transitions and board professionalization, while younger CSOs focus on innovating strategies, refining services, and securing funding. Across all stages, legitimacy issues remain prevalent. Registration hurdles and government pressures are common, particularly for organizations perceived as independent. Fundraising is strained by declining income due to economic downturns, reduced corporate and public donations, and restrictions on international funding. The lack of unrestricted resources for OD further exacerbates these challenges. Talent recruitment and retention are difficult due to limited funding, low public recognition, and the sector's inability to offer competitive compensation or professional appeal. Operationally, CSOs often lack technical skills in areas such as finance, human resources, compliance, communications, and digital tools, with many relying on outsourced services or overburdening staff with multiple roles.

Current state of CSO development

Self-exploration, leadership, and peer learning drive CSOs' growth. Smaller organizations often depend on passion-driven, ad-hoc development, while mid-sized CSOs rely on leader-driven allocation of resources, also having greater access to flexible funding. Informal networks foster mutual support and experience-sharing among organizations of similar sizes. Larger CSOs engage in outsourcing for specialized services like finance and communications or co-develop projects with aligned support institutions. Strategy development is typically handled internally, with larger organizations collaborating on community-building initiatives or an AI-supported public education tool. Leadership development opportunities, such as fellowships and mentorships, are more accessible to senior leaders, but training for new and mid-level staff remains limited. Organizational management is often leader-driven, though some CSOs use external services to enhance capacity.

Access to support

The political environment significantly shapes the CSO support landscape. Many organizations operate under tight government oversight, with limited space for independent action. Those aligned with government priorities may have greater operational leeway but remain subject to changing political

needs. Public awareness and support for CSOs are low, restricting talent inflow and innovation. Funding constraints, including reduced international support and scarce domestic unrestricted funding (such as the Southern Metropolis Foundation), further limit CSOs' ability to invest in long-term development. Resource matching relies heavily on personal networks in China's relationship-based culture, but weakened social bonds and trust due to the pandemic have made access to support more challenging. Additionally, many CSOs adopt a crisis-driven approach, seeking help only when problems become unmanageable, which hinders proactive development efforts.

The ecosystem of support

Existing support, accessibility and effectiveness

Types and scale of support organizations:

Support organizations primarily operate as foundations or companies. Some registered as businesses follow social enterprise standards, while others choose corporate structures for accountability reasons. Most support organizations are small, with teams of 3–10 staff, while those serving institutional funders are slightly larger, with 10–20 staff. Independent consultants are rare, and some organizations operate informally without publicly disclosing their official registration or websites.

Key areas of support provided:

Talent development initiatives focus on equipping leaders and staff with essential skills through training, mentorship, and peer networking opportunities. Organizational development support is provided through management consulting, online courses, and tailored training programs. To ensure operational efficiency, professional skills training covers critical areas such as human resources, financial compliance, communications, and digital transformation. At a broader level, sector infrastructure efforts target leadership networks, sector research, and access to funding opportunities.

Challenges in support accessibility and effectiveness:

Despite the presence of support organizations, the accessibility and effectiveness of assistance for CSOs in China remain limited. With fewer than a hundred support organizations serving over 900,000 registered social groups⁴, the sector faces significant challenges. **Legitimacy constraints** due to the political environment hinder efforts to drive systemic change, while **funding shortages**—particularly the scarcity of unrestricted funding—limit long-term capacity building. Some organizations have begun experimenting with donor circle models to address financial constraints. Amid these challenges, initiatives like those led by Moderator are working to improve public perceptions of the nonprofit sector through innovative media campaigns.

Innovative models for scalable support:

Several innovative models are emerging to provide scalable support for CSOs in China. **Volunteer-based models**, such as A Better Community (ABC), leverage a small team of 8 to coordinate 800 volunteers, to provide affordable consulting services. Similarly, the SEE Foundation engages 200 nonprofit sector leaders and entrepreneurs as mentors, extending expert guidance to CSOs. **Standardized training models**, like That Spark, delivers online training for mid-level nonprofit staff, using structured coaching processes. Meanwhile, **self-replicable models**, such as Gong Yi Fang, train women in flexible roles to deliver financial services for nonprofits, with 30+ branches serving over 1,000 CSOs.

While these approaches help address talent shortages and strengthen organizational management, the quality and alignment of support remain unclear. Many nonprofits seek external assistance only in times of crisis, highlighting ongoing gaps in timely and effective support connections.

⁴ https://mp.weixin.qq.com/s/L-00pMhT5FX_z7cGRSJMyg

Case study: A Better Community (ABC)

Based in Beijing, ABC runs with a theory of change that if the not-for-profit sector can have high-quality, low-cost management consulting service, they will thrive and help create a better society. Their core business is then to recruit and manage pro-bono expertise, often from the business field to help advise on strategy, organisational management, etc. With a team of 8, they manage around 800 volunteers from various industries, providing affordable management consulting services that typically cost 10,000-60,000CNY (1,130-8,300 USD), while commercial services can be 20-30 times this price. ABC is also innovating new funding models, such as developing a funding circle amongst a group of medium net-worth individuals. ABC helps to loop together the donation and help channel to CSOs as core funding.

The market and development of local consultancy support

China's CSO support market is fragmented, reflecting the complexity of the country's nonprofit sector. The political and economic landscape further complicates sector-wide coordination, with isolation and dynamic shifts hindering collaboration.

Key opportunities for market development:

1. **Establishing shared definitions of success:** Support organizations and their counterparts must align on priorities to enhance collaboration.
2. **Adapting global insights:** While some organizations show interest in learning from international peers, these approaches must be contextualized for China.
3. **Strengthening infrastructure:** Systematic mechanisms to connect support organizations with nonprofit needs are lacking, highlighting the need for coordinated networks.

Notable innovations in funding and resource mobilization:

- **Integrating environmental social and governance demands:** Organizations like Yuan Gongyi explore opportunities to link CSO expertise with business sector ESG needs.
- **Domestic funders:** Foundations like SEE, Gingko, and Narada focus on philanthropy infrastructure, talent development, and social innovation.

Despite its challenges the support sector is both constrained and dynamic—a case of “dancing in shackles.” The ecosystem is surprisingly vibrant and diverse yet lacks established consulting services and large-scale business foundations.

While the ecosystem is evolving, substantial investment and collaboration are essential to scale support services and foster a sustainable development network for China's nonprofit sector.

Recommendations

1. Strengthening the domestic CSO support ecosystem in China

- Increase the visibility and understanding of available support.
- Address gaps in supply-demand matching to meet high demand for support, and monitoring to improve quality of support.

- Expand core funding through domestic foundations, innovative fundraising models, and partnerships with companies or the public.
- Identify and empower local actors to coordinate and nurture a robust support ecosystem with a shared vision of success.

Additionally, engage with case study organizations to explore their innovations in tackling systemic challenges (e.g., funding, talent, and social acceptance). Consider tailoring these insights to emerging climate movements in China.

2. Exploring global connections

- Conduct a follow-up study to examine CSOs working outside China or at the intersection of China and global climate and clean energy efforts. This study would identify their development needs, existing support, and networks.

3. Focusing on climate-focused CSOs

- Deepen research into climate-oriented CSOs and their support networks to identify intervention points for scaling up or addressing critical challenges.

"The current state of the nonprofit support sector is a market failure within a market failure. *(Due to the lack of unrestricted funding)*, many organizations can only allocate 10% of their raised funds to institutional development *(which also limits how much they can procure from support organizations)*. As a result, while the sector appears diverse and vibrant, in reality, no single organization can scale significantly. Some have attempted to expand through volunteer-based models, which allow for some degree of scalability, but overall, the demand far exceeds the available support."

Consulting agency

Japan

CSO needs, access and operating environment

CSO needs

Japanese CSOs face the following three core challenges:

1. **Staff shortages and lack of diversity:**

Aging leadership and limited diversity are prominent issues, with over 70% of Non-Profit Organization (NPO) leaders being men aged 60 or older. This demographic challenge, compounded by Japan's declining and aging population and shrinking workforce, makes it difficult to attract young talent. Emerging social businesses and impact startups offer competitive salaries and appealing work environments, leaving traditional CSOs less attractive. Stereotypes of CSOs as "unprofessional" or "self-sacrificing" exacerbate the problem, resulting in outdated practices, limited technology adoption, and declining generational renewal within the sector.

2. **Funding shortages:**

The donation market in Japan remains stagnant, with small CSOs struggling to grow due to unequal funding distribution. Nearly 92% of donations go to just 22.6% of certified NPOs, leaving smaller organizations unable to expand. Older CSOs, established more than 25 years ago, face slow growth due to outdated management strategies. Additionally, rigid funding models with restrictions on administrative costs and single-year budgets limit flexibility. While new funding sources like dormant (unclaimed) bank accounts and bequest donations have emerged, they are not sufficient to address long-term sustainability.

3. **Identity crisis:**

The diversification of the social impact landscape, including the rise of SDGs and corporate-led initiatives, has marginalized CSOs. Previously key to addressing complex social issues and fostering democracy, CSOs now face declining public perception and self-esteem. Traditional intermediary organizations, once essential for capacity-building and networking, are losing relevance due to evolving legal frameworks for NPOs maturing, and digital platforms bypassing the traditional role of these organizations. Amid a harsh management environment, CSOs must reevaluate their core mission and adapt to remain relevant.

“In Japan, both the recipients and the providers of funds are overwhelmed by paperwork, leaving them unable to dedicate time to maximizing social impact. This contributes to the high turnover rate among young people in the sector.”

NPO representative

Current state of CSO development

Japanese CSOs can be broadly divided into two groups: innovative emerging organizations and traditional ones struggling to adapt. Younger organizations leverage technology and global trends, participating in international programs and funding opportunities to scale their impact. Conversely, older CSOs, reliant on established practices, face challenges navigating shifts in human and financial capital. Bridging this divide and modernizing traditional CSOs is critical to the sector's evolution.

Access to support

The operating environment for CSOs in Japan is shaped by three key factors:

1. Demographic shifts and labor shortages:

Japan's aging population and shrinking workforce significantly affect CSOs, which offer salaries roughly 30% lower than the private sector. This demographic crisis limits the sector's ability to attract and retain talent.

2. Economic stagnation:

Economic challenges, including a shrinking domestic market and low labor productivity, reduce public willingness to donate, volunteer, or work in CSOs. Declining trust in the social security system has fostered widespread anxiety about economic prospects and future livelihoods, further exacerbating these trends.

3. Diversification of the social impact landscape:

The rise of SDGs and impact investing has made social problem-solving a priority for corporations, governments, and educational institutions, diluting the unique role of CSOs. This growing competition has marginalized CSOs, excluding them from key platforms and discussions within the broader social impact ecosystem.

Combined, these challenges present a complex and demanding environment for CSOs, necessitating significant adaptation to sustain their role in addressing social issues.

The ecosystem of support

Existing support, accessibility and effectiveness

The Japanese CSO support ecosystem operates on three levels of capacity building: individual, organizational, and sector wide. At the individual level, programs by local governments, intermediary organizations, and NPOs focus on skills such as administration, fundraising, and human resources. Organizational capacity building strengthens infrastructure through grants (ranging from 2 to 20 million yen), corporate partnerships, and fee-based services. Meanwhile, sector-wide efforts aim to strengthen the enabling environment through data analysis, like the "Giving White Paper" (providing an overview of the current state of giving in Japan) by the Japan Fundraising Association (JFRA), informing policy advocacy and sector-wide strategic planning.

Despite these efforts, gaps persist, including weak boards of directors (i.e. weak governance), slow adoption of AI and digital transformation (DX), and limited information flows and funding flexibility. The upcoming launch of Trust-Based Philanthropy Japan Inc. in 2025 seeks to address some of these challenges.

However, issues in the quality of support hinder progress. Funding for capacity-building programs is often unstable, reliant on annual sponsorships that complicate long-term planning. Additionally, the shift to online training, while increasing accessibility, has reduced opportunities for peer connections and knowledge-sharing. Rural areas face particular challenges due to a shortage of experienced consultants, limiting access to tailored support. These gaps highlight the need for more sustainable, inclusive, and strategic approaches to organizational development within the Japanese CSO sector.

“Even with OD funding secured, the lack of available OD consultants poses a significant challenge for organizations.”

NPO representative

Case study: Japan Fundraising Association (JFRA)

Japan Fundraising Association (JFRA) was founded in February 2009 in Tokyo and is now a leading platform to incubate and develop ecosystems to advance philanthropy and social investment in Japan. Their core activities lie in capacity building of fundraisers in Japan whose networks exceed 1,500 professionals.

With the vision of realizing "a society where donations and social investment advance," JFRA is engaged in policy advocacy and educational activities to transform Japanese society into an impact-oriented one through fundraising for non-profit organizations, as well as research and business development, to promote social impact evaluation and social impact investment. JFRA is also engaged in policy advocacy and educational activities to transform Japanese society into an impact-driven society.

The market and development of local consultancy support

The development of a robust OD consultant pipeline in Japan faces structural challenges. The labor market's preference for membership-based employment discourages freelancing, while most training programs cater to employees, leaving freelancers underserved. Additionally, reliance on senior consultants limits opportunities for junior professionals, and the absence of centralized platforms for matching consultants with CSOs leads to mismatches and inefficiencies. These factors collectively restrict access to quality consultancy, particularly in rural areas.

The funding landscape for OD in Japanese CSOs is diversifying but faces sustainability challenges. Corporates and foundations offer support, with Japanese companies favoring long-term programs and international counterparts opting for shorter ones. Governments and local units provide basic and sector-specific training, while dormant deposits are increasingly allocated to OD. Intermediary organizations (ex. ETIC, JFRP, NPO Support Centre), financial institutions, and CSOs themselves also contribute through ad hoc programs, loans, and growing self-funding efforts. The Japan Climate Alliance (JCA) plays a similar role in the climate space. However, aligning these resources with strategic goals is essential to ensure the sector's long-term growth and resilience.

Recommendations

Human resources

Japan faces a severe shortage of OD consultants, excluding those specializing in fundraising. This is primarily due to the absence of programs designed to train such consultants. Therefore, global OD consultant training programs should be developed to train trainers in English. These trainers can then localize the modules for their respective markets and languages, training future OD consultants locally. This modular approach, starting with a foundational curriculum and then adapting it to the local context, will ensure relevant and effective training. Such programs could also cultivate a global network of certified OD trainers, creating a system (Talent Bank) for listing certified trainers and facilitating access to training opportunities in various countries.

Financial resources

Globally, it is recognized that restricted funding hinders CSO growth, creating a "starvation cycle." Global Research on unrestricted funding and trust-based philanthropy is needed, along with establishing a global alliance. Capacity-building training for individual organizations is insufficient without flexible funding, preventing NGOs from proactively addressing their needs. In today's rapidly changing environment, agile approaches, like those used by social businesses and impact startups, are crucial for organizational and individual growth, leading to better outcomes and attracting talent. For NGOs worldwide, securing flexible funding is the most critical survival strategy.