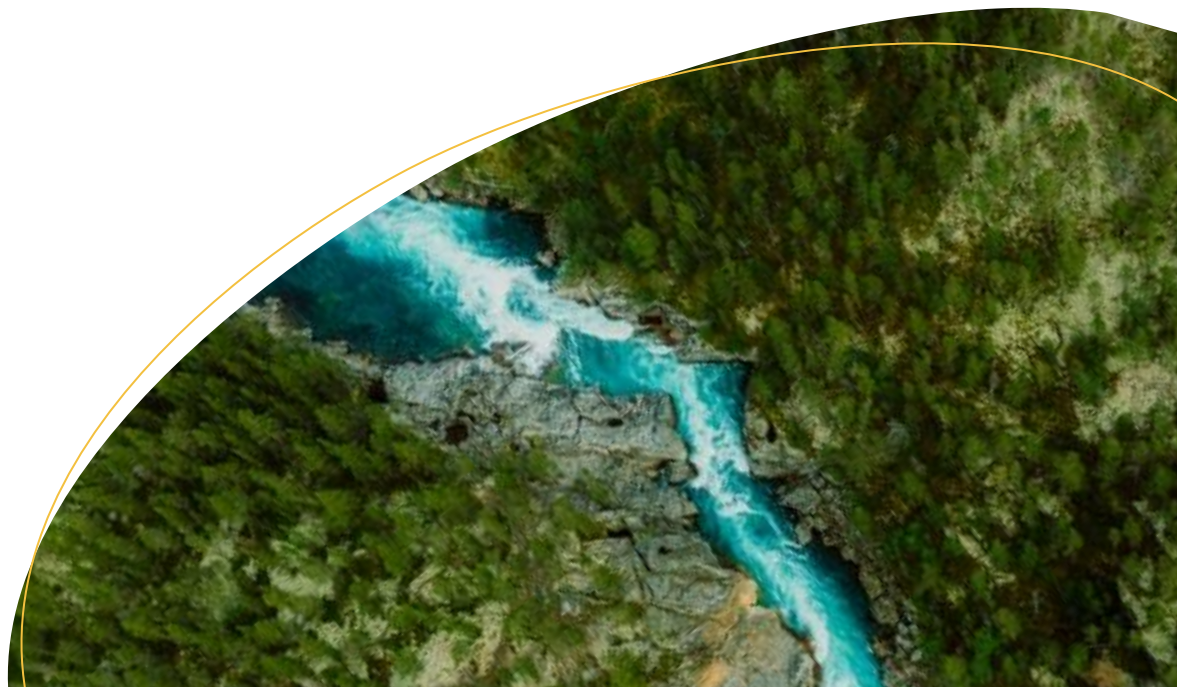


**Mid-Term External Review of the
World Resources Institute's
2023-2027 Strategic Plan**

Final Report

June 30, 2026



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List of acronyms

ACT2025	Allied for Climate Transformation
AFR100	African Forest Landscape Restoration Initiative
BIGRS	Bloomberg Philanthropies Initiative for Global Road Safety
CEF	Climate, Economics & Finance
EAE	Energy Access Explorer
ETB	Ethiopian Birr
FGDs	Focus Group Discussions
FLR	Forest and Landscape Restoration
GET	Global Executive Team
GHG	Greenhouse gas
GLI	Green Legacy Initiative
GSE	Gender and social equity
IMF	International Monetary Fund
IPLC	Indigenous Peoples and Local Communities
IRF	Institutional Results Framework
KEQs	Key Evaluation Questions
LED	Low Emissions Development
MfR	Managing for Results
MTER	Mid-Term External Review
NbS	Nature-based Solutions
NCE	New Climate Economy
OECD	Organisation for Economic Co-operation and Development
OUP	Oxford University Press
PEA	Political Economy Analysis
PES	Payment for Ecosystem Services
PMEL	Planning, Monitoring, Evaluation and Learning
PNC	People, Nature and Climate
RDI	Research, Data and Impact
ROAM	Restoration Opportunities Assessment Methodology
RSA	Rapid Social Analysis
SADD	Sex, age and disability disaggregated data
SMEs	Small and medium-sized enterprises
SPF	Strategic Priorities Fund
STAND	Standing Together for Environmental Defenders
SUNCASA	Scaling Urban Nature-based Solutions for Climate Adaptation in Sub-Saharan Africa
ToC	Theory of Change
ToCs	Theories of Change
UNCTAD	United Nations Conference on Trade and Development / UN Trade and Development
WRI	World Resources Institute

Executive Summary

Founded in 1982, the World Resources Institute (WRI) is an independent research organization working to improve people's lives, protect and restore nature, and stabilize the climate. WRI has over 2,000 staff working on the ground in eleven focus countries, two regional offices, and with partners in over 50 nations. It leverages its data, expertise and global reach to influence policy and catalyze change across systems like food, land and water; energy; and cities.

This Mid-Term External Review (MTER) of WRI's 2023–2027 Strategic Plan was conducted during 2025 - 2026 (year 4 of its five-year strategy) to provide an independent, high-level assessment of WRI's progress against its strategic targets and outcomes, with particular attention to its ambition to drive systems change across food, land and water, energy, and cities. The review also examines how far WRI has advanced the five strategic shifts set out in the strategy¹ and is generating practical learning to strengthen delivery over the remainder of the strategy period and to inform the development of its next strategy. Against this backdrop, the review's findings highlight both WRI's continued strengths and the operational challenges that must now be addressed to continue to translate its strategic ambition into fully realized practice.

WRI continues to operate at the frontiers of the Great Transition, the shift in global modes of production and consumption to a sustainable footing, offering thought leadership, influence and energy. The last review found an ambitious, high-performing, organization. This review finds that WRI, from an already very high base, continues to innovate and improve as it strives to make the world a better, more sustainable, place. WRI's articulation of an overarching set of goals on People, Nature and Climate; a working framework of systems change and country transitions; and a renewed emphasis on One WRI are strategically coherent. The central challenge for the remainder of the strategy period and beyond is now less about sharpening this intellectual structure and more about building out the processes and guidance needed to translate it into an operational program that WRI staff as a whole can implement. This includes enhancing practical guidance and support for staff; ensuring that country strategies are well formulated but also adaptive; strengthening PMEL and especially learning about the new approach; doing more to embed equity and just transition more deeply; and ensuring that One WRI is supported by systems, incentives and governance arrangements that enable joined-up delivery.

Overall assessment

- **WRI has developed a new and convincing theory of systems change, is delivering well, but embedding this new approach in internal systems, structures, and incentives is still an ongoing task.** The organization has strong outcomes and a compelling strategic direction, but some of the systems, incentives, and capabilities needed for country-level systems change remain incomplete.
- **The main gap is operational, not conceptual.** Staff understand the broad ambition, but need more concrete guidance, training, examples, incentives and resourcing to translate it into daily choices.
- **The next phase should focus on practical institutionalization.** This means using the strategy as a live management, learning and collaboration system, building on existing mechanisms and extending emerging practices more consistently across the Institute.

¹ The five strategic shifts comprise: 1) an integrated approach for People, Nature and Climate; 2) a focus on systems change; 3) an emphasis on country transitions to deliver impact; 4) a unified approach to measuring success; and 5) shaping the institution.

WRI's journey since the last review

Since launching its 2023–2027 Strategic Plan, WRI has embarked on an ambitious journey to reposition itself around a more integrated, systems-oriented, and country-grounded model of change. It has moved toward a more integrated model that advances people, nature and climate goals together, links global and country work more deliberately, combines human systems with enabling systems, invests more in country transitions and adaptive planning, and is now modernizing the Institute's internal architecture for learning, coordination, risk management, and flexible funding. The FY25 work plan shows an organization that is not only expanding its substantive agenda across cities, energy, food systems, governance, economics, and finance, but also investing in the institutional capabilities needed to deliver that agenda more coherently and at greater scale.

By FY25, the Institute had put in place core elements needed to convert the five shifts into an operational reality. It had translated the five shifts in its strategy into annual institutional priorities, linked more of its planning and reporting to the institutional results framework, and begun using quarterly performance and strategy reviews to connect the long-term strategy to nearer-term delivery. WRI also strengthened its annual planning and learning cycle so that work planning, review, and results reporting increasingly draw on theories of change and MEL plans, with the aim of making the organization more adaptive and more explicit about how its interventions contribute to people, nature, and climate outcomes. Alongside this, WRI invested in strengthening partnership tools, developing enhanced country strategies based on political economy and stakeholder diagnostics, building in-country capacity for enabling systems, deepening gender and social equity work through its Equity Action Plan, operationalizing theories of change, improving use of DevResults, creating the organizational scorecard, and beginning major institutional reforms such as Workday Unify, an institutional portfolio lifecycle process, and a strong campaign for flexible funding. WRI also put in place a more systematic enterprise risk-management framework spanning project, programmatic, core-function, country-office, and institutional levels.

Results

WRI remains a high-performing institution with strong technical credibility, valued partnerships and continued capacity to deliver results. Overall progress towards WRI's targets for 2027 is good, with seven of its 16 Intervention Targets on track or better and five partially on track. Two targets are off track and two are not validated because of insufficient data. At the next level down, between 68 and 79 percent (depending on progress of outcome targets for which data is lacking) of its 246 outcomes are progressing as expected. WRI's Top 10 Outcomes continue to demonstrate high levels of achievement, and feedback from government and other counterparts during our visits to Indonesia and Ethiopia, was strongly positive. In Indonesia, WRI is influencing national planning, industrial policy, palm oil traceability, social forestry, city-level urban systems, ocean management and planning, and much more. In Ethiopia, it is supporting watershed restoration and urban resilience through integrated coalitions, city frameworks, by-laws and emerging finance mechanisms. These examples show that WRI is increasingly operating beyond project implementation as a systems actor, although evidence of durable, self-sustaining system transformation remains limited.

The key evaluation question is therefore not just whether WRI is producing strong results – it clearly is. The issue is as much about its delivery model i.e. whether it is sufficiently integrated, adaptive and learning-oriented to match the scale of its strategic ambition. Following a review of results achieved so far in this Strategic Plan, the findings from this review are organized around the five shifts set out in the

WRI strategy, aligned with the strategy's three overarching goals: 1) the strategy's architecture integrating People, Nature and Climate; 2) the strategic objective and delivery model for systems change, 3) country transition strategies and operationalization, 4) WRI's approach to measuring success and incorporating learning into its management systems, and 5) governance and systems progress towards operating as One WRI.

1. People, Nature and Climate: clear strategic architecture, uneven operationalization

The People, Nature and Climate (PNC) framing is conceptually strong and is now clearly embedded in WRI's strategic architecture. Staff understanding is high: 93 percent of surveyed staff agree or strongly agree that they understand what WRI means by integrated action for People, Nature and Climate, and 79 percent agree or strongly agree that they understand how to apply the approach in their work. WRI's focus on People has increased since the last review. However, only 43 percent of programmatic staff surveyed agree or strongly agree that they have received enough training to apply the integrated PNC approach to their work.

Although WRI's Strategic Plan positions PNC as an overarching set of integrated global goals, translating that ambition into consistent measurement across the organization remains incomplete. The three PNC goals serve as the guiding star for WRI's Results Framework, and each Human System Pillar identifies impact indicators across people, nature and climate. However, despite a clear system for tracking PNC impacts, there has been limited follow-through on measurement at this level. Country theories of change, one of the main vehicles for collecting IRF-aligned reporting data, do not consistently include these impact indicators, limiting WRI's ability to track how its work is contributing to high-level PNC outcomes. Looking ahead, WRI should require teams to more systematically incorporate the existing menu of PNC impact indicators into their ToCs from the outset so that WRI can better track progress against the Great Transition.

Country strategies provide some of the clearest evidence of PNC alignment. These were developed under the current global strategy. Ethiopia's SUNCASA program and Tana Subbasin Payment for Ecosystem Services (PES) work show how restoration, livelihoods and climate resilience can be linked through a single intervention logic and reinforced by governance or finance mechanisms. Indonesia's strategy illustrates how this integrated approach also requires explicitly mapping structural trade-offs in the national context, including food estate expansion and critical minerals exploitation vs deforestation and greenhouse gas (GHG) intensive housing programs, so that WRI can identify where intervening on one goal risks undermining another and design its portfolio accordingly.

The application of equity remains uneven. WRI's 2025 Top 10 Outcomes provide positive evidence that equity is being integrated across parts of the portfolio. Several other projects we looked at also integrate equity, especially when looking to meet donor requirements. WRI's commitment to procedural and distributive equity, and the development of gender and social equity (GSE) tools, glossaries, checklists, training and communities of practice all represent meaningful progress. However, available resources have not translated into consistent institution-wide understanding or practice, partly because uptake is optional, staff time is limited and equity learning is not yet sufficiently valued or funded. Equity Fundamentals training approved by the Impact Committee in March 2026 and made mandatory for all programmatic staff and program-facing core functions. Rapid Social Analysis and Political Economy Analysis are important WRI tools for moving from broad equity awareness to analysis of power, representation, resources and risk. Where these tools have been used, for example in WRI India and Cities4Forests US, equity integration is stronger. But such analyses are not yet a standard institutional

expectation. WRI often works with broad categories such as ‘women’, ‘low-income communities’ or ‘urban residents’ without always interrogating intersecting identities, structural barriers and the reasons certain groups are excluded or disadvantaged.

Institutional capacity is too thin for WRI's strategic equity ambition. Only 13 staff out of a total staff of approximately 2400 hold formal equity roles, supported by a GSE Committee. WRI Indonesia is the only office with country-level advisors and project-embedded GSE staff. WRI needs a stronger, institutionally authoritative GSE function, complemented by embedded expertise in program and country teams, with a mandate to shape program quality rather than merely check compliance.

2. Systems change: part of WRI's DNA, but not yet a consistent delivery model

WRI's formal adoption of a systems-change lens is one of the major strengths of the Strategic Plan. Not only does it help to focus the organization on the most consequential systems for people, nature, and climate goals, but it also gives WRI a clearer language for describing what many staff already do in practice: looking beyond immediate interventions to the economic, political, and social conditions that determine whether change can endure. **This instinct has long been one of WRI's comparative advantages.** The strategy's distinction between Human Systems and Enabling Systems is especially important in this respect. Governance, Economics, and Finance are not simply surrounding conditions; they are the rules, incentives, and resource flows through which change in human systems becomes possible.

This systems logic is increasingly visible in WRI's strategy and planning architecture. The Human System Intervention Targets are a particularly important part of this design. They represent WRI's hypotheses about the most important components of the wider systems that need to shift to improve people and the planet's health, wealth, and wellbeing. Within this conceptual framework, staff are increasingly thinking about the structural and enabling conditions that WRI needs to help shift so that these systems transform. Indeed, country-level Theories of Change (ToCs) show that teams are not only thinking about sector outcomes, but also about the mechanisms through which change happens. Two-thirds of the 382 outcome indicators reviewed track elements such as policies, practices, resource flows, relationships, power dynamics and mindsets, while the remainder focus more directly on sector outcomes. This suggests that many teams are already trying to capture *how* change happens, not only *what* changes.

The main challenge now is to help codify and systematize the “how” of systems change, to help staff translate plans to action. WRI's Theory of Change guidance provides a solid conceptual foundation, recognizing leverage points, multiple levels of change and the interconnected nature of system transformation. Country Strategy guidance also embeds systemic thinking through questions about interdependence, barriers, enablers, institutions, policies and financial flows. Yet staff do not consistently feel equipped to translate this ambition into delivery choices. When asked whether they had received enough training to adopt a systems-change approach, only a little more than a third of staff agreed. This points to a gap between the strength of WRI's strategic framing and operational readiness. WRI now has a strong base of internal examples – including Dire Dawa watershed restoration, urban systems work in Indonesia, the forest–palm oil nexus in Sumatra and Restore Local globally - that could be used to concretize the guidance and help staff understand what good systems-change practice looks like in different systems and country contexts.

A major constraint nonetheless remains the persistence of organizational silos. Systems work depends on recognizing overlaps across pillars and human systems, but inherited grant structures, reporting lines and funding incentives encourage teams to prioritize their own outputs. Collaboration across pillars occurs, but too often driven by individual relationships rather than organizational arrangements,

incentives or portfolio-level planning. This makes it harder to connect individual projects into coherent systems-change pathways. The role of Climate, Economics and Finance (CEF) is particularly important in this context. CEF sits close to the heart of WRI's systems-change ambition because durable transformation depends on changing the "rules of the game". Its role, however, remains unevenly understood. The priority is to make its model clearer and more consistently applied, especially by clarifying when Human System teams should draw on CEF; how country-level CEF capacity should be strengthened; and how cross-system work led by CEF and system-specific enabling levers work led by Human Systems should relate to one another.

3. Country transitions: right direction, but country strategies must become more adaptive and operational

The country transitions framing is a promising and strategically important shift under the 2023–2027 Plan. It has clearly improved WRI's relevance and has begun to move the institution toward a more mature model of systems change grounded in national realities. Country transition strategies have helped WRI articulate how they will contribute to country transitions in their focus countries, and the best ones indicate how WRI adapts to changing contexts. But the WRI organizational transition is still incomplete. Country transitions are not yet consistently operationalized across the institution, and the concept is ahead of the systems needed to support it. To correct this, WRI will need to help teams understand how to apply the framework that has been developed in practice, to recognize smaller scale systems, to understand the range of levers they can pull to advance systems change, to understand the relationship between innovations that help demonstrate new approaches and larger scale interventions at the policy or even global scale that together can, over time, bring about systems change.

The strongest country strategies are those that go beyond sectoral integration and embed transition within national development trajectories, political economy, finance, and institutional change. For example, Brazil is strong on structural dilemmas around land use, urban inequality, and the Amazon; India is especially strong on jobs, industrialization, energy independence, and distributional impacts; Colombia is strong on justice, territorial resilience, and extractive dependence; Ethiopia is strong on institutional alignment and territorial logic; and Indonesia is strong on national policy architecture, city transitions, and political economy constraints. Across the set, however, there are common weaknesses: several strategies still need sharper country-level theories of change, clearer prioritization of leverage points, stronger treatment of uncertainty and adaptation, more explicit handling of finance and donor constraints, and a more concrete explanation of how OneWRI works in practice. The subnational tier is often the weakest part of the architecture, with less clarity on how national, provincial, city, basin, landscape, and value-chain levels connect into a coherent transition pathway.

There is credible evidence that WRI is increasingly implementing projects and initiatives in ways that target systems change rather than only producing discrete outputs. Indonesia offers some examples: WRI has helped integrate low-carbon development into national and provincial planning, supported industrial decarbonization roadmaps across nine manufacturing subsectors, and built institutional and market infrastructure in areas such as palm oil, land governance, and forest monitoring. India shows strong evidence of systems-oriented work through subnational institutionalization, climate budgeting, integrated resource planning, and the creation of coalitions and intermediate institutions in areas such as just transition, nature-based solutions, and clean construction. Brazil provides convincing examples of multilevel public action and scale-up through urban policy, restoration governance, and engagement with national plans, monitoring systems, and finance mechanisms. None of these cases yet demonstrates fully

durable country-level transformation, but together they show WRI operating increasingly as a systems actor rather than simply a project implementer.

WRI's comparative advantage in support of country transitions continues to lie in its ability to combine applied research, technical assistance, and brokering. Country offices are producing a growing share of WRI's knowledge products, with output from outside the US and global teams now exceeding previous-plan levels and India emerging as the largest producer among country offices. In Indonesia in particular, WRI has combined modelling, data systems, monitoring tools, policy analysis, and participatory processes to make national and subnational problems more tractable and solutions more credible. It has also acted as a secretariat or neutral convener for major coalitions and reform processes, helping move evidence into policy, governance, and implementation. This combination of research and brokering is a distinctive strength of the country transition approach, especially where WRI can align state, market, and community actors around shared change pathways.

OneWRI is contributing to country transitions, but somewhat unevenly. There are strong examples of alignment through global platforms and flagship initiatives such as those we saw in Ethiopia including AFR100, TerraFund, Cities4Forests, SUNCASA, FOLU, and NPAP, which provide common methods, coalitions, financing channels, and learning infrastructure. There is also credible evidence of South–South learning, including exchanges among Ethiopia, India, Colombia, and other African countries, and Indonesia's sharing of social forestry lessons across Asia and beyond. However, collaboration remains too platform-specific and too dependent on strong leadership, personal relationships, and donor-backed architectures. South–South learning is active and valuable, but still too project-driven and opportunistic; it is not yet systematically funded, tracked, or incentivized as a core organizational function. More broadly, WRI remains functionally connected rather than fully integrated around country transition pathways.

4. Measuring success: PMEL and learning: stronger architecture, limited use as management system

WRI has made meaningful progress in strengthening its PMEL architecture. The Institutional Results Framework (IRF), country-level ToCs, the Managing for Results function and the rollout of DevResults all respond to recommendations from the previous review. These organizational advances are significant. They create a stronger foundation for coherent reporting, learning, and strategic alignment than WRI had before.

The IRF provides an important high-level 'North Star' for focus, alignment, and learning around shared targets, but an excessive reliance on the IRF for results communication risks flattening WRI's systems-change story. The IRF has done a good job of orienting teams around a shared set of priority Intervention Targets and provides a useful framework for communicating organizational progress to senior leadership, the Board, donors and other audiences. However, the IRF was not designed, and should not be expected, to capture every element of every results pathway. Yet, WRI's strategy is now about *changing* systems, and accountability to that ambition requires some way of capturing not only what changes, but how change happens. This does not mean expanding the IRF until it becomes too complex to use. Rather, WRI will need light-touch ways of capturing and communicating the mechanisms through which systems change is being pursued: policy shifts, coalition formation, financing mobilization, changes in implementation and enforcement, changes in power dynamics, and mindset shifts. Country-level ToCs often capture these mechanisms more directly than the IRF. The IRF captures what changes; country ToCs often capture how change is expected to happen. This balance is appropriate, but WRI should continue to build its library of narratives to complement the IRF and avoid under-communicating the wealth of substantive progress being made along systems change pathways, including the intermediate outcomes

that programmatic and country teams are rightly proud of. More systematically capturing downstream results from implementation partners over longer periods of time will also be needed to complete the picture.

Conceptually, ToCs provide a strong foundation for this kind of systems-change practice because they help teams articulate nuanced pathways, assumptions, interconnections and adaptive learning needs. They are well suited to explaining how WRI expects to influence complex change processes. WRI's ambition to treat ToCs as living hypotheses, supported by pause-and-reflect processes, is also an important institutional strength. However, this potential has not yet been fully realized. Almost full coverage has been achieved, but staff experience of the first round was mixed: some found the process complex, resource-intensive and too top-down, and several felt that ToCs were developed retrospectively to fit existing work into institutional frameworks rather than prospectively to guide strategic choices. This matters because ToCs will only support systems change if teams see them as useful tools for reflection, adaptation and decision-making, not as one-off compliance products. MfR's revised guidance is therefore a positive course correction. The priority now is to rebuild staff confidence in the process and make ToCs practically useful at the levels where decisions are made, so that they become genuinely living documents that help teams test, learn and adapt over time.

In principle, DevResults could be an organizational backbone for results management, linking project-level activity to country and programmatic outcomes and then to organizational targets. In practice, it is not functioning this way and is unlikely to under current conditions. DevResults is used mainly as a structured data repository at the end of the results cycle, after teams have collected and validated data elsewhere. Because lower-level monitoring is conducted outside DevResults, the platform does not currently trace results from operational work to strategic outcomes. This largely reflects the fact that WRI receives its funding from multiple sources each of which has its own reporting requirements. Uploading this highly heterogeneous set of targets and results onto DevResults in a systematic way would be prohibitively time consuming. This stands in contrast to intergovernmental organizations that receive the bulk of their funding in regular replenishments and can standardize reporting templates (e.g. the World Bank's Implementation Status and Results reports). The Organizational Scorecard also sits alongside DevResults rather than using its own dashboarding functionality, adding to systems proliferation. WRI is therefore at a decision point. If it wants DevResults to become a real management and learning system, it must invest considerable time and resources in the operating model required: stronger project-framework linkages, consistent uptake across teams, integration with project administration tools, and greater PMEL capacity embedded in routine workflows. If not prepared to make that investment, or not resourced appropriately, WRI should consider a lighter, lower-cost architecture for the current use case.

WRI has many features of a learning organization: committed staff, strong interest in evidence, and a growing set of tools and processes that can support reflection and adaptation. Across the portfolio, there are positive examples of adaptive management. In Indonesia, teams adjusted mangrove restoration methods and donor expectations after monitoring showed lower-than-expected survival rates and used after-action reviews around major events such as the Green Energy Summit to refine subsequent interventions. This shows that when MEL capacity and management attention align, WRI projects can operate as structured experiments with explicit feedback loops. However, structured learning loops remain the exception rather than the norm. In many teams, PMEL time is still weighted heavily toward data collection and donor reporting, with limited protected space for reflection, iteration and strategic course correction. WRI's PMEL architecture therefore needs to foster more demand-driven and systematic learning: helping teams identify the questions and puzzles that matter for their work, use ToCs and Outcome Harvesting to test assumptions, and create regular spaces for reflection that feed back into

strategy, fundraising and program design. Reframing Top Outcomes around systems learning, not only achievements, would be one practical step; so would tasking and resourcing existing learning spaces to identify, codify and share cross-country lessons as a core part of their function. Research and global teams have a role to play, systematically assessing the evidence that MfR and country PMEL teams collect from implementation, and generating solutions that global teams have the expertise to design. With the opportunity of greater learning on offer it is possible that project teams will cease to regard PMEL as a supply driven overlay on donor requirements and see it more as an opportunity to create feedback loops and consistent improvement.

5. OneWRI: governance and core systems

WRI has made impressive progress shaping itself into a more coherent global institution, but the move from strategic architecture to day-to-day operating coherence is still ongoing. On governance, WRI has shifted from a looser “sisterhood” model toward a centrally coordinated global network, backed by a clearer governance framework, more formalized Board roles, stronger committee structures, an organizational scorecard, and a more systematic enterprise risk-management system. Connectivity between global and country governance has improved significantly, with the share of country and regional boards represented on the Global Board rising from 17% to 86% in 2024. Board engagement has also become more substantive through program deep dives, in-country retreats, and stronger oversight of strategy delivery, fundraising, and organizational risk. Together, these reforms have helped WRI better manage the complexity that comes with operating at global scale, while ensuring that country perspectives are more consistently reflected in institutional governance and decision-making. Beyond governance, investments in the OneWRI model and country transition approach are further strengthening organizational resilience and effectiveness by embedding capacity, leadership, and decision-making more deeply across the network.

The review also finds clear progress on the OneWRI agenda. WRI now has a stronger strategic framework for alignment through the Institutional Results Framework, shared theories of change, the Impact Committee, annual strategic alignment priorities, and more coordinated communications around major global moments. There are credible examples of “oneness without sameness” working in practice: Research Integrity has decentralized training while maintaining common standards; Communications has built stronger country-global coordination; and the WRI Indonesia Data Lab unit shows how technical capacity can be localized around country priorities. Collaboration is strongest where there are structured platforms, clear global-country divisions of labor, and dedicated infrastructure or funding, as seen in areas such as cities climate resilience and restoration. The same is increasingly true in relation to AI and data-led innovation: WRI has some of the ingredients needed to engage seriously with AI across research, products, and country work, but AI also highlights the need for stronger Institute-wide coordination on priorities, governance, and resourcing. In that sense, AI is emerging not just as a thematic opportunity, but as a test of whether OneWRI can combine innovation with institutional coherence.

However, the evidence suggests that OneWRI is still only partially institutionalized. WRI is stronger on strategic intent than on the operating model needed to make that intent work consistently across the matrix. Staff continue to report fragmented systems, duplication of mandates, unclear ownership of cross-cutting agendas, weak guidance on how OneWRI should function in practice, and insufficiently defined decision rights. Internal systems such as Workday, Salesforce, and DevResults have improved standardization, but they are not yet sufficiently integrated or “live” enough to support real-time coordination, adaptive management, and institutional learning. The use of project management tools such as Asana varies across the network, and the absence of a centralized project database continues to

limit visibility over who is doing what, where, with whom, and with what results. Survey evidence underlines this ambiguity: only 38% of staff agree that WRI's systems are integrated enough to enable OneWRI delivery across locations, while the same share disagree. Collaboration still depends too often on personal relationships, informal effort, or donor-specific arrangements rather than consistent organizational incentives and processes.

Flexible core funding remains strategically crucial but insufficient in scale to meet WRI's goals. Across FY2023–FY2025, WRI received \$41.1 million in core funding from Sweden, the Netherlands, and Denmark. Although this represented only about 3.3% of WRI's total budget, it accounted for roughly 32% of flexible resources. This funding has played a critical role in strengthening the enabling infrastructure for systems change, country transitions, and delivery of the OneWRI model across scales and contexts by supporting organizational functions that are systematically underfunded by restricted project financing, such as PMEL, equity integration, country strategy development, and localized data and research capacity. Core resources also underpin global and multi-country initiatives that deliver impact at scale, while enabling WRI to test, refine, and demonstrate new approaches that can attract larger pools of restricted funding. Importantly, this flexibility allows WRI to target enabling system levers through cross-sectoral tools, strategic partnerships, and policy-relevant research, addressing the incentives, organizational dynamics, and resource flows that drive change across human systems. These resources remain spread thinly across multiple priorities, while core functions are still not sufficiently networked or resourced to support the full ambition of OneWRI.

Overall conclusion

The overall assessment of this review is positive but cautionary. WRI continues to set the pace on many aspects of the global endeavor to advance People, Nature and Climate goals. It has further strengthened its strategic coherence, improved its country grounding, built a more credible systems-change narrative, and invested in organizational capabilities that were previously weak or missing. These are substantial achievements. But the next phase is decisive. For the last three years WRI has been testing approaches, building country strategies, developing theories of change and learning what works in practice. The task now is to consolidate that learning: systematizing what has been discovered, translating it into coherent and accessible guidance for staff, and doubling down on the approaches that have proven their value. To realize the full value of the 2023–2027 Strategy, WRI now needs to make PNC and GSE concrete in design decisions; strengthen systems change as an operational discipline; sharpen country transition pathways; embed PMEL in management routines with greater emphasis on **learning**; and make OneWRI work through clearer decision rights, stronger cross-country and cross-program learning, more integrated systems, and more deliberately networked core functions. The central test for the remainder of the strategy period will be whether WRI can reduce the operational friction of the matrix and turn its diversity of geographies, expertise, technical platforms, and organizational roles into a more dependable source of collective advantage and sustained impact.

Recommendations

The following recommendations address key issues identified in this Mid-Term Review of WRI's strategy. A more detailed description of the problems that each recommendation seeks to address is included at the end of this report.

1. **Guidance:** continue to develop practical guidance on how to support and catalyze systems change, taking into account the global system, specific country contexts, and interactions between country and global levels.
2. **Gender and social equity:** do more to strengthen GSE across all systems through deeper diagnosis of barriers, more compelling narratives, stronger executive leadership on GSE, more GSE specialists in programmatic teams, deeper collaboration with external (including local) partners with appropriate experience, and stronger GSE indicators.
3. **PMEL:** re-engage program teams, especially in country, around a shared PMEL agenda serving both institutional and programmatic priorities by i) co-designing lighter reporting to better align donor, country and WRI needs; ii) increasing strategic project and program evaluations where resources allow; and iii) replacing DevResults with a lighter, fit for purpose alternative.
4. **Learning:** generate practical insights into what works, what does not, and why in systems change by more deliberately combining implementation evidence with WRI's research capacity and knowledge of solutions across the global network and reflect in TOCS to better measure and tell a clearer story of systems change.
5. **OneWRI:** further streamline systems, processes, and policies by co-defining and enforcing a set of One WRI 'non-negotiables' (including existing standards) that apply across all offices, aligning how the institute works to support both global and country transitions.
6. **Joint working:** strengthen incentives and operating routines for tighter cross-team collaboration on shared system outcomes across pillars, among systems, and between global and country teams within WRI.

1. Introduction

1.1 Review objectives

The purpose of this mid-term external review (MTER) of the strategic plan of the World Resources Institute (WRI) is to:

- provide a high-level assessment of WRI's progress against the targets and outcomes laid out in the 2023–2027 Strategic Plan, particularly in driving systemic changes across its focus systems.
- assess how far WRI has advanced the five internal shifts set out in the strategy, and whether these are helping to achieve results; and
- provide actionable insights and learning that can strengthen delivery in the remaining strategy period and inform the development of the next strategy.

1.2 Scope and learning utility of the review

The primary focus of the review is to assess the results of WRI's strategy implementation at mid-term. It assesses progress toward strategic objectives, organizational and programmatic effectiveness, and the internal processes and incentives supporting delivery. The MTER focuses in particular on how and where WRI is catalyzing systemic change in Food, Land and Water; Energy and Cities (as well as the enabling systems of Economics, Finance and Governance) in support of its global People, Nature and Climate goals pursued through country transition strategies.

The external review is intended to facilitate learning in WRI as well as report on achievements to date. Thus, as well as reporting on results, it is designed to generate evidence based, actionable insights to inform course correction, priority setting, and enhanced delivery over the remaining strategy period. The emphasis is on organizational learning and adaptive management, enabling WRI to reflect on progress, refine its approach, and position itself for sustained influence. The evaluation also supports upward accountability to the three core bilateral donors who are funding the evaluation: the Netherlands Ministry of Foreign Affairs, the Swedish International Development Cooperation Agency, and the Danish Ministry of Foreign Affairs.

The MTER is not intended as a comprehensive review of all activities across WRI, but focuses on core areas of strategic relevance, identifying examples of contribution to change and extracting lessons from both successes and challenges. The review covered the period from 2023 to April 2026, focusing on implementation of the current Strategic Plan while recognizing that early signs of systems change often build on prior investments. It also examines how WRI has implemented the recommendations from the previous external review. In addition to global-level analysis, the review included targeted pillar and country deep dives to generate detailed, context-specific insights into strategy implementation. The pillar deep dives covered Restoration within the Food, Land and Water system, and Climate Resilience within the Cities system. The country deep dives were undertaken in Ethiopia and Indonesia to assess how well WRI's global strategy has been translated into country transition strategies and national and sub-national delivery.

1.3 Key evaluation questions

The review is guided by an overarching question, which is divided into five key evaluation questions (KEQs), each with a set of sub-questions. For each of the key evaluation questions, we also look at progress towards relevant recommendations from the previous external review.

Overarching question: Is WRI on track to achieve the targets and outcomes set out in its 2023 Strategy and associated Results Framework and to what extent are the five internal shifts contributing to this?

High level assessment of WRI's progress in implementing its 2023-2027 Strategic Plan:

- To what extent has WRI implemented the recommendations from the previous external review?
- Have these changes contributed positively toward implementation and achievement of the current strategy?

KEQ1: To what extent has an integrated approach to People, Nature and Climate contributed to programmatic results?	Sub-questions: a) How are WRI's global and country programs advancing people, nature, and climate goals in a joined-up way, consistent with Shift One of WRI's strategy? What evidence exists – in program design, implementation, and emerging outcomes – of joined-up programming across WRI? What can be done to reinforce integration in areas where it is lacking? b) How do global and country teams interpret and operationalize WRI's people, nature and climate objectives given finite resources and donor mandates? To what extent are there trade-offs or tensions between these objectives in practice, and how are these being managed? What consequences does this have for the depth and quality of integration? c) To what extent do WRI's programs reflect its People Goal and commitment to gender and social equity? How are gender and social equity reflected in both research and programmatic outcomes at mid-term? d) Deep Dive: How is gender and social equity reflected in the programs and their results at mid-term?
KEQ 2: To what extent has a focus on systems change contributed to programmatic results?	Sub-questions: a) How well are enabling systems (economics, finance and governance) connecting with human systems across WRI's portfolio in both global programs and country offices? What synergies and programmatic results have been achieved from these connections? b) What early signs of systems change exist, especially at the level of theory of change outcomes, across WRI's Results Framework and portfolio? What is driving these changes and what is WRI's contribution? What internal and external obstacles have slowed progress, and what can be done to overcome them? c) Deep Dive: To what degree is the pillar and/or country making progress toward system change and contributing to a country transition?
KEQ3: To what extent has an emphasis on country transitions contributed to programmatic results?	Sub-questions: a) To what extent is WRI's country transition approach relevant and viable in an evolving geopolitical and multilateral context? How might global shifts affect WRI's choice of approach? b) What early indications are there of movement from project-centric delivery toward country transition strategies? What factors are driving or constraining this shift? c) How are global programs and country offices optimizing synergies and aligning their efforts in a joined-up way (OneWRI) toward systems change and country

	transitions? Is there evidence of South-South exchange within the OneWRI network? d) Deep Dive: Is there a clear WRI vision and strategy at the country level (including national, sub-national, and city levels)? e) Deep Dive: How well aligned are WRI's country ToCs aligned with the country context? To what extent is WRI considering country-level political risk and safeguarding in its country strategy and ToC? f) Deep Dive: To what extent are the projects and initiatives being implemented in the country leveraging WRI's comparative advantage – as defined by WRI's Competitive Advantage Framework – particularly regarding research and learning? g) Deep Dive: What evidence is there of effective collaboration with global programs to deepen strategic coherence and strengthen country transition pathways? h) Deep Dive: What evidence has there been of effectiveness of projects and initiatives, particularly Theory of Change Outcomes? i) Deep Dive: What innovation or learning has emerged through WRI's work (including research and knowledge products)?
KEQ4: To what extent has WRI adopted a unified approach to measuring success?	Sub-questions: a) To what extent are WRI's global (human and enabling systems) portfolios and focus country programs, projects, and initiatives - including co-managed partnerships - aligned with, and reporting effectively to, the institutional Results Framework? b) To what extent are Theories of Change (ToCs) and country transitions integrated into the Institutional Results Framework? c) To what extent are WRI's PMEL systems (including DevResults) and standards fit for purpose for measuring progress toward system change? d) How well do ToC pathways to impact, indicator selection, target-setting approaches, and methods for tracking broader PNC impacts support measurement of system change? e) To what extent are WRI staff effectively using PMEL systems, processes, and standards? f) To what extent has WRI achieved a step-change in PMEL integrations across operations and programs, including through funding models, staffing and internal incentives?
KEQ5: How have efforts to reshape the institution supported delivery of the strategy?	Sub-questions: a) To what extent does the governance structure provide oversight for the implementation of the strategy? b) In what ways has WRI's OneWRI centrally coordinated network supported the delivery of its programmatic strategy? c) In what ways has flexible funding from core donors contributed to advancing the strategy?

1.4 Methods

The review applied a mixed-methods approach, combining qualitative and quantitative data to enable triangulation of findings across multiple sources.

Data-Driven Document Review: A structured review of over 200 documents was conducted, including the Strategic Plan and Results Framework, donor reports, annual plans and reviews, country strategies, and program documentation. This enabled analysis of how strategic priorities and theories of change evolved over time, and provided a foundation for assessment progress, coherence, and the adaptation of WRI's goals, internal shifts, and systems-level approach.

Portfolio and Results Framework Review: Quantitative analysis of the Results Framework and available internal performance data was undertaken to assess progress against targets at global, thematic, and country levels. Building on WRI's Managing for Results systems, this included a review of programmatic results captured in DevResults, Top Outcomes archives, and the organizational Scorecard to assess reported progress against the 2023–2027 Strategic Plan, quantify WRI's reach and contribution, and identify strengths and gaps in how results are defined, measured, and communicated.

Key Informant Interviews: A total of 195 stakeholders were consulted through semi-structured interviews with internal and external actors, including WRI leadership, staff across programs and country offices, including core functions, donors, implementing partners, and external experts. These interviews provided in-depth perspectives on implementation, organizational change, and contribution to outcomes, and were used to test emerging findings and explore causal pathways.

Focus Group Discussions (FGDs): Focus group discussions with WRI staff and external stakeholders provided a forum to explore shared experiences, validate findings, and examine organizational dynamics across teams and levels. to explore key questions, sense-check outcome narratives, and generate insight into organizational effectiveness and coherence. FGDs conducted during country visits also generated insights into project implementation, stakeholder experiences, and national and sub-national outcomes.

Survey: An internal staff survey gathered perceptions from 714 WRI staff (31% response rate) across the network on WRI's performance, partnerships, and strategic direction. Survey findings complemented qualitative data by providing broader stakeholder perspectives and identifying areas of convergence and divergence across respondent groups.

Country deep dives: The Ethiopia and Indonesia country deep dives assessed the extent to which country portfolios contributed to the targets and outcomes of WRI's global strategy, and how the five internal shifts supported delivery at country level. They applied a mixed-methods approach, combining document review, stakeholder consultations, and field-based inquiry to examine how delivery pathways operated in practice and generate lessons to inform broader country transitions across WRI's network. Country visits provided opportunities to identify emerging results, test contribution claims, and assess enabling and constraining factors influencing progress. The country deep dives examined the entire country portfolio, encompassing all relevant workstreams and initiatives. Within each country, the review team applied a project sampling approach to identify priority sites, programs, and partnerships for closer examination through interviews and field visits.

Pillar deep dives: The climate resilience and restore deep dives assessed how pillar-level strategies and theories of change translate into practical climate resilience and restoration outcomes across countries and portfolios. The deep dives combined document reviews, key informant interviews, and country-level assessments (Ethiopia and Indonesia) to triangulate evidence on policy influence, strategic approach, and on-the-ground outcomes, including early signals of systems change. Case-level analyses and cross-country

comparisons were used to surface best practices, context-specific adaptations, and key trade-offs across contexts.

Stakeholder engagement overview

In total, 316 stakeholders were engaged through interviews and FGDs. This included over 100 WRI staff members consulted through in-country and virtual interviews, of whom 65 were country office staff. In addition, 90 external stakeholders were interviewed, including donors, implementing partners, experts, national and sub-national government officials, civil society representatives, as well as four members of WRI's global and country boards.

Indonesia: 139 stakeholders consulted

79 interviewees and 60 FDG participants across Jakarta, Bali, and Sumatra

Ethiopia: 106 stakeholders consulted

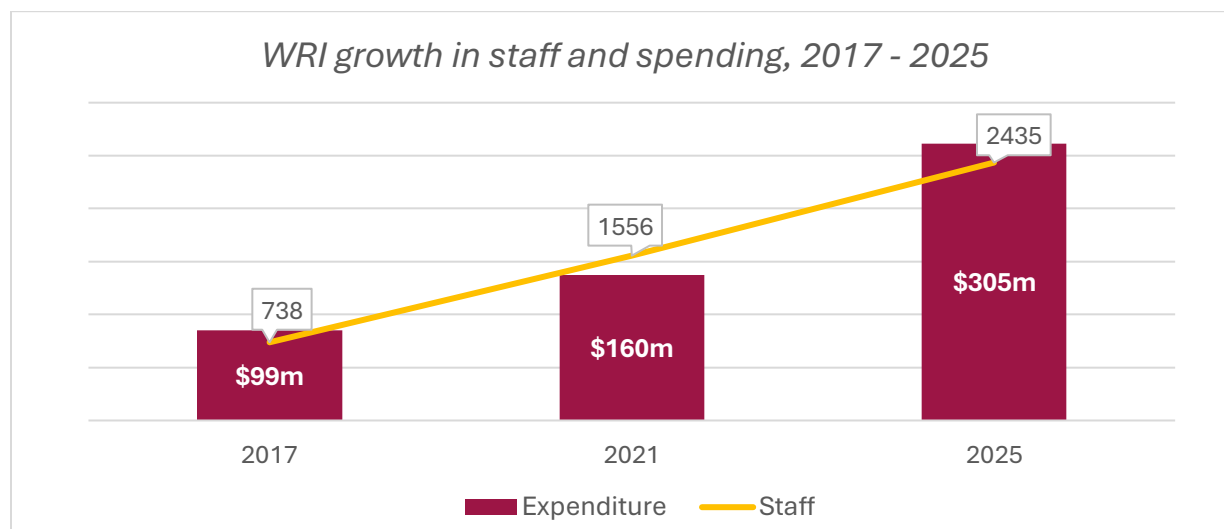
45 interviewees and 61 FDG participants across Addis Ababa, Dire Dawa, and Hawassa

2. Context

2.1 Organizational growth and change

Over the past decade, WRI has undergone a period of rapid expansion, accompanied by increasing operational complexity. This growth trajectory was already evident at the time of the previous Mid-Term review in 2021, when staff numbers and expenditure had nearly doubled compared to 2017 levels. By the end of 2025, WRI had reached approximately \$305 million in annual expenditure and 2,435 total staff, reflecting both growing global demand for its work and a significant deepening of its programmatic reach.

Figure 1: WRI growth in staff and spending, 2017-2025



WRI's growth has been reinforced by the Campaign for People, Nature and Climate, which has raised \$873 million toward its \$1.5 billion goal since its launch in 2023. Major contributions, such as the \$75 million commitment that launched the Polsky Center for the Energy Transition, have supported the expansion of WRI's operational footprint across systems and geographies. WRI now operates in 11 focus

countries - including Brazil, China, Colombia, Democratic Republic of the Congo, Ethiopia, India, Indonesia, Kenya, Mexico, Rwanda and the United States, and in the regional offices in Africa and Europe, while working with partners in over 50 countries. This expanded presence has enabled WRI to engage more deeply at national and sub-national levels, while maintaining a global platform for influence. More fundamentally, this growth reflects WRI's evolution into an organization working across interconnected systems and multiple scales.

This rapid expansion has been accompanied by significant organizational change. WRI has transitioned toward a more centrally coordinated global network, with stronger emphasis on alignment across international offices and between global and country-level work. It has evolved its internal structures and ways of working to manage increased scale and complexity and has demonstrated commitment to developing and implementing a detailed action plan in response to recommendations from the previous mid-term review. Against this backdrop, WRI's 2023–2027 Strategic Plan, *Getting the Transition Right for People, Nature, and Climate*, represents a deliberate effort to focus the organization's expanded capacity and sharpen its contribution to global challenges.

2.2 WRI Strategic Plan 2023- 2027: Getting the Transition Right for People, Nature, and Climate

This review comes at the mid-point of WRI's 2023-2027 Strategic Plan, a plan that highlights the converging crises of inequality, unsustainable resource use, and climate disruption. Around the world, people are grappling with a new era of *polycrisis*, where climate shocks, conflict, insecurity, inequality, and institutional fragility interact in compounding ways. WRI's strategy responds to this challenge by targeting time-bound quantifiable change in human systems (Food, Land and Water; Energy; and Cities), in support of global people, nature and climate (PNC) goals:

- **People:** Ensuring that all people live in equitable societies where they can meet their essential needs
- **Nature:** Protecting and restoring the ecosystems on which life depends
- **Climate:** Limiting global warming to 1.5°C while supporting communities to adapt and thrive.

The strategy is built around a set of five major shifts that collectively redefine how the WRI pursues its mission.

Shift 1: Integrated approach to People, Nature Climate

Shift 1 of WRI's Strategy focuses on moving the organization away from multiple separate programs, each concerned with distinct aspects of human development or environmental protection, to the collective pursuit of three interconnected Global Goals for People, Nature and Climate: improving human well-being, protecting the natural environment, and tackling climate change.

Shift 2: Focus on systems change

Achieving WRI's strategic goals requires a transformation at the systems level. Shift 2 places systems change at the heart of WRI's ambition, reflecting the urgency of transforming how societies produce, consume, and govern. It recognizes that incremental action or action confined to single sectors or regions will not be enough to address the crises that we face. WRI's approach to systems change is grounded in transforming the fundamental human systems that shape outcomes for people, nature, and climate. It also works to shift the enabling economic, financial, and governance structures that underpin these systems so that progress happens at the pace and scale needed for global impact.

Shift 3: Emphasis on country transitions

Shift 3 increasing WRI's focus on country transitions, recognizing that impact ultimately occurs within national and local contexts. The strategy prioritizes work in focus countries to test, refine and scale approaches that are locally relevant, strengthening the link between global ambition and on-the-ground change. Central elements of the plan include equity to ensure that systemic shifts deliver benefits for those historically excluded from decision-making and resource access; strong partnerships with governments, businesses, civil society, and other key change-makers; and integrated delivery across WRI's matrixed structure, where country-level work complements global initiatives and vice versa.

Shift 4: Measuring success

Shift 4 introduces a unified approach to measuring success through an organization-wide results framework, supported by theories of change, with targets and metrics to monitor, evaluate and learn from the real-world impact of WRI's outcomes. The strategy introduces a more rigorous approach to planning, monitoring, evaluation and learning. This includes the development of a shared Results Framework, country-level theories of change, expanded use of DevResults, and new processes such as Pause and Reflect. The strategy also calls for a more rigorous approach to learning, using clear theories of change (ToC) and indicators to evaluate progress and advance evidence-based solutions.

Shift 5: OneWRI

Shift 5 focuses on strengthening WRI's internal capacity to deliver its strategy by improving how it organizes its people, operations, and funding. It aims to create a more cohesive, centrally coordinated global network with stronger collaboration across country and regional offices. The shift also emphasizes enhancing management systems, governance, and operational processes to support consistent delivery. In parallel, WRI seeks to better align fundraising with strategic priorities, deepen Board and donor engagement, and increase flexible, long-term funding.

3. Findings

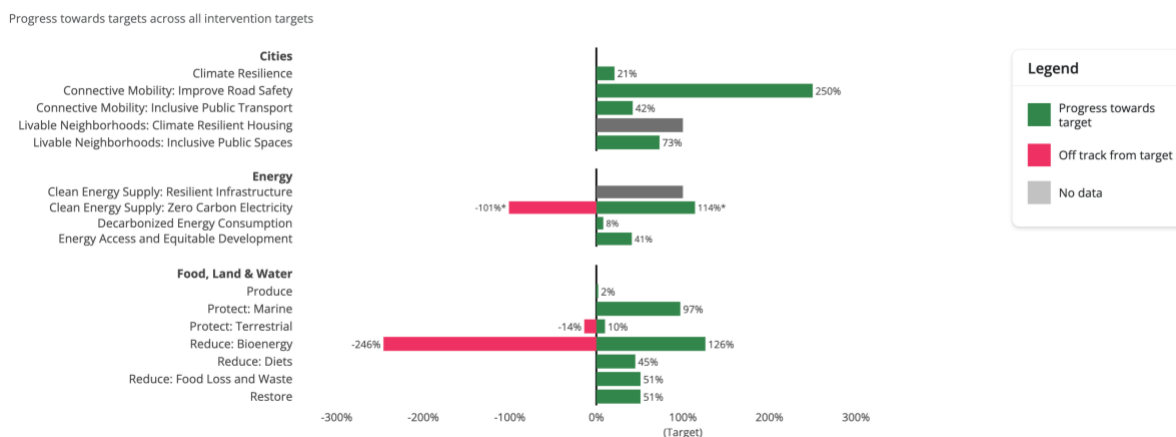
Results: WRI's progress against the targets and outcomes set out in its 2023-2027 Strategic Plan

Overall assessment

WRI is making credible and measurable progress against the results framework set out in its 2023-2027 Strategic Plan. The institutional scorecard tracks progress against the Plan's results framework and shows that the organization is broadly on track at mid-term, with substantial progress across several human systems and a majority of outcomes already achieved or progressing as expected. Seven of the 16 global Intervention Targets are already above 50 percent progress at mid-term, and some have exceeded their 2027 targets. At the same time, progress is not uniform across systems, targets or geographies, in part because some targets are more ambitious than others, depend on external factors, or represent newer bodies of work that are still gaining momentum. Some targets are already being met or exceeded, others are progressing more slowly, two remain at very early stages, and two lack mid-term data. At the level of outcomes (which measure progress within human systems, one level below the indicators tracked in the institutional scorecard), 79 percent of 246 tracked outcomes are progressing as expected. This is a significant institutional achievement. The result is a broadly encouraging but differentiated picture: WRI is delivering meaningful results, but continued progress will depend on sustained funding, adaptive management, and the ability to navigate political, institutional and country-level constraints.

Progress against global intervention targets

Figure 2: Progress against intervention targets



The global Intervention Targets are intended to capture organization-wide, time-bound, quantifiable changes in human systems. These changes in turn are those to which WRI and partners commit in order to deliver positive impacts for people, nature and climate. They therefore represent a deliberately ambitious level of measurement. They are not simply project outputs; they are intended to describe change in the systems WRI seeks to influence.

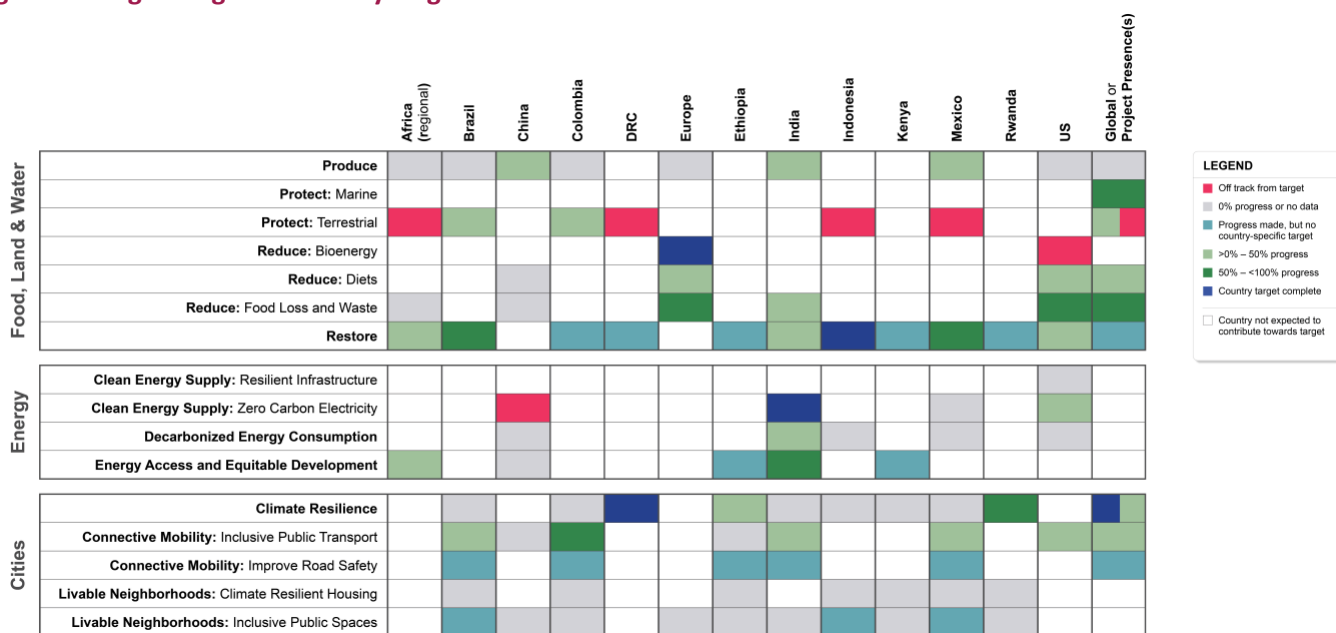
Against these targets, the strongest performance is currently in Cities, especially connective mobility and road safety. The road safety target has already been substantially exceeded: WRI reports 250 percent progress against its global target of 300 kilometers of safer roads implemented through direct WRI influence, including more than 200 redesigned intersections across Brazil, Colombia, Ethiopia, India and

Mexico. This is one of the clearest examples of a scorecard target where the institutional indicator, the theory of change, and country-level implementation appear to connect convincingly.

Other areas of strong progress include parts of Food, Land and Water and Energy. Seven targets are above 50 percent progress, including marine protection, food loss and waste, bioenergy, restoration, zero-carbon electricity, inclusive public space and road safety. A second group of targets shows moderate progress, between 10 and 50 percent, including diets, terrestrial protection, energy access, climate resilience and public transport. Two targets — FLW Produce and Decarbonised Energy Consumption — are showing progress but remain below 10 percent at mid-term. Two further targets, climate-resilient housing and clean energy supply for resilient infrastructure, have no mid-term data reported. In some cases, targets depend on relatively tractable interventions, clear methodologies and existing country pipelines. Others require deeper changes in markets, finance, behavior or political incentives, where WRI's contribution is important but indirect and where progress is harder to move quickly or attribute precisely. The scorecard therefore provides an important signal of delivery, but it must be interpreted with care. Strong aggregate progress can still sit alongside very different country trajectories, even though scorecard visualizations disaggregate performance by country intervention target to make these patterns visible, while weaker aggregate progress may still conceal important upstream or enabling achievements that have not yet converted into quantified system-level change.

Progress against country intervention targets

Figure 3: Progress against country targets



At mid-term, the country-level picture shown by Country Intervention Targets is also encouraging. The Country Intervention Targets provide an important bridge between WRI's global ambition and country-specific transition pathways. They recognize that systems change must ultimately be grounded in specific national and subnational contexts, while still contributing to institutional goals. Out of a total of 80 country-level targets contributing to the global intervention targets, 4.5 country targets have already been met, including climate resilience in the Democratic Republic of Congo, clean energy supply in India, bioenergy in Europe, and restoration in Indonesia; further 9.5 country targets have reached between 50 and 100 percent progress; 22.5 are between 0% and 50%; 38 lack data or have not yet progressed; and

just 6.5 are off track. There are 16 areas where countries have made progress even though there is no explicit target. (Half achievement in a particular target reflects differential achievement against separate components of the same target.)

Progress against country targets varies. Some country offices are already generating strong evidence of progress against institutional targets; others are contributing through work that is not easily counted within the country target architecture; and some are still building the conditions for future contribution. In the Restore pillar, one country target is complete, two countries are between 50 and 100 percent progress, and three are between zero and 50 percent. Five countries have made progress towards the global target despite having no country-specific target, while Europe and China are not expected to contribute to the global restoration target. In the Climate Resilience pillar, one country target is complete, one is between 50 and 100 percent, one is between zero and 50 percent, six countries are reporting zero progress or no data, and four countries are not expected to contribute to the global target.

Theory of change outcomes

At the level of Theory of Change outcomes, the picture is broadly positive. All Country Intervention targets are supported by a theory of change, and between 68 and 79 percent of 296 tracked outcomes are either already achieved or achievable within the expected target year.² This suggests that WRI is not only making progress against high-level scorecard targets but also building a wider body of evidence about the intermediate changes that need to occur if human systems are to shift over time.

Performance varies by system. Cities shows the strongest progress, with approximately 80 percent of outcomes on track and a small number already achieved. This reflects tangible progress in areas such as inclusive transport, public space, road safety and urban resilience, although some outcomes remain exposed to shifting municipal priorities and funding delays. Food, Land and Water reports that around 60 percent of outcomes are expected to be delivered within the current strategy period, with additional outcomes likely to materialize beyond 2027 because ecological restoration, land-use change and behavior change operate over longer timeframes. Energy shows a more mixed picture, with around 40 percent of outcomes on track and particular constraints in areas such as clean energy supply, where political and funding challenges in some countries are affecting delivery.

The outcome data therefore reinforce the central finding from the intervention targets: WRI is making real progress, but the pace and nature of delivery vary across systems. The Cities portfolio appears strongest against the current results architecture. Food, Land and Water is generating important results, but many of its outcomes are inherently longer term. Energy contains clear success stories, including clean energy expansion in key geographies such as India and China, but also faces stronger political economy and funding constraints in some contexts. This unevenness should not be read as failure; rather, it reflects the different maturity, tractability and external conditions of the systems WRI is trying to shift.

² The lower bound figure of 68% divides the number of targeted outcomes that are already achieved or on track by the total number of outcomes including those for which there is no data ($(201/296) \times 100 = 68\%$). But including outcomes for which there is no data in the denominator but not the numerator effectively assumes that no outcome for which data is lacking is making progress. Alternative approaches are (i) to exclude from the denominator those outcomes for which there is no data: $(201/263) \times 100 = 76\%$; or (ii) to assume that all outcomes for which there is no data are on track: $((234/296) \times 100 = 79\%$. The actual share of targeted outcomes that are either achieved or on track will lie between the extreme bounds of 68% and 79%.

Shift 1: An integrated approach to People, Nature and Climate

What we have looked at

WRI's strategic framework articulates three interconnected goals: ensuring people live in an equitable society where they can meet their essential needs (People), protecting and restoring ecosystem health (Nature), and limiting global warming to 1.5°C while supporting communities to adapt to climate change (Climate). The People, Nature and Climate framework (for which we use the shorthand PNC in the rest of the report) recognizes that the root causes of the challenges facing people, nature and climate are deeply interconnected and must be tackled together and at the same time. It provides WRI with a 'guiding star' for aligning, focusing and measuring the impact of its work.³ By applying this integrated lens, WRI seeks to maximize win-win solutions across People, Nature and Climate outcomes while systematically identifying, managing and reducing negative trade-offs where they arise.

Box 1: Recommendations from the previous MTER

Recommendation 3.1 WRI needs to develop stronger policies, Standard Operating Procedures and strategies to elaborate the WRI approach to PGSE, fully.

Recommendation 3.2 WRI should link completion of training in poverty, gender and social equity to staff performance assessments where training may be tailored to the existing skills, experience and needs of staff.

Recommendation 3.3 WRI needs to earmark additional funding for post-intervention impact assessments/longitudinal research to measure outcomes and impacts and include as a structural component of any funding agreement with donors.

Recommendation 3.4 At a minimum WRI should conduct Political Economy Analysis, Social Impact Assessment and Do No Harm assessments at the start of all work initiatives, potentially as part of the New Lines of Work process, to understand how poverty, gender and social equity are shaped by power dynamics etc.

Recommendation 3.5 WRI needs to energetically implement the key proposals of the Equity Task Force, including the use of Markers for gender and social equity, to help ensure that success is recognized; top outcomes reward contributions to equity; and efforts to bolster staff capacity and capabilities are sustained.

Recommendation 3.6 A need to increase engagement, consultation and feedback to stakeholders at community level including women and other marginalized people, and representative bodies i.e. NGOs, CSOs and local leaders.

Recommendation 3.7 WRI needs to build Do No Harm Risk Assessments into PEAs, before and during work in different contexts.

Recommendation 3.8 The Review Team also strongly recommend increasing the number of products produced in multiple languages.

³ WRI (2023) 2023-2027 WRI Strategic Plan: Getting the Transition Right for People, Nature and Climate, [link](#).

The MTER finds that the actioning of the previous recommendations remains partially realized in practice. The strategy picks up the direction of these recommendations with a suite of guidance materials and toolkits developed, Equity Fundamentals training approved by the Impact Committee in March 2026, and the elevation of People (which includes equity within its definition) as a goal represents genuine reorientation of strategic prioritization for GSE as part of the institution's core. However, GSE is not yet systematically embedded across design, delivery or accountability across the Institute.

Under Shift 1, the MTER examines how far WRI's integrated PNC approach is embedded as interconnected goals in WRI's strategic architecture, country strategies and ToCs. It also looks at how staff interpret and operationalize integration in practice, including how they understand trade-offs between P, N and C and whether credible integration can be demonstrated at portfolio level rather than via a 'triple-win' in every project. In line with the KEQs, the review places particular emphasis on whether WRI's People goal and its commitments on gender and social equity (GSE) are being translated into practice across systems and countries, shifting from a general 'people-oriented' lens to a more equity-oriented one that asks who benefits, who holds power and how trade-offs are managed.

EQ1a. How are WRI's global and country programs advancing people, nature and climate goals in a joined-up way, consistent with Shift One of WRI's strategy? What evidence exists – in program design, implementation, and emerging outcomes – of joined-up programming across WRI? What can be done to reinforce integration where it is lacking?

An integrated PNC approach is clearly embedded in WRI's institutional framework, but its application in day-to-day work is still emerging

PNC is clearly embedded in WRI's strategy and institutional architecture, with the PNC intent strongly articulated in the 2023-2027 Strategic Plan. Staff interviews suggest that PNC gives a clearer institutional language and framework to something many felt WRI had already been doing; several described the framework as naming and sharpening a long-standing instinct to work on connected issues rather than as an entirely new idea. The formalization of PNC in the current strategy is therefore significant because it creates the conditions to move from instinct to intentional practice. It provides a clear framework for a globally distributed network, supports more coherent reporting, and offers a basis for more deliberate and consistent application of an integrated approach.

Survey data confirms that staff understanding of the PNC framing is high. 93% of respondents agree or strongly agree with the statement 'I understand what WRI means by integrated action for people, nature and climate' (5% of respondents marked this question as N/A; only 2% disagreed). Understanding of how to apply the approach is somewhat lower but still relatively strong: 79% of programmatic staff surveyed agree or strongly agree with the statement 'I understand how to apply this integrated approach in my work' (13% of respondents marked this question as N/A, 8% disagreed or strongly disagreed). Staff in operational and core-function roles more frequently report uncertainty about how the PNC lens maps onto their day-to-day responsibilities, and several new joiners noted that PNC had not been part of their induction and that they had relied on self-directed learning. Taken together, the data point to strong conceptual uptake, especially across programmatic staff, with room for more deliberate onboarding and support for non-programmatic roles where appropriate.

Figure 4: Survey responses to “I understand what WRI means by integrated action for people, nature and climate.” (Programmatic staff only)

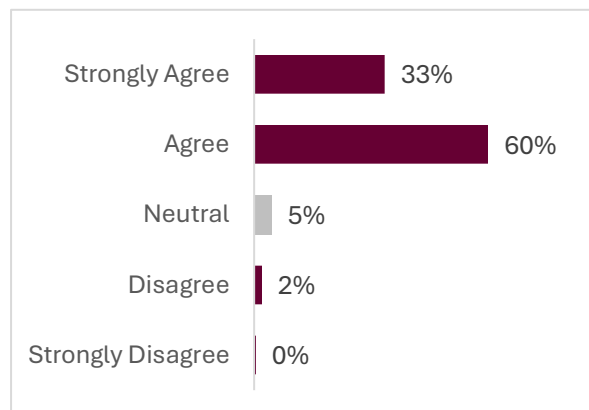
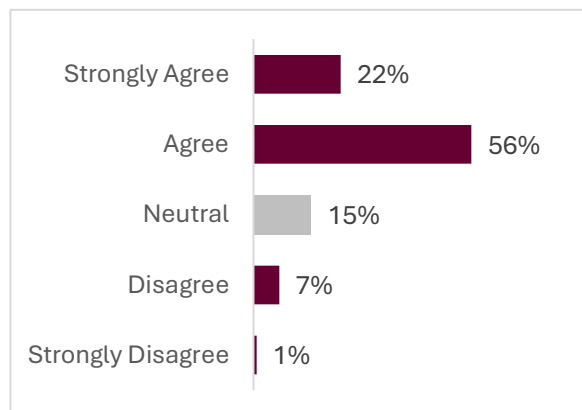


Figure 5: Survey Responses to “I understand how to apply this integrated approach in my work.” (Programmatic staff only)



In light of these broadly positive survey results, the main concern is not lack of understanding but how far the PNC lens is being translated into day-to-day operations. Staff at program and project level describe PNC as a helpful organizing principle for situating their work within WRI's strategic framework, but many note that the extent to which that lens is applied to concrete design or delivery choices is not consistently discussed and that relatively little structured training has been provided so far. A recurring theme is the absence of systematic guidance on how to work through trade-offs when PNC dimensions pull in different directions; staff describe having to navigate tensions at team level without common tools. One survey respondent commented that WRI had “*under-articulated both the linkages and the trade-offs between people-nature-climate*”, leaving teams to interpret integration without clear guidance. The main gap in PNC integration is therefore operational follow-through: turning high levels of conceptual uptake into consistent tools, guidance and incentive structures that embed integration in proposal design, indicator selection and day-to-day delivery choices.

Box 2: Operationalizing PNC

The MTER identified a set of improved or new measures that would support WRI in its move from PNC-aligned intent to a genuinely binding integration framework:

- **Clarifying expectations on where integration lives:** Set out a simple standard for when PNC-integration must be demonstrated at project level (e.g., flagship, high-risk or high-leverage initiatives) and when it is sufficient at portfolio level, so that teams are not implicitly expected to design ‘triple win’ projects in every case.
- **Building common tools for alignment and trade-offs:** Develop practical tools and light-touch processes for PNC alignment checks, trade-off analysis and do-no-harm assessment in program and proposal design, including guidance on when it is legitimate to prioritize one or two dimensions and how to document that choice.
- **Embedding PNC in ToCs and MEL:** Embed PNC aligned indicators in ToCs and MEL systems, especially for larger or strategic programs, so that integration is measured and not just described, and so key trackers (e.g., at pillar and system levels) capture PNC dimensions where they are material.

- **Strengthening WRI's focus on equity:** Use of intersectional social analysis and political economy analysis as standard components of country and human system strategy cycles, with review at least every two years.
- **Strengthening GSE capacity:** Increase GSE capacity at regional and country program level, ensuring that advisors play a central role in integrating GSE approaches and equity-transformative principles into strategies, ToCs and project documents.
- **Integrating PNC integration into induction and ongoing learning:** Make PNC and trade-off management part of induction and regular learning offers, with concrete case examples from programs and country offices, to turn high conceptual understanding into consistent practice.

Further clarity is needed on whether PNC integration should be demonstrated within every individual project or across portfolios. Some staff interpret the integrated approach as requiring every project to advance all three goals simultaneously, while others take a portfolio view in which some projects primarily advance one or two goals so long as the overall portfolio delivers across all three. Staff highlight the practical consequences of misinterpreting integration as “everything, everywhere, all at once” and the risk that this creates unrealistic expectations for project design and encourages rhetorical claims of co-benefits that are not backed by indicators or resources.

The MTER's assessment and discussions with WRI leadership support a differentiated view. At portfolio level, PNC integration should function as a binding design framework: projects and programs across the portfolio are selected and prioritized based on PNC criteria, the portfolio as a whole delivers across all three dimensions, and integrated PNC indicators are developed and consistently reported against. At project level, the expectation should be more realistic. Not every project can or should deliver a fully balanced triple win, but each project should:

- Demonstrate plausible links to at least one PNC goal and, where relevant, to all three.
- Undergo an explicit PNC alignment check.
- Identify and manage trade-offs or tensions between dimensions where they are material.
- Be designed to avoid causing harm to other dimensions when it focuses primarily on one or two of the PNC goals.

Current practice does not yet fully match this model. Document review and sample projects suggest that PNC logic is not yet a consistent filter in portfolio-level investment decisions or systematically reflected in the templates, guidance and criteria that shape program selection and design. At project level, PNC alignment checks, trade-off analysis and do-no-harm thinking are evident in some designs and reviews but are not yet embedded as standard steps in design, appraisal or MEL processes across the portfolio.

An important structural challenge reinforces this gap. The Strategic Plan establishes the three PNC goals as the guiding star for WRI's Results Framework, and each of the IRF's Human System Pillars identifies impact indicators across people, nature and climate. However, despite a clear system for tracking PNC impacts, including MfR guidance and a standard menu of PNC impact indicators, there has been limited follow-through on measurement at this level. Country ToCs, one of the main vehicles for collecting IRF-aligned reporting data, do not consistently include these impact indicators. As a result, WRI has limited ability to track how its work is contributing to high level PNC outcomes. Looking ahead, WRI should encourage teams to systematically incorporate the existing menu of PNC impact indicators into their ToCs from the outset, acknowledging that measurable impact at this level will take time to materialize. The annual reporting cycle can then be used to report against these indicators. This would allow WRI to report

on a consistent set of impact metrics at the institutional level, for example, the number of livelihoods supported, hectares restored, or tones of emissions reduced, aggregated within comparable program types and using transparent methodologies, without treating these figures as compliance targets.

It is worth noting that WRI is already piloting a complementary PNC reporting approach in Africa, monitoring PNC indicators at the country strategy level as a proxy for country transition. This is an important track that could help to support institutional level PNC reporting in the near term, while the broader embedding of PNC indicators into country ToCs continues to develop.

WRI demonstrates substantive PNC alignment, but further work is needed to embed PNC as a binding framework for design and delivery

WRI has not yet fully operationalized what PNC integration should mean in practice. PNC alignment means that projects and portfolios can demonstrate plausible links to PNC outcomes and can often point to co-benefits across more than one goal. PNC as a binding design framework would mean that activities are selected, prioritized or stopped based explicitly on PNC criteria; that integrated PNC indicators are developed and consistently reported against; and that expected contributions across the three dimensions are built into ToCs and MEL systems from the outset rather than added retrospectively or described narratively.

In practice, the strongest examples of integration and trade-off management emerge where PNC is built into a single intervention logic from the start, reinforced by governance, finance or institutional mechanisms. SUNCASA in Ethiopia, for example, links ecological restoration (approximately 735 hectares restored, urban canopy increased from 18% to ~26%), green jobs (~7,800 created), and climate resilience (flash flood risk reduction, urban heat-island mitigation) within a unified project design, supported by strengthened city-level governance for nature-based solutions, helping to institutionalize this integration beyond the life of the grant. Similarly, the Tana Sub-basin Payment for Ecosystem Services (PES) scheme, also in Ethiopia, connects watershed restoration (Nature) with water security and income stability for upstream communities (People) and climate resilience (Climate) through a formal agreement in which downstream irrigators pay upstream communities (around 400 Ethiopian Birr (ETB) per hectare per year, with approximately 1.96 million ETB collected to date) in exchange for soil and water conservation and restoration activities. This arrangement illustrates how enabling systems, including economic valuation, governance agreements and financial flows, can align local incentives with broader nature and climate objectives, reinforcing both ecological and socio-economic outcomes.

Within the Africa Cities portfolio, PNC alignment is substantive but is largely internalized and intuitive rather than driven by a formal PNC design process. Staff describe orienting their work around who benefits, starting with the most climate-vulnerable people and places, and that nature-based solutions and climate co-benefits follow naturally from the programmatic niche that WRI occupies in cities. The nature dimension is described as deeply embedded in the cities program's ethos, shaped partly by institutional leadership that champions greening as a core operating principle, and the climate dimension is seen as implied by the portfolio's thematic focus on resilience and mobility.

Two programs from WRI Indonesia illustrate the range of PNC integration currently visible at project level. The social forestry and sustainable production work in West Sumatra, delivered through the Indigenous Peoples and Local Communities (IPLC) consortium, links forest protection to community tenure security, livelihood enterprise development and the recognition of IPLC rights. This demonstrates genuine Nature and People alignment, with the intervention logic built around both dimensions from the outset. While evidence on climate outcomes and long-term ecosystem health is still emerging, the

program demonstrates what integrated PNC design can look like in practice. The Accelerating Low Emissions Development (LED) project presents a different picture. The project is described as a climate and nature project but the focus on peatland restoration, forest monitoring and licensing transparency are all explicitly GHG-oriented, with nature appearing as an implicit rather than structurally embedded goal. People goals were present in the design but not visible in implementation. For instance, all outcome managers were men, and an independent review identified gender as a design afterthought rather than a structural feature.

The design logic of WRI projects is usually bound by donor results frameworks, posing a structural constraint to applying PNC as a binding framework. In most program and project documents reviewed, PNC is not named as a design criterion. PNC-consistent outcomes are present, but the framework itself is rarely described in proposals, indicator sets or governance documents, which remain anchored in donor-required standards and approaches. This reflects structural constraints rooted in how WRI's funding model and accountability architecture work. The large majority of WRI's resources are restricted, project-based funds managed against donor results frameworks that rarely reward integrated PNC design or multi-dimensional measurement. Staff across multiple interviews describe a pattern in which donor KPIs effectively set the design logic, often leaving people-centered or cross-cutting outcomes in a supporting role. The Bloomberg Initiative for Global Road Safety (BIGRS) in Ethiopia is a good example of this. The program is a strong performer against WRI's Connective Mobility target, with more than double the expected safer kilometers and redesigned intersections against the 2027 global target, but the program logic remains anchored in a road-safety donor mandate rather than in a PNC-centered diagnostic. The ToC has been adapted to articulate PNC links (People benefits from reduced fatalities; Climate co-benefits from active and public transport promotion), yet the Nature dimension remains indirect, and the primary organizing framework is still the Safe System. The German Federal Ministry for Economic Cooperation and Development (BMZ) funded restoration work similarly demonstrates PNC-aligned elements, including gender and social equity working groups and restoration diagnostics that consider livelihoods as well as ecology, but PNC does not appear in the Forest and Landscape Restoration (FLR) Platform's terms of reference or indicator sets.

PNC language is often applied after program design is complete rather than used as a filter from the outset. An Africa portfolio lead described a pattern common across the institution: *"When it comes to reporting, we find ways to add that language to fit in the narrative... it should be the other way around."* This practice of retrofitting PNC framing reflects the absence of standardized PNC design criteria in proposal templates and approval processes. It means that reported PNC alignment is more likely to reflect how work is described than how it was designed, making it difficult to assess how far PNC has genuinely shaped funding decisions or delivery in practice. An example of where WRI is seeking to change this approach is in the Africa Cities climate resilience portfolio, where multi-donor braiding across DANIDA, Global Affairs Canada and Caterpillar has been used to sustain a more coherent program across policy work, community engagement and nature-based solutions (NbS) implementation. This combination of flexible and complementary funding streams has enabled a level of PNC coherence that is harder to achieve with single-donor restricted funding and offers a model for how financing architecture can reinforce integrated design.

There is positive evidence that ToCs and newer programs are beginning to incorporate PNC more explicitly, particularly where ToC development processes have created a structured opportunity for teams to revisit causal logic. Country staff describe the pillar-level ToC development as one of the most useful processes in recent years, providing genuine training, grounding ToCs in country-level realities, and enabling program proposals to be built directly from locally developed ToCs rather than retrofitted to

global frameworks. In Africa, however, many ToCs remain regional by design, reflecting biome level work that crosses national borders, such as the Rusizi Basin or Greater Rift Valley, which limits the scope for country-specific PNC contextualization.

Country strategies show how PNC is becoming operational, but it is too early to assess impact on portfolio composition

Country offices are beginning to use PNC as a lens for shaping their overall mix of work, with country strategies providing some of the clearest evidence that PNC framing is becoming operational. They have the advantage of a clean slate: designed from scratch under the current Strategic Plan, they can use country-level PNC diagnostics as a starting point rather than having to retrofit integration onto pre-existing project portfolios. Across the four country strategies reviewed (Ethiopia (2026–2032), Indonesia (2024–2027), Colombia (2026–2032) and India (2024–2027)), PNC integration is generally well-embedded in strategic framing and diagnostic analysis. All four strategies open with an integrated country-transition diagnosis that maps PNC challenges and interdependencies before turning to programmatic choices. This indicates that WRI's country teams are approaching context analysis through a PNC lens rather than a more siloed thematic lens.

Each strategy explicitly organizes its work around WRI's three interconnected goals, indicating that WRI country teams are internalizing the PNC framework as an organizing principle, not merely a label to attach to outputs. Ethiopia's strategy describes contributing to a system-wide just transition that is equitable, sustainable, and resilient to tackle the interlinked challenges that affect people, nature, and climate, with climate framed as a unifying thread across all programs and social inclusion and gender equality mainstreamed to support equitable outcomes. WRI Indonesia's strategy states that achieving its country transition requires pursuing people, nature and climate goals in tandem, with objectives that combine procedural equity and well-being (people), sustainable food and energy production and ecosystem protection (Nature), and ambitious national climate efforts and transition to net zero (Climate). Colombia's strategy is presented as “promoting a just, regenerative, and resilient transition in the country that puts people at the center, protects its natural wealth, and accelerates action in the face of the climate crisis,” while WRI India's strategy frames its central challenge as balancing economic development with benefits for people, nature and climate.

The process of developing the country strategies has also strengthened PNC integration. Teams in Ethiopia and Indonesia report that strategy development required more deliberate cross-pillar collaboration, encouraged joint framing of country-level PNC challenges and results, and created space for program leads to test trade-offs and co-benefits together. In several cases, staff described country strategy discussions as one of the first times that different pillars had worked systematically through how their work contributes to shared PNC outcomes at the national level. Staff in Ethiopia described a deliberate shift away from a collection of disconnected projects toward a more selective engagement model, using the country strategy and transition framing to decide which proposals to pursue and how to position WRI's comparative advantages. In Indonesia, the country strategy is organized around national system transitions rather than a basket of stand-alone projects, and the office increasingly uses subnational pilots and policy work in cities, energy and land-use systems as building blocks of a more coherent transition-oriented portfolio.

As country strategies are new, it is too early to robustly assess the extent to which PNC-aligned strategic intent is reshaping portfolio composition, managing trade-offs and driving results in practice. Early signs in Ethiopia and Indonesia suggest that country strategies are being used to frame conversations with government and donors around integrated outcomes and to guide choices about which sectors and

partnerships to prioritize, but hard evidence that strategies have led to substantial reallocation or discontinuation of projects on PNC grounds remains limited at mid-term.

EQ1b. How do global and country teams operationalize WRI's people, nature and climate objectives given finite resources and donor mandates? To what extent are there trade-offs, or tensions between these objectives in practice, and how are these being managed? What consequences does this have for the depth and quality of integration?

PNC trade-offs are recognized in WRI's strategies, research and programs, but systematic management remains inconsistent

WRI's own published research makes a compelling case for why active trade-off management is central to any genuinely integrated PNC approach. The landmark Creating a Sustainable Food Future report⁴ frames the fundamental challenge as simultaneously closing a food gap, halting ecosystem loss and reducing agricultural emissions, arguing that these goals cannot be pursued independently without each undermining the others. On bioenergy, WRI's research warns that dedicated use of land for energy crops "inherently comes at the cost of not using that land for growing food or animal feed, or for storing carbon". WRI's 2025 Elephant in the Boardroom report⁵ surfaces a parallel tension in corporate sustainability, finding that while most large companies have set climate and nature targets, only 12% include any goal focused on people in their supply chains, an omission WRI argues actively undermines the sustainability objectives themselves. This research makes it clear that PNC goals can and do pull in conflicting directions, and that integration requires explicit choices about competing land, livelihood and climate demands. At the same time, sustainability of objectives is improved when taking a PNC approach. The question the MTER examines is how consistently this analytical rigor is reflected in how WRI manages trade-offs within its own programs.

At the strategic level, WRI staff recognize that pursuing PNC goals together involves real trade-offs, but these are handled in a largely pragmatic and ad hoc manner. Country strategies in Indonesia and Ethiopia both identify structural tensions and risks: Indonesia's strategy highlights 'headwinds' such as large-scale food estate expansion, down streaming of critical minerals, and a GHG-intensive housing program, while Ethiopia's strategy sets out pressures on land, water and livelihoods that could pit short-term needs against long-term restoration and resilience. These strategies articulate mitigation measures and WRI's comparative advantages, but they do not set out a consistent methodology for how teams should diagnose and manage these trade-offs across portfolios and projects.

In Ethiopia, the restoration portfolio offers some of the clearest examples of trade-offs being recognized and partially managed in practice. TerraFund projects, for example, have had to balance carbon sequestration and restoration objectives with the immediate livelihood needs of communities using the land, with field evidence showing tensions around species choices: communities often prefer fast-growing commercial species such as eucalyptus that generate immediate income but undermine long-term ecological restoration because of high water use and low biodiversity value. Partners report addressing these tensions through community consultations, species diversification and awareness-raising on ecological restoration, but benefit-sharing and governance arrangements that would systematically lock

⁴ WRI, Creating a Sustainable Food Future: A Menu of Solutions to Feed Nearly 10 Billion People by 2050, July 2019, [link](#)

⁵ WRI and CREST, Elephant in the Boardroom: People Are Missing in Corporate Supply Chain Goals, August 2025, [link](#)

in fair livelihood co-benefits are not yet consistently in place across sites. By contrast, SUNCASA in Dire Dawa demonstrates a more integrated and structured approach to trade-offs. The program links watershed restoration, green jobs and gender-responsive livelihoods, and climate resilience within a single intervention logic, reinforced by a Technical Working Group, a mayor-chaired Steering Committee, community by-laws for communal land governance, and a forthcoming Nature-based Solutions Strategic Framework to guide future investments. The design and early implementation show deliberate attention to both ecological and livelihood outcomes, even though biophysical monitoring systems for long-term climate and biodiversity effects are still being established.

Some of the sharpest potential trade-offs arise in infrastructure-led transitions, where roads, energy systems and urban expansion can degrade the ecosystems that nature and climate interventions are intended to protect. WRI's global strategy explicitly acknowledges such tensions in the bioenergy space, committing to reduce demand for crop-based bioenergy that competes with land needed for food production and carbon sequestration. Indonesia evidence highlights how resource flows and power dynamics in palm-oil and minerals value chains continue to reinforce deforestation-linked activities despite local shifts in narratives. In Ethiopia, the Powering Smallholder Farmers solar irrigation pilot generates climate mitigation and livelihood benefits by replacing diesel with solar pumping and increasing agricultural productivity but also raises questions about long-term water resource impacts that are only partially captured in current monitoring frameworks. Across these cases, however, clear examples of project pipelines being reshaped or stopped based on explicit PNC trade-off criteria remain limited.

WRI's funding architecture is a significant structural barrier to more systematic trade-off management.

One staff member noted that *"funding still flows along programmatic lines with KPIs not considering cross-cutting or multi-sectoral outcomes"*, making it harder to design and resource projects that explicitly optimize across PNC objectives rather than maximize single-pillar results. Of the programmatic staff survey respondents, 60% agreed or strongly agreed that *"trade-offs or tensions between PNC goals are openly discussed and managed within my team"* and 18% disagreed or strongly disagreed. This indicates that a substantial minority of program-facing staff do not yet experience such discussions as routine, suggesting a need for practical, Institute-wide guidance and tools on identifying, documenting and managing PNC trade-offs in proposal design, country and pillar ToCs, and major investment decisions so that trade-off management becomes a standard step in WRI's integrated approach rather than a matter of individual and team judgment.

EQ1c. To what extent do WRI's programs reflect its People goal and commitment to gender and social equity? How are gender and social equity reflected in both research and program outcomes at mid-term?

WRI's People goal and commitment to gender and social equity show strong strategic intent, but the conditions needed for consistent practice are not yet in place

The elevation of 'People' to one of three interconnected global goals, alongside Nature and Climate, reflects a significant reorientation of WRI's strategic priorities and an explicit institutional commitment to equity. Defining the People goal in the Strategic Plan as 'people living in an equitable society where they can meet their essential needs' marks an advance on WRI's previously narrow framing. The strategy commits to centering equity across all work and program activities, with procedural and distributive equity positioned not only as a siloed concern for dedicated teams but as a thread running through research design, program delivery, theory of change development and results measurement.

WRI's 2025 Top 10 Outcomes provide positive evidence that equity is being integrated across parts of the portfolio, with all ten outcomes demonstrating some equity content and several showcasing equity transformative approaches. The most advanced examples share a common approach: they begin with social context analysis, interrogate underlying drivers of marginalization and design interventions that seek to shift power relations rather than focusing narrowly on access. WRI India's climate resilient villages program is one such example. Using participatory methods, the team identified caste power dynamics between the Vanniyar community and the Irular tribe and reflected this in program design by intentionally building parallel pathways that benefit both communities, while targeting structural economic dependence through alternative livelihoods for the Irulars. The Nairobi Rivers Regeneration program employed use of sex, age and disability disaggregated data (SADD) to inform the design for climate resilient solutions targeted to the needs of vulnerable urban communities. The project demonstrates procedural equity through its engagement with women's rights organizations and women-led organizations as co-designers. The Standing Together for Environmental Defenders (STAND) initiative is another good example of a focus on procedural equity outcomes, building the capacity of grassroots environmental defenders to participate in decision-making processes.

Across the portfolio, equity integration correlates strongly with donor GSE requirements. The Indonesia country deep dive illustrates this well: where GSE requirements were embedded in donor conditions, as with the USAID's Clean Air Catalyst and UK PACT, projects delivered relatively strong equity outcomes. In projects without such requirements, equity considerations are sometimes sidelined, with marginalization identified but not addressed in program design or results. On procedural equity, a common misunderstanding is the conflation of consultation with meaningful participation in decision-making. FY25 Top Outcomes cite consultation with identified marginalized groups, but with limited documentation of how these groups shaped decision-making and implementation. For example, some urban green space and NbS initiatives engaged communities to map trees but did not ask them to express preferences on land use, safety or accessibility.

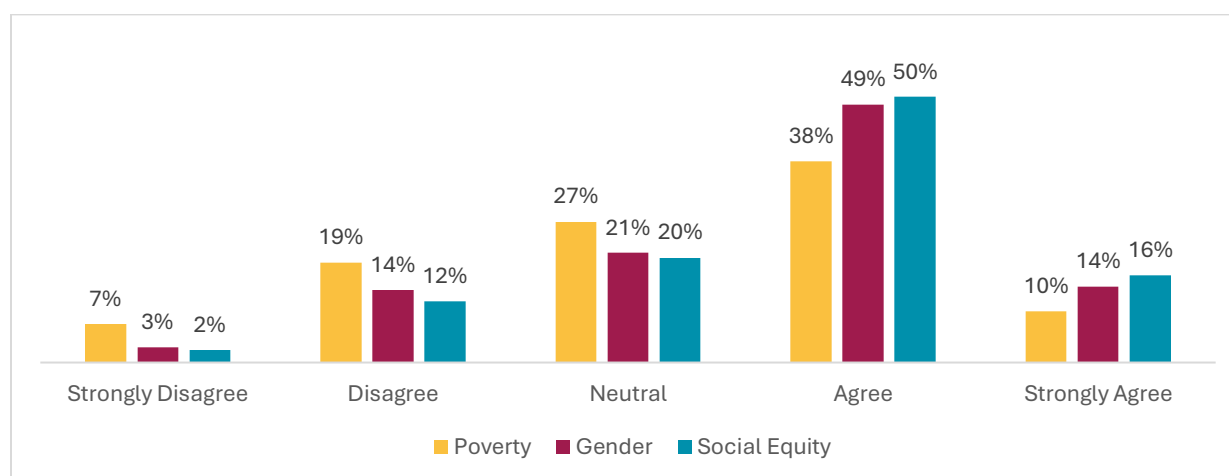
Institutional understanding of core GSE definitions, approaches and what equity integration means in practice, however, remains uneven. The transition from strategic intent and prioritization to systematic application remains incomplete. Despite a substantial range of resources made available to staff, including a GSE glossary in six languages, proposal checklists, team-specific toolkits and an established community of practice, these have not translated into institution-wide understanding or consistent application. The challenge is not one of information availability but of uptake, staff capacity to engage with materials and operational prioritization. WRI's Equity Fundamentals training, for example, available since April 2025 but only formally approved for programmatic staff rollout by the Impact Committee in March 2026, has not yet been widely taken up to date. Staff consistently cite insufficient time and a lack of practical guidance as barriers, but the review finds that WRI's organizational learning culture is also a significant contributing factor. Training provision alone therefore will not close the gap; a broader shift in how learning is valued, applied and resourced across the Institute is required.

Box 3: WRI's approach to poverty alleviation⁶

"WRI's approach to addressing poverty is to focus on strengthening procedural and distributional equity to tackle those systems and build agency for sustained change. WRI's approach aims to center equity across all our work and program activities. The same systemic drivers of inequity - lack of inclusion in political, economic and environmental decision-making and discriminatory institutions, laws, policies and practices - mean that those living in poverty, the historically marginalized and other vulnerable groups lack the influence and capacity to protect or access the resources needed to combat climate change and preserve nature."

Both WRI staff and external stakeholders recognize that achieving equitable outcomes is a long-term endeavor, and that the current strategy represents an important and necessary step in that direction. This framing is important context for the MTER: the review assesses progress at the mid-point of a five-year strategy and is concerned not only with what has been achieved to date, but with whether the foundations are in place for WRI to build on and deepen its equity commitments in the second half of the strategy period.

Figure 6: Survey responses to "I feel that the following are prioritized enough by WRI in decisions about projects, partnerships, and funding proposals." (Programmatic staff only)



Staff perceptions of the prioritization of poverty, gender and social equity vary by tenure. Across all three dimensions, staff who joined WRI in 2023 or later have a more positive view than longer tenured colleagues about prioritization of GSE across projects, partnerships and proposals. The gap is most pronounced on poverty, which has the weakest overall agreement. Among newer staff, 53% agree or strongly agree that poverty is sufficiently prioritized, compared with 43% of longer-tenured staff. 32% of longer-tenured staff disagree or strongly disagree, versus 21% of newer staff; a gap of 11%. Gender prioritization is viewed more favorably both groups, with 70% of newer staff agreeing or strongly agreeing compared with 57% of longer-tenured staff. Longer-tenured staff were nearly twice as likely to disagree. Social equity receives the strongest positive response overall, 66% of staff overall agreeing that social equity is prioritized across projects, partnerships and proposals; 73% of newer staff, and 60% of longer-tenured staff agreeing or strongly agreeing. The analyzed tenure-based differences across all three

⁶ WRI (2023) 2023-2027 WRI Strategic Plan: Getting the Transition Right for People, Nature and Climate, pg. 18, [link](#).

dimensions however warrants reflection. Longer-tenure staff are more likely to be evaluating current practice against a longer implementation history and able to reflect on any gaps between the strategy's priorities and practice over time, while newer staff may reflect that GSE strategic commitment is visible.

WRI's programmatic work frequently operates at a level of broad social aggregation, limiting its equity-orientation and transformative power. The MTER finds an encouraging trajectory of social context analysis, particularly at the country office level, but observes that programs typically work with broad population categories such as “women”, “low-income communities” and “urban residents” without critically assessing intersecting identities and or the specific factors that drive marginalization. This extends to the treatment of poverty reduction which is frequently cited as a co-benefit or anticipated downstream impact. While broad categories may be appropriate at portfolio level, more granular disaggregation is needed at program level to understand heterogeneity within populations, to ensure the fair distribution of gains across different groups and to address the structural causes of inequality. A particular gap is when household-level data is cited, projects frequently assume that benefits accruing at household-level are equitably distributed within it, which a substantial body of research on intrahousehold dynamics challenges. This is also essential for social safeguards, which require identifying which groups bear disproportionate costs, who is marginalized (including historically marginalized) and why. The review finds good example within the Cities work where sex, age and disability data is collected to inform urban resilience, with evidence of WRI also partnering with women's rights and women-led organizations. Examples include road safety projects in Bengaluru, India, and in Brazil, focused on redesigning of high-risk intersections and streets to protect vulnerable road users including pedestrians, women, children and Indigenous communities. The Bali public transport reactivation similarly demonstrates what explicit poverty-aware design can achieve, with a provincial subsidy model documented to have reduced household transport expenditures by up to 60% for low-income households.

The use of social context analysis such as Rapid Social Analysis (RSA) and Political Economy Analysis (PEA) is integral to advancing equity-oriented design and delivery. PEAs map the power relations and structures that influence the distribution of resources, representation and risks across populations, providing qualitative depth for understanding a context that quantified data alone cannot capture. Without this understanding, teams can identify that inequality exists but lack the contextual knowledge to address the political and structural conditions that reproduce it, resulting in program designs that risk being unresponsive to power dynamics, structural barriers and the lived realities of the people they seek to reach. An independent assessment conducted of WRI's integration of equity in ToC processes found that while social context analyses were conducted for most of the ToCs (93% of ToCs developed alongside or with input from a RSA), the analytical insights were frequently not carried through into program design or monitoring. This points to a persistent gap between analysis and action; the social context analyses do not always shape what is implemented or measured. Realizing the full value of RSAs and PEAs therefore requires not only that they are conducted, but that structured mechanisms translate the findings into project design choices, outcome pathways and MEL indicators.

Poverty reduction is recognized across WRI's programmatic portfolio, but recognition has not translated into structural analysis or measurable outcomes. While socioeconomic status and poverty are among the two most frequently recognized equity dimensions across RSAs and TOC problem statements, second only to gender, this recognition is predominantly distributional in character, focused on impacts of poverty rather than the causes or the power dynamics that sustain it. The independent equity integration assessment found that only 58% of problem statements identify root causes of inequity and systems of oppression are identified only in 23%, suggesting that poverty is often seen as a condition rather than analyzed as a structural outcome of exclusionary systems. The pattern is compounded by weak translation

into monitoring with fewer than half of MEL plans including distributional results for marginalized groups, and as a result, poverty reduction as an outcome is rarely tracked or verified. The Energy human system is of particular concern with 54% of Energy TOCs found to be equity unaware, the highest rate across all human systems, despite energy poverty being a critical dimension of socioeconomic exclusion in many of WRI's operating contexts.

Where social analyses and community engagement have been conducted, equity integration is more meaningfully reflected. WRI India's use of RSA and emerging use of PEA provides a strong institutional model for how to do this well. These exercises have enabled the India team to reflect on and interrogate power dynamics, identify structural barriers and develop a deeper understanding of target populations' lived experiences. The team is now working through how to reflect these insights in revisions to their ToC and program designs. The Cities4Forests US initiative, recognized as one of WRI's top 10 outcomes for 2025, similarly used RSA to understand how wildfire risks and restoration opportunities affect low-income, tribal and rural communities unequally, using this analysis to design career pathways for tribal youth and secure financing to protect displaced rural populations.

Box 4: Social equity in Theories of Change

Where applied, Rapid Social Analyses strengthen understanding of how different groups experience and respond to interventions. For example, stronger ToCs link factors such as gender, income, or social status to differences in access to services, exposure to risks, and capacity to benefit from interventions. In some cases, equity considerations are also embedded within problem framing and linked to system-level outcomes, such as productivity, resilience, or access to resources. The India – Climate Resilience ToC provides a clear example of integrated equity analysis by showing how gender, age, and migrant status shape access to services, exposure to climate risks, and ability to respond, and by linking these factors to interventions such as participatory planning and targeted investment in vulnerable communities. Similarly, Africa – Produce explicitly links unequal access to land, finance, and knowledge with low agricultural productivity and food insecurity, and frames equity as central to improving system outcomes.

However, this level of integration is not consistent. The independent assessment conducted reported that almost half of problem statements did not reflect the equity findings of social context analyses that has been conducted. This reflects a broader pattern in which inequality is recognized but not systematically analyzed or carried through into the ToC logic. Social equity is often descriptive and includes broad generic references to vulnerable and marginalized groups, then analytically identifying who is affected but less frequently explaining how inequities shape system dynamics, influence stakeholder behavior, or affect the likelihood of change. As a result, social equity is present as a framing device but less consistently used to inform strategic choices or shape assumptions and risks. Greater consistency in linking social analysis to causal logic, assumptions, and intervention strategies would improve the ability of ToCs to address structural drivers of inequality and support more inclusive system change. This requires that the social context analyses be treated not as stand-alone inputs to planning, but as living analytical foundations that inform design, implementation, real-time adjustments, monitoring and learning throughout the program cycle.

While social context analyses have been conducted, the translation of these analyses into practice remains uneven. Where RSA's have been conducted at pillar level, findings are not always applied consistently across all programmatic work within the pillar, raising the challenge of follow-through. More broadly, GSE guidance is provided across WRI's institutional processes, but its translation into practice is uneven and not yet fully mandatory. Outside of the ToC approval process, there is a lack of mandated standards to hold teams accountable for equity integration. The large proposal review process, for example, benefits from Equity Advisor review and comment, but there is no feedback loop between the advisor's comments, the final submission and implementation if a project is approved. This points to a structural gap in accountability: equity considerations raised at key decision points without any mechanism to ensure they are acted upon, leaving their influence dependent on the commitment of teams or donor requirement, rather than institutional expectation.

The evaluation finds evidence that gender inclusive and inclusive designs are sometimes undermined at the point of handover to government authorities or implementing partners. For example, observations during a site visit in Addis Ababa, Ethiopia, the MTER team noted that wheelchair-friendly curb ramps had been installed on one side of the road but not the other. A wheelchair ramp was also observed positioned mid-crossing at a gradient too steep for safe use. While WRI indicated that design and standards were developed but the works were completed by the municipality.

Equity integration is constrained by insufficient institutional capacity, limited authority and under-resourcing relative to ambition

WRI's Institutional Equity Integration Strategy 2025-2030 presents a coherent theory of change, but its implementation is constrained by the current operational model, authority gaps and insufficient resourcing. The strategy rightly focuses on building capacity and tailoring support to context, but its effectiveness is limited by weak accountability mechanisms and a persistent opt-in culture for equity work. The central function lacks the institutional authority to drive meaningful adoption across the organization, the human resource capacity to meet demand, and the accountability levers needed to ensure that guidance and tools provided to teams are applied. The result is a persistent gap between strategic intent and practice.

The positioning of the Equity Integration team has also, to some extent, constrained its institutional influence. Currently housed within the Climate, Economics and Finance (CEF) team, the function sits outside the core delivery and performance structures where other areas of delivery excellence are assessed and driven. While locating the team within CEF reflects the strategic intent to mainstream equity across all areas of work, in practice it has reinforced the perception of GSE as a programmatic overlay rather than a core component of program quality, the opposite of what the strategy signals. Closer alignment with WRI's excellence delivery functions would strengthen institutional leverage and send a clearer signal, through the organizational architecture, that GSE integration is a core quality standard, not an optional add-on. As a central function, the Equity Integration team should continue to provide structured guidance and tools for programmatic teams and to set institution-wide standards for quality and consistency.

The resourcing picture reinforces this concern: Only 13 staff across WRI hold formal Equity roles as Equity Advisor roles, against a total staff complement of 2,435. The GSE Committee, a body of representative staff who dedicate around 10 percent of their time to supporting the application of GSE guidance and learning across country offices and thematic areas, has long filled part of this gap, but this model should not substitute for structural capacity investment. The consequences of the resourcing gap are made visible in the independent assessment of equity integration which finds a correlation between

the presence of dedicated equity support and the quality of equity integration: where no equity support was documented, 60% of ToC's were equity unaware, while teams that received support demonstrated markedly stronger equity approaches.

Comparatively, organizations that have successfully embedded GSE as a component of their work typically operate through a reinforcing dual structure, with an institutionally authoritative central team setting standards, complemented by formal distributed expertise embedded within programmatic teams and dedicated coordination focal points across all operational offices. WRI has some elements of this structure in place, but not at the scale required for an area of stated strategic importance. WRI Indonesia is currently the only country office with both a country-level equity advisor and project-embedded equity staff.

MTER finds some evidence of practical consequences of this capacity gap. Key informant interviews cite examples of proposals being cancelled as WRI lacked sufficient expertise to support a proposal to address violence against women in the forestry sector, for example. This example illustrates capacity constraints within WRI resulting in the organization stepping back from GSE work, rather than acting as a prompt to invest in partnering with those that might be well placed to help support the relevant work. This is a missed opportunity, and one that the previous MTER identified; WRI should deepen its partnerships with organizations for which GSE is a core mandate. In a resource-constrained funding environment, the case for such partnerships is stronger than ever. Working in closer nexus with development and civil society actors, would allow WRI to extend their reach, particularly in contexts where the intersection of climate and nature loss, and social vulnerability are most acute.

At this mid-term juncture, closing the gap between ambition and practice requires commensurate investment in human resources. The GSE minimum standards literature is unambiguous on this point.⁷ Equity specialists need to be genuinely empowered within their roles, not only to review compliance but to build institutional capacity for GSE approaches, deepen the equity considerations for WRI's 'People' goal, and coordinate learning across the organization.

Equity integration in WRI research is improving, but progress is uneven and needs to accelerate

WRI's annual publication review, which has applied a structured scoring rubric for GSE integration since 2022, provides a valuable longitudinal data source. Table 1 below presents the scores awarded to publications from 2022 to 2023.

Table 1: Publication review scores for GSE integration, 2022-2024

Score	2022	2023	2024
N/A	13	9	17
0 – No mention of people or GSE concepts	14	40	13
1 – Brief keyword-level or normative mentions	20	13	24
2 – Partial integration, including some details but not consistently embedded across the text	14	10	17

⁷ FCDO and Adam Smith International, [Gender Equality and Social Inclusion Mainstreaming Research: Global Literature Review](#), March 2024

3 – Descriptive without analysis; failing to analyze differential effects throughout the text	25	13	13
4 – GSE primary focus and integral to analysis	14	15	17
% achieving 3 or 4 score	39	23	30

These results point to a mixed but encouraging direction of travel in alignment between WRI's publication portfolio and its institutional commitments in the institutional strategic plan. While the share of publications with GSE as a primary focus and integral to the analysis has increased overall from 14% in 2022 to 17% in 2024, the percentage share remains modest overall. Given that WRI's comparative advantage lies in the interplay between research, data and programmatic work, publications are a critical lever: they can help make the case for equity integration in policy debates and provide the analytical foundations for more equitable program and policy design and outcomes.

The review finds some positive examples of research informing programmatic work. The Urban Water Resilience work in Africa offers a notable illustration, grounded in research developed with partners. The work was iteratively tested through local engagements with the final report going on to inform work in six cities. Importantly, the team was able to adapt to local contexts, demonstrating how research with partners can serve as foundation for locally responsive programming.

External stakeholders however highlight the importance of strengthening WRI's engagement with local researchers and academics to advance knowledge decolonization and deepen the organization's grounding in local operational realities. At the global level, WRI's Research Anthropologists have begun to respond to this agenda by convening sessions on community-led research methodologies, the ethics of knowledge production and effective community engagement.

Box 5: WRI Indonesia's Young Scientist Incubator

External stakeholders highlight the importance of WRI's working with local researchers and academics to advance knowledge decolonization and WRI's grounding in local operational realities. WRI Indonesia's Young Scientist Incubator offers a compelling institutional model of this commitment in practice. Funded through the inaugural cohort of WRI's Innovation Fund, using flexible core resources, the initiative builds directly on the success of three cohorts of Wahana Riset Indonesia (2017-2019), which produced 11 scientific publications, 4 international conference presentations, 6 policy notes and 2 books, the incubator embeds youth researchers from local universities and communities into structured mentored programs tackling coastal urban resilience challenges in Jakarta, Padang and Sorong. The youth researchers are not just data collectors but knowledge co-producers developing their own policy relevant outputs and dissemination strategies grounded in lived local realities. The most recent cohort have completed fieldwork across four provinces, developed five knowledge papers, and submitted eight abstracts to present the research results in the first International Young Environmental Scientists conference. The program offers a replicable model for other WRI offices, both regional and country, seeking to build locally grounded research capacity.

Outcome reporting rarely disaggregates who benefits, limiting visibility of distributional equity

Across reported outcomes, there is often an implicit assumption that benefits reaching marginalized groups (e.g., households, SMEs, or communities) will be distributed equitably among all members, but outcome narratives generally lack the disaggregation and depth needed to meaningfully track equity outcomes. Indicators and narratives tend to focus on aggregate metrics, such as numbers of jobs created or livelihoods improved, without specifying who benefited. This is analytically insufficient: it does not reveal whether marginalized groups accessed opportunities on equal terms, nor whether outcomes translated into improvements in broader dimensions of well-being beyond income. Advancing outcome narratives and indicators to include disaggregation by relevant equity dimensions, and to describe changes in power, voice or security where material, would allow more credible demonstration of progress against the distributional equity aims of WRI's Strategic Plan. The same limitation is visible in the outcome narratives presented within the organizational scorecard, where reporting against institutional results framework indicators rarely distinguishes who within target populations is benefiting and who may be left behind.

Qualitative storytelling offers an avenue for better capturing and communicating equity outcomes, particularly where quantitative indicators cannot adequately surface changes in social dynamics and lived experiences. However, qualitative storytelling is not a cost-free proposition for an organization whose reporting culture and systems, and donor obligations are heavily oriented towards quantitative measurements. Collating qualitative evidence requires investment in methodology, staff time, and community-level relationships that are not always resourced within existing program budgets. At the same time, as WRI's focus on systems change matures, there is an opening for WRI to make a more deliberate case for combining qualitative storytelling with quantitative reporting on reach, so that it can show more clearly *how* change is occurring, and *for whom*. Positioning this not as an additional reporting burden but as analytically necessary for demonstrating systems change would align with WRI's strategic ambitions, while also enabling more credible reporting on equity outcomes.

Energy programs in East Africa have produced substantive distributional outcomes: for example, Makueni County in Kenya has committed a \$270,000 budget to electrify a local hospital with solar energy, the Sidian Bank introduced a financing facility for health-facility electrification, and solar-powered integration projects in Uganda are reported to have increased incomes for smallholder farmers. These programs utilized the Energy Access Explorer to provide a strong analytical foundation for targeting underserved populations. This is representative of meaningful outcomes; however, the associated narratives remain at a high-level, and reporting does not always provide sufficient detail on who specifically benefits to substantiate the equity dimensions of these results.

EQ1 conclusions

WRI has moved beyond rhetorical commitment on People, Nature and Climate and is using PNC as a guiding frame for strategy, country positioning and parts of the portfolio, although operational practice is still catching up. PNC is clearly embedded in the 2023–2027 Strategic Plan and in the four country strategies reviewed, and programs such as SUNCASA in Dire Dawa, the Tana Sub-basin PES scheme and social forestry work in Indonesia demonstrate that it is possible to link PNC outcomes through a single intervention logic backed by governance and finance mechanisms. At the same time, there is some confusion about whether integration should be demonstrated at project or portfolio level, PNC alignment checks and trade-off analysis are not yet standard practice, and PNC language is often applied retrospectively to existing designs rather than used as a binding criterion for what gets funded and scaled. Structural features of WRI's funding model and accountability architecture, including reliance on

restricted, donor-driven project funding and indicator sets with less focus on multi-dimensional outcomes, are part of the constraint. Qualitative storytelling has potential to help navigate this limitation, offering a means of conveying progress (on equity and systems change in particular), that aggregate metrics alone cannot capture.

On GSE the strategy represents a step change, elevating People to an explicit global goal, committing to procedural and distributive equity, and setting expectations that equity should run through research, program design, ToCs and results measurement. However, progress is uneven. Understanding of what GSE integration requires in practice varies widely; social analysis (RSA, PEA) and intersectional disaggregation are used in some cases (e.g., WRI India's climate-resilient villages and the Cities4Forests US outcome) but remain far from universal; and outcome reporting rarely specifies who within "beneficiary" groups is gaining or how power relations are shifting. Centrally, the Equity Integration function has a coherent strategy, but it operates with limited authority and thin resourcing, and in an opt-in culture where guidance and tools exist but are not consistently applied. The annual publication review and Top 10 Outcomes show encouraging signs of improvement, yet they also underline how much equity integration still depends on donor requirements, motivated individuals and pockets of good practice.

Looking ahead to the second half of the strategy period, the central challenge on PNC integration is not to redefine ambition but to close the gap between intent and practice. This will require a clearer, organization-wide interpretation of what good PNC integration looks like at project and portfolio level; practical tools and minimum standards for PNC alignment, do-no-harm and trade-off management; and deliberate embedding of PNC and equity indicators in ToCs, MEL systems and decision processes, supported by qualitative storytelling. It will also require commensurate investment in GSE capacity and authority, a stronger learning culture, and more systematic use of social and political economy analysis to shape design and outcome narratives. This will enable WRI to use PNC not just as a shared language but as a genuine design and decision framework that shapes what work is prioritized, how trade-offs are handled and who ultimately benefits.

Shift 2: Focus on Systems Change

What we have looked at

This section explores the overall question of whether a focus on systems change is starting to contribute to programmatic results. Shift 2 can be viewed as one part of WRI's response to longer-standing concerns about fragmentation and institutional coherence. While the 2021 MTER did not frame these issues in "systems change" language, it did highlight many of the organizational conditions that matter for systemic work: weak alignment across the matrix, difficulty aggregating and communicating results into a coherent institutional narrative, and the need for stronger connections between strategy, programming, and organizational routines.

The 2023–27 Strategic Plan marks a clear shift in institutional framing. Systems change is no longer implicit in the organization's work but explicitly positioned at the center of the strategy and as an organizing logic for teams and priorities. This is an important strength. Few organizations combine WRI's breadth of technical expertise in a way that allows them to work across whole systems rather than on isolated interventions. In that sense, the strategy reflects a serious attempt to define WRI's role not merely as a project implementer or knowledge provider, but as an actor seeking to influence the wider conditions that shape long-term change. This is a meaningful advance in strategic architecture, giving WRI a clearer language for describing how its diverse capabilities might contribute to wider transformation.

At the core of this systems change framing is the idea that progress for people, nature, and climate depends on transformation in three major human systems: Food, Land and Water; Energy; and Cities. These are well chosen. They represent some of the most consequential systems that must shift for the health, wealth, and wellbeing of both people and the planet alike. They also align closely with WRI's accumulated institutional capabilities and programming experience. The strategic logic is therefore sound: if these systems do not shift, progress on climate, nature, and people will remain partial and fragile.

The Strategy recognizes that transformation in these human systems depends on shifts in a wider set of structural conditions, captured under the label of Enabling Systems: Economics, Finance, and Governance. This is, conceptually, one of the strongest features of WRI's strategy. It acknowledges that systems do not change through technical interventions alone. Enabling systems are not simply external conditions adjacent to Food, Land and Water, Energy, or Cities. They are the means through which systems change happens. They are the incentive structures that shape behavior; the rules and institutions that govern decision-making; the resource flows that determine what scales and what does not.

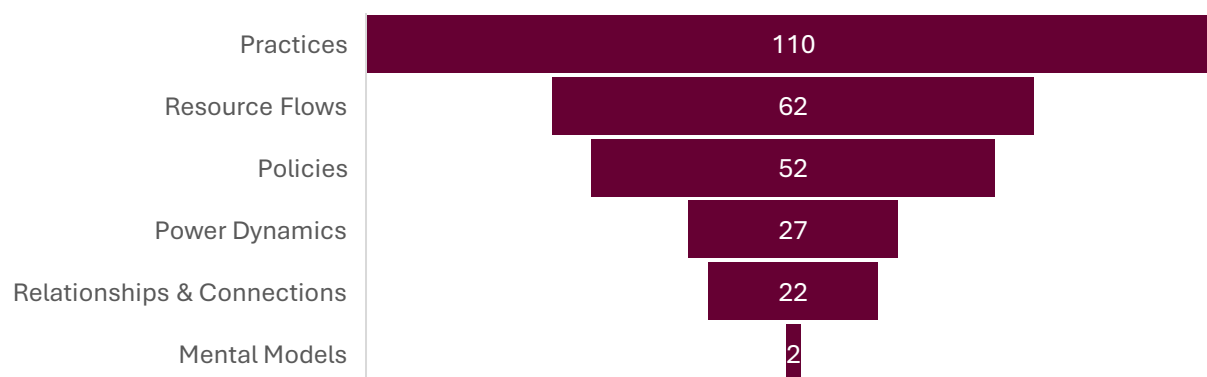
Box 6: Centrality of Enabling Systems to Systems Change: An Example

A simple example helps clarify the point. In the Food, Land and Water system, one could observe real progress: ecosystems restored and protected, land productivity improved, and food loss reduced. These are important achievements. But such important achievements do not necessarily mean that the system itself has changed. The gains may be reversed if the underlying incentives remain intact. Farmers may still reclaim restored land, convert it to unsustainable agricultural use, and continue supplying markets that do not reward sustainability or waste reduction. In that scenario, interventions generate results, but the underlying system remains fundamentally unchanged. The deeper problem lies not in the absence of technical solutions, but in the persistence of incentive structures that reproduce the status quo.

This in fact reflects one of WRI's long-standing institutional advantages. Across interviews and the material reviewed, there is strong evidence that many WRI staff already think and work this way in practice. Teams routinely look beyond immediate interventions to the conditions that shape outcomes at scale, connecting technical work with wider economic, political, and social dynamics – something frequently described as a “T” shaped approach to engagement. In this sense, systems thinking is not an imported concept for WRI. It is in many ways part of its institutional ‘DNA’ and, in our view, has been a major driver of WRI's remarkable success.

Systems thinking is already embedded across multiple parts of the organization. The Global Human System Impact Strategies treat enabling systems not as peripheral context, but as central levers of change. Likewise, the country-level ToCs reviewed suggest that teams are not only focused on sector outcomes, but also on changes in system conditions. Approximately two-thirds of the 382 indicators reviewed track elements such as policies, practices, resource flows, relationships, power dynamics, and mental models, while the remainder focus more directly on sector outcomes (see Figure 7 below). Some ToCs have also begun to engage with scale and interdependence. Some 18 of 38 reference cross-country or global actors within their causal logic. The United States – Reduce: Bioenergy ToC, for example, highlights collaboration with teams in the UK, India, and China as part of its strategy to influence aviation biofuel policy. This suggests that, at least in planning terms, many teams are already thinking about how change happens, not only what change should look like.

Figure 7: Country-Level System Change Indicators



Caption: Most indicators captured in country-level ToCs focus on practices, resource flows, and policies, with fewer addressing power dynamics and very few addressing mental models. This is understandable: the deeper structural dimensions of systems change are harder to influence and much harder to measure. Still, the pattern suggests that WRI's operationalization of systems change remains concentrated in the more visible and tractable layers of transformation, while the deeper institutional and political dimensions are less consistently captured.

Early Signals of Systems Change

What early signs of systems change exist, especially at the level of Theory of Change outcomes, across WRI's Results Framework and portfolio? What is driving these changes and what is WRI's contribution?

Evidence from the Deep Dives suggest that WRI's strongest early signs of systems change are emerging at the level of enabling conditions rather than full system transformation. Across the portfolio, WRI is helping to shift how problems are framed, what kinds of evidence and data are used, who is brought into decision-making, and which rules, incentives and institutional arrangements are beginning to change. These are visible in the move from fragmented restoration activities to whole-of-watershed planning in Dire Dawa; from urban greening to a broader NbS resilience agenda in Indonesia; from forest protection to a wider forest–palm oil governance agenda in Sumatra; and from tree planting to the enabling architecture of a restoration economy through Restore Local. Though these initiatives themselves do not yet amount to wholesale transformation of major Human Systems, they do provide credible evidence that WRI is influencing the conditions through which such change may become possible.

One of the strongest patterns of systemic thinking is WRI's ability to reframe fragmented problems as connected systems. In Dire Dawa, watershed restoration was reframed from separate upstream, midstream and downstream activities into a whole-of-watershed resilience model. In Indonesia's forest–palm oil nexus, WRI connected forest restoration outcomes to agricultural incentives, rights, traceability and supply-chain governance. In Restore Local, restoration is being reframed not simply as tree planting, but as part of a wider restoration economy. These reframings matter because it changes what actors see as the problem, which levers they consider relevant, and which partners need to be involved.

Another key pattern is that systems change becomes more credible when WRI works across multiple levers at once. The strongest cases move beyond simple implementation activities, and combine changes in policies, practices, relationships, resource flows, power dynamics, and mindsets. Restore Local is compelling example of this sort of thinking put into practice, where the core pillars of its work combine finance, policy change, monitoring, and capacity development. Likewise, the SUNCASA Project in Dire Dawa provides a particularly strong example of where restoration practices have successfully been linked to changes in municipal planning and communal land governance. Conversely, the Indonesia urban NbS case led by Citie4Forests shows the limits of partial systems thinking where pilots in opening public reservoirs are not sufficiently connected to more sanitary and water-quality systems, the public value and durability of NbS are constrained.

WRI's convening role is seen as incredibly important in overcoming systemic challenges. Across the cases, WRI's contribution is rarely as a standalone implementer. Its value lies in assembling coalitions across government, communities, civil society, technical institutions, investors and private actors, and helping them work from a more shared understanding of the system. This is visible in the Dire Dawa coordination structures; participatory planning processes in Jakarta; and government–community relationships around social forestry in Sumatra. These relationships are themselves an important systems outcome, especially where previous exclusion, fragmentation, or even mistrust limited coordinated action.

The Deep Dives also show that WRI is beginning to influence mindsets and power dynamics, though unevenly. Community members in Dire Dawa appear to be seeing themselves as actors within a wider watershed system. Social forestry work in West Sumatra has given some communities a stronger legal footing in forest governance. Participatory processes in Indonesian cities have created space for groups often excluded from planning. Restore Local is helping local organizations and SMEs become more credible actors in restoration finance. These shifts are important because systems change is not only

about formal policy or technical delivery; it also depends on who has agency, whose knowledge counts, and whether actors begin to behave differently within the system.

At the same time, the cases underline a consistent limitation: WRI's early systems-change outcomes are stronger in problem framing, coalition-building, tools and policy architecture than in durable shifts in finance, enforcement and institutional ownership. Long-term maintenance finance remains uncertain in Dire Dawa. Urban NbS in Indonesia remains vulnerable where wider water and sanitation systems are unresolved. Forest–palm oil work is constrained by deeper political economy, weak enforcement and powerful expansionary actors. Restore Local has built promising financial and data infrastructure but has not yet crowded in external investment at the scale needed for a transformed restoration economy. This suggests that WRI is often effective at building the architecture of change, but the transition from architecture to durable system transformation remains the hardest step.

The Strategic Plan's ambition to place systems change at the heart of WRI's work thus needs to be interpreted with realism about scale, time horizon, and WRI's sphere of influence. It would be difficult for WRI, even in coordination and collaboration with other partners, to drive transformation of major human systems in any direct or measurable sense within a single strategy period. The more relevant evaluative question is not whether WRI can already demonstrate systems change, but whether there are credible early signs that it is helping shift the conditions through which wider change becomes possible. In practice, this means looking for evidence of change within the spheres where WRI can plausibly exert influence – specific landscapes, sectors, policy domains, and institutions – and assessing whether these more bounded contributions are beginning to alter the underlying 'rules of the game'. The three case studies in Annex 1 present three different 'Systems Change Stories' to capture some early signals of systems change in WRI's portfolio, with particular attention to what appears to be changing, what is driving those shifts, and where WRI's contribution seems most visible.

Areas for improvement

What internal and external obstacles have slowed progress on Shift 2 and what can be done to overcome them?

Despite many positive signals of systems orientation within WRI, there are several areas in which the Institute can clearly improve. Its main challenge is not capability, but codification and operationalization. This represents an incremental change rather than a structural one. Staff do not appear confused about WRI's ambition. Rather, many are uncertain about the "how". They can see the direction of travel, but they do not yet feel equally equipped, personally and institutionally, to translate that direction into delivery choices. The following explores these internal and external obstacles that have slowed progress on Shift 2 and what can be done to overcome them. Note that associated challenges relating to PMEL and OneWRI are discussed in further detail in the sections on Shift 4 and Shift 5, respectively.

Enhancing practical guidance on systems change

WRI's systems orientation has emerged as much from existing practice as from formal strategic direction. The organization has substantial latent capability for systems work, with many staff already recognizing that technical interventions alone rarely deliver durable change. Yet because this way of working has often remained implicit and dependent on particular teams or leaders, WRI has not yet translated it into a consistent enterprise-wide delivery model. This matters because, although "systems

change” is not new in theory, it remains relatively new in development practice and may be many staff members’ first sustained encounter with the concept. Survey findings suggest that while almost four-fifths of staff believe they understand systems change conceptually, far fewer feel equipped to apply it. Only 38% agree that they have received enough training to adopt a systems-change approach in their own work, while 38% disagree or strongly disagree and 24% remain neutral. Respondents frequently reported little or no explicit training, noting that although the term is widely used, they lack a clear explanation of what it means in practice, what is expected of them, or how it should shape their work. Guidance therefore needs to go beyond defining systems and their boundaries, and show more concretely how systems can be shifted, through what kinds of interventions, and under what conditions, supported by broader and more inclusive training and mentoring for all staff, including new hires.

Figure 8: Survey responses to “I understand what is meant by ‘systems change’ within WRI” (Programmatic Staff Only)

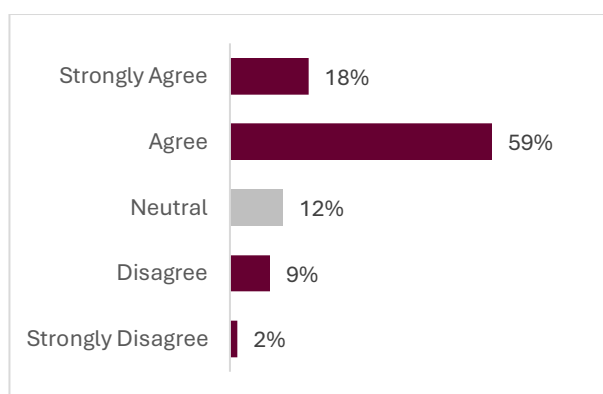
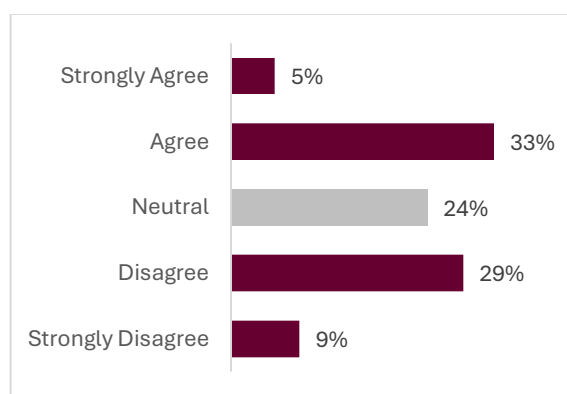


Figure 9: Survey Responses to “I have received enough training to adopt a “systems change” approach to my work.” (Programmatic Staff Only)



The Theory of Change Guidance and Country Strategy Guidance both make substantive efforts to embed systems thinking in practical guidance for staff, though they do so in different ways. The Theory of Change Guidance is more explicit, providing a conceptual basis for applying systems thinking to program design. It highlights the importance of leverage points, including shifts in knowledge, policies and behaviors, and recognizes that change can occur across multiple levels, from individuals and communities to institutions and the wider enabling environment of policies, norms, laws and regulations. The Country Strategy Guidance is less explicit in its use of systems-change language but contains a strong underlying systems logic. It defines country strategies as a way to “integrate and amplify WRI’s human and enabling system interventions to deliver a Country Transition for People, Nature & Climate”, and encourages teams to consider the interdependence of their work with other Teams and longer-term structural change rather than isolated projects. Together, these documents show that WRI has already begun translating systems thinking into practical tools.

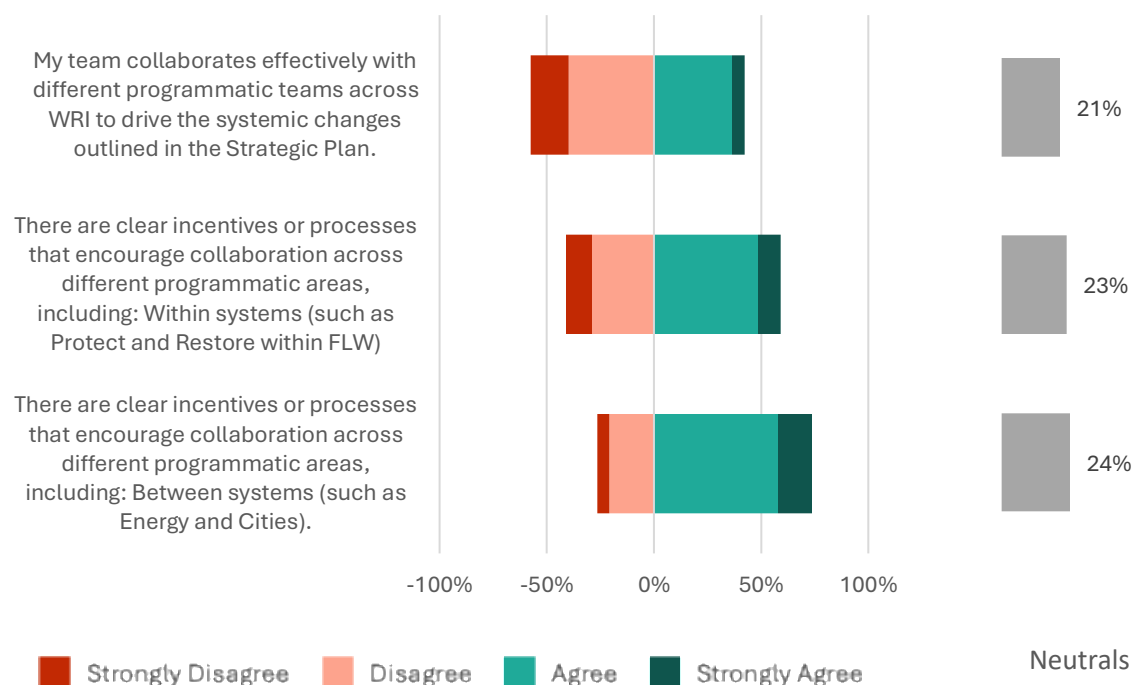
The more important limitation is that this guidance is not yet sufficiently concrete or widely socialized across the institution. Both documents are primarily aimed at staff directly involved in strategy and Theory of Change processes: the Country Strategy Guidance notes that countries may not be ready to complete all sections and encourages teams to tackle what they can, while the Theory of Change Guidance identifies specific leads, facilitators and reviewers as central to the process. This suggests that the most intensive engagement with systems thinking may be concentrated among a subset of staff, rather than

diffused broadly across the organization. The Theory of Change Guidance is also stronger at the level of conceptual architecture than operational application. It provides a useful vocabulary for thinking about systems change, including leverage points and enabling conditions, but gives less practical detail on how to identify the most important leverage points, assess alternative intervention pathways, or recognize strong WRI-applied examples across different sectors and country contexts. To some extent, this gap appears to have been filled by MfR in its work with teams to develop ToCs, though whether this has permeated much beyond PMEL staff is harder to judge. For systems thinking to become more institutionally embedded, staff more broadly need practical support to understand what systems change is, why it matters, how it affects their work, and what it looks like when applied in practice.

Breaking down silos

Staff suggest that a major constraint on systems change at WRI is the persistence of organizational silos and the lack of sufficiently strong incentives for collaboration across the matrix. The organization remains, in important respects, siloed. WRI's strategic ambition to tackle Earth's challenges is being layered onto a legacy model shaped by portfolios of individual grants and reporting structures that often operate singularly within defined pillars. This is important because the logic of systems change cuts against those inherited structures. Systems work depends on recognizing overlap across Pillars and Human Systems and incentivizing teams to pursue shared outcomes rather than isolated outputs. Yet, several current practices appear to work in the opposite direction.

Figure 10: Staff Views on Cross-Matrix Collaboration (Programmatic Staff Only)



Across the survey and KIIs, staff described cross-Human Systems working – and in some cases even collaboration within Human Systems – as uneven and too often dependent on individual relationships, rather than embedded in institutional processes and expectations. Though staff report relatively positive experience of collaboration with other programmatic teams (within *and* between Human Systems), when the questions move from collaboration itself to whether there are clear incentives or processes that

encourage collaboration agreement falls noticeably. This suggests that where staff have the capability, confidence, and space to work systemically, WRI produces impressive examples of integrated practice. But this remains uneven, and too much still appears to depend on local initiative rather than on a clearly articulated institutional model. Several comments also pointed to competition between Teams, particularly relating to territorial behavior around funding and staffing, as well as divergence in donor-led priorities as barriers to collaboration. These issues are compounded by the fact that many staff are still not appearing to work from a shared understanding of the “system” they are trying to influence, and how individual projects can and should combine to contribute to broader system shifts, even when expressing confidence that they know what “systems change” means to WRI more generally. As a result, the sort of joined up working that systems change often requires is often seen as more of a narrative aspiration than an operational reality.

The tendency to default to working within one's specialized field is structurally reinforced in some cases.

ToCs are still often developed largely at country-pillar level, which can reinforce fragmentation rather than surface interdependencies across systems. IRF reporting processes appear to incentivize contribution to siloed indicators rather than shared cross-system outcomes. This latter point is precisely what the previous MTER sought to address by recommending the development of cross-challenge targets that encourage cross-sectoral working among senior managers and their Teams. This creates a familiar problem to the previous MTER: WRI's portfolio risks remaining activity-driven rather than strategically integrated. The institution may articulate systems change at the level of strategy, but operationally it often defaults to the logic of siloed delivery.

Another practical issue is that there is incomplete visibility of who holds relevant expertise across the institution, which makes it harder for staff to identify potential collaborators even where there is willingness to do so. There are however some promising low-cost relational mechanisms, such as informal learning exchanges and office-level formats that bring different pillars together (e.g., potlucks in the Kenya office), which can help build familiarity and offer opportunities for spontaneous collaboration. This suggests that breaking down silos is not only a matter of formal restructuring, but also of creating regular, socially and professionally rewarding opportunities for staff to connect across organizational boundaries.

As the center of gravity shifts toward Country Offices, this has implications for the role of Global Programs: rather than simply managing their own portfolios as a complement to those of the Country Office, they may need to play a stronger coordinating role across countries and thematic areas, helping to connect country staff to global expertise and knowledge, and cross-programmatic opportunities. At present, relationships between Global Programs and country teams are often described as relatively arms-length rather than deeply integrated. Their role is more focused on limited QA, due to lack of time and funding. Survey respondents thus repeatedly called for stronger internal coordination and alignment across Country and Global teams, combined with better information sharing, and more structured pathways for collaboration.

Clarifying the institutional positioning of CEF

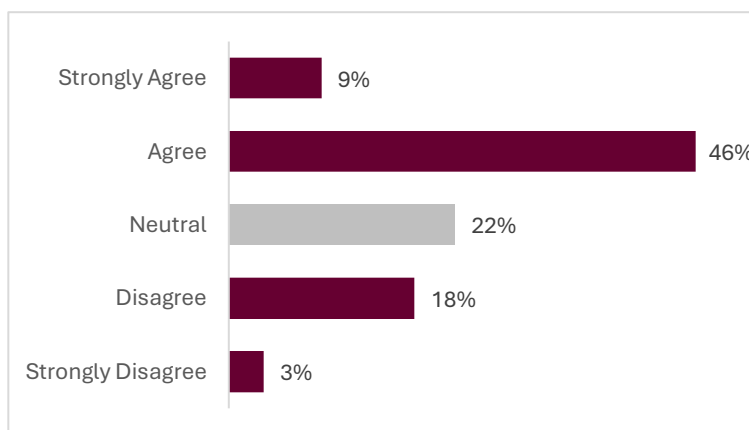
How well are enabling systems (Economics; Finance; and Governance) connecting with Human Systems across WRI's portfolio in both global programs and country offices? What synergies and programmatic results have been achieved from these connections?

The enabling Climate, Economics and Finance (CEF) team sits close to the heart of WRI's systems-change ambition, but its institutional role remains unsettled. Across interviews, WRI's leaders consistently described systems change in terms of shifting the 'rules of the game' – macroeconomic models, financial flows, governance arrangements – rather than relying only on bottom-up projects. In principle, this should place CEF near the center of WRI's strategic model. It embodies an understanding that durable transformation depends not only on projects and implementation, but also on institutional and market conditions.

However, WRI's decision to establish "Enabling Systems" as a distinct system alongside the Human Systems appears to have generated some conceptual confusion. After three years of existence, the role and value of CEF remains understood and valued differently across the organization.⁸ For some, especially those within CEF itself, it is best understood as a cross-cutting function working *independently* on the deeper systemic conditions that shape what is possible across the Human Systems. For others, it could provide more value as a

support function helping the Human System teams achieve their objectives. WRI's intended model appears to combine both roles: CEF is expected to support Human System transitions, while also leading on finance, economics and governance levers that have cross-system relevance at global and country levels. Most system-specific enabling levers are expected to sit primarily within the Human System teams themselves. Yet, the Human System teams do not always readily see how CEF's mandate connects to their own work; when they should draw on this important resource, if at all; and how cross-system and system-specific levers are meant to relate to one another.

Figure 11: Survey responses to "WRI's work on "enabling systems" (e.g. Finance, Economics, etc.) are prioritized enough in programming" (Programmatic Staff Only)



⁸ This perception should be interpreted in light of CEF's institutional development trajectory. CEF targets and strategies were developed only in the past 12 months, partly because WRI first prioritized the development of Human System transition strategies, and partly because CEF did not have a director in place until recently. This sequencing helps explain why the CEF role may be clearer within the Teams directly engaged in the work than in organization-wide strategic documentation or staff understanding.

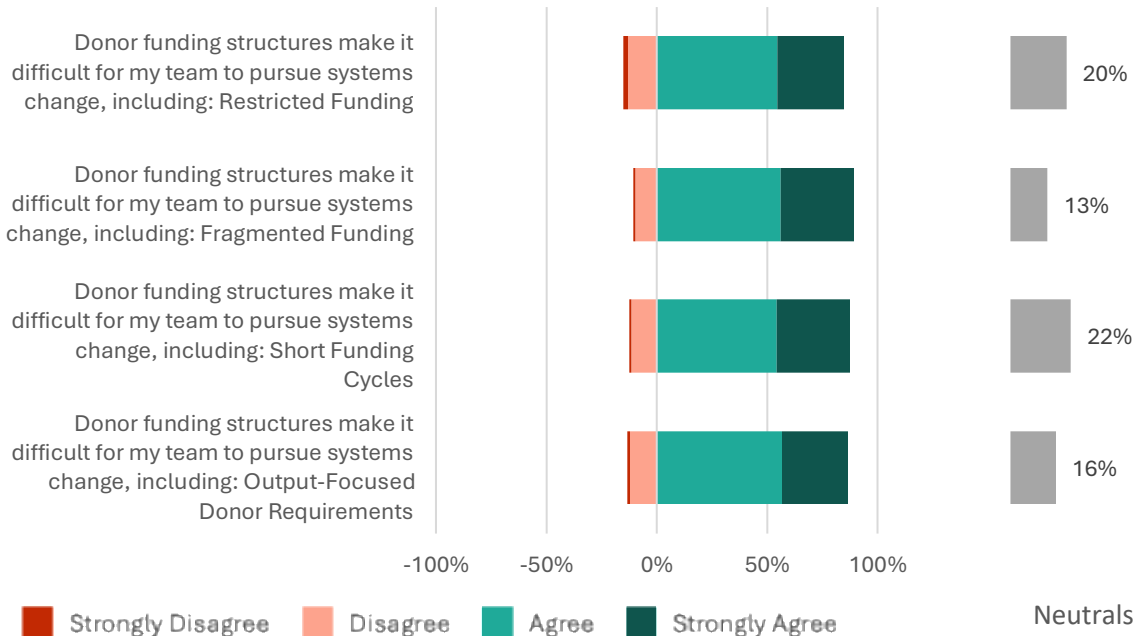
This ambiguity is reflected in the survey data. Overall, a narrow majority (54%, see Figure 11) of staff agree that WRI's work on enabling systems is prioritized enough in programming, but the pattern masks a notable internal divide: Enabling System staff are considerably less positive, with only 45% agreeing or strongly agreeing, compared with 60% among other staff. Over a third of CEF staff actively disagree. Written feedback in the Staff Survey reinforce this tension. Some CEF-linked staff argued that Human System teams are increasingly building their own policy and finance capacity, which may make collaboration with CEF seem less necessary, or even weaken the case for a distinct, cross-cutting enabling function. Others felt that the strategy has, in practice, privileged the Human Systems and left the enabling systems comparatively under-defined, under-resourced, and inconsistently integrated. From the perspective of Human System staff, the message is similar: Enabling Systems work is often seen as conceptually important but operationally secondary, siloed, or difficult to access. This suggests less a disagreement about the importance of finance, economics and governance to WRI's ambition, than a gap in how the model has been explained and documented beyond the Teams most directly involved.

The current ambiguity risks weakening the systems-change logic the strategy is trying to advance and undermines the important role CEF could play. The issue is not that finance, economics and governance are absent from Human System work; rather, it is that WRI has not yet sufficiently codified how these enabling levers should be distributed between Human System teams and CEF, or how the two should work together in practice. If CEF sits independently of the Human Systems without a clearer explanation of why, and if Human System team's own work on system-specific enabling levers are not explicitly connected to CEF's broader cross-cutting mandate, the Enabling System work risks implicitly being seen as adjacent to those systems rather than as part of how they change. As long as this ambiguity persists, WRI risks underutilizing one of its most distinctive institutional assets for systems change. A clearer and better-socialized dual role for CEF would help address this. At one level, CEF should continue to act as a centralized global and country-level "rule-shaper" and producer of institutional public goods. At another level, CEF should be more systematically accessible to Human System teams as a source of deeper technical support and learning. This would allow Human System teams to draw on CEF expertise when designing and implementing systemic interventions, while continuing to embed specialized CEF-type expertise directly in their own teams, such as Restoration Finance. The recent CEF strategy appears to move in this direction, but the approach now needs to be more clearly codified and socialized across WRI so that staff understand when CEF leads, when Human System teams lead, and how collaboration between them should work.

When Enabling Systems are deliberately integrated in programmatic arrangements and initiatives, they strengthen durability and sustainability. In the Tana Basin, a formal payment for ecosystem services agreement between downstream irrigators and upstream communities created a direct financial mechanism for watershed restoration and conservation. This is significant not because it delivered a one-off activity, but because it aligned local incentives with broader environmental goals. Likewise, in Dire Dawa, governance by-laws and strategic frameworks helped create locally embedded rules and coordination arrangements that could continue beyond the lifespan of donor-funded interventions. These cases illustrate the difference between conventional project delivery and systems-oriented programming. When WRI combines its technical interventions with changes in the enabling context, it is more likely to generate outcomes that endure after grants end, bridging short-term results and sustained transformation.

Addressing funding constraints

Figure 12: Staff Views on Funding as a Constraint to Systems Work (Programmatic Staff Only)



A second, closely related constraint identified by staff concerns funding structures. Respondents frequently noted that short-term, restricted, and fragmented grants can make long-term, integrated work more difficult. Funding landscapes intensify competition for the same funding opportunities, reinforcing the Institute's silos, and leaving too little time or resource for the coordination, learning, and adaptive work that systems change requires. Staff responses in the survey are, more or less, unanimous in this respect. In this context, staff called for more cross-programmatic fundraising and budget sharing, and greater use of flexible or unrestricted funding to support collaboration across teams, offices, and programs.

At the same time, projectized donor funding is not incompatible with systems work. Projects are likely to remain the primary loci through which WRI can influence wider systems, if it is able to deploy projects as entry points into a wider, deliberately curated portfolio logic. Some staff observed that donors can be open to co-creating initiatives and that WRI has scope to shape the funding landscape through how it packages programs of work and engages donors around systemic outcomes. This suggests that the problem is not only one of donor-imposed limitations, but also of WRI's own ability to align its fundraising strategies, portfolio management, institutional incentives with its stated ambition to work in more systemic and integrated ways. Put differently, the key issue is not just the nature of available funding, but whether WRI's decentralized fundraising model for restricted grants creates sufficient incentives for teams to connect individual grants into a more coherent systems portfolio, rather than maximizing resources for their own Teams and projects.

Other ways of promoting good systems practice

Supporting systems change requires management processes and organizational routines that make collaboration easier, more visible, and more rewarding than siloed behavior. Where such incentives are weak, cross-system work will continue to occur unevenly and depend disproportionately on motivated individuals. Beyond a wholesale revision to WRI's funding model, the feedback also points toward two practical levers for reducing silos and driving coordination and collaboration around systemic outcomes: changing what is rewarded and making it easier for staff to move across organizational boundaries.

First, several staff argued that Managers should be assessed not only on the performance of their own teams, but also on their ability to enable cross-team cooperation, reduce fragmentation, and contribute to shared institutional goals. Suggestions included explicit metrics rewarding Human System and Pillar managers for cross-team collaboration, alongside stronger accountability where management styles discourage integration or allow unnecessary duplication to persist.

Second, staff emphasized the importance of greater mobility of people and expertise across teams, programs, countries, and core functions. This included calls for better systems to identify available staff capacity, administrative and financial arrangements that allow staff to work smoothly across teams and offices, and organizational structures that support more fluid deployment of expertise. Interview evidence reinforces this point by showing that legal, financial, and organizational barriers can make it difficult to second or share staff across offices, even where doing so would help catalyze collaboration. Some interviewees also highlighted hybrid roles as a promising model, since these can create built-in bridging functions and encourage staff to think beyond a single project, geography, or program. Together, these findings suggest that joined-up working requires both stronger incentives and more practical mechanisms for moving people, time, and expertise across existing boundaries.

EQ2 conclusions

Overall, Shift 2 represents a meaningful advance in WRI's strategic architecture. Systems change is now much more clearly positioned as the logic connecting WRI's work, and there is strong evidence that many teams already think and work in systemic ways. The clearest progress is in planning and framing: WRI's strategies, ToCs and IRF indicators increasingly recognize that durable change depends not only on sector outcomes, but also on shifts in policies, practices, resource flows, relationships, power dynamics and mindsets. This is a significant strength and reflects one of WRI's long-standing comparative advantages: its ability to connect technical expertise with wider economic, political and institutional conditions.

WRI's success to date is mainly concentrated at the level of enabling conditions, rather than full system transformation. This is not surprising given the scale and time horizon of the systems WRI seeks to influence, but it does mean that claims about systems change need to be made carefully. This should not be read as implying that progress against individual Pillars, their Intervention Targets, or the underlying enabling conditions within them is insignificant, or that no change has occurred simply because Human Systems have not yet transformed as a whole. Such a view would set an unrealistically high bar and risk overlooking the meaningful progress that WRI has made in components of the systems that it has identified as necessary to drive change. The stronger conclusion is that WRI is beginning to build the conditions for systems change in specific landscapes and sectors. The key test is therefore not only whether WRI can demonstrate end-state transformation of major Human Systems, but whether progress on enabling conditions is being made in areas most likely to shift those systems over time. Our view is that it clearly is.

WRI's systems-change contribution is most convincing when it combines five elements: a clear whole-system framing; credible technical evidence; coalition-building across actors with different forms of authority; practical tools that change how decisions are made; and attention to the incentives, finance and institutional routines needed for sustainability. Where one of these elements is missing, systems approaches risk remaining conceptual, pilot-based or dependent on WRI facilitation. Where these elements come together, such as in Dire Dawa's water system or Sumatra's forest system, WRI is beginning to show how bounded interventions in landscapes, sectors, cities and institutions can shift the underlying conditions for wider change.

WRI's main challenge now is not capability or commitment, but codification and operationalization. Staff broadly understand and support the ambition, but many do not yet feel equipped to translate systems change into concrete delivery choices. Guidance is improving but remains too concentrated among those directly involved in Strategy and ToC processes. Collaboration across the matrix is still too dependent on individual relationships rather than institutional incentives, and funding structures continue to reinforce projectized and siloed delivery. CEF also remains underutilized because its dual role as both global rule-shaper and source of applied support to Human System teams is not yet sufficiently clear. The priority is therefore to move from systems change as a strategic narrative to systems change as an operational discipline: clearer guidance, stronger incentives for collaboration, better integration of enabling systems, and funding and staffing models that help connect individual projects into coherent systems portfolios.

Shift 3: Country Transitions

What we have looked at

This section of the report assesses the extent to which an emphasis on country transitions has contributed to programmatic results in WRI.

The last MTER found that WRI had invested heavily in realizing the 'World' dimension of its name and now had a major presence in nine countries, which distinguished it from many other NGOs. However, programs that were being delivered within countries where WRI had an International Office, often appeared to be owned primarily by WRI Global. The International Offices still had a culture of dependence on WRI Global, fostered by centralization of fundraising capacity and budgets within Washington DC.

The 2023-2027 Strategy reaffirmed the importance of a country-led approach as central to delivering systems change. The Plan underscores that *all impact is ultimately local*: every country must undertake its own transition shaped by its political economy, development trajectory and societal needs. This recognition underpins WRI's decision to 'go deep' in a set of 12 focus countries while maintaining coordinated regional efforts in Africa and Europe. These focus countries – ranging from long-standing presences such as Brazil, China, Colombia, India, Indonesia, Mexico and the United States, to countries where WRI is deepening engagement including the Democratic Republic of the Congo, Ethiopia, Kenya, and Rwanda – were selected because they host large vulnerable populations, contain significant remaining natural landscapes, or present major opportunities for shifting emissions pathways.

WRI's country transition approach is its main strategic frame for organizing work in countries, aiming to shift away from a largely short-term project-based model toward a long-term country-level approach to systems change. A country transition is understood as a significant change within a nation-state that advances people, nature, and climate goals: people can meet their essential needs in an equitable society, ecosystem health is protected, and global warming is limited to 1.5°C while communities are supported to adapt to climate change. Country transitions imply longer-term shifts in how national systems function rather than individual projects and not just individual projects or short-term wins, although both will continue to play key roles.

WRI's country transition approach starts from the premise that every country must undergo its own transition based on its specific context and needs. WRI's role begins with helping to define what that transition looks like in a given national context for people, nature and climate goals by applying systems thinking in country strategies. These strategies are meant to overlay political economy onto resource systems so that WRI can identify the most important leverage points in the focus human systems rather than simply accumulate disconnected activities. The approach also depends on a OneWRI model, drawing on WRI's wider network, global presence, local footprint, and country-to-country learning to connect national change with global goals for people, nature, and climate.

The approach is explicitly whole-of-system. It links the three human systems with enabling systems, connects macro-level policy with micro-level implementation, and spans both supply and demand. It recognizes that national transitions have cross-border spillovers and synergies, so country work must also take account of regional and global dynamics. Effective transitions are expected to be anchored in high-level policymaking and planning, especially in central finance, planning, or coordinating institutions that can create coherence across departments. They must also mainstream equity, with explicit attention to groups that may face losses, disruption, or exclusion as systems change.

A distinctive feature of this approach is that it treats transition as both a process and an outcome. Systems change – and country transitions – unfold over long periods: visible results today may reflect actions taken years earlier, and today's interventions may not bear fruit for years to come. For that reason, country transitions – as processes – need to be dynamic and adaptive, evolving as political, economic, and social conditions change. WRI therefore needs to be able to detect changes in transition trajectories, respond to new openings or constraints, and revise strategy as new evidence emerges. The approach also requires deliberate engagement with multiple forms of uncertainty and complexity, including analytical, macroeconomic, political, technical, and financial uncertainty.

In practice, these features of a country transitions approach mean that WRI must work less as a stand-alone project implementer and more as a strategic partner, trusted technical advisor, convener, and coalition-builder. The emphasis is on aligning with country priorities and local realities, using subnational work where useful, engaging pragmatically with political economy, and translating research, evidence, and convening power into durable changes in policies, institutions, incentives, and investment flows. The ultimate aim is for WRI's projects, partnerships, research, and influence to add up to a longer-term national transition rather than remain as isolated interventions.

WRI's country transition approach is thus a country-specific, systems-based, politically informed way of contributing to long-term national shifts for people, nature, and climate. The approach is still evolving, and its success depends on WRI's ability to operationalize systems thinking, strengthen cross-country and global-country coordination, adapt to changing contexts, and work through funding and measurement systems that still often favor shorter-term projects and deliverables.

To what extent is WRI's country transition approach relevant and viable in an evolving geopolitical and multilateral context? How might global shifts affect WRI's choice of approach?

WRI's country transition model is taking shape in a rapidly evolving global context. Key trends include:

- **A continued shift towards harder-edged power politics and geoeconomics.** Military spending reached a record \$2.7 trillion in 2024; states are increasingly using subsidies, trade restrictions, and supply-chain policies for national security and geopolitical reasons; and the rules of development are being rewritten by security concerns, strategic rivalry, and resilience politics. ([OUP Academic](#))
- **The economic backdrop is also becoming more volatile and fragmented.** Higher trade barriers, tighter financial conditions, weak confidence, and policy uncertainty are weighing on growth; some “connector countries” may gain in the short term from rerouted trade and investment, but fragmentation leaves all countries more vulnerable in the long run; the likely medium-term picture is one of blocs, selective de-risking, tariff and subsidy competition, and more effort by countries to localize strategic capabilities without fully decoupling. ([OECD](#))
- **Multilateralism is likely to persist, but in a thinner, more transactional form.** In 2024, UN member states adopted the Pact for the Future and called for reform of the multilateral system and the international financial architecture. Universal institutions remain important for norms and legitimacy, while delivery shifts increasingly toward MDBs, regional platforms, sector coalitions, and issue-specific arrangements ([dashboards.sdindex.org](#))
- **LDC needs are increasing as ODA tightens.** Climate finance needs in developing countries are projected at \$1.1 trillion to \$1.8 trillion annually from 2025 to 2030, while many low-income countries are already under debt stress and aid is under pressure. Over the next 10–15 years, this implies a world in which many countries face chronic fiscal scarcity, more expensive borrowing, and stronger

pressure to justify climate, nature, and equity agendas in terms of growth, resilience, jobs, and political stability. ([UN Trade and Development \(UNCTAD\)](#))

- **Technology, especially AI, is likely to sharpen these dynamics rather than sit outside them.** AI is progressing rapidly, but development is concentrated in a few companies and countries. AI infrastructure gaps could widen inequalities within and between countries. The IEA adds that data-center electricity demand is rising fast and could more than double by 2030, making energy, water, land, digital infrastructure, and industrial policy increasingly intertwined. ([Stanford HAI](#))

Against this evolving context, the country transition approach is highly relevant in principle, and likely to become more so. Its relevance is likely to rise because domestic transitions matter more in a fragmented world. The weakening of ‘top-down’ multilateral momentum strengthens the case for a ‘country transition’ logic: global goals will be realized, if at all, through nationally specific transitions. That is consistent with WRI’s own framing of country transitions as country-specific, systems-based, adaptive, and connected to global outcomes. In addition, as the world moves toward development politics shaped by energy security, industrial competitiveness, strategic minerals, resilient infrastructure, food security, and digital capacity, country transitions offer a way to work where real government power increasingly sits: ministries of finance, planning, industry, energy, infrastructure, and executive coordination, not only environment ministries. ([IMF](#))

On the other hand, in a more fragmented world, many of the forces shaping national transitions will sit partly outside the country: trade rules, commodity chains, sovereign debt markets, AI infrastructure, capital costs, migration, energy corridors, water basins, security alliances, and regional power pools. If WRI’s framing becomes too state-bounded, it may underplay the extent to which national outcomes are conditioned by cross-border systems and global institutions. In that case, the approach would remain conceptually appealing but become strategically incomplete. ([IMF](#)) As one staff member put it: “The country approach makes some level of sense but i) threatens to neglect globally important institutions that coordinate across countries ... ii) creates institutional incoherence – ‘One WRI’ is nice but we are literally several different legal entities’. In addition, country transitions are long-arc processes, but geopolitical conditions are becoming more volatile. If WRI’s country strategies are too heavy, slow (and we heard repeatedly from country offices that this is the case), or tied to stable assumptions, they may lag the pace of shocks: elections, tariff shifts, conflict spillovers, price spikes, debt events, AI disruptions, or climate disasters. The more volatile the world becomes, the less viable a static version of the approach will be. The relevant version will be the one that is genuinely adaptive. ([IMF](#))

Box 7: WRI’s Horizon Scanning Analysis

WRI’s leadership is well attuned to the changing global environment in which it operates. For example, ahead of the annual senior leadership retreat held in Mexico in March 2026, a Horizon Scanning document was prepared to help inform discussions. Its core insight, that WRI’s operating environment is becoming more fragmented, fiscally constrained, politically contested, AI-influenced, and physically unstable, is persuasive and highly relevant to the organization’s future strategy. The document rightly frames AI not only as an efficiency tool, but as a force reshaping trust, knowledge production, misinformation, economic concentration, and WRI’s distinctive value as a research organization. The implication that WRI should focus more on hard-to-replicate, locally grounded, implementation-based evidence is convincing. Additional questions that need urgent attention include: how WRI’s research products should change, how

communications should adapt to AI-mediated information discovery, what AI governance is needed, and where WRI should avoid using AI?

The Horizon Scanning suggests several other operational questions. For example, what are the urgent no-regret moves (e.g. AI literacy, cyber resilience, clearer global narrative, research quality standards), longer-term strategic bets (e.g. deeper influence through selected middle-income country offices), adaptation/resilience as a cross-cutting institutional offer), issues to monitor (e.g. regional trade platforms, emerging donor ecosystems, AI governance roles, natural resource-security positioning, and things to avoid (spreading country offices too thin; generic AI adoption without data governance; an adaptation pivot that weakens mitigation/system-transition credibility)? WRI's analysis also raises questions about its operating-model. For example, "Locally led not just locally implemented" is a key idea in line with country ownership within WRI, but open questions remain including decision rights, funding flows, country-office authority, global program roles, staff incentives, research agendas, or regional influence strategies.

What early indications are there of movement from project-centric delivery toward country transition strategies? What factors are driving or constraining this shift?

There is early but still incomplete evidence of movement from project-centric approaches towards more integrated country transition strategies, both in terms of staff understanding and emerging country strategies.

Staff understanding

Staff feel that they broadly understand what is meant by country transitions, but are clearly appealing for more guidance and opportunities to learn what this means in practice. The basic concept of country transitions has been absorbed by the overwhelming majority of WRI staff and the importance of using this approach to frame WRI's work in-country is well accepted. Most staff agree or somewhat agree that they understand what is meant by country transitions, but there is still a substantial share (38 percent) who are either neutral or do not understand how the shift affects their work in the regions where their team operates. This suggests that there is still scope for additional operational clarity, as voiced in interviews with WRI country offices and evident in our country visits to Ethiopia and Indonesia.

One country director told us that "many staff still ask, what is a system?". Another said that "practical guidance is limited at country level". A third said "staff see the ingredients but not the transition dish". In the survey several staff commented on the same topic. One staff member said: "There has been limited engagement or education about country transitions at least at the global level". In practice, country offices have proceeded to develop their own interpretations of what systems change means for their work. Some have hired consultants to help them work through this (e.g., India). There is merit in country offices engaging actively in the development of system change approaches. This is a new and complex area and understanding will evolve through debate and experimentation at all levels of the organization. But to corral and optimize this learning there is a need for some orchestration at global levels, some proactive channeling of the insights arising from experimentation across the organization. While there are some examples of this, e.g. webinars that have been held on specific topics (e.g. India's work on e-buses and political economy analysis), more is needed.

Figure 13: Survey responses to “I understand what is meant by “country transitions” within WRI.” (Programmatic Staff Only)

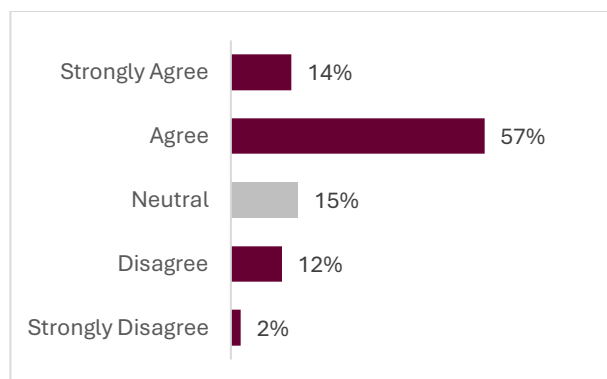
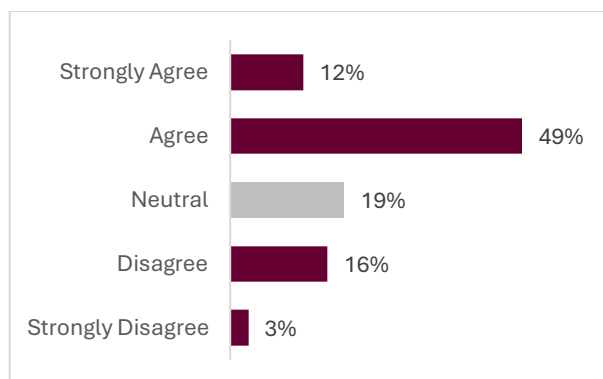


Figure 14: Survey Responses to “I understand how the shift towards country transitions impacts my work in the regions where my team operates.” (Programmatic Staff Only)



Country strategies

There is good evidence in WRI's emerging country strategies of a shift towards country transition approaches. Several country strategies are complete or nearly so, including the five in our sample: Brazil, India, Ethiopia, Colombia, and Indonesia. Each of the five show a clear move toward a more systemic country-transition framing, but they vary in how sharply they define the transition, how convincingly they convert diagnosis into a country-level theory of change, and how fully they address uncertainty, finance, equity, and OneWRI positioning.

Deep dive: Is there a clear WRI vision and strategy at the country level (including national, sub-national, and city levels)?

WRI has a clear vision and strategy at the country level, especially nationally and in cities, although strategy at the sub-national tier tends to be a relatively weaker part of the architecture. In our two deep dive countries Ethiopia is somewhat stronger than Indonesia at the sub-national level because its territorial logic is more explicit, while Indonesia is somewhat stronger in showing how city work connects upward to national priorities. In both cases, the remaining gap is not the absence of strategy, but the need for clearer operational prioritization across geographies. It is striking, for example, how in Indonesia the region of Papua is at the same time home to one third of the country's remaining rain forest and yet also subject to major challenges for WRI and others because of very high political and economic stakes and attendant security risks. The tradeoff between working to conserve and restore smaller patches of rainforest in relatively safer regions vs identifying approaches to working in Papua is only indirectly addressed in the WRI Indonesia strategy. A more explicit account of how national, sub-national, and city-level change connect into a single country transition pathway should also feature in future iterations of these two country strategies.

Indonesia's strategy is well anchored in national policy architecture, identifies barriers, enablers, and priority intervention clusters, and links the country vision to major national plans and commitments. At the city level, it is also relatively clear: it sets out a dedicated city transition with three pillars—livable neighborhoods, connective mobility, and climate resilience—and links these to concrete targets on public space, slum reduction, transport access, e-buses/e-two-wheelers, and green infrastructure. This gives Indonesia a reasonably strong vertical line from national priorities to city action. The weaker area

is the sub-national level. The strategy refers to governors, mayors, regents, provincial decarbonization plans, and specific provinces such as Bali, West Sumatra, Papua, West Papua, East Kalimantan, and Southeast Sulawesi, but it does not yet clearly prioritize among provinces, allocate resources across them, explain the relationship between city and sub-national levels, or show a clear scaling pathway from sub-national to national change.

For Ethiopia, the strategy is well grounded in Ethiopia's own planning architecture, explicitly links WRI's role to national frameworks such as the TYDP, CRGE, LT-LEDS, NDC 3.0, and NAP, and identifies country-specific barriers such as fragmented coordination, limited institutional capacity, financing gaps, and weak data systems. It also recognizes the federal, regional, and local governance structure and sets geographic priorities through six river basins and six cities, which gives it a stronger territorial logic than Indonesia. At the city level, the strategy is also quite concrete, organized around three pillars—climate resilience, livable neighborhoods, and sustainable mobility—with delivery targets such as 4–5 partner cities adopting plans and integrating nature-based solutions, access, and safety goals. The main weakness is again at the sub-national/interface level: the strategy uses multiple territorial lenses—regions, basins, cities, local governments, and landscapes—without fully clarifying how they fit together operationally or how prioritization will work across them.

WRI's own Strategic Plan, website, Annual Results and Learning report for 2024 and country strategy guidance note make clear that country transitions are an opportunity: (i) to situate the concept of country transitions in specific national contexts; (ii) ground WRI's country work on resource systems in an analysis of political economy; and (iii) leverage One WRI and cross-country learning. Each of the five strategies noted above have made progress against these goals.

Situating country transitions in national contexts

All five country strategies assessed do a thorough job locating country transitions in their respective, distinctive, national contexts:

- **The Brazil strategy frames the country's challenge as a development trajectory that is undermining its own ambitions** on prosperity, equity, and climate leadership, and then recasts transition as an inclusive, responsible socioeconomic model that reduces inequality, preserves ecosystems, and reaches carbon neutrality by 2050. It is tied directly to Brazil's actual structural dilemmas around land use, urban inequality, industrial modernization, and climate finance.
- **India's strategy is equally strong and the most explicitly grounded in national development ambitions:** growth, energy independence, jobs, urbanization, food and nutrition security, resilience, and green industrialization. That gives India perhaps the clearest statement of what a transition must mean in the Indian context: not simply climate ambition, but a people-centered structural transformation that can support a \$30 trillion economy while also decarbonizing, restoring land, and improving equity. The strategy is especially effective in showing that transition must be reconciled with India's status as a lower-middle-income, rapidly growing, highly unequal, and climate-vulnerable economy.
- **Ethiopia explicitly frames its strategy as contributing to a system-wide, just, and climate-resilient transition, rooted in Ethiopia's own development plans and institutions.** It is strong on the people-nature-climate nexus and on linking transition to concrete national frameworks such as the TYDP, LT-LEDS, and NDC 3.0. The limitation is that the framing, while sound, is somewhat more generic and less sharply distilled than in Brazil or India.

- **Colombia defines transition through the lens of justice, territorial resilience, and regenerative development.** Its framing is rooted in Colombia's actual conditions: post-conflict territorial restructuring, biodiversity wealth, extractive dependence, and structural inequality. The country transition vision is strong and normatively coherent. The strategy could be improved with a slightly stronger sense of the decisive national pivots that would make the transition cohere as a strategic whole.
- **Indonesia's foreword is explicit that the strategy was developed alongside WRI's global shift toward people, nature, and climate.** It is presented as a living document intended to shift the country's development pathway toward a low-carbon economy. The overall framing is in place and would be stronger with a more detailed definition of the country transition.

Grounding country work in political analysis

Country strategies are grounded in a solid assessment of political economy, but they vary in terms of the extent to which they detail the 'so what' – how the analysis shapes WRI's response:

- **Brazil's strategy identifies four systemic challenges, ties each to an underlying political-economy driver, and then maps WRI's strategic pathways against them.** It is a genuine attempt to show how political economy produces system behavior and where WRI can intervene. The result is a strategy that reads like a country-level theory of change rather than just a thematic portfolio.
- **The India strategy has a rich enabling-system diagnosis—covering growth, labor markets, informal economy, adaptation, fiscal space, green jobs, MSMEs, distributional impacts, state-level inequality, and external policy risks such as CBAM.** It is very good at showing what the transition must grapple with. The analysis would benefit from identification of a small, explicit set of leverage points.
- **Colombia is strong on political economy and compelling on implementation risks.** It addresses extractive dependence, stranded-asset risk, post-conflict territorial governance, corruption, institutional capture, armed conflict, illegal mining, and the disconnect between climate governance and macroeconomic policy. It is one of the richest documents on country-specific structural risk and could be further strengthened by distilling the analysis into a more concentrated transition logic.
- **Ethiopia also has many of the right elements—systems change language, enabling system diagnostics, barriers and enablers—but could go further showing how the political economy analysis directly yields a prioritized set of leverage points.**
- **The Indonesia strategy takes political economy seriously.** Its strategy acknowledges elections, changing political leadership, long-term planning shifts, adaptation pressures, and low-carbon development as part of the national development agenda. The overall (implicit) theory of change could be further integrated and consolidated.

Deep dive: How well aligned are WRI's country ToC's with the country context? To what extent is WRI considering country-level political risk and safeguarding in its country strategy and ToC?

Overall, the country TOCs in Ethiopia and Indonesia are well aligned with country context, showing strong awareness of political-economy constraints and transition headwinds. In both cases, there is a thorough diagnosis of the structural political, economic and other drivers within systems and positioning of WRI's work in response to these drivers. Both strategies also recognize exclusion, inequality, and political constraints, but are less consistent in showing how those risks will be managed in practice.

For Indonesia:

- **alignment with country context is strong across all three human systems.** In FLW, the strategy responds directly to palm oil expansion, deforestation, peatland degradation, food insecurity, food loss and waste, IPLC tenure insecurity, and the food sovereignty push. It identifies food-estate expansion, peat drainage, chemicals, land-related social issues, forest conversion, overlapping permit authority, and weak incentives for sustainable land management. In Cities, it is rooted in the realities of rapid urbanization, underperforming urban growth, coastal exposure, extreme heat, flood risk, housing backlog, slums, waste methane, air pollution, and a car-centric development pathway. In Energy, it is grounded in the coal-heavy energy mix, PLN's dominance, industrial demand, hard-to-abate sectors, critical minerals, regulatory uncertainty, and fossil-fuel incumbency.
- **there is clear attention to country-level political risk.** The strategy explicitly notes politically connected coal interests, overlapping authority, weak sustainable-land incentives, uncertainty around JETP, and the risk that weak planning could deepen urban inequality and environmental injustice. The strategy also includes explicit equity language around the urban poor, informal settlements, inclusive transport, equitable public space, and climate adaptation for vulnerable coastal populations. However, there is a shortage of practical proposals, beyond research, to address these issues and in energy the treatment of transition risks is less developed around labor, broader social protection, and just transition implications.

For Ethiopia:

- **alignment with country context is also strong, though somewhat uneven across systems.** FLW is the strongest area of alignment. Cities is also strongly grounded, especially through its focus on inclusion. Energy is described as strategically well aligned and risk-aware, but less complete on safeguarding. Overall WRI's theory of change for Ethiopia is responsive to Ethiopia's actual structural conditions.
- **on political risk, Ethiopia pays close attention to inclusion, structural barriers, and risk-aware positioning in energy.** But as with Indonesia, the limitation is in relation to operational follow-through. Although the Ethiopia strategy considers country-level risks, the safeguarding dimension is still thinner than the contextual analysis. Energy is less complete on safeguarding, which implies that the TOC has not yet fully incorporated how losers, vulnerable groups, or politically sensitive trade-offs will be managed.

How are global programs and country offices optimizing synergies and aligning their efforts in a joined-up way (One WRI) towards systems change and country transitions? Is there evidence of South-South exchange within the One WRI network?

WRI is moving beyond a fragmented, project-based model toward a more integrated, system-oriented mode of operation, although the model is still partial and uneven. Global programs and country offices are increasingly connected through shared tools, coalitions, and funding mechanisms. These linkages are now central to how WRI delivers on country transitions.

There are good examples of global platforms facilitating collaboration between global and country teams, demonstrating what integrated practice can look like. The Energy Access Explorer (EAE), for

example, has been incorporated into several country transition strategies and contributes significantly to country portfolios. Cities4Forests also provides a useful flagship framing for joint engagement between global and country teams, providing country offices with clearer entry points for collaboration and helping them leverage global expertise and partnerships. However, because WRI operates simultaneously at global, regional and country levels, entry points are not always clear, with some countries noting uncertainty about who is leading on climate resilience. Naturally, what works for global teams, or in some regions, does not always align with country priorities elsewhere. For example, while WRI's NbS Accelerator has been well aligned with country needs in India and Latin America, African teams stressed the need for integrated solutions that combine nature-based and gray infrastructure in urban settings, prompting evolution into a broader GGI Accelerator.

In practice aligning global and country efforts around a country transition pathway is not always easy.

As one staff member put it: "We are still working on how the global programs and country offices merge this conception of "bottom up and top down" transition and appropriate roles in this." Another senior staff member asked: "as a member of the global team, someone who doesn't work particularly and exclusively on a single country, what does [country transitions] mean in terms of what I'm supposed to be doing? I feel like we've never quite had a clear articulation of that, so that's an issue." Another global team expert described how country-global collaboration is still a work in progress: "we have been developing notes on how [global theme] can support country strategies. But not sure if we have been able to make integration between country transitions and [global theme] less ad hoc. May be conflicting priorities, may be different timelines and time constraints. You can add it to a country strategy, but will we actually engage with that team effectively or is it just a checkbox."

Rather than each country developing its own approach, WRI is increasingly operating through shared architectures that enable both consistency and contextual adaptation. The most compelling example of this is the use of global platforms as connective infrastructure. These platforms function as de facto 'operating systems' for systems change. In our two deep dive country case studies, Indonesia is using platforms such as FOLU, GPAP/NPAP, GOAP, and SCeNe to connect national work on food systems, plastics, oceans, and nature-based solutions to global agendas. Ethiopia similarly relies on TerraFund, AFR100, SUNCASA, Cities4Forests, and Bloomberg initiatives to anchor restoration, resilience, and urban work in broader institutional frameworks. These platforms help provide common methodologies and analytical tools, enable alignment with global goals, and create shared coalitions and financing channels.

There is an increasingly effective division of labor between global programs and country offices. Global programs contribute technical methods and tools, financing mechanisms and donor engagement, and cross-country learning and standard setting. Country offices contribute political relationships and convening power, contextual adaptation, and implementation and policy uptake. This division of roles is largely working. It allows WRI to combine global scale and legitimacy with local relevance and access, which is essential for systems change. It also reflects a maturing institutional model where duplication is reduced and complementarities are clearer.

Global-country collaboration is also visible at the level of sectoral systems. For example, industrial decarbonization in Indonesia is linked to global initiatives, such as CEIA/Kadin NZH, and translated into national policy and industry roadmaps. Restoration in Ethiopia connects global commitments (AFR100) with national targets and local implementation. Urban resilience uses shared analytical frameworks across multiple African cities. This example shows that OneWRI is not just about coordination, but aligning interventions within broader systems (energy, land, cities). This is consistent with a country-transition approach.

Multi-country initiatives (e.g. SUNCASA, Cities4Forests, Bloomberg programs) play a critical role. They help standardize approaches across countries, enable transfer of lessons and methods, and feed country-level evidence back into global programs. These flagships combine funding, technical frameworks, and learning across countries, and represent a strong foundation for scaling systems change.

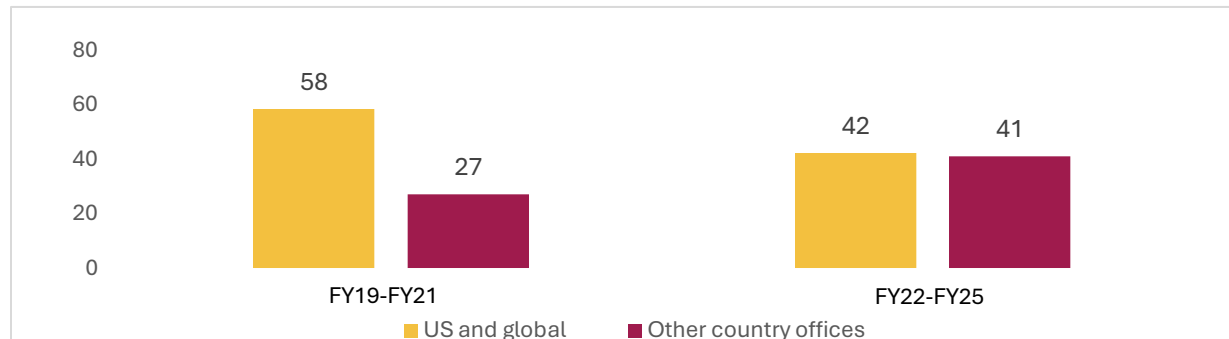
Despite these strong examples of coherent joint working, overall global country cohesion is still a work in progress. In practice collaboration is often platform-specific rather than system-wide, different initiatives may operate in parallel without being fully integrated; and there is no single mechanism or coherent set of mechanisms to ensure that all efforts add up to a coherent transition pathway. The degree of integration is uneven across programs. It is strongest in areas with strong global leadership, and which have established platforms (e.g. climate resilience, restoration), but relatively weaker across different thematic pillars and where programs lack shared infrastructure. This suggests that OneWRI is still somewhat program-dependent rather than institution-wide. Integration varies depending on where the institutional 'scaffolding' is strongest. The coherence of some collaborations also naturally varies with the quality and strength of leadership in programs and countries, personal relationships, and donor-driven initiatives. The risk is that without more formalized systems, collaboration risks being uneven and difficult to sustain at scale.

South-South learning

There is credible evidence of active South–South learning across WRI. For example, WRI in Ethiopia has exchanged methods and evidence with WRI India, WRI Colombia, and other countries on regenerative agriculture and post-harvest loss. Other learning flows within Africa include Dire Dawa (in Ethiopia) drawing on Kigali's urban tree protection laws; Ethiopian by-law innovations attracting interest from South Africa; and shared frameworks (e.g. Urban Water Resilience) that are applied across multiple countries. In some instances, certain country offices act as anchors for cross-country learning. For example, Ethiopia is positioned as a regional hub for Africa, with learning and expertise shared across countries (though unevenly distributed). Indonesia has likewise shared learning across Asia (and beyond) on social forestry. Nevertheless, South–South learning is also constrained by funding structures and internal incentives. Learning happens, but it is often project-driven or opportunistic; it is not systematically funded, tracked, or incentivized; and it is not yet a core institutional function.

Deep dives: To what extent are the projects and initiatives being implemented in the country leveraging WRI's comparative advantage – as defined by WRI's Competitive Advantage Framework – particularly regarding research and learning? What innovation or learning has emerged through WRI's work (including research and knowledge products)?

Country offices are producing an increasing share of WRI's knowledge products. The annual output of approved knowledge products generated outside of the US and Global Teams has averaged 41 during the last three years (compared with 27 in the previous period under the last Strategic Plan). By contrast, the output generated by US and global teams has fallen to 42 under the current Strategic Plan (from an average of 58 under the last Plan). The largest producer of approved knowledge products outside of the US and global teams is the India office.

Figure 15: Approved knowledge products generated

Country offices are also combining applied research with active brokering to create insight and underpin initiatives. On the research side, WRI Indonesia, for example, provided the modelling that helped secure a greenhouse-gas reduction indicator in Indonesia's National Long-Term Development Plan, and supported provinces such as Bali to develop their own net-zero roadmaps, using subnational work to demonstrate what more ambitious climate planning can look like in practice. It has also developed new analytical tools and evidence bases in areas where public decision-making was weak: near-real-time forest monitoring across 2.1 million hectares in six districts; peatland emissions studies to quantify the benefits of rewetting; ridge-to-reef research in Papua linking upland forest management with mangrove protection and community resilience; and three studies for the RIMBA ecological corridor that were used to shape restoration strategies, watershed protection, and new financing ideas such as payments for ecosystem services.

Research outputs have been generated across different systems. In cities, it expanded Jakarta's air-quality monitoring system, carried out the first comprehensive black-carbon source apportionment study, and used that evidence to inform the city's clean-air strategy. In food systems, it coordinated the development of Indonesia's first standard method for measuring food loss and waste, piloted with 15 provincial governments and 30 businesses, and complemented this with local studies that fed into municipal planning. In palm oil, it helped create the data architecture for more sustainable supply chains through a national sustainable commodities dashboard, improved smallholder registration guidance, and the registration of 180,000 independent smallholders on the STDB platform. In oceans, it produced Indonesia's first national plastic lifecycle analysis, piloted ocean accounts in Riau and West Nusa Tenggara, and generated evidence now feeding into a Blue Natural Capital strategy and local mangrove and seagrass protection measures.

WRI also plays an active convening and brokering role to move evidence into policy, coalitions, and implementation. It has acted as secretariat or neutral convener for major multi-stakeholder platforms such as the Sustainable Food Systems Coalition and the National Plastic Action Partnership, the latter bringing together 76 organizations, five thematic task forces, and 300 mapped commitments under a single strategy. In forest governance, it worked with the Corruption Eradication Commission to develop an anti-graft module for the forest sector and supported multi-stakeholder forums in Papua to address corruption and licensing risks. In palm oil, it convened a Policy Accelerator bringing ministries, industry, NGOs, and technical bodies together around EUDR readiness and smallholder inclusion, helping build consensus around reforms and traceability. In energy and industry, it partnered with Bappenas on just-transition indicators, convened dialogues with government, labor, and civil society, and was appointed by the Ministry of Industry to coordinate decarbonization roadmaps for nine industrial subsectors, including an early Green Nickel Industry Roadmap shaped through engagement with 120 stakeholders. In cities, it has gone beyond technical advice to structure participatory processes: co-design workshops in Surabaya

with women, persons with disabilities, and low-income residents; Tudang Sipulung mobility forums in Makassar; and Air Pollution Learning Circles in Jakarta that culminated in a workshop with 157 residents and policymakers to co-produce recommendations on low-emission zones. In West Sumatra it convened 54 institutions to co-design a REDD+ action plan, and across the RIMBA corridor it engaged 425 stakeholders to build consensus around an ecological corridor strategy. WRI's role is thus not simply to advise, but to broker between state, market, and community actors, create the institutional spaces in which evidence can be negotiated and owned, and turn technical research into more durable policy and coalition outcomes.

WRI has worked across different scales and political openings. When national engagement was constrained, it shifted toward provincial and local governments, using places such as Bali and West Sumatra to create demonstration effects that could later be scaled up. When the national political context opened again, it moved quickly to re-engage central ministries, signing MoUs with the Environment and Forestry ministries and using earlier subnational success to strengthen its national position. Across these areas, WRI has combined technical assistance, analysis, training, facilitation, and coalition management rather than acting as a funder or a campaigning organization. Its practical contribution has therefore been to make problems tractable through data, make solutions credible through research and pilots, and make change more feasible by building trust and aligning the actors needed to carry it forward.

Deep dive: What evidence has there been of effectiveness of projects and initiatives, particularly Theory of Change outcomes?

Note that while the country visit to WRI Ethiopia provided insights into specific instances of effectiveness, the office has not yet published an annual report, and it is therefore difficult to generate a comprehensive overview of effectiveness. Therefore, below we compare two other offices with WRI Indonesia, namely WRI Brasil and WRI India.

There is evidence that WRI country offices, in different ways, are increasingly implementing projects and programs in ways that target systems change. This is evident, for example through annual reports published by the Brazil, India and Indonesia offices. In Indonesia, it is most visible in national planning and industrial policy architecture. In India, it is most apparent in the institutionalization of subnational planning, finance, and implementation. In Brazil, it is evident in scaling urban and restoration work into government programs, public policy, and multilevel coordination. None of the three countries is yet able to evidence fully durable country-level transformation. Often the incentives from donor funding and legacy thinking works against this shift. As one country office staff member put it “Although there is a clear incentive to adopt a more strategic, country level transition approach, in practice many teams still default to project-based delivery’. Yet all three countries provide credible evidence that WRI is operating increasingly as a systems actor rather than just a project implementer.

WRI Indonesia:

- **clearest evidence of trying to change the *rules of the system* at national and provincial level.** It has successfully helped counterparts to embed climate goals into formal state planning, sector roadmaps, and government-business platforms. WRI Indonesia has worked with Bappenas to integrate low-carbon development into the RPJPN 2025–2045, helped set long-term emissions and emissions-intensity targets, and then extended that work into the RPJMN 2025–2029 and Bali's provincial plan. It also became the Ministry of Industry's main development partner for industrial decarbonization roadmaps across nine priority manufacturing subsectors, supported the first Annual Indonesia Green Industry Summit, and helped push a national nickel decarbonization roadmap into government planning. This work is not confined to pilots: it is shaping national planning architecture, sector strategy, and government-industry coordination.

- **supported institutional and market infrastructure to underpin systems change.** In palm oil and land use, WRI Indonesia helped move 180,000 smallholders onto the online STDB platform, trained 150 companies on emissions and deforestation monitoring, supported 6,100 smallholders, and helped establish 28 farmer organizations with internal control systems aligned to RSPO standards. In forestry and governance, it combined landscape monitoring across 2.1 million hectares, timber-traceability work, and anti-corruption modules in Papua. This is effectively evidence of system-oriented practice because it combines data systems, regulatory readiness, business accountability, and local implementation. However, it is too early to say if these initiatives will translate into self-sustaining systems change on the ground.

WRI India:

- **shows evidence of systems change through its support for subnational institutionalization and state capability and linking human and enabling systems.** For example, WRI India helped produce Mumbai's first municipal climate budget report, aligned with the Mumbai Climate Action Plan, while also supporting the institutionalization of the city's Environment and Climate Change Department. In Kerala, it worked with state agencies and a state-led initiative to advance renewable energy through 92 panchayats, combining local assessments, training, and project templates. In energy planning, it supported integrated resource planning in Tamil Nadu, Rajasthan, and Madhya Pradesh through a structured workshop series and modelling tools.
- **is helping embed planning, budgeting, modelling, and implementation routines inside public institutions.** WRI India has also done good work linking enabling systems with human systems. This includes work on just transition for MSMEs and women workers, restoration hubs in central India, city-level food waste MoUs, the India Forum for Nature-based Solutions, and the India Alliance for Clean Construction. These are attempts to create coalitions, standards, and intermediate institutions that can outlast individual grants. The work on Maharashtra, Tamil Nadu, and Assam combines economy-wide modelling, climate finance strategy, industrial roadmaps, climate resilience planning, and capacity building in a sophisticated systems-change package.
- **work looks broad and well networked. There is good evidence of systems thinking, but less of a unified country-transition narrative tying these efforts together.** Much of WRI India's focus is on convenings, partnerships, toolkits, and working papers alongside institutional support. This amounts to a dense ecosystem strategy but still presents more as a portfolio of system-oriented interventions than as a clearly sequenced country-level transformation pathway.

WRI Brasil:

- **portfolio shows clear evidence of translating systems ambition into practice through public policy influence, multilevel coordination, and scaling.** In cities, WRI Brasil is supporting implementation of a federal program covering 58 Brazilian peripheries through the Periferia Viva Network and action-plan support. Other significant initiatives include climate plans in Belo Horizonte and Campinas, the end of the first cycle of the Unidades Forum, work with Amazonian cities through the National Front of Mayors, and coordinated responses to the Rio Grande do Sul floods, including support for an NBS program and a dedicated credit line. WRI Brasil is also strong in forest and restoration governance. For example, WRI Brasil played a central role in the relaunch of Planaveg 2.0, including stronger governance, financial instruments, and monitoring systems; its convening of CEOs and the environment minister to mobilize restoration finance; work through the Restoration and Reforestation Observatory; and efforts to scale Assisted Natural Regeneration across municipalities in Pará and Mato Grosso. These all illustrate a translation of strategic ambition into practice i.e. not just small projects, but engagement with national plans, finance, monitoring, and scale-up mechanisms.

- **less evidence on enabling-system transformation beyond climate and restoration.** There is strong evidence of change in cities and land use, and there has been a strategic overhaul of the Climate, Economics and Finance program. But much of WRI Brasil's work still comprises public-policy support, publications, technical assistance, and coalition work, rather than a clearly demonstrated reshaping of economic and financial systems at scale. WRI Brasil thus provides convincing evidence of multilevel public action and scaling practice into government programs, but less on how far the deeper enabling systems have shifted.

EQ3 conclusions

WRI has made a real and important shift toward country transitions, and this shift is already contributing positively to programmatic results. Compared with the last mid-term review, there is credible evidence that country offices now have greater strategic autonomy, stronger country-specific framing, and a clearer role as the primary locus for influencing national and subnational systems. In the stronger cases, WRI is operating as a strategic partner, trusted technical advisor, convener, and coalition-builder working to influence planning architectures, institutions, incentives, and investment flows. This is visible in the quality of the country strategies reviewed, in the increased production of country-based knowledge products, and in the practical examples from Ethiopia, Indonesia, and others of work that is shaping public systems rather than simply delivering discrete outputs.

At the same time, progress is still partial and uneven. The strongest country strategies now situate transition within national development trajectories, political economy, and institutional change, but several remain more diagnostic than operational. Across the sample, the most common weaknesses are insufficient operational specifics (i.e. how the strategy will be put into practice), weak subnational prioritization, incomplete treatment of uncertainty and adaptation, and an uneven account of how OneWRI will function in practice to support country-level transformation. There is also still a gap between the ambition of the concept and its operationalization across the institution: staff broadly understand and support the idea of country transitions, but many are still unclear what it requires in practice, and country offices are often left to interpret and develop the model for themselves with limited global orchestration.

The evaluation also confirms that systems change is a long-term prospect: examples such as the electrification of Mexico City's bus fleet took more than 15 years. Attempts to replicate this in other countries were not always successful. Systems change evidence is strongest in terms of successful attempts to influence national planning, institutionalize subnational capability, scale public programs, create coalitions and platforms, and anchor interventions in broader systems. At the same time, projectized funding, uneven enabling-systems strategies, and underdeveloped measurement and learning systems continue to pull the organization back toward shorter-term, project-centric delivery. In this sense, WRI's country transition approach is on the right track and increasingly visible in practice, but not yet fully institutionalized or consistently supported by the funding, management, and PMEL architecture needed to realize its full potential.

Overall, the emphasis on country transitions has been a promising and strategically important shift under the 2023–2027 Plan. It has clearly begun to move WRI toward a more mature model of systems change grounded in country realities. However, its success over the remainder of the strategy period will depend on whether WRI can now convert a compelling strategic idea into a more selective, adaptive, and operationally coherent institutional model: one with stronger global-country orchestration, better treatment of enabling systems and finance, and more usable systems for learning and evidencing change over time.

Shift 4: Unified approach to measuring success

What we have looked at

Shift 4 can be understood as WRI's institutional response to a major set of concerns raised in the 2021 MTER about the status of Planning, Monitoring, Evaluation and Learning (PMEL) across the Institute. That review found that WRI lacked a sufficiently developed institutional theory of change and results framework to support meaningful organization-wide tracking of outcomes, that MEL practices and data systems remained fragmented, and that MfR and wider PMEL functions were under-resourced relative to WRI's ambitions. It therefore called for both structural and cultural change: more meaningful measurements of higher-level impact, better aggregation of team-level results, a step-change in MEL resourcing and support, and fuller institutionalization of MfR and DevResults across the matrix.

Box 8: Recommendations from the previous MTER

Recommendation 2.8: WRI should rethink the targets it uses to measure organizational progress under the Strategic Plan, including developing meaningful measures of higher-level impact, as well as better ways of aggregating the results of Teams' 5-Year plans.

Recommendation 2.9: There is a need for a step-change in funding, resourcing, and support for MEL across the organization. All grant agreements should include provisions for MEL; Directors should be held responsible for integrating MEL into their programs' work; and projects and programs should be required to use Dev Results, the system that WRI has already invested in, to ensure consistently high standards across the matrix.

Recommendation 2.10: The MfR function needs to be fully integrated as an essential core function, commensurate with WRI's role and reputation as a center of research excellence.

The current strategy has picked up and reflects the recommendations from the previous MTER and WRI has made meaningful progress in strengthening its Planning, Monitoring, Evaluation and Learning (PMEL) architecture. Over the strategy period, it has introduced or expanded several of the core building blocks one would expect in a more mature results-oriented institution: a strengthened Institutional Results Framework (IRF), an Organizational Scorecard which tracks this reporting data, a growing portfolio of country-level Theories of Change (ToCs), a strengthened Managing for Results (MfR) function, and the rollout of DevResults as an institutional results platform. These changes reflect a significant effort to move beyond fragmented reporting arrangements toward a more integrated institutional approach to results management. However, the evidence suggests that this step-change remains only partially realized in practice. The architecture is stronger, but not yet systematically embedded in routine management across the Institute. In important respects, WRI still appears to be operating with a hybrid model: stronger institutional frameworks at the top, but uneven adoption and limited integration with the systems and routines through which Teams manage their work at the bottom.

Institutional Results Framework

EQ4a. To what extent are WRI's global and focus country programs, projects, and initiatives - including co-managed partnerships - aligned with, and reporting effectively to, the institutional Results Framework?

Among the most important developments during this strategy cycle is the introduction of the Institutional Results Framework (IRF) as a common institutional frame. This responds directly to the previous MTER's recommendation to develop meaningful measures of higher-level impact, as well as better ways of aggregating the results of individual teams. This introduction of a common institutional framework is a necessary condition for a more coherent OneWRI approach, and the IRF provides a useful high-level structure for aligning work across the Institute. It also reflects a deliberate governance effort to align programmatic strategies to the five-year plan, including through mechanisms such as the Impact Committee.

The IRF appears to have become reasonably well sensitized across the organization, as shown in the survey results. Almost three quarters of respondents report familiarity with it, while a similar proportion say they can see how their work fits within its broad strategic architecture (see Figures 16 and 17 below). In this sense, the IRF is performing an important function. It provides what might be called an institutional "North Star" – or, more accurately, a constellation – around which teams can orient themselves. It has thus helped to align Country and Global teams around shared targets and created clearer accountability for organizational-level progress.

Figure 16: Survey responses to "I am familiar with WRI's Institutional Results Framework."

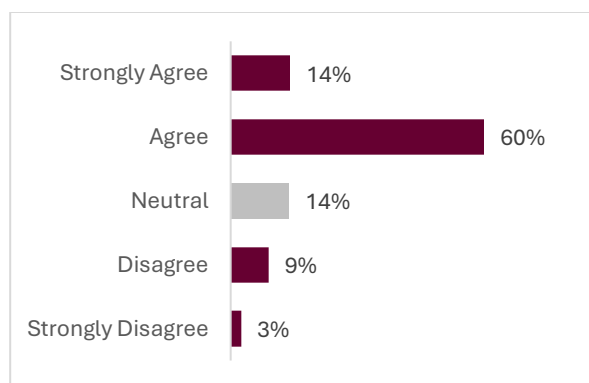
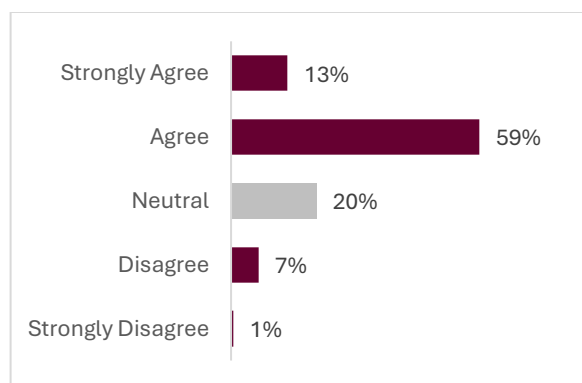


Figure 17: Survey Responses to "My team's work is clearly aligned with the strategic areas outlined in WRI's Institutional Results Framework."



Theories of Change have helped embed the IRF in country planning. The development of ToCs has played an important role in driving country-level alignment with the IRF. These ToCs are explicitly intended to serve as the bridge between strategy and results reporting. They are developed in alignment with the IRF, tied to Intervention Targets, and increasingly linked to people, nature, and climate impact indicators. In that sense, ToCs have had significant value in helping embed the IRF in country-level planning, at least at strategic levels. The review found that 39 of 43 country-level ToCs included relevant IRF indicators, either through full alignment with ITs or partial alignment allowing for some variation in indicator wording.⁹ This means that more than 90% of relevant country-level ToC indicators are aligned with the IRF. As an additional benefit, some staff emphasized that the IRF and ToC process has helped increase awareness of impact pathways and encouraged teams to think more systemically when designing projects.

⁹ The assessment of IRF alignment includes only country-level ToCs that met the criteria for upload to and storage in WRI's Interactive Theory of Change tool and excludes country-level ToCs still under development or partially completed at the time of the assessment.

Figure 18: Presence of IRF Intervention Target Indicators in Country and Regional ToCs

	WRI Colombia	WRI India	WRI Brasil	WRI China	WRI Mexico	WRI Indonesia	WRI Europe	WRI US	WRI Africa
Produce	Partially Aligned		Partially Aligned	Fully Aligned					Fully Aligned
Protect: Terrestrial	Partially Aligned		Fully Aligned	Partially Aligned		Fully Aligned			
Protect: Marine									
Reduce: Food, Loss, and Waste	Fully Aligned								Fully Aligned
Reduce: Diets		Not Aligned					Fully Aligned	Fully Aligned	
Reduce: Bioenergy								Fully Aligned	
Restore	Fully Aligned		Not Aligned		Fully Aligned	Fully Aligned		Fully Aligned	Fully Aligned
Clean Energy Supply: Zero Carbon Electricity				Fully Aligned					
Clean Energy Supply: Resilient Infrastructure								Fully Aligned	
Decarbonized Energy Consumption				Not Aligned	Fully Aligned	Partially Aligned		Fully Aligned	Fully Aligned
Energy Access and Equitable Development				Fully Aligned					Fully Aligned
Livable Neighborhoods: Inclusive Public Spaces	Not Aligned	Fully Aligned		Fully Aligned	Fully Aligned	Fully Aligned			
Livable Neighborhoods: Climate Resilient Housing									
Climate Resilience		Partially Aligned				Fully Aligned			
Connective Mobility: Inclusive Public Transport		Partially Aligned	Fully Aligned	Fully Aligned	Partially Aligned				Fully Aligned
Connective Mobility: Improve Road Safety		Fully Aligned			Partially Aligned				

= N/A
 = Not Aligned
 = Partially Aligned
 = Fully Aligned

The IRF intentionally does not fully represent WRI's full results chain, but this has left some staff with a feeling that their work is not being adequately communicated to the outside world. The IRF's primary function is to provide the topline results architecture for the Global Executive Team, the Board, donors and other institutional audiences, and to focus the organization on a set of priority system intervention targets. As such, it does not always capture the broader constructs that country transitions comprise, nor the more dynamic ways in which Country Offices are trying to influence change. This appears to be part of the explanation for why Country Offices can simultaneously report broad alignment to the IRF, while still expressing concern that the logic of their work is not fully captured by it. In some cases, staff suggested that the framework has been overextended, pointing to a "top-down" development process that now requires them to shoehorn heterogeneous work into a narrow set of macro intervention targets. This appears to have weakened buy-in in some parts of the organization and contributed to a perception amongst some staff that reporting to the IRF is often a burdensome process, rather than one that adds value to their work.

This limitation is not necessarily a design flaw in itself. A central results framework cannot be expected to fully capture every nuance of country and project-level work, and a high-level framework can still offer value even if it does not. The IRF is clearly functioning well as an orientation device. Yet, it functions less well *on its own* as a complete framework for understanding how change occurs across WRI. In practice, Teams are often trying to influence transitions through, *inter alia*, evolving combinations of policy shifts, coalition-building, and financing pathways. Those dynamics are central to transformation, but they do not always map neatly onto a fixed institutional indicator set. This does not necessarily mean that the IRF is mis-specified; rather, it points to the challenge of making clearer how lower-level, intermediate outcomes along Global and country-level transition pathways contribute to the higher-level changes captured in the IRF. The IRF may define the destination, but it is often less effective at describing

the route. That said, the current lack of connectivity between the IRF and other elements of the PMEL system creates a risk that some of the most important aspects of systems *change*, which WRI now places at the center of its strategic framing, are lost between the day-to-day reality of implementation and annual institutional reporting.

WRI's strategic focus on systems change will require tracking not only progress toward desired end states, but also the mechanisms through which change becomes durable and scalable. To capture results towards systems change, institutional reporting will need to reflect not only what changed, but also how WRI helped make that change possible. Feedback to the Staff Survey reinforces this point. Several respondents argued that success should be measured not only by end-state outcomes achieved, but also by whether WRI is strengthening the enabling conditions for longer-term change. Others noted that many important results in this space are gradual and non-linear, meaning that qualitative evidence is often as important as quantitative progress against indicators. In that sense, the issue is not whether WRI needs an IRF – most staff agree that it does – but whether the current PMEL framework is sufficiently flexible to capture the breadth of WRI's work while retaining organizational discipline around impact. WRI's Annual Results and Learning Report has already started to capture much of this nuance, including evidence on intermediate changes and learning behind reported results. However, because this reporting is detailed, the strategic narrative about how specific interventions are contributing to systems change may not always be easy to discern.

Country-Level ToCs in practice reflect many of the causal mechanisms that staff point out are both important and missing from the IRF. The choice of additional indicators in country-level ToCs beyond the IRF embody a strong systems instinct. Most include indicators that are useful for measuring the mechanisms through which Teams believe change happens. This suggests that the IRF and the ToCs are currently doing different but complementary things, both of which are important. The IRF is oriented toward higher-level institutional outcomes – in effect, what changes. Country teams, by contrast, often appear more focused on the intermediate conditions and causal pathways through which those outcomes are expected to occur – that is, how change happens.

WRI's more recent use of approaches such as Outcome Harvesting is a positive development. These methods are better suited to identifying WRI's role within multi-actor, multi-factor change processes and to capturing aspects of systems change that are difficult to represent through quantitative indicators alone. These new approaches should be paired with the IRF to capture contribution to transformation in a more textured way. This seems especially important given repeated concerns from staff that the current framework privileges final impacts and macro-level intervention targets, even where WRI influences them only indirectly and only in part. In those circumstances, qualitative and contribution-oriented methods such as Outcome Harvesting are likely to provide a more credible account of WRI's role in systemic transformation than indicator reporting alone.

A particularly promising complementary innovation is WRI's emerging "fingerprints" approach to contribution. Conceptually, this helps distinguish between scale of ambition and WRI's share of the results chain: WRI may have a small direct role in very large outcomes, but a much stronger, more proximate role in a narrower set of nonetheless important upstream results. The fingerprints model thus helps WRI to classify and communicate different degrees of contribution in a more transparent and credible way – for example, distinguishing between results directly catalyzed and closely managed by WRI, results that arise through indirect but substantive WRI influence such as policy influence, and broader outcomes in systems where WRI has played a more limited but still meaningful upstream role. It could therefore become a useful bridge between quantitative reporting and narrative explanation: helping WRI say not only what

changed, but how close WRI was to the change, through what mechanisms, and with what degree of confidence. Used well, this could materially strengthen WRI's ability to tell a more honest and nuanced results story.

Theories of Change

EQ4d. How well do ToC pathways to impact, indicator selection, target-setting approaches, and methods for tracking broader PNC impacts support measurement of system change?

Conceptually, the model of using Theories of Change to articulate WRI's contribution to systems change is well aligned with systems-change thinking. If done well, developing Theories of Change helps teams move from describing isolated activities to articulating how change is expected to unfold across a wider system: it forces them to define the whole pathway of change, identify interconnections and feedback loops, surface different stakeholder perspectives, and test the assumptions that link action to results. Several staff comments strongly reinforce this point, particularly from those working closest to implementation. In this sense, there appears to be little disagreement about the conceptual value of ToCs themselves.

Moreover, WRI's ambition to treat ToCs as 'living' hypotheses deserves credit. Embedding ToCs in regular monitoring and using structured pause-and-reflect processes are important features of a learning architecture that is appropriate for complex, adaptive change processes. It shows that WRI understands, at least conceptually, that systems change cannot be pursued through static planning. It requires Teams to track emerging patterns, question whether assumptions are holding and refine pathways as the system responds. It is too early to judge the extent to which the ToCs are genuinely 'living' tools in practice, but the intended cadence of annual reflection, ideally through Pause and Reflect events supported by recent quantitative and qualitative evidence, is appropriate.

During the Strategic Plan to date, WRI has made substantial progress in formal ToC coverage. Some 58 ToCs have been completed across Human Systems; 54 of these have completed Indicator Description Sheets and been uploaded into DevResults for Annual Results Reporting; 40 have been included in the Interactive Theory of Change tool. Several other ToCs remain under development at both country and global pillar levels, including five for "Enabling Systems outcome targets.

Staff views on ToCs appear broadly positive in principle, but somewhat more mixed in practice. Base-level understanding of ToCs is relatively strong: some 78% of respondents agree or strongly agree that they understand the ToC underpinning their Team's work. Yet, when asked whether they find ToCs useful in their work, the level of practical endorsement softens, even if it is still broadly positive, with 66% respondents agreeing or strongly agreeing.

Many staff seem to accept the value of ToCs in principle, yet have found the development process complex, resource-intensive, and difficult to revisit, particularly where internal MEL capacity is limited. Some staff described the institutional ToC process as having taken so long that teams became fatigued and developed negative associations with it. Others noted that the process felt top-down, overly complex, and insufficiently adapted to local contexts, with ToC development subsequently mutating into an exercise in fitting existing work retrospectively into a framework rather than using the framework prospectively to shape action. Part of the issue was that the first round of ToCs were developed to a demanding schedule but necessarily needed more refinement than would be expected in future rounds due to staff's limited experience with such tools. Nonetheless, there still exists a real risk that ToCs will be

treated less as live learning tools and more as one-off compliance products. One respondent captured the broader sentiment well: “The institutional ToC process was helpful as a training and reflection exercise, but it was much less clear how far it has influenced programmatic decision-making or implementation on the ground.” This risk is important. ToCs can only support adaptive learning if teams use them as live frameworks for reflection and adjustment, and staff’s prior experience with the ToC process is likely to have a major influence on whether they focus on them again.

WRI has started to address this risk through strengthening guidance. After significant after-action reviews and quantitative and qualitative assessment of the first round of ToC products and processes, MfR has introduced updated Theory of Change guidance to help address staff’s frustrations. It now includes clearer guidance on how to strengthen alignment with the IRF and the practical use of ToCs for learning, continuous improvement, and evidence-informed adaptive management. The revised Guidance also appears to address several of the concerns raised by staff: it strengthens the systems perspective and places greater emphasis on explicit causal linkages, assumptions, risks, and feasibility at scale; requires institutional ToCs to be facilitated by trained facilitators; streamlines review processes to reduce bottlenecks. Likewise, it seeks to prioritize only essential monitoring needs, aligning indicators where possible to data already collected through projects, and identify longer-term evaluation needs separately. This is important, because it suggests an effort to make ToCs more proportionate and more connected to actual management and learning needs, rather than simply expanding the reporting burden.

To help realize the potential of ToCs as a mechanism to shape WRI’s systems change contribution, the Institute would benefit from three things: first, demonstrating more clearly the practical value of ToCs as part of a systems-change approach; second, introducing a lighter architecture, including potentially by focusing ToC development efforts at system-level, rather than by Pillar; and third, investing more in MEL capability, since where such capacity exists ToCs appear to be stronger and more actively used.

DevResults

EQ4c. To what extent are WRI’s PMEL systems (including DevResults) and standards fit for purpose for measuring progress toward system change?

DevResults has gained some traction as WRI’s reporting backbone, but its current use remains relatively narrow. Fifty-four Strategic Plan ToCs are now uploaded to the system, and DevResults provides a structured place to compile and store results data against the IRF. However, it is mainly used at the end of the results cycle, serving as a platform for compiling and reporting aggregated results data that have been collected, validated, and compiled elsewhere.

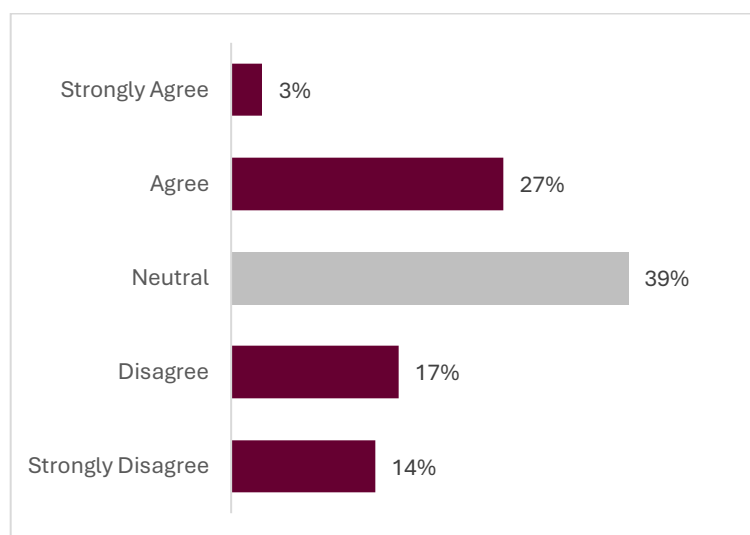
Across Global Programs and Country Offices, teams continue to maintain their own project- and program-level monitoring systems outside DevResults. MfR then collects data on IRF indicators through periodic consultations and reporting templates, before uploading consolidated results into DevResults, usually on an annual basis. This means that much of the underlying monitoring work takes place offline, with DevResults functioning as the final repository for a limited set of reporting rather data than as the sort of integrated performance-management system that it is marketed as. This raises the question of whether WRI’s current operating model is making meaningful use of a platform of this sophistication.

Though consistent with WRI’s intended use of DevResults, this configuration hamstrings WRI’s ability to trace results from operational activity to higher-level strategic outcomes. Because lower-level monitoring is largely conducted outside DevResults, the platform does not currently provide a clear line

of sight from project delivery to country or program outcomes and then to institutional targets. The “Related Projects” field, which could in principle link operational projects to ToCs or IRF outcomes, is consistently empty; there are no parent–child project relationships through which indicators can be connected across levels; and relatively few “projects” outside the IRF and ToCs are in active use, which is contrary to the recommendation made by the previous MTER. Even global-level reporting through the IRF remains largely disconnected from country-level ToC reporting, despite the fact that the shared indicator base between ITs and CITs would allow aggregation in around half of cases where indicators are expressed numerically rather than as percentages. In practice, connecting projects and aggregation is therefore happening through parallel processes managed outside the platform, rather than through DevResults’ own data architecture.

The survey findings are consistent with this picture: only a minority of staff report that they find DevResults to be a useful tool for tracking results. The modal response is neutrality given that few staff are currently using the platform. That overall pattern, however, conceals important variation by role. MfR staff are the most positive, with 57% agreeing or strongly agreeing, though even here over a third disagree. MEL staff in programs are also more favorable than average, with 53% agreeing or strongly agreeing. By contrast, broader programmatic staff are much

Figure 19: Survey responses to “I find DevResults to be a useful tool to help me track results”. (Programmatic Staff Only)



less convinced: only 30% agree or strongly agree, while 39% are neutral and 31% disagree or strongly disagree. This is telling. It suggests that DevResults is seen as more useful by those closest to institutional PMEL functions, but far less embedded in the routine practice of the wider staff base it would need to serve if it were to function as a genuine Institute-wide monitoring platform. This pattern points not so much to hostility to the platform as to uncertainty about its purpose and limited embeddedness in routine work. It is reinforced by wider staff feedback — including WRI’s own assessment of DevResults conducted in 2025 — which suggests that DevResults is not intuitive and requires significant training to use effectively. This matters at two levels. At one level, it is a usability issue: a system that is difficult for non-specialists to navigate will struggle to achieve broad adoption. At another level, it reveals a broader PMEL maturity issue. PMEL expertise is not yet embedded strongly enough in day-to-day practice across teams for a specialist platform like DevResults to become a natural part of routine workflow. In this sense, WRI’s experience with DevResults also exposes wider institutional PMEL weaknesses rather than causing them.

Another missed opportunity is the way institutional reporting continues to operate outside DevResults. The Institutional Scorecard, for example, sits alongside DevResults as a separate dashboard for presenting progress toward programmatic results, even though it draws its quantitative data from DevResults and the platform itself already includes visualization and dashboarding features. This may eventually make sense if the scorecard evolves into a more external-facing communication product. But in its current,

internally oriented form, it represents a missed opportunity for system consolidation. Rather than consolidating how staff engage with results, the current arrangement risks adding complexity through systems proliferation. On the one hand, there is a clear logic to this arrangement: it makes results data more accessible than it would otherwise be through DevResults alone, given the platform's complexity and barriers to use. On the other hand, it still contributes to WRI's broader challenge of systems proliferation. If staff require parallel tools to engage with institutional results data, this suggests that the systems WRI has adopted are not yet functioning as intuitive entry points for data use and learning across the organization.

DevResults clearly has considerably more potential than is currently being used. These concerns are only raised because this is *exactly* the sort of functionality that WRI is paying for. DevResults' central theoretical strengths are precisely its ability to link results across levels of the organization – from the bottom, right to the top – and then communicate this to both internal and external stakeholders for decision-making purposes. Both WRI's own internal assessment and this MTER recognize this theoretical potential. However, its current use achieves neither of these purposes. Staff feedback to WRI's own assessment of DevResults suggests that this functionality would be valued: staff in India and Indonesia, for example, highlighted the potential for more systematic project-level monitoring via DevResults, including real-time progress tracking to signal underperformance and help course correct. Without this traceability, DevResults cannot yet provide the kind of management insight its design would otherwise enable.

Some of the benefits cited by staff – such as improved data quality or a “single source of truth” – may be real, but they should be interpreted carefully. At present, DevResults may be a source of truth for a subset of curated indicator data, but not yet the institutional source of truth for performance information as a whole. Some of the quality gains may be driven less by the software itself than by the templates, definitions, and business rules surrounding data submission. In fact, the current usage of DevResults may have negative effects: because data is managed outside the platform and then re-entered, monitoring and reporting processes are duplicated, significant effort is required to compile and reconcile data, and as such the system adds transaction costs for MfR rather than reducing them.

This leaves WRI at a clear decision point: whether the benefits of continuing with DevResults for its current use case justify its cost. On current evidence, the likely answer is no. The ideal for any development organization is an integrated, Institute-wide results system of the sort that DevResults offers, especially in a tighter funding environment where they need to show not only what has changed, but how different investments and interventions “add up”. However, this ideal does not fully match WRI's current practical realities. Managing all lower-level results across the Institute would require a level of effort and cost that is likely to outweigh the benefits, particularly in a donor-facing organization where project indicators are often shaped by funder requirements and are mostly heterogeneous. It would require, at a minimum, a clear institutional commitment to DevResults, including requiring consistent uptake across teams as a non-negotiable; more assertiveness, where possible, in ensuring that IRF-relevant indicators are adopted alongside donor-required indicators to build stronger links between project- and framework-level monitoring; and the integration of the platform with existing project-management and operational systems. If WRI is not prepared, or not yet resourced, to make those changes, then it should ask whether its current use case is narrower than the platform assumes, and whether a lighter, lower-cost reporting architecture would be more proportionate in the near term. Over the medium-term, building more robust results management systems may be best concentrated at the country-office level, where PMEL systems can be best tailored to project management needs, with options to scale toward a more integrated Institute-wide system over time if WRI has the resources, capacity and institutional commitment to bring it together at the center.

Learning

WRI's current PMEL practice shows early signs of a systems-oriented, learning-by-doing culture, but structured learning loops remain the exception rather than the norm. This is important to highlight because the strategy treats systems change as inherently experimental. If WRI is testing transition pathways in complex contexts, its operating model needs robust feedback mechanisms that turn real-time evidence into course correction at project, program and portfolio levels.

Learning is being captured in multiple ways, but current practice is fragmented and still relies too heavily on individual initiative. Country offices such as WRI Indonesia and WRI Ethiopia use theories of change, outcome narratives and case-based documentation (for example on watershed restoration, social forestry and urban mobility) to make sense of complex change pathways and to inform new proposals and partnerships. At network level, WRI's Top-10 Outcomes, as well as other mechanisms such as Strategic Learning Reviews, Strategy Week, and cross-office MEL exchanges provide formal opportunities to surface lessons and incorporate them into planning. Even so, staff feedback points to limited systematic synthesis and circulation of those insights, with teams often perceiving learning products as one-off reports rather than as part of an institutional learning architecture. Cross-country diffusion of promising models (for example between India and Kenya on e-mobility) remains a valuable but largely intuitive and person-driven strength that will only become systematic if these existing learning spaces are more deliberately tasked, resourced and incentivized to identify, codify and share cross-country lessons as a core part of their function.

Learning can occur at many levels and through both structured and less structured processes. Systematic analysis of evidence, however, remains crucial to the effectiveness of WRI programming. Urban Water Resilience work in Africa, for example, started with [solid research](#) undertaken by teams from research and practice because it was a new area of work for WRI. The research was tested iteratively with engagements on the ground, and the final report informed work that was implemented across cities. The team was able to adapt recommendations to specific local contexts. Projects highlighted in WRI's 'Reflect on Equity' webinar are another example. By contrast, while Bus Rapid Transit was a success in many initial cities, scaling in Asia led to mixed success. Research completed much later established the importance of enabling conditions, both in Latin America and in Asia.

Across the portfolio, there are positive examples of adaptive management, but they are not yet consistently embedded as formal learning loops. In Indonesia, for example, teams adjusted mangrove restoration methods and donor expectations after monitoring showed lower than expected survival rates, and they used after-action reviews around major events such as the Green Energy Summit to refine subsequent interventions. Similarly, WRI Ethiopia's SUNCASA and ProTana initiatives use unified MEL frameworks and sequential evidence-building to inform decisions about scaling, rather than treating pilots as one-off delivery exercises. These cases suggest that when MEL capacity and management attention align, projects can operate as structured experiments with explicit feedback loops. However, survey and interview evidence from across WRI indicates that, in many teams, MEL time is still weighted heavily toward data collection and donor reporting, with limited protected space for reflection, iteration and strategic course correction.

At present, WRI's systems-change ambition is only partially matched by an experimental, learning-by-doing operating model. On the one hand, there are credible examples of adaptive practice and strategic use of pilots and subnational demonstrations (for example in Bali, Sumatra, Dire Dawa and Addis Ababa) to test and refine approaches before seeking wider uptake. On the other hand, WRI's PMEL systems (including DevResults) are still configured primarily for compliance and retrospective reporting,

with limited functionality yet used for tracing contribution pathways or supporting real-time management decisions across levels.

Broader PMEL Maturity

EQ4e. To what extent are WRI staff effectively using PMEL systems, processes, and standards?
and

EQ4f. To what extent has WRI achieved a step-change in PMEL integrations across operations and programs, including through funding model, staffing and internal incentives?

The challenges raised in this MTER regarding IRF uptake, ToC development, and DevResults use, point to a deeper set of foundational challenges in PMEL maturity across WRI. The broader institutional conditions needed for PMEL tools to function well – shared understanding, user-friendly guidance, formal policies and standards, dedicated capacity, consistent training, and management prioritization – remain uneven across the network. In that sense, many of the frictions identified in this review are better understood not as isolated system-design problems, but as symptoms of a PMEL function that is still only partially institutionalized.

The survey results reinforce this interpretation. While a meaningful share of program staff feel their teams have adequate capacity to meet WRI's expectations for monitoring, evaluation, and learning, confidence is far from universal, and perceptions of having received enough training to measure success are weaker still. Written feedback points to a consistent pattern: PMEL expectations have grown, but staffing, time, funding, and practical support have not kept pace. Many respondents report receiving little or no systematic training in MEL, the Results Framework, DevResults, or the wider logic connecting these tools. Those that have received training have noted that it is too infrequent, too high-level, or does not reach the staff who need it most. As a result, teams with dedicated MEL support are better able to use PMEL systems and tools in a purposeful way, while others experience them primarily as additional reporting burdens layered onto already stretched delivery responsibilities. This implementation gap is particularly visible in some country offices where PMEL capacity remains limited, including Mexico, Colombia, Brazil and China.

Figure 20: Survey responses to “My team has adequate capacity to meet WRI’s expectations for monitoring, evaluation and learning.” (Program Staff Only)

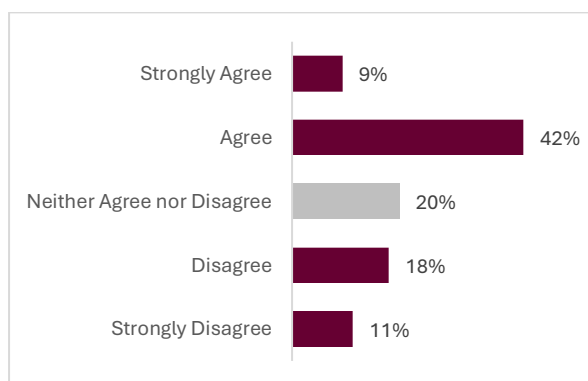
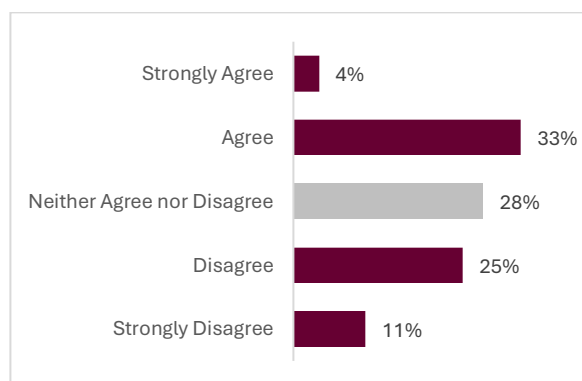


Figure 21: Survey Responses to “I have received enough training to better measure the success of my work” (Program Staff Only)



Yet, this is not only a capacity issue, but also an authority and prioritization issue. The MfR team has developed systems, guidance and tools to support stronger PMEL practice, but it has limited authority over the PMEL practices of global and country program teams and cannot, on its own, ensure consistent compliance or uptake. Responsibility therefore sits partly with programmatic teams, some of which do not sufficiently prioritize PMEL or have not invested in the capacity needed to meet institutional expectations. On this latter point, fundamentally there appears to be an incentive and value-proposition problem. Many program and country teams are being asked to contribute to institutional PMEL systems, but the resulting information is not yet consistently returned to them in forms that support planning, fundraising, adaptation, or strategic decision-making.

EQ 4 conclusions

WRI has made real and important progress under Shift 4, especially when judged against the concerns raised in the 2021 MTER. The Institute now has many of the core components of a more mature PMEL architecture: an Institutional Results Framework, an Organizational Scorecard, a wider set of Theories of Change, a more visible MfR function, increased use of Outcome Harvesting and contribution-oriented methods, and DevResults as a common reporting platform. These are not minor changes. They have helped create greater strategic alignment, made institutional results more visible, and encouraged teams to think more explicitly about pathways to impact. The IRF provides a useful high-level orientation around what WRI is trying to change; ToCs offer a way to explain how change is expected to happen; and newer approaches such as fingerprints and Outcome Harvesting could help WRI tell a more credible contribution story in complex, multi-actor systems.

However, the step-change called for in 2021 remains only partially realized. WRI has strengthened the formal architecture for measuring success, but that architecture is not yet consistently embedded in the routines, capacities and incentives through which teams plan, monitor, learn and manage their work. The central challenge is therefore not only technical, but also organizational and behavioural. PMEL systems will only become more useful if they generate evidence that teams themselves value: evidence that helps them make choices about strategy, partnerships, fundraising, adaptation and delivery, rather than evidence collected primarily to satisfy institutional reporting requirements.

The IRF is useful as a topline orientation device, but it is not intended to represent WRI's full results chain or provide a complete account of how systems change occurs. The challenge is therefore to make clearer how lower-level and intermediate outcomes in global and country-level transition pathways contribute to the higher-level changes captured in the IRF. This is particularly important for Country Offices and delivery teams, whose work often generates important enabling or "fringe" outcomes that may not be fully visible in the Institutional Scorecard but are nevertheless relevant to WRI's wider systems-change agenda. Without a clearer way to capture and interpret these contributions, there is a risk that institutional reporting underrepresents the types of progress that matter most for learning, adaptation and resource allocation.

ToCs are conceptually well suited to this and broader systems-change thinking, but risk becoming compliance products where teams lack the time, capacity or support to use them as living tools. Their value depends less on their existence as documents than on whether they are actively used to test assumptions, connect project and programme-level results to wider transition pathways, and support decisions about what should change. This points to the importance of connecting ToCs more clearly at systems level, including across pillars, countries and programmes, so that WRI can tell a more coherent story about how different strands of work contribute to wider change.

DevResults illustrates the same broader challenge. It is gaining traction as a reporting repository, but it is not yet functioning as the sort of integrated performance-management system capable of tracing results from project activity to country, programme and institutional outcomes. Much of the monitoring, validation, aggregation and interpretation work still happens outside the platform. In addition, the diversity of donor reporting frameworks makes it unrealistic to expect DevResults to provide a comprehensive line of sight from all project delivery to institutional outcomes without imposing an excessive burden on teams. Unless WRI is prepared to resource the platform's full functionality and embed it in programme management routines, there is a risk that investment in sophisticated global PMEL infrastructure will outpace the organization's ability to use it effectively.

More broadly, PMEL capacity remains uneven across the matrix, and many staff still experience monitoring and reporting as an additional burden rather than as a core management function. This reflects a wider incentive problem. Centrally coordinated PMEL systems are often disconnected from the day-to-day responsibilities of programme and country staff, especially their need to meet donor reporting requirements and manage delivery pressures. As a result, staff have limited reason to invest time in institutional PMEL processes unless these are visibly connected to decisions that matter to them.

In this sense, WRI's progress is real but incomplete: it has built many of the right tools, but has not yet fully created the operating model needed to use them to their full potential. The next stage of maturity will depend on creating stronger "pull" for PMEL by making results evidence more useful to teams and decision-makers. This means better aligning donor and WRI reporting needs where feasible; making space to capture important outcomes not fully reflected in the Institutional Scorecard; using more evaluations to demonstrate the value of evidence for internal accountability and learning; and developing more proportionate, country-led approaches that help teams collect, structure and interpret data in ways that support both institutional reporting and practical programme management. Over time, this would help WRI build a stronger PMEL culture: one in which results evidence is not seen mainly as a compliance requirement, but as a tool for understanding whether WRI's work is making a difference, how it contributes to systems change, and how strategy and operations should adapt in response.

Shift 5: Shaping the institution

What we have looked at

Shift 5 focuses on the organizational changes WRI has made to strengthen its capacity to delivery Strategy 2023-2027 effectively. It brings together changes in how WRI organizes its people and culture, manages its operations, and deploys its funding to support a more cohesive global organization.

The analysis is framed around three sub-questions. First, to what extent does the governance structure provide oversight for implementation of the strategy? Second, in what ways has WRI's OneWRI centrally coordinated network supported delivery of its programmatic strategy? Third, in what ways has flexible funding from core donors contributed to advancing the strategy? These questions correspond closely to the 2021 External Review recommendations on governance, strategic monitoring, research oversight, alignment of strategy, budget and people, and the need to grow unrestricted funding.

EQ5a. To what extent does the governance structure provide oversight for the implementation of the strategy?

Shifting to a centrally coordinated global network

WRI has shifted its governance model to better align oversight with the scale, complexity, and operating realities of a global network. In 2022, the Global Governance Task Force carried out a comprehensive review to ensure governance arrangements are fit for purpose and reflect WRI's scale and operating model. The 10 recommendations developed through this process underpin the 2023 - 2027 Strategy's ambition to move to a *centrally coordinated global network model* and respond directly to the 2021 MTER recommendation to strengthen governance arrangements, including International Office Boards, so that they reflect the diversity, skills, and experience required for WRI's growing global agenda.¹⁰ The task force recommendations covered three broad areas: governance model and architecture; mandates and decision-making processes; and composition and operating norms, and included an initial implementation plan to be further defined through implementation roadmaps developed by global, regional, and country governance bodies.

The shift from the sisterhood model addresses growing complexity and lack of clarity in how governance functioned across the network. Under the previous model, offices operated as "co-equal siblings" with autonomy over local program priorities, while relying on WRI Global for quality assurance, fundraising, and brand management. As the network expanded, this created ambiguity around decision-making and coordination. The governance review identified both the practical difficulties managing multiple point-to-point relationships and a lack of clarity on how decisions should be taken or coordinated across the organization. The centrally coordinated model introduces clearer structures and expectations, ensuring all countries and regions have a governance body and establishing a defined coordinating role for the Global Board.

WRI has taken concrete steps to formalize this model and strengthen the foundations of Board governance. Significant effort has gone into establishing a baseline of strong governance, including the development of Committee charters and annual goals and an updated global governance handbook with input from country offices. Minimum standards for Board composition and tenure have been introduced

¹⁰ Recommendation 6.1 WRI should undertake a review of its governance arrangements, including its IO Boards, to ensure that they have the diverse perspectives, skills, fundraising capabilities, and experience to ensure WRI remains equipped in the face of its growing global agenda.

to support a balance of demographics and professional backgrounds across governance bodies, alongside a more structured approach to assessing and documenting Board capacities and maintaining diversity across International Office Boards. Governance responsibilities have also been standardized around four core areas: technical oversight, network access, brand building, and fundraising.

There is evidence that these reforms have strengthened connectivity between global and country governance. In 2024, the share of country and regional office boards with representation on the Global Board increased significantly, from 17 percent to 86 percent. This is an important institutional shift because it strengthens pathways for country perspectives to inform global leadership and for global governance to be more grounded in the realities of delivery. The addition of members from the WRI Mexico and WRI Brazil Boards to the Global Board also illustrates this direction of travel. Subsidiary offices that previously had no governance body, including Africa, Europe, and the United States, are in the process of establishing advisory boards, with Global Board members recruited to support their development.

Board governance is also a major institutional asset for fundraising, external positioning, and strategic guidance. WRI Global Board members have contributed nearly \$19 million in multi-year gifts and pledges toward the Campaign for People, Nature and Climate. The Enterprise Fund was developed through cross-team collaboration to make the case for how unrestricted and flexible funding can support strategic initiatives often overlooked by traditional grants and strengthen WRI's financial resilience. Since its launch, WRI has raised substantial enterprise funding toward its target, including major Board-linked contributions, illustrating the practical value of Board engagement in helping WRI mobilize resources for strategic priorities and position the organization in a more challenging funding environment.

Oversight is supported by a combination of formal tools and interactive mechanisms that strengthen the Board's ability to engage meaningfully with strategy delivery. The organizational scorecard provides a consolidated view of progress across financial sustainability, operational health, strategic alignment, and programmatic results. Board members find it valuable as a tool for accountability and for demonstrating WRI's performance and contribution, particularly in a more constrained funding environment. It is used in the Global Executive Team's quarterly review process and reported to staff globally. This creates a more systematic basis for assessing institutional progress and gives Board members a more structured way to engage with performance information across a large and complex organization. The scorecard also helps respond to the 2021 recommendation that the Board demand more meaningful reporting and incentivize stronger monitoring of annual planning targets.

Board members do not rely on the scorecard alone but use metrics as a legitimacy check rather than their main basis for judgement. Board members place greater weight on understanding context, including whether programs are aligned with local priorities and political realities and how WRI is adapting to changing conditions. They also emphasize the need to identify the 'right' evidence for assessing progress against the types of change the strategy is aiming to achieve, including further demonstrating WRI's contribution to long-term systems change and country transitions. Board members point to assessment approaches that evolve over time, support learning, and account for external factors affecting delivery, including headwinds and tailwinds in focus countries.

Program deep dives and Board retreats are strengthening oversight by giving the Board more direct exposure to delivery and context. These mechanisms are used to complement the scorecard and give the Board a more detailed understanding of program performance across systems and geographies. There are ongoing efforts to deepen this engagement, including consideration of a program committee to expand opportunities for structured learning and global exchange. Interview evidence found Board retreats are

highly valued by members of the Global Board, Country Board, Global leadership Team, and Country Directors for their role in connecting the Global Board directly to in-country delivery and strengthening links between Global and Country Boards. The 2025 Global Board meeting in Brazil is a clear example. Designed in response to the Board's interest in engaging more directly with country work, it combined strategy discussions with field-based learning, supported the development of the WRI Brazil country strategy, and enabled Board members to contribute to partnership development. The retreat received an operational Top Outcome for its role in advancing Global Board Affairs Strategy Targets (e.g. a highly engaged and energized Global Board who are meaningfully contributing to the delivery of WRI's outcomes) and task force recommendations on Board culture, learning, and collaboration.

Risk oversight has strengthened. WRI has developed an Enterprise Risk Management system with a five-tier risk structure across project, programmatic, core function, country office, and institutional levels. Every country office and core function team now maintains a risk register, and a new risk-register template has been rolled out for project teams so that risk identification occurs earlier in project design and implementation. Quarterly risk reporting has been standardized, providing leadership with greater visibility over risk trends. Significant Tier 2 risks are overseen by the Global Executive Team, while exceptionally critical Tier 1 risks are escalated to the Audit and Risk Management Committee of the Board. This creates a clearer escalation pathway and strengthens governance oversight of the most strategic risks to WRI's mission.

There is still progress to be made to ensure governance operates as a fully global system rather than an international one. The centrally coordinated model depends on regular communication, peer learning, and structured exchange across governance bodies, but these practices are not yet consistently embedded. The Council of Board Chairs is one of the few formal mechanisms connecting governance bodies, yet it meets infrequently, limiting its potential to capture and share lessons across the network. Country board members also highlighted the need for more structured opportunities for country-to-country collaboration and information exchange. This points to an opportunity to advance the Task Force ambition of building a peer network of country and regional offices. This is a missed opportunity for WRI's governance model to mirror the broader OneWRI ambition of sharing learning across diverse country contexts, including South-South exchange.

Representation and inclusive decision-making remain uneven across the network. Although WRI Africa is the second largest office by budget, its lack of legal standing as a single entity means it has not yet had a formal board or governance structure. The establishment of an Advisory Board with a Global Board Champion, with a first meeting planned for 2026, is a positive development, but it will be important to ensure that critical geographies such as Africa are meaningfully represented in global decision-making. Given the varying legal standings across country offices, interviews with country board members highlighted the importance of creating structured opportunities for country and regional governance bodies to interface with the Global Board to ensure country perspectives are used to inform collective problem-solving.

Board composition and capability will be a key test of implementation in the next phase. Nominating Committee annual recruiting priorities have gradually contributed to a more representative Global Board. Between 2021 and 2026, the share of women on the Global Board increased from 39 percent to 45 percent, while representation from outside the United States and Canada increased from 36 percent to 55 percent. The balance of perspectives between developed and emerging economies has also improved from 21 percent to 45 percent over the same period, though diversity of sectoral and subject matter expertise remains an identified gap. Over the 2026–2028 period, 12 Board members (or 48% of the Global

Board) are expected to complete their final terms, including several committee chairs. This represents a significant loss of institutional knowledge and leadership continuity, while also creating an opportunity to further align Board composition with WRI's global strategy and governance ambitions. As such, WRI is considering a more targeted "portfolio approach" to Board composition that recognizes different forms of contribution across ambassadorial, philanthropic, scientific, business, technical, and policy leadership profiles. Proposed changes to the nomination process would also place greater emphasis on candidates with demonstrated commitment to WRI's mission and realistic availability to engage. Together, these reforms are intended to strengthen the Board's ability to support WRI's increasingly global operating model and evolving strategic priorities.

EQ5b. In what ways has WRI's OneWRI centrally coordinated network supported the delivery of its programmatic strategy?

The objective of OneWRI – aligning a growing global network

"WRI's global network can be seen as a prism that allows for multiple perspectives, types of expertise and experiences that make WRI strong as they come together into a single whole without losing the power inherent in diversity." – WRI's Strategic Plan 2023 - 2027

The OneWRI model is WRI's core institutional response to rapid growth in scale, complexity, and geographic reach. WRI now works in over 50 countries, with staff increasing from around 700 in 2018 to more than 2,000 in 2024. This growth has created important opportunities for greater impact, but it has also increased the coordination burden across countries, regions, programs, and core functions. OneWRI is intended to help WRI leverage the best combination of global and local expertise, while maintaining a common mission, values, approach, branding, standards, governance model, and results framework.

The strategic plan sets clear ambitions for a OneWRI approach that:

- Recognizes the diverse nature of the organization and understands that oneness does not equal sameness
- maintains a common mission, values, approach, branding and standards
- Is united by an integrated technology platform, systems and processes.

WRI's efforts to strengthen OneWRI reflect progress against the 2021 external review recommendations to better align strategy, budget, and people across the organizational matrix. The 2021 review recognized that WRI's Global Network enabled the organization to introduce and adapt solutions across varied contexts but also identified the need for stronger alignment to support coherent delivery at global, national, and local levels. It recommended reducing silos between programs and centers, strengthening core function support, improving integrated project data systems and monitoring capacity, and ensuring that expertise and learning are better leveraged across the network.¹¹

Aligning strategy: Stronger architecture tested by ongoing pressures

¹¹ Recommendation 1: WRI should explore how to better align strategy, budget and people across the organizational matrix to achieve a more coherent and cohesive offer that meets demand at global, national and local levels as effectively and efficiently as possible. Core functions need to be better networked e.g., Operations with MfR to develop an integrated project database that supports WRI's strategic imperatives.

WRI has made important progress in establishing a strategic framework that supports a OneWRI approach. The Institutional Results Framework (IRF) creates a clearer basis for strategic alignment by providing a shared structure for defining and tracking progress across systems and geographies and facilitate cross-network learning through shared objectives (see Shift 4). Alignment with the IRF has been reinforced through shared theories of change, which aim to connect strategy, evidence, equity, and action across projects, pillars, proposals, and country transitions. Together, these tools provide a stronger foundation for aligning decision-making and assessing contributions to institutional goals.

Institutional reforms have also strengthened alignment between programmatic delivery and strategic intent. The Equity Center has been structurally integrated into CEF, with both institutional and programmatic roles, including integrating GSE considerations into proposals and reporting. The establishment of the Impact Committee has introduced more formalized processes for ensuring that new and ongoing work aligns with WRI's strategy and results framework. The committee plays both a decision-making and advisory role: approving relevant new lines of work, while also advising on programmatic strategy, learning priorities, scaling approaches, SPF allocation, Strategy Week, and external engagement around major events such as COPs. Broader organizational alignment efforts have been complemented by annual Global Leadership Team Strategic Alignment Priorities, which guide work across functions and help align programmatic and operational efforts with institutional goals. Among these are the development of country strategies to operationalizing the country transition approach, establishing the organizational scorecard to track progress across the organization, and formalizing 'OneWRI planning approaches' at international events.

At the same time, evolving donor priorities, country needs, and emerging areas of work continue to test the coherence of this framework. Country teams in particular face pressures in ensuring alignment with WRI's global strategy while navigating political economy dynamics and donor requirements. Interview evidence indicates that teams may apply the system-change lens and people-nature-climate framing internally; while adapting or translating narratives for donors whose priorities are more sectoral, output-oriented, or geographically bounded. The same tension is visible in new areas of innovation, such as AI. Emerging opportunities require WRI to be agile, but they also increase the need for clear criteria about how new work contributes to systems change, how it draws on WRI's comparative advantage, and how it should be governed across the matrix.

Leveraging a common mission, branding, and standards, while recognizing oneness does not equal sameness

Progress toward a OneWRI approach is evident through strengthened institutional coordination and the development of shared standards and narratives across programs and country teams. Core communications has established an annual priority-setting process, meeting with each program and country team to identify high-impact institutional messaging priorities for major global opportunities such as COP meetings and G20 processes. In 2024, this approach was supported by the establishment of practical coordination mechanisms, including centralized planning tools, regular cross-team calls, and public-facing resource hubs, to increase visibility of planned events, reduce duplication and strengthen external coherence. This enabled a more unified and strategic response to international summits, ensuring leadership communicated consistently across interconnected climate, biodiversity, and desertification agendas while showcasing country-level work through a shared narrative.

A key test of the OneWRI model is whether shared standards can be applied in ways that enable, rather than constrain, local adaptation. Several examples suggest that this is increasingly possible where standards are clear, and where implementation authority is meaningfully shared with country offices.

- a) **Research Integrity's shift toward more decentralized, locally led training - recognized as a top outcome in 2025 - demonstrates how global standards can be maintained while moving ownership closer to country teams.** A multi-country Training Working Group was established to support this transition, with offices in Brazil, India, Indonesia, China, and across Africa taking a greater role in designing and delivering training, often in local languages. Examples include scientific writing training in Brazil, research methods sessions in Africa, and India's Research Excellence Program, where local needs assessments guide delivery. This shift has increased participation, strengthened research capacity, and improved relevance while maintaining consistent quality standards. It represents a move from a centralized, top-down model to a more distributed and collaborative system of delivery that shifts leadership and implementation closer to researchers while preserving a shared commitment to high-quality, credible research.
- b) **Communication functions provide another example of alignment that recognizes country priorities.** In 2025, WRI launched an Internal Communications Network, bringing together colleagues from country and regional offices to align global rollouts, exchange resources, and highlight country office news. In addition, WRI Africa, WRI Brasil, and WRI India added internal communications positions that worked closely with the global team to develop a WRI-wide internal communications playbook.
- c) **The establishment of a Data Lab Unit in WRI Indonesia illustrates both the need for and complexity of localizing technical capacity.** Recognizing global datasets were insufficiently granular for national decision-making and while country offices struggled to sustain data tools beyond project cycles. In response, the Global Data Lab and WRI Indonesia co-designed a locally embedded unit aligned with Indonesia's country transition priorities. The resulting unit enables the development of tailored data, tools, and insights for national challenges, including land use, water management, and urban resilience. At the same time, the model highlights that decentralization requires not only technical capacity, but also clear funding models, strategy, and institutional support to remain viable over time.

Aligning budget: progress through flexible funding, gaps in core capacity

WRI's current practice of providing institutionally flexible funds into five broad allocation buckets is a strong basis for aligning flexible resources with strategic priorities. The five allocation buckets are: the Strategic Priorities Fund, Institutional Strengthening, Program Flexible Support, Country Flexible Support, and the President's Fund. This structure provides leadership with a set of instruments to support programmatic work at global and country or regional level, strengthen core functions, provide flexible support to programs and country offices, and respond to emerging opportunities.

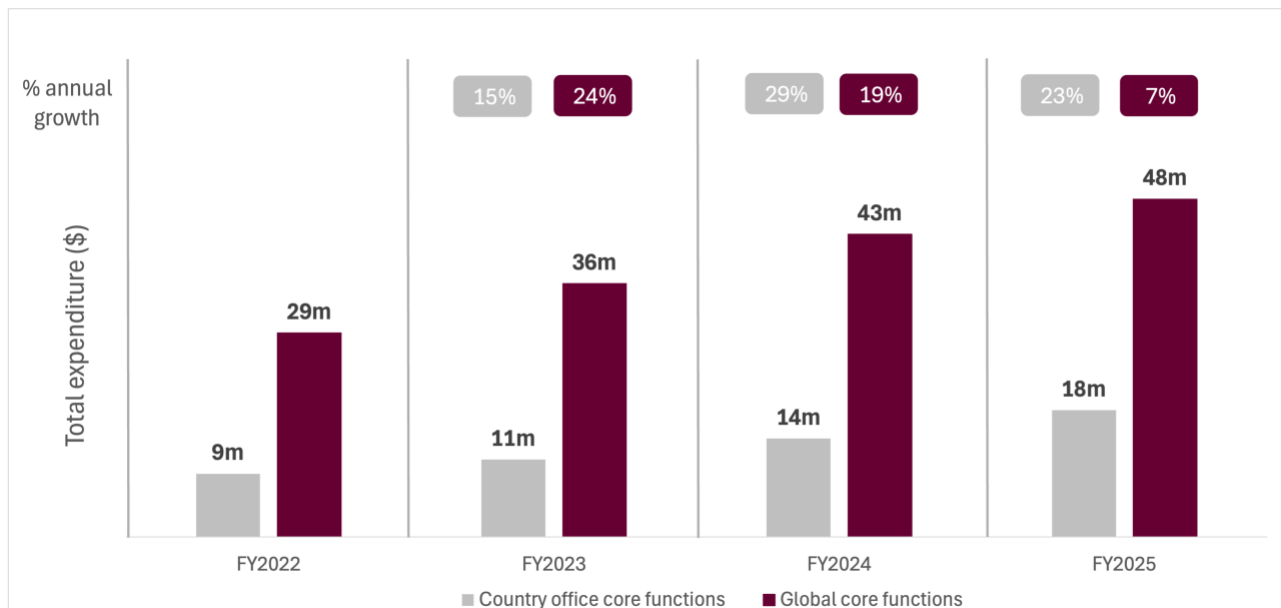
The Strategic Priorities Fund (SPF) and Innovation Fund have supported strategic alignment by directing flexible funding toward initiatives that advance shared priorities, including expanding social forestry in Indonesia, measuring WRI Mexico's impact on gender, equity and inclusion, and establishing the Cities learning agenda, which received a Top Outcome in 2025 (see Box 9 below). SPF allocations are decided by the Impact Committee to drive strategic capacity and alignment. The process evolved from a competitive, rubric-based proposal system in 2024 to a more targeted, leadership-informed prioritization in 2025. This improved efficiency and reduced the administrative burden of preparing proposals with limited chances of success but raised concerns among some staff about reduced transparency in decision-making criteria, highlighting a broader OneWRI trade-off between strategic prioritization and maintaining trust through clear processes. WRI has also begun to develop and pilot an approach for managing dedicated country flexible resources. This approach is anchored within a broader framework, in recognition that the OneWRI model requires not only global strategic funds but also flexible resources that country offices can use to advance locally grounded transition strategies.

Box 9: Leveraging flexible funding to advance internal and external learning

The Cities Program learning agenda is a strong example of targeted flexible funding supporting institutional learning. In 2024, Strategic Priorities Fund resources were allocated to advance the Cities Program learning agenda, which was recognized as a Top Outcome in 2025. The WRI Ross Center conducted a capacity development market gap assessment that analyzed 540 training offers across 160 cities in the Global South and surveyed 201 urban stakeholders from Ethiopia, Brazil, India, China, Mexico, and Turkey. This assessment identified critical gaps in training topics, target audiences, and learning formats. The market analysis was complemented by internal surveys that explored how the learning platform could support broader knowledge management needs across WRI. Staff identified goals including greater transparency around decision-making, stronger organizational memory, better historic information on projects, and more accessible stories of impact. Using this data, TheCityFix Learn platform was redesigned in 2024 to improve functionality, user experience, and visual presentation. This case highlights the need to connect program-specific learning investments into a broader organizational learning approach. Without integrated project data and institutional knowledge systems, even strong learning platforms may remain program-specific rather than becoming part of a network-wide memory.

WRI has substantially increased investments in core functions to better support effective delivery across the network. Eligible areas for Institutional Strengthening funding include global and country office core functions such as HR, Development, Executive Office, Institutional Strategy, Partnerships, Finance, Operations, Communications, Research Integrity, Managing for Results, and Data Lab. Between 2022 - 2025, the overall budget across these functions more than doubled. Over this period, country office core function budgets grew by 83%, while global core function budgets increased by 57%, reflecting growing recognition that country transitions require durable institutional capacity in-country, not only project staff.

Figure 22: Growth in global and country core functions, 2022 - 2025



Growth across global core functions has varied over the strategic period in response to evolving institutional priorities. From 2022 to 2024, funding for research, data, and innovation increased by 116%, reflecting WRI's efforts to strengthen performance tracking and standards across the network (see Figure 23 below). More recent increases in operations (36%) and human resources (54%) reflect investments in Workday implementation and broader people management processes.

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Figure 23: Evolution of global core function budgets, 2022 – 2026

	% change 2022 – 2024	% change 2024 – 2026
Executive Office	71%	3%
Development	42%	15%
Finance & PMO	41%	6%
Operations	26%	36%
Communications	24%	5%
Human Resources	34%	54%
Research Data Innovation	116%	-4%

Despite this growth, core functions are still not fully networked or sufficiently resourced to support the full ambition of OneWRI. Core function investment has remained relatively constant at 19–20% of overall organizational expenditure across the strategic period, and funding remains concentrated at the global level. Interview and survey insights indicate both operational and programmatic staff continue to experience core functions as under-resourced and insufficiently coordinated across teams and offices.

“From a program operations perspective, WRI has the tendency to get in the way of itself when it comes to administrative efficiency and/or alignment... We overwork our core staff with little institutional recognition and often we only have 1-2 people in a role.” – WRI staff member

“There is a need for much stronger coordination across finance, contracts, HR, grants, compliance, legal, and program teams. At present, support functions can operate too independently from one another, which creates fragmentation and leaves frontline operational staff carrying the burden of stitching systems and people together.” – WRI staff member

Many staff described administrative inefficiencies and operational strain, particularly where support functions operate in parallel rather than through integrated workflows. Staff feedback highlights information bottlenecks and unclear operational oversight, noting that the move toward country offices has not always been matched by sufficient global or country operational capacity to ensure consistency, oversight, and alignment. These tensions are likely to become more significant as WRI further integrates global and country operations and as some global core functions begin to plateau or decline (see Figure 23 above).

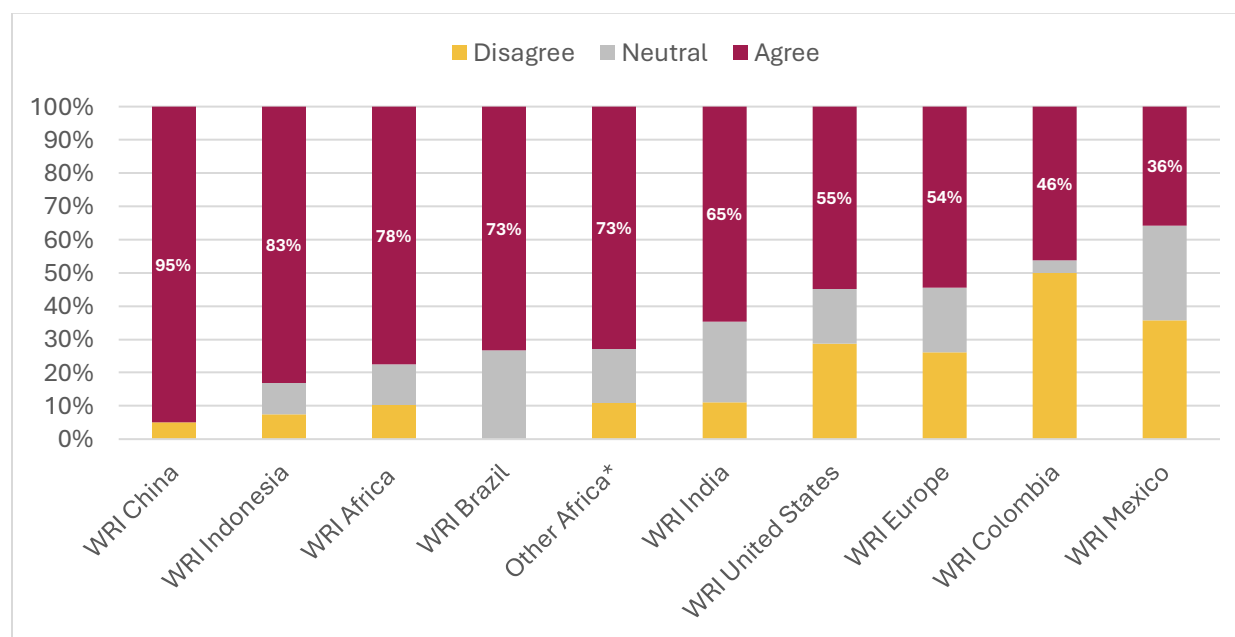
“I have seen us go from a much more collaborative culture with smoother information flows to a much more transactional, siloed and internally competitive culture with more gatekeeping of information. This creates inconsistencies around the Institute and more work for core functions, which are perpetually underfunded.” – WRI staff member

The Future Operating Model process is intended to strengthen resource alignment across the network, but progress has been slower than intended. Phase 1 of the Future Operating Model project mapped and analyzed how core functions are funded across WRI offices. However, the underlying issue is not simply the amount of funding, but whether WRI has a clear operating model for where global capacity adds most value, where country capacity is essential, and how both layers can operate together with sufficient coordination and accountability. Over the next three years, phase 2 is intended to determine the effective distribution of capacity and establish a shared understanding of performance standards to ensure that restricted funds for core functions are strategically aligned.

Aligning people: Growing variability in how OneWRI is experienced across the network

While the concept of OneWRI resonates across the organization, it is not yet experienced evenly across the organization. Survey evidence suggests that many staff broadly support the concept of OneWRI, reinforcing findings from the 2024 culture and values refresh which point to strong alignment with mission and a sense of community across the institution. However, the experience of OneWRI varies significantly across offices and functions. Although 62.7% of respondents reported a positive experience of WRI as “one organization”, this ranged from 83% in Indonesia and 95% in China to 35.7% in Mexico and 46.2% in Colombia. Programmatic respondents were also less positive than non-programmatic respondents, at 60% percent compared with 68%.

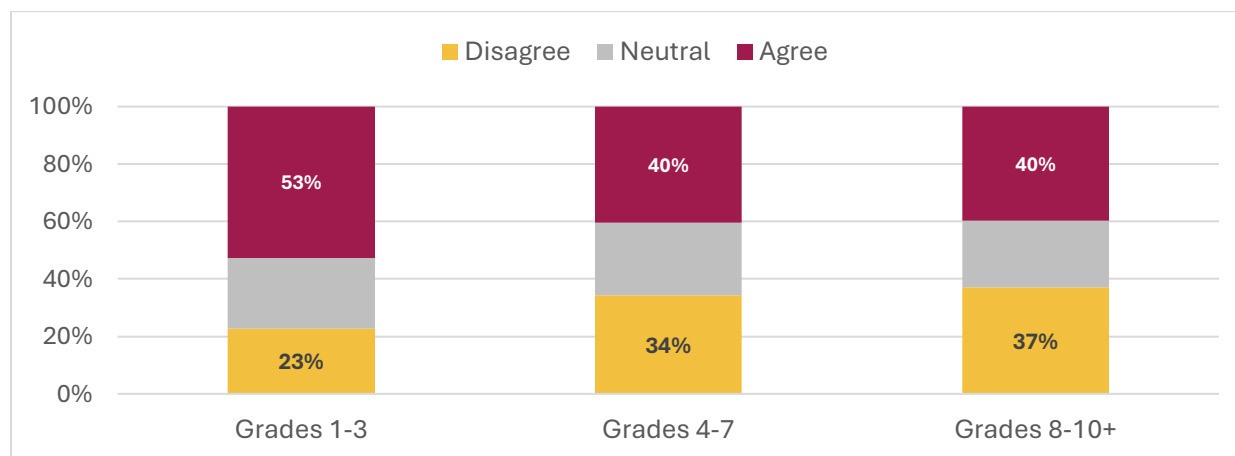
Figure 24: Survey responses to “I experience WRI as ‘one organization’ with a shared mission, while still respecting differences across offices”, by office (All staff)



Guidance and training on how OneWRI is expected to function in practice are not yet sufficiently developed. Survey results indicate that a substantial proportion of staff do not feel they have received enough training or guidance on how OneWRI works in practice, including how collaboration and alignment across teams, functions, and regions are expected to support the strategy. This gap is especially important for mid-level staff, who often must navigate the matrix in practice without having the authority to resolve structural tensions. Qualitative responses frequently describe OneWRI as dependent on informal

relationships rather than consistent systems or structures, resulting in the practical expression of the model varying significantly across context.

Figure 25: Survey responses to “I have received enough training or guidance on how One WRI works in practice — including how collaboration and alignment across teams, functions, and regions is expected to support WRI's strategy” (All staff)



Staff experience the operating model through roles, decision rights, incentives, workload, and collaboration expectations, making people alignment one of the clearest tests of whether OneWRI is functioning effectively in practice. People processes, including hiring and workforce planning, remain inconsistent across programs and countries. Evidence from interviews and organizational design work points to duplication of mandates, unclear ownership, and confusion over who leads on cross-cutting areas such as the Cities climate resilience pillar. This creates friction, especially in matrixed areas where multiple teams engage with the same thematic space from different entry points. Staff also report difficulty navigating organizational structures, identifying the right counterparts and understanding who has authority to make decisions.

“A significant amount of staff time is currently spent navigating processes that, in other organizations, would typically be resolved quickly through clearer systems, ownership, and coordination. Reducing this operational friction would free up considerable time, energy, and talent so that staff can focus more fully on delivering impact. Clarifying decision rights, strengthening accountability, and streamlining approval pathways would likely improve efficiency significantly and reduce frustration for staff across teams.” –

WRI staff member

Collaboration is happening more often across the network, but practice is uneven. The Climate Resilience and Restoration deep dives show that OneWRI collaboration where cross-country or cross-program platforms provide a clear architecture for joint work and clear global-country division of labor. Cities4Forests, TerraFund, TerraMatch, AFR100, and the Policy Accelerator illustrate how global teams can add value through fundraising, common frameworks, finance mechanisms, and cross-country learning, while country teams bring local knowledge, technical expertise, and relationships. In these cases, country experience also feeds back into global tools, research, policy insights, and learning products that can be adapted across geographies. However, interview evidence indicates that collaboration is often dependent on individual relationships rather than formal structures or incentives. Instead, structural factors such as funding arrangements and reporting frameworks continue to incentivize program-level delivery over cross-program collaboration. As a result, opportunities to share learning and scale successful

approaches are not consistently realized, even in areas where there is clear overlap in expertise and objectives.

More broadly, the balance between global coordination and local flexibility remains an active area of tension within the OneWRI operating model. Flexibility is widely seen as essential for operating effectively across diverse political, institutional, and cultural contexts. However, the absence of a sufficiently clear and streamlined set of institutional “non-negotiables” has contributed to growing variability in how the model is implemented across the network. Several country offices are legally independent or increasingly autonomous, creating a risk of greater heterogeneity in priorities, systems, standards, and reporting practices, and limiting the extent to which the organization operates as an integrated system. The recently developed Network-wide Global Footprint Policy Framework, Banyan Policy Portal (centralized access to policies, guidelines, and handbooks) and ‘10 Golden Rules of Empowered Accountability’ demonstrate the value of clear, shared expectations in enabling coordination, accountability, and quality across a distributed network.

The concept of OneWRI makes sense! But the implications of what this looks like in practice (and sometimes tensions / adverse implications) aren't often discussed.” – WRI staff member

Delivering strategic ambitions for OneWRI: Processes and systems that enable OneWRI ways of working

While WRI has made progress in establishing the strategic architecture of OneWRI, key elements of the operating model - particularly systems, processes, and incentives - are not yet consistently enabling the level of coordination and integration envisaged.

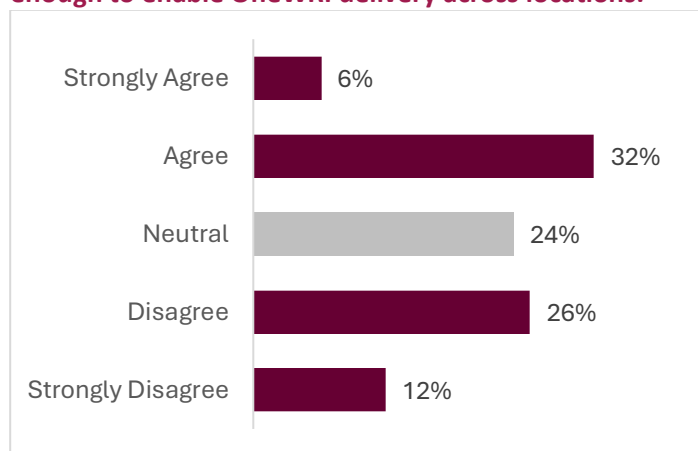
“A lot of what we have left to do is at the nitty gritty level, which is not articulated in the strategy, but risks not finishing the story. Unfortunately, very technical things, but we need a common view of how we operate, the bones and muscle of WRI. Very important to finish organizational strengthening.” – WRI staff member

WRI's internal operational systems are important investments, but they are not yet sufficiently integrated or live to support a systems-change model. The organization has made significant investments in shared institutional infrastructure, including Workday, Salesforce, and DevResults. These are intended to support consistency, coordination, visibility over information, and evidence-based decision-making. In principle, these are exactly the kinds of investments an organization needs if it is serious about becoming more joined-up and better able to orchestrate work across countries and programs.

The evidence suggests these systems are generating some benefits. They have improved standardization, especially for compliance-related functions, and in some cases reduced reliance on fragmented local tools by centralizing access to key data. But the more important question is whether these systems are enabling the type of coordination, learning, and adaptive action required for a systems-change agenda. Here the answer appears to be not yet, or not consistently. Staff experience suggests that these systems are still not fully integrated with one another, nor sufficiently connected across HQ and country-office contexts. Nor are they yet “live” enough to function as real-time inputs into decision-making and systems orchestration. In several cases, staff appear to experience them more as partial repositories or compliance tools than as a genuinely enabling institutional ecosystem.

Staff perceptions strongly confirm that systems integration across the network remains weak. The survey data makes this especially clear. Asked whether WRI's systems are integrated enough to enable OneWRI delivery across locations, only 38% of respondents agreed or strongly agreed. The same proportion — 38% — disagreed or strongly disagreed, while 24% remained neutral. This is one of the most balanced and therefore most revealing findings in the report: staff are effectively split down the middle, with a large neutral middle still unconvinced.

Figure 26: Survey responses to "WRI's systems are integrated enough to enable OneWRI delivery across locations."



In the absence of fully integrated systems, local innovation has played an important role in addressing operational gaps. Country and program teams have developed fit-for-purpose solutions, some of which have been recognized as top outcomes for improving efficiency, transparency, and data-driven decision-making. Examples include system improvements by WRI India's HR and accounting teams, which strengthened clarity, trust, and efficiency through better communication and structured processes, and the Cities Program's project management transformation, which enhanced transparency, accountability, and data-driven decision-making.

At the same time, there are concerns that multiple parallel initiatives risk increasing fragmentation if not coordinated effectively. Mechanisms such as the Operations Committee provide important spaces for joint problem-solving and shared learning across the network. These structures will be critical in aligning institution-wide strategic priorities with program- and country-led efforts to improve operational efficiency and delivery, helping to ensure that local innovations contribute to, rather than diverge from, a coherent OneWRI operating model.

Budgeting and financial visibility continue to constrain networked delivery. Staff highlighted limited visibility over globally raised funds at country level and the continuing effects of siloed fundraising by sector and geography. This is reinforced by donor behavior, which often funds outputs by sector and geography. Interview evidence suggests that collaboration remains highly dependent on trust and timing, with country teams often brought into fundraising discussions too late in the process. Several interviewees emphasized that if country transition is to be credible, country offices must move from being implementers to genuine co-decision-makers in fundraising and resource allocation processes.

WRI has made partial progress toward integrating project management processes. A defined project hierarchy and lifecycle approach has been introduced, with ongoing refinement of early phases and initial planning for pilot implementation of a full end-to-end process. However, due to capacity constraints, the Portfolio Lifecycle Management process has not been operationalized and has been delayed to FY26. The absence of a more integrated lifecycle process limits WRI's ability to make consistent decisions about project design, resourcing, delivery, learning, and closure across the matrix. Additionally, use of project management tools such as Asana is not standardized, limiting consistency and visibility. Staff feedback

emphasized the need for a centralized project database containing core information such as project leads, budgets, burn rates, activities, targets, and indicators.

The absence of a centralized project database remains one of the most important gaps. The 2021 External Review recommended refining a project database into a one-stop shop for programmatic work across the WRI matrix, connecting project management, operations, HR, development, Managing for Results, and other data in one digestible place for staff. This would support learning across the network and strengthen WRI's sense of itself as a global organization. While Workday and related systems represent progress toward enterprise management, no progress has been made on developing a centralized project database. This remains a significant gap in WRI's toolbox. It limits visibility over who is doing what, where, with whom, and with what results, and it weakens organizational memory.

Internal coordination challenges affect WRI's ability to present a coherent external offer. Staff emphasize the value of presenting a more consistent WRI offer to governments, donors, and partners, especially where integrated solutions require combined expertise across cities, energy, food, land and water, and climate, economics and finance. There are increasingly positive examples of proposal co-creation, and the strategy provides high-level alignment. However, proposal development processes are not yet institutionalized enough to consistently leverage expertise across the network. This limits WRI's ability to present integrated offers and may reduce its competitiveness where donors are looking for systems-level solutions.

Information and learning systems are improving, but do not yet provide full institutional visibility or organizational memory. Learning is central to OneWRI because WRI's value as a global network depends on its ability to adapt insights across geographies, systems, and scales. While new platforms and learning products are expanding access to knowledge across the network, gaps remain in the ability to track projects, share lessons, and build a coherent institutional evidence base. Country to country learning is widely seen as a high value but underutilized opportunity. Examples of South–South collaboration demonstrate the potential for sharing approaches and adapting lessons across contexts, but such exchanges are not yet systematically supported or resourced.

Leveraging core funding

KEQ5c. In what ways has flexible funding from core donors contributed to advancing the strategy?

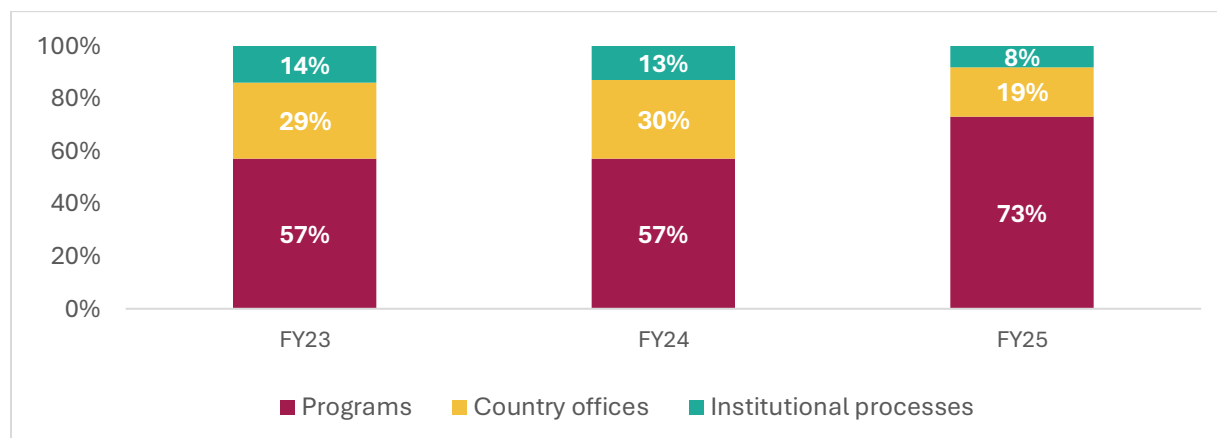
Core funding represents a strategically critical share of WRI's financing

WRI's core funding is anchored in multiyear strategic partnerships with three institutional donors, Sweden, the Netherlands, and Denmark. WRI received \$41.1M USD from Sweden, Denmark, and the Netherlands across FY2023–FY2025. Although this represents a modest share of WRI's total budget (approximately 3.3% on average across the three years), it accounts for a significant share of WRI's flexible resources (approximately 32% on average across the three years).

Core funding plays a critical role in enabling activities that cannot be easily financed through restricted project grants. Allocations are led by the Global Executive Team (GET) as part of the annual budgeting cycle, with criteria including strategic alignment, potential for impact, contribution to human wellbeing and social equity, and the ability to leverage the OneWRI network. In practice, this positions core funding as a key instrument for supporting cross-cutting capabilities, institutional functions, and early-stage or system-level work. However, the relatively limited scale of flexible funding creates trade-offs across programs and offices. Additionally, as the majority of core funding is allocated to programs and country

offices, funding to cross-institution functions - such as PMEL, equity, research, data systems, and global engagement - is dispersed across multiple competing priorities. This creates ongoing challenges around prioritization and sequencing to ensure resources are sufficiently concentrated to maximize catalytic impact.

Figure 27: Core Funding allocations 2023 – 2025



The value of institutional strengthening

A central contribution of core funding is strengthening the institutional systems required to deliver on WRI's strategy. This includes Planning, Monitoring, Evaluation and Learning (PMEL), equity integration, and other core management functions - areas that are systematically underfunded by restricted project financing but essential for effectiveness. Across FY23–FY25, core funding has supported the development and scaling of WRI's PMEL architecture, particularly through the Managing for Results (MfR) function. These resources have enabled the development and application of Theories of Change (ToCs) across programs and country strategies, helping teams identify the pathways through which WRI can contribute to change. At the project level, ToCs have strengthened intervention design by grounding activities in a clearer understanding of local systems and pathways to impact.

The Ethiopia deep dive provides a strong example of the value of increased PMEL capacity. Staff reported that the ToC process created space to reflect on the core problem each pillar seeks to address and identify the key drivers of those problems, which supported more system-level targeting and prioritization. Partners also valued WRI Ethiopia's ability to examine "untapped potential" through ToC development and to "diagnose before prescribing". In the Powering Smallholder Farmers solar irrigation project, this approach helped focus limited resources on high-impact entry points and increased the catalytic value of small-budget projects.

This evidence suggests that core funding is strengthening the enabling conditions for delivery, particularly where it supports better diagnosis, prioritization, and adaptive planning. However, the scale of investment remains limited relative to need. MfR still represents a small share of core allocations, which constrains uptake of new systems and limits opportunities for adaptive learning. In addition, while other country-level core functions have grown significantly, PMEL growth at country level has been comparatively modest.

Core funding has also enabled the integration of equity considerations into key institutional systems, including PMEL, Research, Data and Impact (RDI), program management, and HR, embedding gender and

social equity lens into country strategies, ToCs, and proposal processes. It has supported the Equity Center in developing enabling outcomes, finalizing its Equity Strategy and Action Plan, and establish an equity advisory committee to strengthen regional representation and institutional accountability.

Operationalizing WRI's Country Transitions approach

Core funding has played a critical role in operationalizing WRI's Country Transitions approach by supporting both the development of country strategies and the operational foundation needed for effective country-level delivery. From 2023 – 2025, a total of \$9.7 million was spent on country office management support to Africa, Brasil, Mexico, India, China, Colombia, and Indonesia. These investments align with WRI's strategic shift toward focus countries, where over 60% of staff are now based, and have enabled the rollout of country strategies across the network.

This funding has strengthened essential country-level capabilities that are rarely covered by project funding, such as data and innovation capacity, IT systems, financial management, communications, and partnership development. These functions enable country offices to retain local expertise, maintain long-term relationships, and bridge funding gaps between projects - factors that are consistently identified as critical for sustained engagement and systems change.

Core funding has also strengthened the integration of equity and political economy considerations into country strategies and ToCs, improving WRI's ability to navigate power dynamics and institutional barriers through Rapid Social Analyses (RSAs) and Equity Action Plans across multiple regions. These tools help ensure that interventions are grounded in an understanding of power dynamics, institutional barriers, and the needs of marginalized groups.

- In Kenya, core funding enabled the Africa energy access team to conduct a Rapid Social Analysis to inform an inclusive energy transition plan for Makueni County, identifying vulnerable groups and shaping a capacity-building and engagement strategy focused on social inclusion.
- In India, core funding supported the integration of gender, poverty, and equity considerations into industrial decarbonization strategies, with WRI facilitating workshops and consultations with key government stakeholders to raise awareness about the role of green jobs and cleaner industries in offering equitable opportunities for women and low-income communities.

Investing in the evidence base, partnerships, and tools for systems change

Core funding contributes to systems change by strengthening the evidence base, analytical capacity, and institutional linkages required for long-term transitions. It enables upstream, policy-relevant research and data systems, particularly in areas where restricted funding is limited or unavailable. This includes cross-cutting and exploratory work that underpins multiple programs but may not be tied to specific project outputs.

Country-level work under the New Climate Economy (NCE) in Mexico, Brazil, Colombia, and Ethiopia provides concrete examples of how research informs systems change in national strategies and policy pathways. In Ethiopia, the NCE supported Addis Ababa University's Department of Economics to establish a Research Hub with focused curriculum on systems thinking and green economic modelling. In addition to engaging key ministries and generating applied evidence on system dynamics across sectors such as sustainable transport, urban waste management, and green employment, the program is helping to develop a new generation of economists and climate analysts equipped to apply systems-level approaches to policy challenges. The partnership was showcased at the African Climate Summit as an example of how systems-based academic research can inform national and regional climate strategies.

Core funding has also enabled flagship research outputs to be strategically positioned in policy processes and global forums. For example, the New Economy for the Amazon has been leveraged in national decision-making and international platforms, including COP30, contributing to shaping narratives around sustainable development pathways. The value of core funding here lies not only in producing research, but in connecting evidence to policy engagement, communications, and convening.

Investments in data systems, analytical tools, and research platforms function as enabling infrastructure for systems change. They provide the “glue” that links projects, supports cross-sectoral analysis, and allows WRI to engage credibly in policy and finance discussions. Without flexible funding, many of these functions would be fragmented or underdeveloped, limiting WRI's ability to operate at the systems level.

Responding to emerging opportunities and enabling systems levers

Core funding has enabled WRI to respond to emerging opportunities, both in terms of thematic innovation and engagement in key global processes. This includes support for strategic communications, participation in international events such as COP, and the ability to mobilize quickly around new priorities. At COP30, for example, WRI contributed to the launch of the Global Initiative on Jobs & Skills for the New Economy, developed in collaboration with governments and international partners. This initiative builds on research indicating that the climate transition could generate hundreds of millions of jobs globally, linking climate action with economic and social outcomes. Core funding enabled the research, partnerships, and convening required to position WRI within this agenda.

Importantly, this flexibility allows WRI to target enabling system levers through strategic partnerships and policy-relevant research, addressing the incentives, institutional dynamics, and resource flows that drive change across human systems. For example, core funding enabled WRI to support the ACT2025 initiative at COP28, helping reflect developing country priorities in negotiations and contributing to outcomes linked to approximately \$700M in pledges to the Loss and Damage Fund. It also facilitates collaboration with Multilateral Development Banks to align climate and biodiversity priorities under the Global Biodiversity Framework.

Table 2: Largest enabling system allocations

Project	Region / Country	Total Funding 2023 - 2025
Procedural equity: Equity Action Plans, Mainstreaming, and management support	Africa Region, India, Mexico, Developing Country Unallocated	\$3 million
New Climate Economy	Africa Region, Brazil, Colombia, SE Asia Region	\$2.9 million
Shifting the Multilateral Development Banks	Developing Country Unallocated	\$0.9 million
Economic Framework for Just Transition	Africa Region, Brasil, Colombia, Developing Country Unallocated, India, Mexico	\$0.6 million
Allied for Climate Transformation (ACT2025)	Africa Region, Brasil, Developing Country Unallocated	\$0.6 million

Global and multi-country programs and approaches – scaling impact

Core funding has contributed directly to programmatic results through global and multi-country initiatives that deliver impact at scale. It has supported programs such as REHOUSE and flagship tools including Global Forest Watch, Energy Access Explorer, CityMetrics, and Aqueduct. These platforms function as global public goods, widely used by governments, investors, and civil society actors, and require sustained investment in maintenance, updating, and adaptation to remain effective. The value of these investments is evident in country-level outcomes. In Brazil, work under REHOUSE contributed to the federal Periferia Viva policy, supporting improvements in housing and services for climate-vulnerable communities.

Core funding also enables WRI to play a convening role in global platforms and negotiations. This includes serving as secretariat for the High-Level Panel for a Sustainable Ocean Economy and engaging in processes such as the New Collective Quantified Goal and the Financial Institutions Net Zero Tracker. These efforts extend WRI's influence beyond individual projects, allowing it to shape global agendas and connect them to country-level implementation.

Demonstration effect to leverage additional funding

Core funding plays an important role in leveraging additional resources by enabling WRI to develop, test, and demonstrate new approaches. Early-stage investments allow programs to build evidence, refine models, and establish credibility, which in turn attracts larger-scale restricted funding from bilateral and philanthropic donors.

The Cities4Forests and urban climate resilience work provides a clear example. Initial core funding supported the development of approaches that have since been scaled across more than 100 cities globally, helping them identify climate risks and implement nature-based solutions. This work subsequently attracted funding from multiple donors, including ClimateWorks Foundation, Laudes Foundation, Moore Foundation, NICFI, and DEFRA, and was further expanded through programs such as SUNCASA.

A similar pattern is visible in the growth of the Data Lab, which expanded significantly in capacity, growing from a team of 6 to 45 over the course of 2024, and secured \$12M in funding from technology-focused donors such as the Rockefeller Foundation, Google.org, and the Wellcome Trust. In both cases, core funding acted as a catalyst - supporting early development and enabling WRI to mobilize substantially larger resources.

Box 10: The AI Revolution - opportunities, challenges and WRI positioning

WRI appears better placed than most peer NGOs to engage seriously with AI, but it is not yet fully organized to capture the opportunity strategically. The strongest point in its favor is that it is not starting from scratch: it has more than a decade of experience using data and advanced analytics for environmental impact, a large in-house technical base through the Data Lab, and substantial distributed analytical capacity across programs. Just as importantly, WRI combines research, product development, and partner engagement in one institution, giving it a stronger feedback loop than organizations that only produce research or only build tools.

The opportunities are significant. First, AI can strengthen WRI's substantive program work by improving environmental monitoring, structured data extraction, scenario modelling, and decision-support tools. Existing or emerging examples such as Global Nature Watch, the NDC parser, Cool Cities

Lab, and Ask WRI suggest that WRI is already using AI not just for analysis, but to make research more actionable for policymakers, journalists, cities, and companies. Second, AI opens a major new field of **policy and systems work** for WRI around the environmental footprint of AI itself, especially the energy, water, land, and governance implications of data-center expansion. This is strategically important because AI infrastructure could either accelerate clean power investment or deepen fossil lock-in, depending on how it is governed. Third, AI offers scope for **internal efficiency gains**, although this is currently more constrained.

The challenges are equally material. One is that AI is changing the information ecosystem in ways that could weaken WRI's influence even if its research remains strong: AI tools may summarize WRI's work without attribution, blend it with other sources, or misstate WRI's actual position. Another is that AI's own growth poses environmental and political risks that align directly with WRI's mission: data-center expansion can intensify pressure on electricity systems, water resources, land, and local governance, especially if growth shifts to weaker-regulation contexts. A third challenge is internal: WRI's use of AI in operations is understandably cautious because of privacy, compliance, and legal uncertainty across jurisdictions. The institution also appears to need stronger governance and communication around AI; the interview suggests that AI is moving faster than current board-level understanding and oversight.

Overall, WRI seems well positioned operationally and intellectually, but less well positioned institutionally than it could be. Its technical depth, trusted public platforms, and applied model put it in a strong starting position. But that advantage is partly offset by governance and resourcing gaps: the Data Lab is only lightly core-funded, board understanding of the AI portfolio appears uneven, and there is a need for more explicit technical and business-model expertise in governance. The proposed advisory board and stronger board capability in technology strategy are therefore important next steps.

EQ5 conclusions

WRI has made substantial progress toward becoming a more cohesive global organization, and the OneWRI agenda is now clearly more than an aspiration. The shift to a centrally coordinated global network, the strengthening of the Institutional Results Framework and shared theories of change, the creation of the Impact Committee, and the development of the organizational scorecard have all given WRI a stronger institutional architecture for acting as one organization across geographies and programs. Governance has also become more purposeful and more connected to delivery: the Global Board now has stronger country representation, more structured oversight tools, deeper engagement through program deep dives and in-country retreats, and a clearer role in fundraising, risk oversight, and strategic guidance. In these respects, WRI has moved well beyond the looser "sisterhood" model and has laid the foundations of a more deliberate and coordinated global network.

At the same time, this review finds that OneWRI remains only partially institutionalized. WRI is stronger on strategic architecture than on day-to-day operating coherence. The institution has made the right kinds of investments in systems, standards, communications, and core functions, and there are good examples of shared platforms working well, particularly where there is a clear global-country division of labor and dedicated infrastructure for collaboration. But these strengths are not yet consistent enough across the matrix. Staff continue to experience fragmented systems, uneven guidance, duplication of roles, unclear ownership, and insufficiently defined decision rights. Collaboration often works best where it is held together by strong leadership, formal platforms, or flexible funding, and less well where it depends on

personal relationships or donor-driven workstreams. The result is an organization that is connected in important places, but not yet consistently operating as a single, dependable institutional system.

The main challenge is therefore not whether WRI has the right idea, but whether it can complete the next phase of organizational strengthening. Several structural tensions remain unresolved: between global coordination and local flexibility; between common standards and contextual adaptation; between strategic alignment and donor-driven delivery; and between the ambition of OneWRI and the still uneven networking of core functions, systems, and learning processes. Flexible funding is playing a strategically important role in helping WRI address these tensions by financing underfunded institutional goods such as PMEL, data, equity, country-office capacity, and shared learning. But the findings also make clear that these resources remain limited relative to need, and that some key operating-model reforms, including stronger project management and better institutional visibility over resources, are progressing too slowly. In practice, WRI still asks staff to work across considerable complexity without always giving them the operating model, systems integration, and support needed to do so efficiently. Recent efforts to develop '10 Golden Rules of Empowered Accountability' demonstrate the value of clear, shared expectations for coordination, accountability, and quality across the network. A more explicit and streamlined set of non-negotiables for systems, processes, and key institutional priorities such as GSE and PMEL, could build on these assets to reduce fragmentation while avoiding additional bureaucracy.

AI reinforces both the promise and the unfinished business of OneWRI. WRI appears better placed than many peer organizations to engage seriously with AI because it already combines research, product development, and partner engagement, and has substantial technical capacity through the Data Lab and distributed analytical expertise across programs. AI offers real opportunities to strengthen WRI's research, tools, and policy work, and to open a significant new field of systems-oriented engagement around the environmental footprint and governance of AI infrastructure itself. But it also sharpens institutional weaknesses that matter for OneWRI: board understanding of the AI portfolio remains uneven, the Data Lab is still only lightly core-funded, operational use is constrained by legal and compliance uncertainty, and the organization needs clearer criteria for how AI-related work fits within its broader strategic architecture. In this respect, AI is not a side issue: it is a test case for whether WRI can combine agility and innovation with coherent governance, resourcing, and cross-organizational coordination.

Overall, the review finds that is that WRI is directionally on the right path, but the next phase is decisive. OneWRI is already visible in stronger governance, better strategic alignment, more distributed ownership of standards, and some effective global-country collaboration. But it has not yet become the default way the institution works. For that to happen, WRI will need to move from a framework-led version of OneWRI to an operating-model version: one with clearer decision rights, more integrated systems, stronger cross-country and cross-program learning, more deliberately networked core functions, and a more consistent balance between central coordination and local agency. The central test for the remainder of the strategy period will be whether WRI can reduce the operational friction of the matrix and turn its diversity of geographies, expertise, technical platforms, and institutional roles into a more dependable source of collective advantage.

4. Conclusions

This mid-term review finds that WRI has made further substantial strategic progress under the 2023–2027 Plan. Across the five shifts, the organization has moved toward a more coherent strategic model built around People, Nature and Climate; systems change; country transitions; stronger measurement and learning; and a more joined-up institutional architecture. In each of these areas there is credible evidence of forward movement. WRI is clearer than it was in 2021 about the kinds of change it is trying to influence, the systems through which those changes occur, and the institutional capabilities it needs to support that ambition. The strongest overall finding is therefore positive: WRI is becoming more intentional, more country-grounded, and more strategically self-aware. At the same time, the review also finds a recurring pattern across the strategy: WRI is generally stronger on strategic architecture and framing than on consistent operationalization. The core challenge for the remainder of the strategy period is not whether the right ideas are in place, but whether they can be translated into everyday practice across a large, complex, and still highly projectized organization.

On People, Nature and Climate, WRI has moved beyond rhetorical commitment and is now using PNC as a real guiding frame for strategy, country positioning, and parts of the portfolio. There are credible examples showing that integrated outcomes can be pursued through a single intervention logic backed by finance, governance, and institutional mechanisms. Similarly, on gender and social equity, the strategy represents a genuine step change: “People” has been elevated as an explicit goal, and there is now a clearer expectation that equity should run through research, program design, theories of change, and results measurement. However, operational practice is still catching up. Integration remains uneven; trade-off analysis and do-no-harm checks are not yet standard practice; and equity integration still depends too often on donor requirements, motivated individuals, and pockets of stronger practice rather than routine institutional discipline. The implication is that the challenge is no longer to restate the ambition, but to make PNC and equity function as real design and decision rules that shape what gets prioritized, funded, and scaled.

The review reaches a similar conclusion on systems change which is now much more explicitly articulated as the logic connecting its work. This is one of the clearest strengths of the current strategy. In many areas WRI is already behaving in systemic ways: connecting technical expertise to policy, finance, governance, and institutional routines; using evidence to influence decision-making; and building coalitions that can shift enabling conditions over time. But the evidence remains strongest for changes in the conditions for transformation rather than transformation itself. WRI is beginning to build the foundations for systems change in landscapes, sectors, cities, and institutions, but it is not yet able to claim major transformation of whole human systems. That is not a criticism of ambition so much as a realistic judgement about time horizons and scale. The next step is therefore to turn systems change from a strategic narrative into an operational discipline, with clearer guidance, more deliberate integration of enabling systems, stronger collaboration incentives, and funding and staffing models that help connect individual interventions into coherent systems portfolios.

Country transitions are among the most promising aspects of the strategy and one of the clearest areas of improvement since the previous review. Country offices now show greater strategic autonomy, stronger country-specific framing, and a more visible role as the primary locus for influencing national and subnational systems. In the stronger cases, WRI is operating not simply as a project implementer but as a strategic partner, technical adviser, convener, and coalition-builder helping to shape planning architectures, institutions, incentives, and investment flows. This has improved WRI's relevance and has begun to ground its systems ambition more firmly in political and institutional reality. Yet the shift remains

partial and uneven. Several country strategies are still stronger on diagnosis than on operational pathway; subnational prioritization is often underdeveloped; uncertainty and adaptation are not always handled well; and country offices still need more practical support to translate the country transition idea into delivery choices. Much of the evidence points to promising transition pathways rather than durable, demonstrated transformation. The country transition approach is therefore directionally right and strategically important, but it is not yet fully institutionalized or consistently supported by the funding, orchestration, and learning systems needed to realize its full potential.

On measurement and learning, WRI has made real progress, particularly relative to the concerns raised in 2021. It now has many of the core ingredients of a more mature PMEL architecture: an Institutional Results Framework, a broader set of theories of change, a more visible Managing for Results function, increased use of contribution-oriented methods, and DevResults as a common reporting platform. These are important achievements that have improved strategic alignment and made institutional results more visible. However, the step-change remains incomplete. The architecture exists, but it is not yet consistently embedded in the routines, capacities, and incentives through which teams plan, monitor, learn, and adapt. Theories of change still risk becoming compliance products rather than living tools; DevResults is still more a reporting repository than a fully integrated performance-management system; and staff often continue to experience monitoring and reporting as an additional burden rather than a core management function and opportunity for learning. In short, WRI has built many of the right tools, but it has not yet fully created the operating model, resourcing, and learning culture needed to use them to full effect.

The same broad judgement applies to OneWRI. WRI has made substantial progress toward becoming a more cohesive global organization. The move to a centrally coordinated global network, the strengthening of the IRF and shared theories of change, the creation of the Impact Committee, and the development of the organizational scorecard have all given WRI a stronger institutional architecture for acting as one organization across geographies and programs. Governance has become more purposeful and more connected to delivery, with stronger country representation on the Global Board, more structured oversight tools, and deeper engagement through program deep dives and in-country retreats. But OneWRI remains only partially institutionalized. WRI is stronger on architecture than on day-to-day operating coherence. Staff still experience fragmented systems, uneven guidance, duplication of roles, unclear ownership, and insufficiently defined decision rights. Collaboration is often strongest where it is held together by formal platforms, strong leadership, or flexible funding, and weaker where it depends on personal relationships or donor-driven workstreams. The result is an organization that is connected in important places, but not yet consistently operating as a single, dependable institutional system.

AI brings these strengths and weaknesses into sharp relief. WRI appears better placed than many peers to engage seriously with AI because it already combines research, product development, and partner engagement, and because it has substantial technical capacity through the Data Lab and distributed analytical expertise across programs. AI offers real opportunities to strengthen WRI's tools, research, and policy work, while also opening an important new field of systems-oriented engagement around the energy, water, land, and governance implications of AI infrastructure. But it also exposes unfinished institutional business: board understanding of the AI portfolio remains uneven, the Data Lab is still only lightly core-funded, operational use is constrained by legal and compliance concerns, and WRI still needs clearer criteria for how AI-related work fits within its broader strategic architecture. In this sense, AI is not peripheral to the strategy. It is a practical test of whether WRI can combine agility and innovation with coherent governance, resourcing, and cross-organizational coordination.

Overall, WRI's biggest challenge is not lack of ambition, capability, or strategic direction. It is the persistence of an operating model, funding structure, and incentive environment that still pull the organization toward projectized, siloed, and compliance-heavy ways of working. Across the review, the same constraints recur: reliance on restricted donor funding, uneven support for enabling systems, under-networked core functions, insufficiently integrated systems, and collaboration that is still too often more relational than institutional. These factors do not negate the progress made; rather, they explain why progress is uneven and why WRI so often appears to have the right strategic architecture without yet having the full institutional machinery to deliver it consistently. Flexible funding is helping to fill some of these gaps by financing underfunded institutional goods such as PMEL, data, equity, country-office capacity, and shared learning. But it remains limited relative to need, and too many important capabilities still sit at the margins of a predominantly project-funded model.

5. Recommendations

The following recommendations address key issues identified in this Mid-Term Review of WRI's strategy:

Recommendation 1 – Guidance: **continue to develop practical guidance on how to support and catalyze systems change, taking into account the global system, specific country contexts, and interactions between country and global levels.**

- WRI's adoption of a systems-change lens has helped to focus the organization on the major Human Systems that matter most for people, nature and climate goals.
- However, it has articulated *what* systems need to change and *why* more clearly than *how* staff can influence those systems in practice, including which levers they can pull, what capabilities they need, and what systems-oriented delivery choices look like in different contexts
- Some Global Programs and Country Offices are experimenting with ways to work systemically, and this learning can be captured and shared more systematically.
- The IRF provides a useful high-level framework for prioritization and institutional coherence, but staff need clearer guidance how to evidence their contribution to it.

Recommendation 2 – GSE: **do more to strengthen GSE across all systems through deeper diagnosis of barriers, more compelling narratives, stronger executive leadership on GSE, more GSE specialists in programmatic teams, deeper collaboration with external (including local) partners with appropriate experience, and stronger GSE indicators.**

- WRI – especially through its leaders – could do more to make the case for why placing people – especially marginalized and historically excluded communities – at the center of programming is key to systems change, especially equitable systems change
- WRI lacks a compelling narrative of why and how inequality exists, including in different geographies, and what equity would deliver for WRI's people, nature and climate goals
- WRI has an unrivalled track record of research and emerging evidence base through implementation that it could use to generate country level flagship publications on GSE
- Staff GSE capabilities can be strengthened through recruitment processes, through the rollout of the approved and mandatory Equity Fundamentals training for programmatic staff, and greater accountability
- Where skills are lacking, WRI can work more with local partners that specialize in GSE.

Recommendation 3 – PMEL: re-engage program teams, especially in country, around a shared PMEL agenda serving both institutional and programmatic priorities by i) co-designing lighter reporting to better align donor, country and WRI needs; ii) increasing strategic project and program evaluations where resources allow; and iii) replacing DevResults with a lighter, fit for purpose alternative.

- WRI has made important progress in developing its institutional PMEL architecture, including the Institutional Scorecard and the adoption of DevResults as a central reporting system.
- However, WRI has not yet established a sufficiently shared PMEL agenda between its global decision-makers and programme and country teams. The central PMEL architecture responds primarily to institutional reporting and decision-making needs, while delivery teams generate and use different types of evidence for day-to-day project management and donor reporting.
- As a result, engagement with WRI's central PMEL needs remains uneven. Delivery teams, especially in Country Offices, do not see central PMEL as a source of management insight or learning. There is no clear return on the time required to translate project-level evidence into WRI's institutional reporting architecture.
- Usage of DevResults illustrates this broader challenge. Despite progress, it still functions mainly as a data repository, with much of the underlying monitoring, validation, aggregation, and interpretation work happening outside the platform. Multiple donor reporting frameworks make incorporating project reporting frameworks excessively onerous.
- WRI therefore needs a more proportionate and useful PMEL architecture that creates stronger “pull” from programme and country teams. This means better aligning donor, country, programme, and institutional reporting needs; creating space to capture important outcomes and “fringe” indicators that sit outside the Institutional Scorecard but matter for systems change; and investing more in strategic project and programme evaluations where resources allow.
- This should be supported by shifting investment away from sophisticated global PMEL platforms such as DevResults, unless WRI is prepared to resource their full functionality, and towards more fit-for-purpose alternatives that are easier for teams to engage with.
- Over time, the recommended changes will help WRI build a stronger PMEL culture by connecting institutional reporting requirements to the questions that matter most to staff: whether their work is making a difference, how it contributes to wider systems change, what should be adapted, and how evidence can support stronger partnerships, fundraising, and influence.

Recommendation 4 – Learning: generate practical insights into what works, what does not, and why in systems change by more deliberately combining implementation evidence with WRI's research capacity and knowledge of solutions across the global network and reflect in TOCS to better measure and tell a clearer story of systems change.

- WRI is already generating rich evidence of systems-change practice, but this is not always captured and systematized in ways that can contribute to institutional learning and scaling of lessons learned externally.
- Current reporting is stronger at communicating high-level results on end-state outcomes than at explaining how WRI helped make those outcomes possible (policy shifts, coalition formation, financing mobilization, changes in power dynamics, and mindset shifts).
- These forms of contribution are central to WRI's systems-change model and its ability to learn and adapt, but are not fully captured through current PMEL practices.

- WRI needs a light touch way to surface, synthesize and communicate this evidence across the network to strengthen learning and storytelling and support adaptive management and institutional communication, rather than adding a heavy new reporting layer.
- Global teams and researchers need to be able to turn data and evidence generated by WRI's increasing track record of implementation into learning, for WRI and externally.

Recommendation 5 – OneWRI: further streamline systems, processes, and policies by co-defining and enforcing a set of One WRI ‘non-negotiables’ (including existing standards) that apply across all offices, aligning how the institute works to support both global and country transitions.

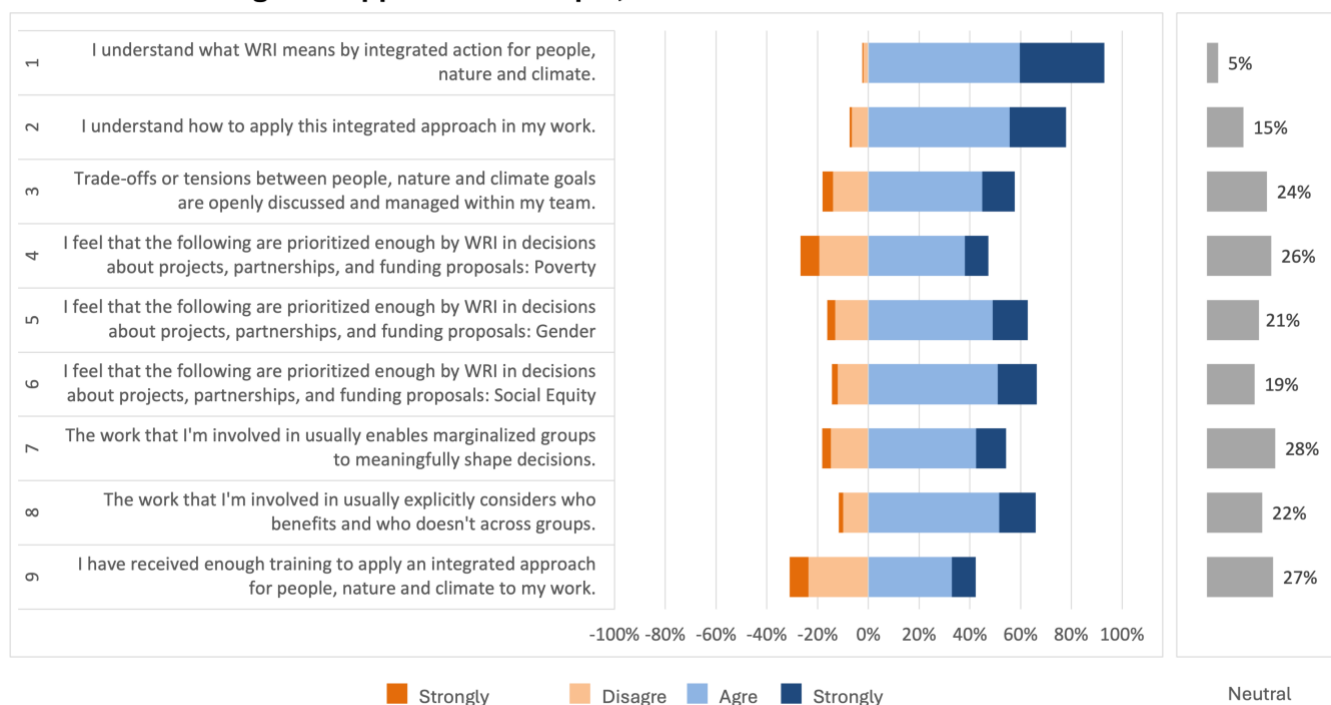
- Several country offices are legally independent or increasingly autonomous, creating a risk of greater heterogeneity in priorities, systems, standards, and reporting practices
- The 10 Golden Rules of Empowered Accountability and the Banyan Policy Portal (centralized access to policies, guidelines, and handbooks) demonstrate the value of clear, shared expectations in enabling coordination, accountability, and quality across a distributed network
- A more explicit and streamlined set of “non-negotiables” can build on these assets while reducing fragmentation and avoiding additional bureaucracy e.g. i) minimum expectations in relation to GSE throughout planning and implementation; ii) minimum standards for PMEL and proposal design and data management and information visibility; iii) core requirements for how project, financial, and staffing data are captured and shared across systems; iv) minimum standards for decision-making, roles, and operational processes; v) minimum standards for budgeting transparency and coordinated fundraising
- Introduce guardrails to ensure visibility and alignment in how funds are raised and allocated.

Recommendation 6 – Joint working: strengthen incentives and operating routines for tighter cross-team collaboration on shared system outcomes across pillars, among systems, and between global and country teams within WRI.

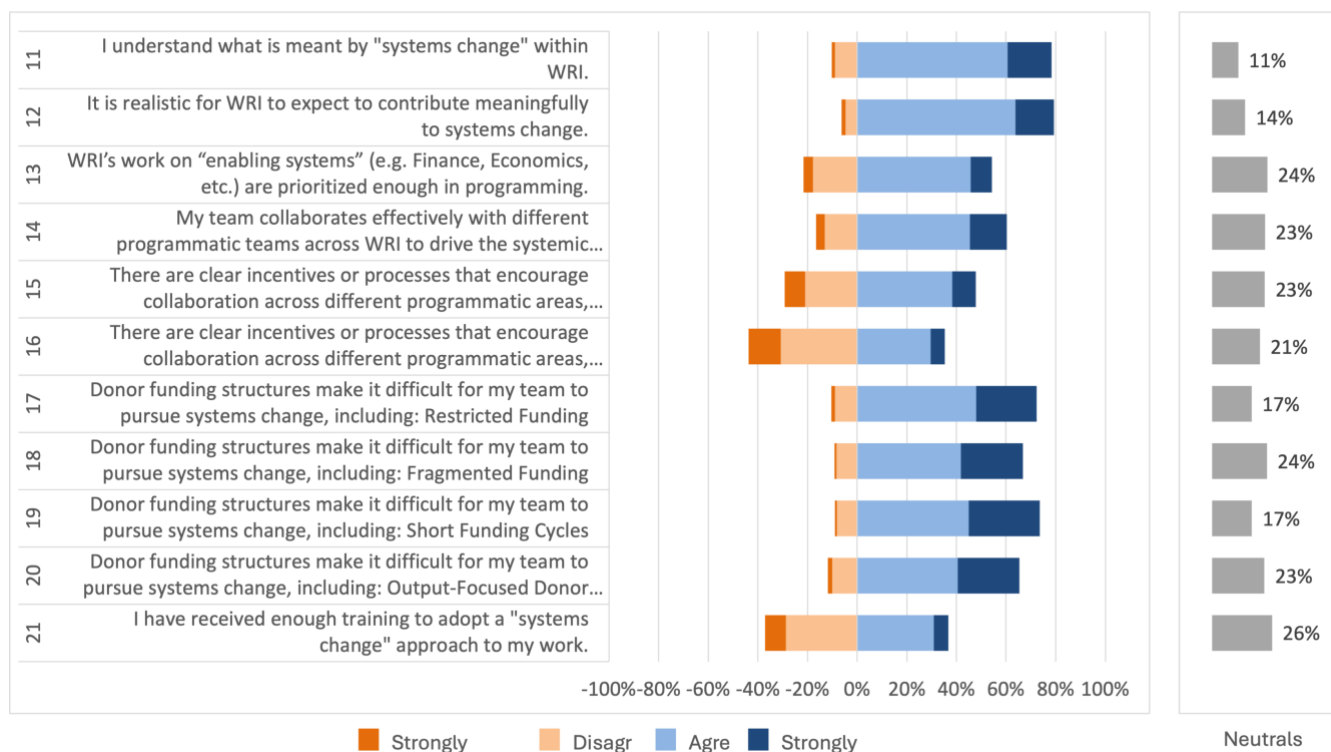
- Systems work depends on recognizing overlaps, encouraging teams to pursue shared outcomes rather than isolated outputs, and overcoming organizational silos.
- Collaboration happens, but often through the initiative of dedicated individual staff rather than through institutional arrangements, incentives and routines
- WRI's legacy portfolio of grants, project-based fundraising, and reporting lines can encourage staff to prioritize their own outputs and budgets rather than shared system outcomes.
- This makes it harder for WRI to originate, design, resource, manage and communicate work as part of coherent portfolios.
- WRI's should enhance incentives that lead to integrated systems work including joint planning, shared fundraising, cross-team deployment of expertise, collective ownership of outcomes, and common contribution narratives

Annex 1: Survey Summary

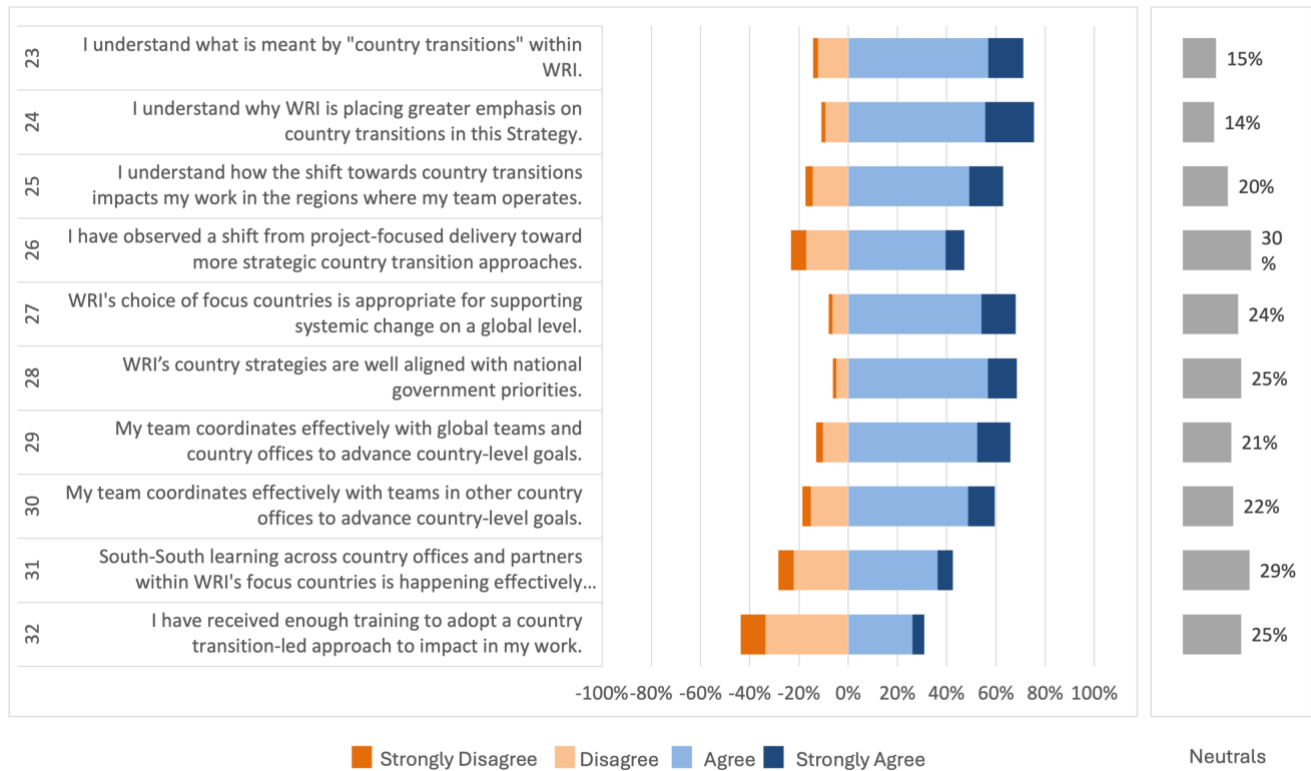
Shift 1: An integrated approach for People, Nature and Climate

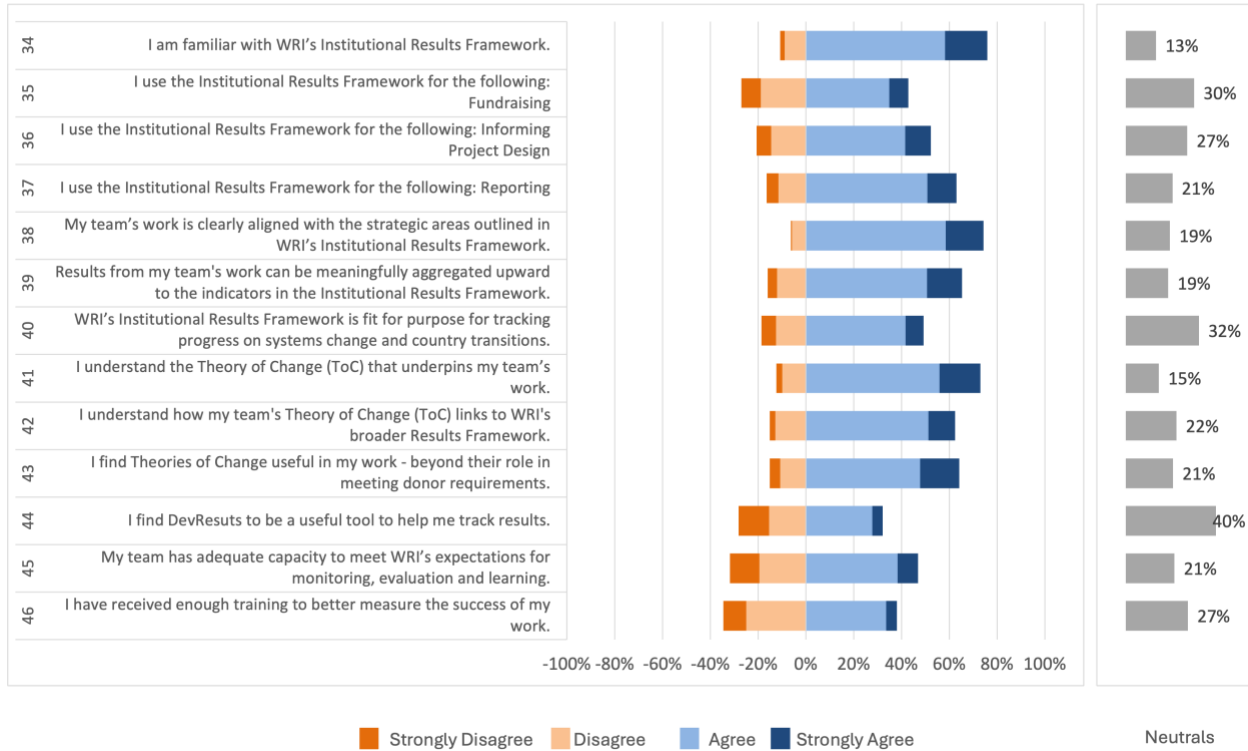
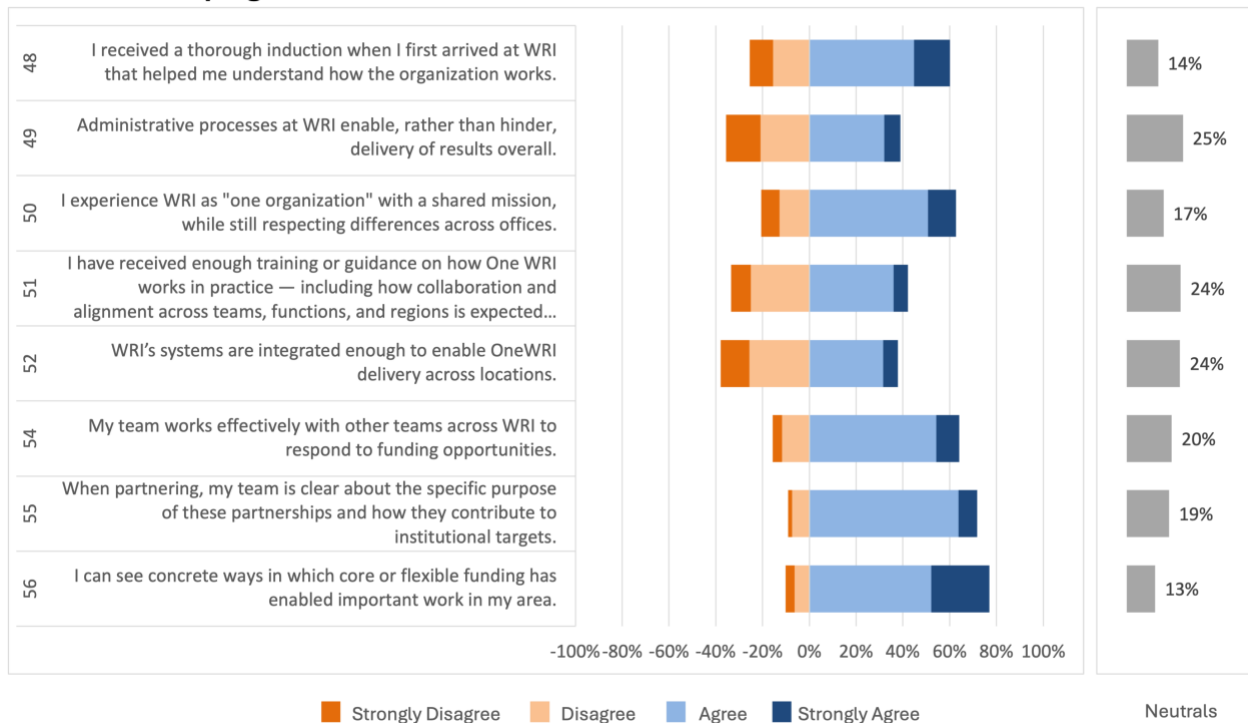


Shift 2: Focus on systems



Shift 3: Emphasis on country transitions to deliver impact



Shift 4: A unified approach to measure success**Shift 5: Reshaping the institution**

Annex 2: Detailed Systems Change Stories

Systems Change Story 1: Watershed restoration in Dire Dawa, Ethiopia

WRI's work in Dire Dawa illustrates how a systems approach can shift watershed restoration from a set of discrete environmental activities into a more integrated city-wide resilience model. The core challenge is the interaction between upstream deforestation, midstream erosion, downstream flash flooding, groundwater decline, weak communal land governance and fragile peri-urban livelihoods. Historically, these issues were addressed in fragmented ways, with different actors working on separate problems in separate geographies. Through Scaling Urban Nature-based Solutions for Climate Adaptation in Sub-Saharan Africa (SUNCASA) and related city and water programming, WRI has helped reframe this as a whole-of-watershed challenge and organize action around that logic.

The value of this reframing is that it changes both the spatial and institutional logic of intervention. Rather than treating upstream afforestation, midstream agroforestry and downstream urban greening as separate workstreams, SUNCASA presents a single resilience narrative for the Dechatu watershed. It also connects nature-based solutions to urban planning, groundwater management, communal land governance, social inclusion and livelihood creation. In systems terms, WRI is not only supporting restoration activities, but helping local actors see the watershed as a shared system in which risks and benefits are distributed across communities.

WRI's most visible contribution has been to assemble and stabilize a multi-actor coalition around this shared watershed logic. The model combines WRI and IISD's systems framing, Haramaya University's scientific design and monitoring, Hararghe Catholic Secretariat's community mobilization and implementation role, and government leadership through the Dire Dawa Administration and sector bureaus. This matters because the project links technical knowledge, community trust, land allocation, municipal planning and strategic tools such as the Nature-based Solutions (NbS) framework, manuals and decision-support systems. The Technical Working Group and mayor-chaired Steering Committee have also created a coordination mechanism across agencies that would not typically work together so closely. The reported resolution of a land allocation conflict with a parallel World Bank program through this structure is a useful signal that coordination is becoming more functional.

There are early signs that several system levers are beginning to move. At community level, households are participating in agroforestry, communal land restoration, beekeeping and savings groups, rather than relying only on extractive coping strategies such as charcoal and firewood production. At institutional level, city agencies are beginning to treat watershed restoration and urban NbS as part of planning and service delivery, rather than as donor-funded add-ons. Policy and governance rules are also beginning to shift, including participatory by-laws for communal land governance, the emerging Dire Dawa NbS Strategic Framework, the city's decision to stop issuing new groundwater extraction licenses, and exploratory work on payment-for-ecosystem-services mechanisms. These are important because they begin to alter the incentives and rules behind degradation.

The project also shows how systems change depends on shifts in power and mindsets, not only technical delivery. Focus group evidence suggests that women's participation has been supported through childcare, paid work, savings and livelihood diversification, with potential effects on intra-household decision-making and social norms. Community members also appear to be developing a stronger understanding of the link between upstream land management and downstream flood and heat risk. This is a potentially important systems-change signal: people are not only participating in project activities but

beginning to see themselves as agents within a wider watershed system. Government actors, too, appear to be moving from seeing NbS primarily as beautification or environmental compliance toward understanding it as a practical resilience strategy.

Early results are significant. By February 2026, the project reported 735 hectares restored, 83 hectares of riparian buffers, more than 1.08 million trees and shrubs planted, 11.1 km of urban tree planting, seedling survival rates above 85%, and an increase in urban canopy cover from an 18% baseline to around 26%. It also reports creating more than 7,800 green jobs, producing six manuals and guidelines, and supporting development of a communal land by-law and city-level NbS framework.

The main lesson is that WRI has demonstrated a credible model for integrated watershed restoration but has not yet secured the full enabling conditions for that model to persist without continued external support. The intervention appears strong on systems framing, coalition-building, practice change and early institutionalization. Its weaker point is long-term finance. The SUNCASA grant, reported municipal allocations for monitoring, two to three years of post-project support, and plans to absorb 13 trained green-job groups into the Beautification and Sanitation Agency budget are positive signals. However, a durable city-level financing pathway for long-term watershed management is still emerging, and private sector financing, especially from water-dependent businesses, remains limited. The systems lesson is therefore clear: reframing the watershed, aligning institutions and shifting community practice can create credible early change, but the model will only become durable systems change if maintenance finance and local fiscal ownership are locked in.

Systems Change Story 2: Nature-based solutions in cities in Indonesia

WRI Indonesia's work on nature-based solutions in Jakarta, Denpasar, Surabaya and Makassar illustrates both the promise and the limits of applying systems thinking to urban resilience. Through Cities4Forests and related programming, WRI helped shift discussion away from a narrow urban greening frame toward a broader understanding of how wetlands, floodplains, urban forests, reservoirs and public space connect to the functioning of the city as a whole. This was an important contribution. However, the experience also shows that awareness of the wider system is not the same as changing it. In Jakarta especially, reservoir-focused NbS interventions sat within a much larger water, sanitation, flood management and land-use system. Where those wider bottlenecks remained unresolved, localized greening struggled to deliver durable outcomes for health, wellbeing and public value.

WRI's strongest contribution has been in participation, coalition-building and reframing. Across several cities, it helped bring together actors who do not typically shape urban planning on equal terms, including city agencies, community groups, civil society, women, people with disabilities, urban poor communities and, in some cases, private investors. In Surabaya, participatory design workshops with more than 70 stakeholders informed a masterplan for the Old City, while in Makassar, Tudang Sipulung forums created space for residents and officials to discuss mobility challenges together. In Jakarta and Bali, WRI's work was also valued for linking local priorities to wider technical and financing conversations. These are real enabling-system contributions: they affect who is involved, what kinds of knowledge are considered legitimate, and how urban resilience problems are framed.

There are also signs of movement across several system levers. WRI supported cities to begin integrating NbS into urban strategies and adaptation measures, with eight partner cities reportedly adopting initial NbS actions or policy commitments by the end of 2024. It also helped shift planning practice toward participatory design, technical analysis, training and hybrid green-gray approaches, rather than relying

only on conventional infrastructure. Perhaps most importantly, WRI helped legitimize NbS as a serious urban resilience tool rather than an environmental add-on. In Surabaya, this generated both a redesign vision and investor interest, with more than 90 investors engaged through a market-sounding exercise. In Makassar, community forums produced tangible outputs, including a citizen-authored book that informed planning discussions.

However, this case is also a cautionary example of what happens when NbS pilots are not sufficiently connected to the wider urban systems on which they depend. In Jakarta, political momentum appears to have accelerated implementation before the underlying conditions were in place. Reservoir restoration and greening may have been visually and politically attractive, but water in some reservoirs remained polluted and surrounding sanitation and waste systems were not sufficiently addressed. This limited the public value of the intervention: if reservoirs remain unclean or unpleasant to use, their contribution to public space, health, recreation and resilience is necessarily constrained. The result is not a total failure, but it does expose a key systems lesson: NbS cannot be treated as a surface-level improvement to a degraded urban asset if upstream flows, sanitation infrastructure, maintenance arrangements and public-use conditions remain unresolved.

The main limitation is therefore that WRI's strongest outcomes so far are upstream and institutional: shifts in planning norms, stakeholder engagement, technical credibility and early policy adoption. These are meaningful enabling conditions, but they do not guarantee delivery or sustainability. In several cases, upstream influence appears to be moving faster than downstream implementation. Cities may adopt NbS principles or pilot interventions, but the systems that determine whether those interventions endure — budgets, enforcement, maintenance, infrastructure integration, water quality management and political continuity — remain weak. This creates a risk that NbS is seen as a discrete project layer, rather than as part of a deeper transition in how urban water, land and public-space systems are governed.

The lesson from Indonesia is not that WRI's NbS work lacks value. WRI has helped build legitimacy, participation and technical confidence around urban NbS, and has opened space for more inclusive planning. The lesson is that systems thinking needs to shape not only the framing and design of interventions, but also decisions about sequencing, readiness and implementation discipline. Where wider sector conditions are not yet in place, WRI may need to be clearer about what NbS can and cannot achieve, and more cautious about supporting politically rushed interventions that risk overpromising. For urban NbS to become durable systems change, it must connect more directly to the less visible but decisive parts of the system: sanitation, drainage, waste management, maintenance finance, enforcement and long-term institutional ownership.

Systems Change Story 3: Forest–palm oil nexus in Indonesia

WRI's work in Sumatra illustrates a systems approach to one of Indonesia's most difficult land-use challenges: the interaction between weak forest governance, palm oil expansion, smallholder livelihoods and global commodity pressures. The central issue is not only that palm oil drives forest loss, but that the wider "rules of the game" — tenure arrangements, supply-chain incentives, information gaps, political influence and uneven enforcement — continue to favor expansionary land uses over sustainable stewardship. WRI has engaged this system from several angles: supporting social forestry regulations, customary forest recognition, community enterprise development and local stewardship arrangements in West Sumatra, while working on smallholder registration, traceability, digital monitoring and deforestation alerts in Riau.

The value of this approach is that it recognizes that forest outcomes cannot be separated from agricultural incentives, and that supply-chain sustainability cannot be achieved without addressing rights, governance and rural livelihoods. WRI's strongest contribution appears to be its role as a convener and bridge-builder across actors that rarely work from a shared frame. In West Sumatra, this has helped create new government–community relationships around social forestry, with communities participating in joint planning and gaining a more legitimate role in land-use decisions. In Riau, WRI has helped create the conditions for district-level multi-stakeholder forums that could bring together government, law enforcement, companies, cooperatives, NGOs and village leaders around a more coordinated land-use agenda.

There are credible early signs of movement across several system levers. At the policy level, WRI helped support West Sumatra's social forestry regulation, opening legal pathways for community forest management and customary forest recognition. Nationally, its contribution to the One Map Policy has helped reduce conflicting land-use claims by consolidating spatial data into a single geospatial reference, while its analysis informed Indonesia's Long-Term Development Plan by helping embed emissions-intensity targets alongside economic goals. In palm oil, WRI supported the Ministry of Agriculture in registering 180,000 independent smallholders into the STDB platform, a major step toward formalization and traceability.

Practices and information flows are also beginning to shift. In Riau, smallholders have been supported to adopt better agricultural practices, engage with no-deforestation principles and use farm-level data more systematically. In West Sumatra, some communities have shifted from illegal logging and insecure extraction toward stewardship and forest-based enterprise. Women's cooperatives have developed new livelihood models around *Garcinia* processing and value addition, while forestry units and local government actors are reported to be using new tools, patrol models and income-tracking approaches. Digital tools, MIS systems and satellite-based deforestation alerts are also improving transparency and creating a stronger basis for targeted action.

These changes matter because they begin to align forest protection with livelihood improvement, rather than treating conservation and development as separate objectives. In West Sumatra, social forestry reforms have opened the way for around 340,000 hectares of community-managed land, and in at least one pilot village illegal logging reportedly dropped to zero through combined community stewardship and joint patrols. Provincial forestry agencies are also tracking community income, not only hectares, which is important because it connects conservation success to livelihood improvement. In the palm oil system, smallholder registration increases visibility over who is producing, where and under what conditions, creating a basis for linking compliance to support and incentives.

There are also signs of shifts in power and mindsets, though these remain fragile. Social forestry and customary rights recognition give some communities a stronger legal footing in areas where they were previously marginalized or criminalized. Some communities increasingly see forests as long-term productive assets worth managing, while smallholders engaged in sustainable palm oil programs are beginning to view record-keeping, compliance and conservation as part of viable agricultural practice rather than as external impositions. Government actors appear more open to seeing communities as partners, and some companies are beginning to treat sustainability as part of business legitimacy. These are important signals, but they remain uneven and highly dependent on continued support.

The main lesson is that WRI is building important enabling architecture for systems change, but that architecture is not yet strong enough to overcome the deeper political economy driving forest loss. The

wider system still favors expansionary actors: palm oil retains disproportionate political influence, enforcement remains weak and often compromised, and rights recognition and traceability systems do not by themselves shift underlying incentives. In Riau, stakeholder references to an “unseen mafia” of illegal loggers and land speculators underline that some of the most powerful actors remain outside routine enforcement and beyond the reach of convened forums.

A further lesson is that scaling pathways need to be engineered more deliberately. The implicit logic is that better pilots, stronger data systems and more formalized smallholders will add up to wider regime change. But this is unlikely without stronger attention to how local successes are translated into financing, enforcement, procurement norms and political coalitions capable of reshaping the broader system. Many gains also remain dependent on WRI facilitation, donor funding and exceptional local leadership, including community enterprises, stewardship arrangements and some digital systems. WRI is therefore generating real pockets of systems change in the forest–palm oil nexus, but these remain vulnerable unless the deeper resource flows, power relations and enforcement systems that sustain deforestation are addressed more directly.

Systems Change Story 4: Restore Local

Restore Local is one of WRI's clearest examples of a systems-change approach in practice. Its significance lies not only in the restoration it directly supports, but in its attempt to change the conditions under which restoration happens. Rather than treating restoration as tree planting alone, WRI is working on the rules, incentives, capabilities, data systems and financing mechanisms that determine whether restoration can scale. In this sense, Restore Local is trying to build the enabling architecture for a “New Restoration Economy”: one in which restoration becomes investable, locally led, measurable and connected to rural livelihoods.

The program works across four main system levers. The first is finance. Through TerraFund, WRI is trying to shift restoration from a grant-dependent activity toward investable rural enterprise and outcome-based finance. TerraFund channels grants, loans and other support to local NGOs, community-based implementers and SMEs that are often excluded from conventional finance. It also helps identify, screen and support credible local restoration actors, making it both a financing mechanism and a form of market infrastructure. This is important because long-term restoration depends on whether local actors have a durable economic reason to sustain restoration beyond the life of a project. However, the model remains resource-intensive and still depends on donor subsidy, concessional capital, WRI country presence and tailored support. At this stage, TerraFund is best understood as a prototype and learning platform for restoration finance, rather than a fully scalable investment model.

The second lever is policy. Restore Local works on the rules and incentives that enable restoration to move from voluntary activity to more durable public systems. The Africa Food, Land Use and Restoration Policy Accelerator illustrates this by helping governments identify bottlenecks, prioritize reforms, develop roadmaps and design public incentives for restoration. In Ethiopia, this has contributed to work around a restoration platform and task force linked to the Green Legacy Initiative, as well as WRI's emerging role in the Degraded Landscape Restoration Special Fund. In Rwanda, the Accelerator helped identify the limited quality and supply of tree planting material as a bottleneck and supported revision of the National Tree Reproductive Materials Strategy. In Kenya, it has supported county-level roadmaps, technical working groups and draft legislation. These examples show a clear systems-change pathway: diagnosing a constraint, translating it into a policy priority, and supporting the co-production of a concrete

instrument. The next test is whether these instruments are formally adopted, resourced, implemented and used.

The third lever is monitoring. Restoration finance, policy and practice all depend on whether actors can see what is happening, compare performance, verify results and trust claims about outcomes. TerraMatch provides the data infrastructure beneath TerraFund, storing project and polygon data, supporting reporting, and enabling monitoring and verification. WRI's emerging AI-enabled MRV work, including DINOv3-based monitoring, could further reduce the cost and increase the credibility of restoration verification. This matters because weak and inconsistent monitoring remains one of the main barriers to restoration finance, adaptive management and public accountability. If WRI can make restoration outcomes easier to verify, it can help shift finance from upfront promises toward measured performance.

The fourth lever is capacity development. Restore Local combines finance with support to strengthen the delivery systems, investment readiness and credibility of local restoration champions. This matters because many smaller organizations and SMEs have strong local legitimacy but lack the systems needed to access larger or more formal finance. Capacity development is also embedded in the Policy Accelerator, where governments and technical agencies exchange experience, work with mentors and co-create solutions. WRI's emerging "playbook" approach is particularly important because it aims to codify learning from implementation into tools, standards and models that others can adapt. This is central to the program's systems logic: WRI does not aim to implement Restore Local everywhere, but to generate infrastructure and proof points that others can replicate.

Results to date are strong. By the end of 2024, Restore Local had funded 103 champions across 119 projects and directed \$41.9 million in grants, loans and other investments into restoration. Across its three anchor landscapes, it reported 8.3 million trees planted, 14,286 hectares brought under restoration, 26,427 jobs created and 99,242 smallholders or beneficiaries reached. The program also reports that 57% of jobs created were held by women and 60% by youth, suggesting that the "people" dimension is translating into concrete employment and livelihood outcomes. These results are distributed across Kenya's Greater Rift Valley, the Lake Kivu and Rusizi River Basin, and Ghana's Cocoa Belt, indicating that Restore Local is already operating beyond isolated pilots.

The program has also made progress in building the systems needed for scale. It provided capacity support to 420 projects, strengthened 10 local capacity-building providers, supported seven policy requests from government partners, delivered two Policy or Monitoring Accelerator workshops, and monitored 100% of anchor-landscape hectareage using baseline and change data from 2020–2024. These are important enabling-system achievements because they strengthen the institutional, technical and informational foundations for restoration, rather than only delivering site-level outputs.

The main lesson is that Restore Local has made significant progress in building systems architecture but has not yet proven that this architecture can shift the wider restoration economy at scale. Its strongest contribution is not only the number of trees planted or hectares restored, but the attempt to reshape how restoration is financed, monitored, locally delivered and connected to policy reform. However, the more ambitious systems-change claims remain a work in progress. TerraFund has not yet crowded in external investment at scale; many policy outcomes remain at the roadmap or draft stage; and the model still relies heavily on WRI facilitation, donor funding and bespoke support. The next phase will need to show whether the tools, finance mechanisms, policy instruments and playbooks WRI is developing are adopted, resourced and institutionalized by actors beyond WRI-supported programs.

Annex 3: Restoration

Ambition and Approach

Restore's work is one of the most compelling examples of WRI's systems change ambition put into action. It is best understood not as a conventional restoration program, but as an attempt to build the enabling architecture for what the Restore team calls a "New Restoration Economy": a new economic era in which economies and ecosystems grow together. Trees are treated as productive assets within local economies, not simply as ecological outputs. In WRI's vision, the public sector, businesses, and communities invest in restoring nature to create jobs, build sustainable productivity, and protect the natural systems that provide clean water, healthy soils, climate stability and biodiversity.

Its work takes advantage of major external tailwinds. The UNCCD Global Land Outlook notes that over 1 billion hectares have already been pledged for restoration under international commitments, including the Bonn Challenge and land degradation neutrality targets. This reflects broad political recognition of the need for restoration. It also builds on more than a decade of WRI work to create a global restoration movement. Earlier phases focused on agenda-setting, political mobilization and national readiness, including support to the Bonn Challenge, the New York Declaration on Forests, Initiative 20x20 and AFR100.

The current phase thus marks a shift from commitment-making to durable implementation at scale. WRI's long-term ambition is to get 350 million hectares of degraded areas into the process of restoration in ways that increase climate security, expand habitat area, and strengthen food and water security. Within WRI's 2023–2027 Strategic Plan, this translates into a defined intervention target: getting 33 million hectares into the process of restoration by 2027, while ensuring procedural equity.

Internally, this ambition is increasingly being operationalized through what Restore colleagues describe as a "T-shaped" strategy. The vertical bar is Restore Local: deep, place-based work in selected landscapes designed to build the practical "plumbing" for restoration, including local policy change, implementation capacity, monitoring systems and finance absorption. The horizontal bar is the wider Restoration Economy agenda that can influence many more countries and actors than WRI can support directly. This distinction is important because WRI does not aim to implement Restore Local everywhere; rather, it aims to generate blueprints, diagnostics and infrastructure that others can adapt and replicate.

People, Nature and Climate

The Restore agenda responds to a global challenge with major ecological, climatic and human consequences. Roughly 2 billion hectares of the Earth's land – around 15 percent of terrestrial area – is degraded to some extent, with an additional 12 million hectares degrading each year. As a result, nature is being pushed past its limits, the climate is destabilizing, and many people are increasingly locked out of economic prosperity. Restoration offers an integrated response to these pressures because it links livelihoods, land use, and ecological function in the same strategic frame.

This people–nature–climate framing is clearly visible in Restore Local's overall Theory of Change. The program assumes that restoration can and should deliver people, nature and climate outcomes together.

Climate mitigation, biodiversity recovery, and agroforestry and sustainable agriculture are framed as mutually reinforcing. This integrated framing matters because it moves restoration away from a narrow hectares-based logic and toward a broader landscape transition logic. The aim is not only to restore land, but to alter how rural economies, public incentives and investment flows relate to ecosystems.

Gender and Social Equity

GSE is reflected primarily through Restore's "people" dimension, rather than as a fully mature standalone agenda. Restore Local's model places livelihoods, community benefits and local organizations at the center of restoration, of which women and other historically marginalized groups are an important component.

The evidence suggests that WRI's approach to social inclusion has become more structured over time. Early implementation relied more heavily on partner discretion, while more recent work has introduced clearer expectations, standards and guidelines.

Restore Local is increasingly using geospatial tools to combine biophysical indicators — including land degradation, biodiversity hotspots, watershed importance and agroecological zones — with socioeconomic data on poverty, gender, agricultural households and food insecurity. This helped identify priority sub-landscapes where restoration could generate stronger combined outcomes for biodiversity, water, food security and community resilience.

The Equity Leadership program and the WOCAN/W+ partnership indicate a shift toward more measurable empowerment outcomes, including the possibility of linking empowerment to finance.

There are also strong indirect equity dimensions in TerraFund's work. By targeting local NGOs, community-based implementers, and SMEs operating in rural landscapes, TerraFund reaches actors that are often excluded from conventional finance. Its capacity-building work strengthens the ability of these groups to access its support. This is important because social equity in restoration is not only about who receives benefits; it is also about who has the capability and credibility to access finance and shape restoration markets.

Progress Towards Systems Change

Restore's main systems-change contribution lies in its attempt to change the conditions under which restoration happens. Rather than treating restoration primarily as "tree planting", WRI is working on the rules, incentives, capabilities, data systems and financing mechanisms that determine whether restoration can scale. In this sense, Restore's systems-change role is not only to deliver restoration directly, but to orchestrate the wider system around restoration helping stakeholders find one another, reduce transaction costs and coordinate around shared restoration outcomes, rather than relying on fragmented projects or chance connections.

Restore's work combines four main system levers: (i) **Finance**: shifting restoration from grant-dependent activity toward investable rural enterprise and outcome-based finance; (ii) **Policy**: changing the rules, incentives and institutional frameworks that enable restoration; (iii) **Monitoring**: improving information

flows, verification and trust in restoration outcomes; and (iv) **Capacity Development**: strengthening the capabilities, practices and knowledge systems needed for restoration to spread.

Restore Local provides the clearest expression of this approach. It concentrates work in selected landscapes and countries, while using those landscapes as test beds for models that could influence wider markets, public policy and investment practice. TerraFund provides a key finance mechanism. The Policy Accelerator works on enabling rules and incentives. TerraMatch and other MRV innovations, including AI-enabled monitoring, provide the data backbone needed to make restoration outcomes visible and credible. Meanwhile, capacity-building work with local organizations and enterprises helps ensure that restoration actors can participate in, and benefit from, these emerging systems.

The emerging scale pathway appears to depend on three reinforcing elements. First, WRI needs a demonstration effect: credible evidence that locally led, monitored restoration can deliver people, nature and climate outcomes. Second, it depends on trusted relationships with government actors, which allow WRI to influence public policy, public budgets and multilateral investment pipelines. Third, it requires codified tools, playbooks and digital platforms that allow restoration intelligence to travel beyond WRI-supported landscapes.

Finance

One of Restore Local's most significant systems-change hypotheses is that restoration needs to become part of viable rural economies rather than remain dependent on donor-funded projects. This matters because long-term restoration depends on whether local actors have a durable economic reason to sustain restoration beyond the life of a grant. TerraFund therefore seeks to reposition restoration as an income-generating and investable activity within rural economies. Restore Local increasingly sees most near-term investment opportunities in restorative value chains in the real economy. Enterprises linked to agroforestry, sustainable commodities and mature markets can often offer clearer revenue models and lower risk profiles than restoration activities that depend solely on the long maturation cycles of trees. Achieving this step change, means changing not only the amount of finance available for restoration, but also the conditions that shape where capital flows.

TerraFund is an important test of this proposition. Its private-sector window, managed with Realize Impact, supports for-profit firms whose business models are linked to tree restoration services or restoration-compatible value chains. It helps to address a "missing middle" in restoration finance. Many restoration SMEs are too commercially oriented for conventional grants, but too risky for mainstream investors. TerraFund uses patient, concessional capital, tailored enterprise support and monitoring to help these organizations formalize, grow, and become more widely investment ready.

The wider TerraFund model also responds to a structural problem in restoration finance: local organizations and land stewards are often among the most effective restoration actors, but they are also among the least likely to qualify for finance. TerraFund's value is therefore not only that it channels capital to restoration projects, but that it helps find, screen, fund and support locally led organizations that conventional finance tends to overlook. This makes TerraFund both a financing mechanism and an infrastructure for identifying credible local restoration opportunities.

From a longer-term systems-change perspective, the critical question is whether TerraFund can help shift investor incentives, risk perceptions, and investment models for restoration more broadly. One of its key hypotheses is that strong repayment performance, credible impact data and disciplined portfolio management can show that restoration enterprises are investable, even in challenging contexts. In this sense, TerraFund is not only a financing vehicle; it is also a learning mechanism for the wider impact investing field.

However, the evidence also shows the limits of the current model. TerraFund remains resource intensive. It depends on donor subsidies and concessional capital, WRI's country presence and strong local intelligence, tailored support, and long timelines. External investment has not yet been crowded in at scale, and there remains a mismatch between the patient, flexible capital needed by restoration SMEs and the expectations of mainstream investors. At this stage, TerraFund is therefore better understood as a prototype and learning platform for restoration finance than as a fully scalable investment model.

That said, there are potentially important strategic shifts underway. Restore Local is trying to localize the financial infrastructure around restoration. The 2024 report notes that existing financial intermediaries were not based in Africa, creating high staffing costs, international transaction fees and weaker familiarity with local market conditions. In response, Restore Local founded the Vumbuzi Impact Africa Foundation in Rwanda to contract with restoration champions at lower cost and with stronger regional ownership. It also supported Realize Impact to create Africa Trees, a subsidiary designed to provide local-currency loans in Kenyan shillings and Rwandan francs, reducing foreign exchange risk. Together with Barka Fund and the Markets Readiness Technical Assistance program, these examples show that WRI is not only moving money but trying to build a more appropriate African financial intermediation ecosystem for restoration.

Another emerging direction is for WRI to become less of a sole capital provider and more of an enabler of investment by others.¹² However, the broader pipeline held in TerraMatch is not yet openly accessible. External access remains limited and bespoke. This is potentially a missed opportunity because the platform has generated a large internal pipeline of potential restoration organizations, only a fraction of which have received funding. WRI is increasingly using this pipeline itself strategically, including through closed calls and targeted sourcing in priority landscapes. Yet, over time, something like TerraMatch could potentially become a broader marketplace-like infrastructure, helping funders identify credible restoration opportunities by geography, outcome type or investment profile.

Another important pivot is the one toward outcome-based finance, including payment for ecosystem services-type models. The underlying problem is that many of restoration's most important benefits — carbon sequestration, biodiversity recovery, watershed protection, erosion control, soil health and livelihood resilience — are public goods. They create value for society, but that value is often not priced or paid for. Outcome-based finance seeks to change this by attaching payments to verified restoration outcomes. This is important for public finance, because governments and public agencies can use verified outcomes to justify public investment in restoration. It is also relevant to private finance, though less

¹² This depends heavily on TerraMatch and WRI's MRV systems explored further below.

directly, because predictable payments for ecosystem services can create revenue streams that make restoration enterprises, landholders, or landscape projects more investable.¹³

The Rwanda Wildlife Conservation Bond pilot is an early test bed for this broader logic. In the model currently under development, investors purchase a World Bank bond; restoration activities are funded on the ground; WRI monitors and verifies restoration outcomes, while WCS monitors chimpanzee and biodiversity outcomes; and outcome buyers pay only when agreed results are verified. This matters because it separates the provision of upfront capital from payment for achieved outcomes. Investors and implementing partners can support restoration before benefits fully materialize, while outcome buyers — including public, philanthropic or concessional finance actors — pay against independently verified results

Policy

The 2025 Africa Food, Land Use and Restoration Policy Accelerator in Ethiopia provides a very clear example of how the Restore team works directly on the “Rules of the Game.” It brought together policy innovators from Burundi, DRC, Ethiopia, Ghana, Kenya, Malawi, and Rwanda. Its purpose was to strengthen national and subnational capacities, identifying policy bottlenecks, prioritize tractable reforms, develop roadmaps, and generating insights for wider AFR100 policy engagement. More specifically, it works on the design and implementation of public incentives for Restoration, including instruments such as PES, environmental compensations, carbon markets, and other mechanisms that can help shift restoration from voluntary action to more durable policy and financing systems. This is a practical expression of systems thinking: rather than trying to support all restoration implementation at once, it focuses on specific policy levers that can unlock wider change.

In Ethiopia, the Accelerator appears to have contributed to the development of a restoration platform and task force linked to the Green Legacy Initiative. The roadmap priorities included baseline setting for monitoring and better alignment with national restoration efforts. WRI's strong relationship with the Ethiopian Forest Development Office and Ministry of Planning appears to have positioned it as a convenor and policy partner. The establishment of a platform involving WRI, CIAT, FAO, the Ethiopian Forest Development Office and others is a tangible early signal of country-transition support. Likewise, WRI is playing an important role in Ethiopia's recently established Degraded Landscape Restoration Special Fund, which is expected to allocate up to \$80 million per year toward restoration, with WRI helping to source, manage, and monitor high-quality restoration projects in priority areas.

In Rwanda, the Accelerator surfaced a critical bottleneck around the limited supply and quality of tree planting material. This was traced to an outdated framework for tree reproductive material. WRI then worked with the Rwanda Forestry Authority to revise the National Tree Reproductive Materials Strategy, which has gone through public consultation and is moving toward formal endorsement. If approved, this would represent the Accelerator's first major policy outcome in Africa and would provide an important

¹³ For example, a hydropower company might pay upstream landholders for restoration that improves water regulation, while carbon or biodiversity buyers might pay for verified ecological outcomes. In this sense, PES is not necessarily private investment in itself; rather, it is part of the enabling architecture that can make restoration financially viable

proof point for the model: moving from bottleneck identification to technical support, consultation and formal policy adoption.

In Kenya, the Accelerator has been adapted to the county level. Four counties linked to priority landscapes identified the absence of forest and landscape restoration policies or bills as a core bottleneck. Through the Accelerator, counties developed roadmaps, established technical working groups and received support to integrate financing considerations into policy texts. In Makueni County, the Sustainable Forest Management and Landscape Restoration Bill has already been finalized, approved by the Cabinet in July 2024 and forwarded to the County Assembly for adoption. This suggests that WRI is helping subnational governments move from general restoration ambition to institutionalized policy frameworks.

The Policy Accelerator also supports cross-country and cross-regional learning. African countries are learning from Latin American experiences with payment for ecosystem services and environmental compensation frameworks. These Latin American examples are important because they show the level of policy outcome WRI is ultimately aiming to support in Africa. In El Salvador, WRI supported the development of an environmental compensation guide that sets out how compensation should be calculated and implemented in natural ecosystems and agroecosystems. In Mexico (Veracruz), the Policy Accelerator contributed to an officially published biodiversity compensation guide, which establishes procedures, metrics, monitoring requirements and rules for achieving net biodiversity gain through environmental compensation. This matters because it shows how policy learning can travel across contexts. Countries compare challenges, learn from one another, and adapt examples from other regions to their own institutional and political realities.

Together, these examples show a typical systems-change pathway: diagnostic work identifies a constraint; the constraint is translated into a policy priority; and WRI supports the co-production of a concrete instrument. The Latin America examples show that this pathway can lead to formal policy products; the Africa examples show that a similar pathway is now emerging but remains at an earlier stage. The main limitation is that much of the Africa work is still at the policy-output stage. Drafts, strategies and roadmaps are important, but the evidence of post-adoption implementation, behavioral change and financing shifts remains less visible. The next phase should track whether these instruments are formally adopted, resourced, implemented and used by public and private actors.

Monitoring

Monitoring is a central systems-change lever because it changes information flows. Restoration finance, policy, and practice all depend on whether actors can see what is happening, compare performance, verify results and trust claims about outcomes. Without credible information, restoration remains difficult to finance, difficult to manage and difficult to scale.

TerraMatch functions as the data infrastructure underneath TerraFund. It stores project and polygon data, supports reporting, and enables monitoring and verification. One of the major potential systems change contributions of TerraMatch is its ability to reduce information asymmetries and as such help de-risk finance by linking investment to verified outcomes. Indeed, if WRI can credibly verify outcomes such as tree establishment, survival, and wider people–nature–climate impacts, it can help structure finance around measured performance rather than upfront project promises. This could increase the confidence of public and private funders by reducing uncertainty about whether restoration finance is producing real

outcomes. WRI has seized this opportunity and clearly linked TerraMatch to the TerraFund platform in Restore Local's architecture. Project-level geospatial monitoring data is not treated only as a reporting requirement; it is increasingly becoming part of the enabling infrastructure for outcome-based finance.

Another major innovation in Restore Local's data infrastructure is AI-enabled MRV, particularly through DINOv3. By combining WRI's restoration expertise with Meta's advanced AI and geospatial analysis, this work is helping to shift restoration monitoring from a costly, manual and project-by-project process toward a more scalable system for verifying outcomes across landscapes. High-resolution tree monitoring — including individual tree counts, survival and growth tracking, and structural estimates relevant to biomass and carbon — can significantly strengthen the credibility of restoration claims. This matters because restoration finance depends on trust: if WRI can reduce the cost and increase the reliability of verification, it can help unlock new capital, reduce the monitoring burden on local partners, and improve adaptive management and public accountability across the wider restoration field.

Capacity Development

Capacity development is another important systems-change pathway because restoration will only scale if local organizations, farmers, enterprises, their communities, and public sector actors can change their practices over time. In Restore's work, capacity development is not simply training; it is part of the process of making restoration actors more capable, credible and connected within emerging restoration systems.

The emerging "playbook" approach is particularly important. Restoration Works is WRI's attempt to codify what it is learning from implementation into more replicable models. This is crucial for systems change. The transition from pilots to wider uptake depends on whether WRI can turn bespoke experience into accessible and usable standards, guidance, tools and institutional models. These playbooks and proof points are intended to help shift how others invest and act, moving beyond isolated projects toward broader influence. The next phase will need to show whether these learning products are adopted by actors beyond WRI-supported programs.

At more local levels, for restoration champions, TerraFund combines finance with support to strengthen investment readiness. This is especially important for smaller organizations and SMEs that may have strong local legitimacy and implementation capacity but lack the systems required to access larger or more formal sources of finance. In this sense, capacity strengthening is also a form of de-risking. It helps local actors become more credible partners for funders.

Capacity development is also embedded in the Policy Accelerator. Governments and technical agencies are not only supported to produce policy instruments; they also engage in peer-to-peer capacity-building process: countries exchanged experience, worked with mentors, identified bottlenecks, co-created solutions, and began defining follow-up roadmaps for implementation.

Results to Date

Restore Local's 2024 Annual Report provides useful evidence that the program has moved beyond design into early implementation across its four system levers. By the end of 2024, Restore Local had funded 103 champions across 119 projects and directed \$41.9 million in grants, loans and other investments into

restoration. Across its three anchor landscapes, it reported 8.3 million trees planted, 14,286 hectares brought under restoration, 26,427 jobs created, and 99,242 smallholders or beneficiaries reached. The program also reports that 57% of jobs created were held by women and 60% by youth, providing some early evidence that the “people” dimension is translating into concrete employment and livelihood outcomes.

These results are spread across the three anchor landscapes. In Kenya's Greater Rift Valley, Restore Local supported 39 projects, planted 2.5 million trees and created more than 5,000 jobs. In the Lake Kivu and Rusizi River Basin, despite conflict-related challenges, it funded 41 projects, planted more than 4 million trees and created 18,000 jobs. In Ghana's Cocoa Belt, it funded 16 projects, planted 1.4 million trees and created 2,400 jobs. These figures help show that Restore Local is already operating at a scale that goes beyond isolated pilots, even if the deeper systems-change effects are still emerging.

This success to date has been supported by substantial progress in building the underlying systems needed for scale. Restore Local provided capacity support to 420 projects, strengthened 10 local capacity-building providers, supported seven policy requests from government partners, delivered two Policy or Monitoring Accelerator workshops, and monitored 100 percent of anchor-landscape hectareage using baseline and change data from 2020–2024.

Box 11: Ethiopia's Green Legacy Initiative

Ethiopia's Green Legacy Initiative (GLI), launched in 2019, is one of the world's most ambitious nationally led restoration efforts. It forms part of Ethiopia's wider commitment to restore degraded landscapes, strengthen climate resilience, improve food security, and support rural livelihoods. Government counterparts describe the GLI as emerging in a context where the political profile of forests and restoration had risen sharply, but where Ethiopia also faced major evidence, coordination and financing gaps. WRI's contribution has therefore been less about directly implementing GLI at scale, and more about helping build the technical, institutional and financial foundations that can give a national restoration movement traction.

A key foundation was WRI's support to Ethiopia's 2018 Restoration Opportunities Assessment Methodology (ROAM) study. Conducted with government partners, the ROAM analysis identified approximately 82 million hectares of land suitable for tree-based restoration, including 54 million hectares prioritized for integrated, cross-sectoral interventions addressing the drivers of land degradation. Government stakeholders reported that this work came at an important moment, providing the spatial evidence needed to communicate the scale of degradation, influence policy makers, and help make the GLI more ambitious. EFD counterparts described the ROAM work as both a technical and policy contribution, helping guide regions toward the most degraded areas and watersheds, and serving as one of the reference points for GLI planning alongside other national policies and studies.

WRI's more recent support has focused on the enabling systems needed to move from high-level ambition to implementation. Through BMZ-supported work, WRI helped establish national and regional Forest and Landscape Restoration (FLR) platforms to address institutional fragmentation across government agencies and restoration actors. These platforms bring together government, civil society,

technical partners and implementing organizations, creating a coordination space for planning, learning, accountability and technical exchange. EFD stakeholders described the FLR platform as one of the largest in the natural resources sector, with WRI contributing to stakeholder mobilization, terms of reference, technical support and capacity building, including on GSE.

WRI has also supported the financing architecture for GLI through the Green Legacy and Degraded Landscape Restoration Special Fund. The Special Fund is significant because it shifts restoration finance from short-term, donor-funded projects toward a domestic, government-owned mechanism. The evidence points to WRI's role in helping operationalize the Fund, including support for stakeholder convening, technical task force formation, program framework development, resource mobilization, operational guidance and capacity needs. The FLW pillar review describes this as a shift in WRI's role from direct implementer to strategic advisor: rather than restoring a fixed number of hectares itself, WRI is helping Ethiopia build a multi-year financial mechanism capable of funding restoration beyond individual grant cycles.

On-the-ground implementation through TerraFund and AFR100 projects provides a practical test case for these national systems. TerraFund-supported partners such as World Vision, NABU and SUNARMA are implementing agroforestry, assisted natural regeneration, native species planting and livelihood activities in coordination with local government structures. These projects contribute directly to restoration outcomes, while also generating lessons on site selection, species matching, community mobilization, monitoring and livelihood integration. TerraMatch and related monitoring systems provide project-level information that can feed back into national restoration discussions and future financing mechanisms.

The GLI example is therefore best understood as an emerging country-transition pathway rather than a discrete project result. WRI's contribution combines several systems-change levers: evidence and spatial analysis through ROAM; coordination through FLR platforms; finance through support to the GLI Special Fund; technical capacity through monitoring, GSE and restoration guidance; and demonstration through TerraFund implementation. This combination is strategically important because Ethiopia's restoration challenge is not simply to plant more trees, but to ensure that restoration is targeted to the right places, supported by credible data, coordinated across institutions, financed over the long term, and linked to benefits for people, nature and climate.

At the same time, the evidence also points to unfinished work. Government counterparts continue to expect WRI to support climate finance mobilization, GIS and monitoring of restoration progress, and clearer roadmaps for how WRI and EFD will collaborate around the Special Fund. There are also practical challenges around identifying and certifying land for restoration, ensuring appropriate species-site matching, and translating national ambition into consistent regional and local implementation. WRI's future added value may therefore lie in helping GLI move from mass mobilization toward a more data-driven, finance-enabled and ecologically robust restoration system.

At the same time, these are still early signs of change rather than evidence of full system transformation. The report is clear that Restore Local is still refining how to replicate the model beyond its initial anchor landscapes. The most defensible conclusion is therefore that Restore Local has produced credible early outputs and proof points, while its more ambitious systems-change claims — around outcome-based finance, replication, and wider shifts in public and private investment — remain a work in progress.

Collaboration Between Global and Country Offices

Restore provides a strong example of WRI's "One WRI" ambition in practice. Its work depends on collaboration between country offices, global programs, technical platforms and external partners. For instance, the Policy Accelerator work connects WRI's global Restore expertise, Country Offices, and partners such as CGIAR to government agencies. MRV innovation draws on WRI's geospatial and data capabilities, including links to Land & Carbon Lab, Global Forest Watch and Restoration Works. In principle, this makes Restore more than a portfolio of projects. It becomes a platform through which WRI can combine its global and national comparative advantages.

Country Offices are especially important to this model. In TerraFund's private-sector window, WRI Country Offices help to provide local intelligence, maintain relationships and support reporting. In Ethiopia, WRI's institutional relationships appear to have been central to convening policy actors and supporting the restoration platform. In Kenya and Rwanda, country and landscape teams play an important role in aligning policy, finance and implementation work.

At the same time, Restore also illustrates the practical challenges of WRI's matrix model. Cross-programmatic integration is valuable, but it requires clear governance, decision-making, resource allocation and accountability. The relationship between Restore Local, TerraFund, TerraMatch and wider WRI platforms can be clear internally but confusing externally. As Restore matures, WRI may need to clarify how these different components are presented as part of a coherent institutional offer.

Annex 4: Climate Resilience

Ambition and Approach

Climate resilience is a core outcome of WRI's 2023–2027 institutional strategy, embedded across its global programs rather than treated as a standalone theme. WRI defines climate resilience in equity-focused terms, emphasizing the reduced vulnerability and exposure of poor and vulnerable communities to climate-related shocks, language that mirrors SDG 1.5's focus on protecting vulnerable people. The strategy's overarching framing positions climate resilience as an integrated outcome of transitions across three human systems (Food, Land and Water (FLW), Energy, and Cities) and the enabling systems of Economics, Finance, and Governance.

Within the Cities program, climate resilience operates as one of three dedicated pillars alongside Livable Neighborhoods and Connected Mobility. The vision for this pillar is that urban residents enjoy a higher quality of life in livable and climate resilient neighborhoods with equitable and low-carbon access to jobs and core services. Climate resilience is not confined solely to the Cities pillar, however; WRI's FLW programs address resilience through landscape restoration (the 2030 target to catalyze restoration of 350 million hectares of degraded land explicitly notes resilience co-benefits), and the Energy pillar contributes indirectly through decentralized renewable energy access.

WRI's 2030 global target is to increase the resilience of the poor and those in vulnerable situations. To deliver on this, WRI has set 2027 intervention targets of 6,000 hectares of new or enhanced green infrastructure in or near cities and a 3 percentage-point increase in integrated water resources management (IWRM) implementation in selected geographies. These are the two principal levers through which the institution aims to drive measurable change under the climate resilience pillar within the strategy period.

The climate resilience portfolio spans global, regional, and country-level initiatives and includes the following focus areas/ is built around the following services/ project types:

- **Research and knowledge products:** WRI produces a range of knowledge outputs, including landmark reports (e.g., NBS in Sub-Saharan Africa, downloaded nearly 1,500 times on launch), guidance documents, geospatial mapping tools (e.g., urban heat mapping, spatial tree-cover analysis), cost-benefit analyses, GSE toolkits, water resource assessments, and policy briefs.
- **Accelerators:** The GGI Accelerator in Sub-Saharan Africa and equivalent models in Brazil, Mumbai, and Indonesia are one of WRI's flagship delivery mechanisms. These combine technical assistance, policy guidance, capacity building, and proof-of-concept implementation.
- **Demonstration and pilot projects:** Physical implementation of NbS (e.g., riparian restoration, urban greening, agroforestry, afforestation) in cities and their surrounds (e.g., SUNCASA in Dire Dawa, Kigali and Johannesburg).

- **Country work:** Country programs embedded in national policy processes, municipal planning frameworks, and local partnerships. Examples include Rwanda's National Urbanization Policy (2024–2029) and Colombia's GCF watershed proposal.

People, Nature and Climate

More than a billion people in cities around the world are exposed to climate-related flooding, extreme heat, water scarcity, and coastal erosion. The grey infrastructure paradigm that has shaped cities for decades (e.g., drains, levees, hard-engineered flood defences), has repeatedly proven insufficient and unequal: it protects formal city cores while leaving the poorest neighborhoods most exposed, and it treats climate risk as an engineering problem rather than a governance and equity problem. Nature-based solutions (NbS) offer an integrated response to these pressures because they link ecological function, community livelihoods, and climate risk reduction in the same strategic frame. A restored urban forest reduces heat and manages stormwater. A healthy upstream watershed regulates water flow for millions of downstream residents. A riparian buffer protects informal riverbank settlements from flooding and creates employment for women and youth in nursery and planting programs. The aim is not only to restore hectares, but to alter how urban economies, municipal incentives, and investment flows relate to the ecosystems within and around cities.

WRI's goal is to increase the resilience of *the poor and those in vulnerable situations* and reduce their exposure and vulnerability to climate-related extreme events. This language mirrors SDG 1.5 and positions people outcomes as the measure of success, not just ecological or hydrological metrics. The Institutional Results Framework operationalizes this through a four-tier hierarchy that cascades from global targets (reduced vulnerability for the poor) through intervention targets (6,000 hectares of green infrastructure, 3-point improvement in integrated water resource management) down to country-level and impact indicators that track people-centered outcomes: heat exposure for urban populations, disaster deaths per 100,000, and access to basic services disaggregated for vulnerable groups. People, nature, and climate (PNC) outcomes are named as joint impact areas across the portfolio, not siloed into separate programs.

Evidence from across the portfolio suggests that PNC integration is real but uneven, and that the depth of integration is primarily determined by city readiness and whether the people dimension is structurally embedded in delivery, not just stated in design documents. At its most integrated, PNC convergence is visible in a single activity or project. In Bukavu, DRC, for example, women-led planting campaigns in the Ruzizi catchment simultaneously restored upstream vegetation (nature), reduced flood and landslide risk for downstream communities (climate), and created employment specifically targeting women and youth (people), with plastic waste recycling programs serving as a parallel livelihoods mechanism, with 403 women and 306 youth trained. In Dire Dawa, Ethiopia, a gender-responsive climate risk assessment shaped which sites received priority for NbS investment, meaning the people dimension changed what was done, not just who would benefit from it. In Kigali, community nursery employment integrated livelihoods directly into the restoration supply chain, with 12 community-led nursery sites established.

Integration is weaker where people outcomes appear in design language but do not generate dedicated indicators, specialist staffing, budget lines, or delivery-level changes that would make them binding. The Indonesian portfolio, for example, illustrates this dynamic at project level, where the LED project pursued climate and nature goals coherently, but people outcomes were harder to identify.

Another gap relates to MEL. Portfolio-level KPIs track hectares, policies, and funds leveraged, but gender-disaggregated employment data, flood exposure reduction by income quintile, and community adaptive capacity are often reported narratively and not systematically tracked in a unified framework. This means that at mid-term, the portfolio can demonstrate PNC intent but cannot yet showcase PNC delivery at scale.

Progress towards systems change

WRI's main systems-change contribution in climate resilience lies in its efforts to change the conditions under which cities adopt and sustain NbS. Rather than treating urban resilience primarily as green infrastructure delivery, WRI is working on the rules, incentives, capabilities, data systems, and financing mechanisms that determine whether NbS can become a standard feature of how cities plan, invest, and govern their relationship with the natural environment. This includes managing proof-of-concept projects to make the case, attracting scaled finance, helping cities find partners and resources, and reducing the transaction costs of adoption. WRI's own strategy framing is built around four interconnected levers: i) policies, plans and strategies: changing the institutional frameworks and rules that determine whether NbS features in how cities are planned and resourced; ii) technical assistance for deployment: building the analytical foundations that allow cities to move from concept to implementation; iii) partnerships: orchestrating the coalitions of city governments, civil society, community organizations, and investors needed to move projects from ideas into action; and iv) finance: shifting NbS from grant-dependent activities toward investable urban infrastructure.

Cities4Forests and the Green-Grey Infrastructure (GGI) Accelerator provide clear examples of this approach. They concentrate work in selected cities and regions, while using those cities as test beds for models that could influence wider municipal practice, investment markets, and policy frameworks. The GGI Accelerator's tiered city model (pioneering, advancing, and emerging) is a structured approach to building city readiness, with Pioneering Cities (Kigali, Dire Dawa, Johannesburg, Bukavu) acting as proof-of-concept sites with documented outcomes creating an evidence base that persuades other cities to follow. Cities4Forests provides the global coalition architecture, convening 90+ cities around a shared declaration on urban forests and NbS, and using that collective voice to shift international agendas and unlock financing that individual cities could not access alone.

Finance

To drive systems change NbS needs to become part of investable urban infrastructure rather than remain dependent on donor grants. Long-term maintenance and replication of green infrastructure depends on whether cities, utilities, and private actors have a durable economic reason to fund it beyond the life of a grant cycle. The portfolio therefore seeks to position NbS as a cost-effective risk-reduction investment that competes on its own merits with grey infrastructure alternatives.

An example of WRI's work on finance is the Bogotá watershed case, where WRI conducted biophysical modelling and an economic analysis of forest restoration in the watershed supplying Bogotá's water, making the ROI case in terms that a multilateral development bank could act on. This generated a GCF project preparation grant, and WRI is now working toward a full USD 90 million implementation program to restore the watershed for water security and climate resilience (with earlier C4F reporting citing a USD 70 million program scope). The trigger for investment was not advocacy but evidence: a quantified, spatially grounded economic case that changed what the investment conversation was about. WRI is also leveraging funds in the Sub-Saharan Africa (SSA) portfolio. In Ethiopia, WRI's citywide NbS Strategic Assessment for Addis Ababa and in Johannesburg, a hybrid green-grey investment opportunity is being developed to ensure energy and water security. However, private sector and blended finance mobilization for urban NbS in Africa remains nascent.

Policy

WRI's policy work is built around a consistent systems logic: identify the specific rule, standard, or institutional framework that is preventing NbS from being planned, funded, or maintained and then work to change it. Rather than trying to influence all policy at once, the portfolio focuses on tractable policy levers at the city and national level that can unlock wider change.

Examples of significant policy outcomes include the mainstreaming of NbS into Rwanda's National Urbanization Policy 2024–2029. WRI's work in Musanze provided the data-driven analysis and project pipeline that informed national policy recommendations, making NbS a formal component of how Rwanda plans urban development. A similar pathway is visible in Ethiopia, where WRI's city-wide NbS Strategic Assessment for Addis Ababa led directly to the AFD investment, demonstrating that when policy analysis is connected to a credible implementation pathway it can help to unlock finance.

Cities4Forests has influenced multiple policies, plans, strategies, and regulations. These include an urban forest policy for Brazzaville, new municipal regulations for Campinas (Brazil) promoting NbS, NbS planning policies for Indonesian cities, and Nairobi-focused work on flood water mapping and stakeholder engagement to guide resilience planning along the Nairobi River corridor. Impacts in informal settlements that linked community-level evidence to formal planning recommendations. In Johannesburg, WRI supported development of an Open Space and Urban Greening Strategy that provides the institutional framework for the Jukskei River restoration. Across the SSA portfolio, all eleven cities issued political declarations on NbS adoption, a form of political commitment that, while not yet binding, establishes an accountability reference point and shifts the terms of the public debate.

While WRI clearly showcases policy influence, there is less evidence of systematic policy implementation, which requires (often resource-stretched) municipalities to translate adopted plans into budgets, staffing and action. Progress can also be undermined by electoral cycles and political transitions when institutional embedding is shallow.

Technical assistance and data

WRI's approach is to use data and analysis to make NbS outcomes visible, quantifiable, and comparable to grey infrastructure alternatives, thus changing the information environment within which cities and investors make decisions. Its methodological toolkit is substantial: geospatial tree-cover mapping, urban heat atlases, climate risk assessments, water resource assessments, spatial mapping for site prioritization, species selection guidelines, and cost-benefit models. These are developed in specific city contexts to produce city-specific investment cases. In Dire Dawa, for example, WRI's integrated gender-responsive climate risk assessment influenced which sites received priority for NbS investment, while in Kigali and Addis Ababa, WRI's NbS Strategic Frameworks created the analytical baseline from which policy recommendations and investment pitches were built.

The emerging Measuring and Monitoring NbS for Water Security platform in Latin America extends this further by developing a cross-country framework and monitoring infrastructure for water security outcomes. This is the climate resilience equivalent of TerraMatch: a data infrastructure that can reduce information asymmetries and help de-risk finance by linking investment to verified outcomes. The Cooling Data Lab and GoAdapt initiative serve a similar function in linking urban heat and adaptation finance data to the decision-making frameworks of city planners and financial institutions.

Handing TA infrastructure over to local and national government actors to lead for themselves is important to manage the risk is that cities become dependent on WRI for analytical capacity rather than developing the in-house systems needed to plan and monitor NbS without external support.

Capacity and partnerships

NbS will only scale if city governments, community organizations, and local enterprises can sustain, replicate, and resource it beyond WRI's direct involvement. The GGI Accelerator's structured city-cohort model is an example of a well-developed capacity-building mechanism. It differentiates support by readiness stage, with Pioneering Cities receiving implementation support, Advancing Cities receiving business case development, and Emerging Cities receiving diagnostic and institutional readiness support. The Accelerator builds capacity appropriate to each city's context and readiness.

Another WRI innovation is the competitive selection model used in the Brazil NbS Accelerator (which identified 10 potential NbS projects for capacity support) and the Mumbai Accelerator (with 5 NbS solutions providers selected). By running open calls and selecting local enterprises these models build a local provider market for NbS, building an ecosystem of capable local actors who can operate independently.

Results to date

Across the SSA portfolio as of early 2025, the GGI Accelerator reported 5,084 acres restored through GGI-aligned activities, 521,516 trees planted, and climate resilience directly improved for up to 4,000 individuals, with over 10,200 people reached through job creation, trainings, and local implementation. USD 12 million in leveraged funds had been raised, nine city plans developed embedding GGI into urban

policy and decision-making, 11 city declarations issued, and 1,700 stakeholders engaged in workshops and trainings. Cities4Forests, across its lifetime, has reported over 8,000 hectares restored and 1.5 million individuals benefitting from 2021–2024.

These results show credible early outputs but do not yet evidence of full system transformation. At mid-term, the portfolio can demonstrate traction across all four levers but the shift from accelerated projects to autonomous city-led NbS systems is still to be demonstrated.

Collaboration between global and country offices

The climate resilience portfolio provides a strong example within WRI of both the potential and the practical limits of the OneWRI model. Its work depends on close collaboration between a global team performing a secretariat function, country offices, Cities4Forests as a global initiative platform, and cross-pillar partners in FLW, Energy, and CEF. This allows WRI to bring together its global fundraising power, technical modelling capability, country-level relationships, and city-level implementation into a single coherent program to drive urban systems change.

The global team is responsible for securing approximately 85% of climate resilience resources, because major bilateral and multilateral donors have to date preferred to channel funding through WRI's global entity rather than directly to country offices. This creates a natural division of labor, with the global team leading on fundraising, strategic framing, ToC development, and knowledge dissemination, while country teams hold the city relationships, contextual intelligence, and implementation capacity that make global propositions credible. Regular all-hands calls and check-ins between global leads and country office leads maintain coordination across a geographically dispersed team.

The Bogotá case is the clear example of what global-country collaboration can produce, jointly conducting biophysical modelling and an economic analysis of watershed restoration for Bogotá's water supply, then co-developing and presenting a concept to the GCF. Following a project preparation grant, WRI is now developing a full USD 90 million watershed restoration and resilience program. In this case, the global team provided the technical modelling and donor relationship, while the local team held the city authority relationships and on-the-ground delivery pathway. The Johannesburg case provides a similar example at smaller scale, where collaborative urban water resilience work between global and local teams, anchored in rigorous evidence building, led to the city allocating USD 3.5 million from its own budget to restore river catchments, and the Mayor championing a one-million-tree program.

The braided funding model is another area where global-country collaboration has worked effectively. The SSA portfolio's combination of DANIDA (covering policy, capacity, and flexibility), Global Affairs Canada (driving on-the-ground implementation), and the Caterpillar Foundation (supporting proof-of-concept work) produces a unified program architecture that no single donor would have been likely to fund alone. WRI has been transparent with each donor about how their contribution complements the others, a practice that has built funder confidence and generated repeat investment, although this is not something all teams currently feel comfortable doing.

One concern that was raised by staff, however, is how the global-country model operates in practice in Africa. Country-level staff described fundraising as largely opaque, noting that they are often absent from donor conversations and at times receive budget allocations with no accompanying rationale. At times this means country teams must design backwards and based on smaller budgets than anticipated. This can be a source of strain, particularly because country staff hold the reputational relationship with city and national government partners if delivery falls short.

A further challenge is the accumulation of overlapping global platforms (e.g., Cities4Forests, the GGI Accelerator, the AQUA Fund/AQUA Platform, SUNCASA, the Urban Water Resilience initiative) that often approach the same city stakeholders with closely related but differently branded offerings. This can be confusing for external stakeholders. The same projects can also be counted and reported under multiple program names, creating risks of confusion and double counting.

Country strategies represent a structural opportunity to build the global-country relationship. The ambition is a bottom-up process where countries define their transition pathways, strategies aggregate at the regional level, and the global strategy is built on country foundations rather than the reverse. Senior regional staff are cautiously optimistic about this shift, noting that core donors are increasingly asking for country-window approaches and country-specific impact stories rather than aggregated global results. WRI recognizes this opportunity, with work currently underway to build bottom-up ToCs with country teams in Africa.