#### WORLD GIVING REPORT

# INDIA — CHARITY INSIGHTS

2025





#### **OVERVIEW**

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#### Welcome.

This report presents an in-depth analysis of India's charity landscape as part of the *World Giving Report 2025*, offering a data-led understanding of how the country's non-profit sector continues to evolve amid economic uncertainty and growing social demand. Developed in partnership between the Charities Aid Foundation (CAF) and OneStage, it explores the financial health, operational resilience, and adaptive capacity of charities across India, reflecting both opportunities and vulnerabilities within a rapidly transforming philanthropic ecosystem.

The findings reveal that while Indian charities demonstrate a strong sense of purpose and community orientation, financial diversification and structural resilience remain ongoing challenges. Many organisations continue to rely on limited income sources, face capacity constraints, and must navigate complex compliance environments. Yet, the sector's ability to sustain operations, innovate in delivery models, and maintain optimism for the future underscores its enduring commitment to social progress.

By situating India's data within global giving trends, this report highlights both convergence and contrast — where India's deep-rooted culture of giving aligns with global solidarity, but its institutional systems still strive for balance between growth, governance, and grassroots impact.



**Dr. Pratyush Kumar Panda**CEO, OneStage

"Resilience defines India's nonprofits: adapting, evolving, and empowering communities"

#### About us.

#### **OneStage**

**OneStage India** is a not-for-profit organisation (registered as Charities Aid Foundation India) established in New Delhi in 1998, with a mission to develop a culture of giving that leads to sustainable and impactful change.

Rooted in the belief that transformative development must reach the last mile, OneStage works to create positive social impact by strengthening local communities and building partnerships that enable long-term progress.

Over the past two decades, OneStage has been at the forefront of India's development landscape, providing strategic advisory and implementation support to corporates and foundations. Through a collaborative and community-centric approach, the organisation engages with a diverse ecosystem of stakeholders — grassroots NGOs, local and national governments, and private sector partners — to co-create development solutions that are inclusive, effective, and scalable.

OneStage focuses its efforts on key thematic areas including education, health, environment, and sustainable livelihood, with gender equity as a cross-cutting lens in all its programmes. We continue to drive the ethos of purposeful giving and inclusive development in India, ensuring that every contribution leads to lasting change.

#### **CAF**

The Charities Aid Foundation (CAF) exists to accelerate progress in society towards a fair and sustainable future for all. Over the last 100 years, we have led the way in developing innovative approaches to giving. Annually, we distribute over £1 billion to social purpose organisations around the globe.

As a leading charity operating in the UK, US and Canada, alongside an international network of partners, CAF works at the centre of the giving world. We collaborate with corporate and individual donors to enable them to give more effectively, strategically and impactfully. This includes connecting them to charities globally and providing access to our in-depth sector knowledge, governance expertise and innovative giving solutions.

We help social purpose organisations to strengthen their resilience and do more of their life changing work, through strategic advisory services from our Impact Accelerator, tools to support charities' fundraising activities, and charity financial services from CAF Bank Limited and CAF Financial Solutions Limited. Using our research, policy and campaigns work, we understand and influence the wider environment for charities and donors.

Together, we give more.

# The World Giving Report captures the public's attitudes and behaviours around giving in 101 countries across the world and — working with local partners — the state of the charity landscape in 27 of these countries.

- This report is one of 16 country-specific Charity Insights reports and is produced by CAF in partnership with leading social purpose organisations around the world.
- You can access all our global and country-specific insights from both donors and charities at: www.worldgivingreport.org

## Our methodology.

The results described in this report were collected as part of the Charity Landscape aspect of the World Giving Report between March and June 2025.

All fieldwork was conducted by OneStage. Partners reached out to charities in their countries with an online survey. Sometimes, the partners encouraged responses by conducting telephone or face-to-face interviews and simultaneously (or subsequently) completing an online response that accorded to the answers given in person. Surveys were available in the predominant local language or English.

The sample collected is an indicative snapshot of charity perspectives in this country as, in most cases, there is no data on the sample universe with which to guide any sampling or post-hoc weighting.

#### A note on 'Charity'

Across the report, we use the words 'charity' and 'charities' to represent any organisation that works to try and improve issues that are affecting individuals, communities, animals or the natural environment, and society as a whole.

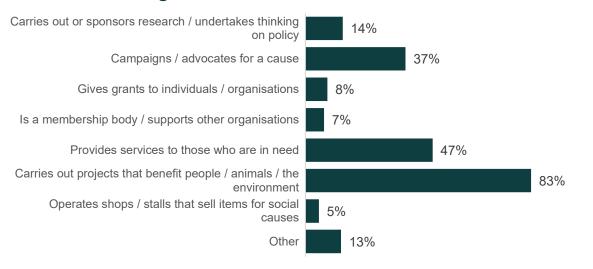
In doing so, we recognise that these terms and their definitions differ around the world, with this type of organisation also described as: non-governmental organisations (NGOs), non-profit organisations (NPOs), community organisations, social purpose organisations, associations and other names.

www.worldgivingreport.org



## The organisations in the sample: 161 in total.

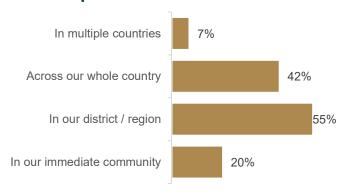
#### The role of the organisation:



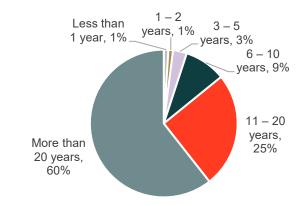
#### Size of organisation:



#### The scope of their work:



#### How long the organisation has operated:



#### The main cause area supported:

A total of 14 different main cause areas were represented within the sample, with the five most common being:

- 1. Education (21%)
- 2. Children or young people (19%)
- 3. Environmental protection/improvement (13%)
- 4. Poverty relief (12%)
- 5. Disabled people (9%)





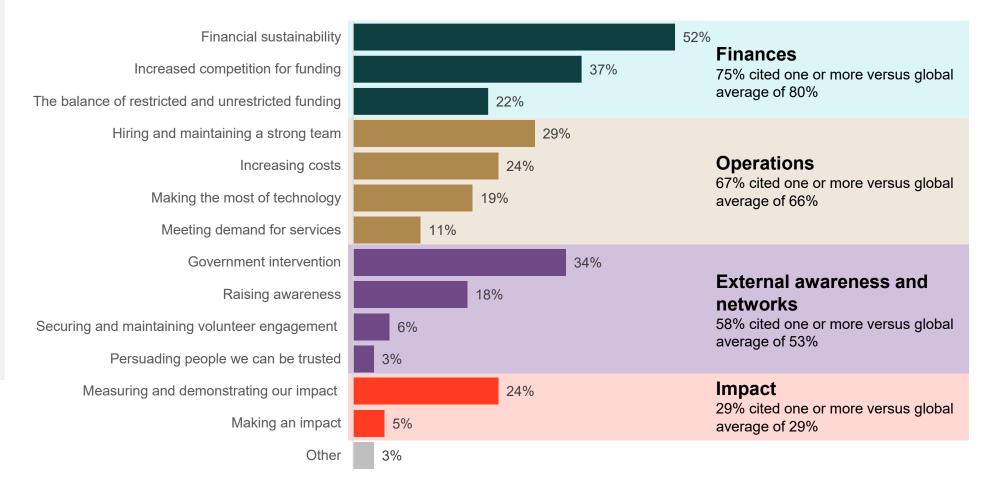
## The biggest challenges for the sector.

Financial sustainability remains the most pressing concern for Indian charities, with over 52% citing it as a key challenge.

Increased competition for limited funding and the constraints of restricted grants compound operational pressures.

Recruitment and cost escalation further strain organisational capacity, while government regulation and external visibility continue to shape sector dynamics.

These findings highlight a maturing ecosystem striving for balance between compliance, growth, and long-term resilience amid evolving donor priorities. Q. Below is a list of challenges that charities might be facing. Please select the three that are most pressing for your organisation: (All charities answering, n = 119)



## Perceptions on overall sector health.

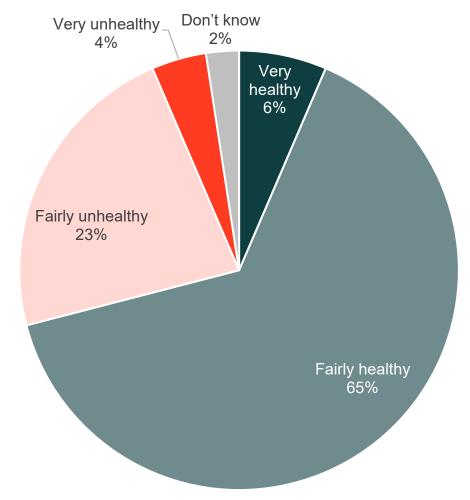
A majority of Indian charities (71%) perceive the sector as healthy, surpassing the global average of 60%.

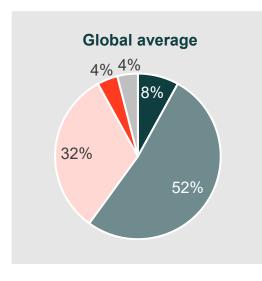
This optimism reflects growing institutional maturity, stronger collaboration, and adaptive management practices despite funding and regulatory challenges.

However, one in four organisations still view the sector as unhealthy, pointing to persistent financial stress and uneven capacity development.

Overall, the data suggests a cautiously resilient sector navigating transformation with pragmatism and optimism for long-term sustainability.

Q. Overall, would you say the charity sector in your country is... (All charities answering, n = 124)





## Deep dive: sector health.

Charities describing the sector as "fairly healthy" often cited greater collaboration, improved donor confidence, and digital adoption as drivers of resilience.

Respondents highlighted how "community trust and partnerships have deepened post-pandemic," and that "funders are more open to dialogue on sustainability."

Conversely, those viewing the sector as "unhealthy" pointed to inconsistent funding flows, high compliance burdens, and talent shortages.

One respondent noted, "We survive, not thrive — funding is project-bound, not institutionally strengthening."

Together, these views reveal a sector that is steady but stretched — resilient in purpose yet seeking structural stability to scale its impact.



The sector's health is driven by real change and impact

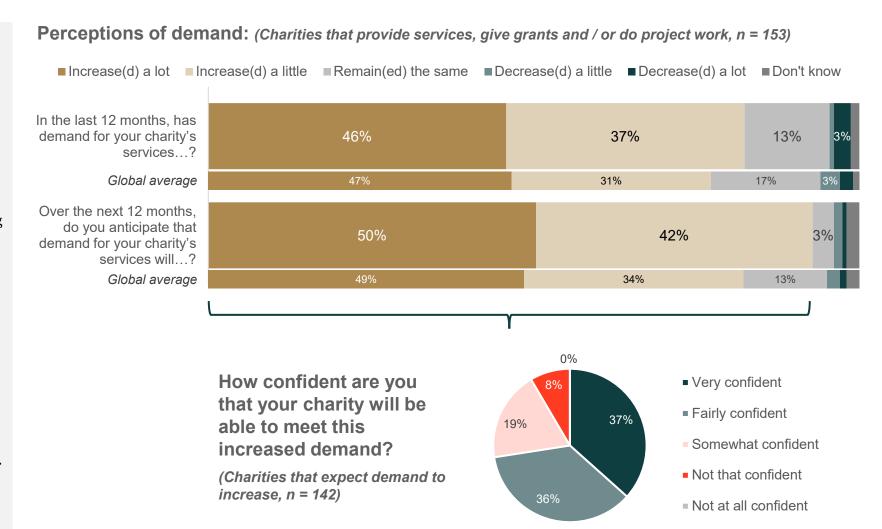
#### Demand for services.

Demand for charitable services in India continues to grow, with 83% of organisations reporting an increase over the past year and a similar proportion expecting further growth ahead.

This surge reflects rising social and economic pressures, alongside the sector's expanding role in service delivery. However, only 37% of charities feel very confident about meeting this demand.

Limited funding flexibility, staffing shortages, and digital capacity gaps remain key barriers. Many organisations are responding through collaboration and innovation, yet sustainability concerns persist.

Overall, the data signals a sector under strain but driven by adaptability and community trust to sustain its impact.



## Optimism for the future.

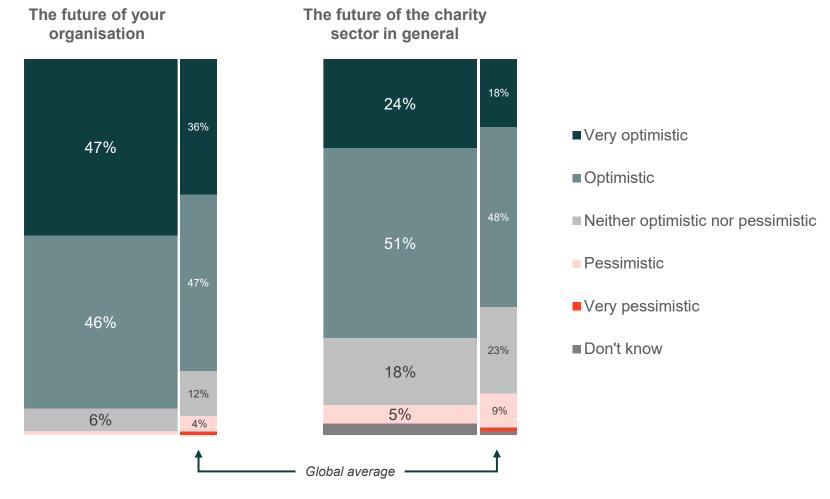
Indian charities demonstrate strong confidence in their organisational outlook, with 83% expressing optimism about the future of their own institutions — notably higher than global averages.

This optimism is rooted in improved stakeholder engagement, adaptive programming, and digital transformation within the sector.

Confidence for the sector is slightly lower (75% optimistic), with concerns stemming from funding volatility, policy uncertainty, and uneven institutional capacity.

The contrast highlights a self-assured but cautious sector — resilient at the organisational level yet aware of systemic vulnerabilities that could influence long-term sustainability and growth.

**Q.** How optimistic or pessimistic are you about...? (All charities answering, n = 118)



## CAF's six characteristics of a resilient charity.

Through our extensive research and advisory work with charities, we have identified six characteristics that show an organisation has the potential to be resilient.



#### **Purpose**

Understanding what the organisational purpose is, and just as importantly, what it is not.

#### Evidencing impact

The ability to identify and communicate the needs being met, and the impact that is having.

#### Well networked

Being well connected and able to get support from working in partnership with others.

#### Financially & operationally fit

Being financially and operationally fit with sufficient income from a diverse range of sources.

#### People & culture

Having the right staff and

#### **External awareness**

Awareness of the political, economic, local and national context. Horizon scanning for threats and opportunities.



prioritising their development and wellbeing with effective leadership.

The questionnaire included a number of questions that, when taken together, give each organisation a score for each of the six characteristics. Please see page 16 for the scores for this country.



#### Levels of resilience.

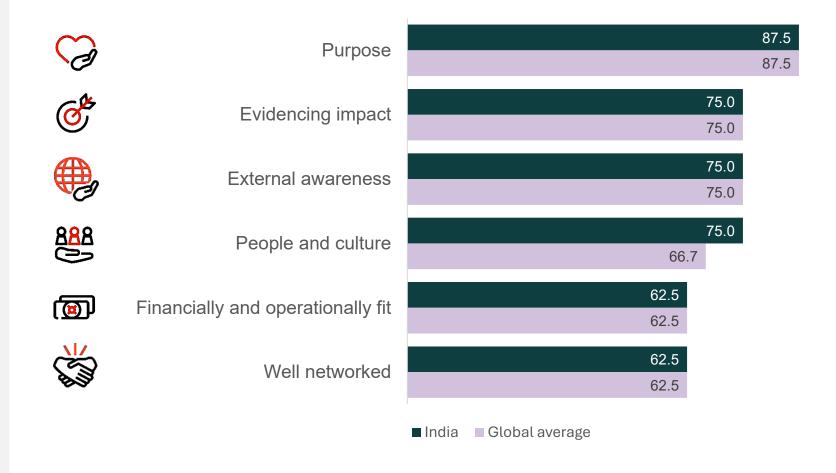
India's charity sector demonstrates strong overall resilience, aligning closely with global averages across all indicators.

Purpose emerges as the sector's greatest strength (87.5), underscoring clarity of mission and alignment with community needs.

High scores in impact evidence, external awareness, and people and culture (all 75) reflect growing professionalism and adaptability among organisations.

However, relatively lower ratings in financial and operational fitness (62.5) and networking capacity suggest ongoing structural limitations.

These results indicate a sector grounded in vision and values, yet requiring systemic investment to enhance financial stability, partnerships, and long-term organisational agility. Resilience scores showing the median score for each aspect: (All charities answering, n = 132)







### Diversity of income streams.

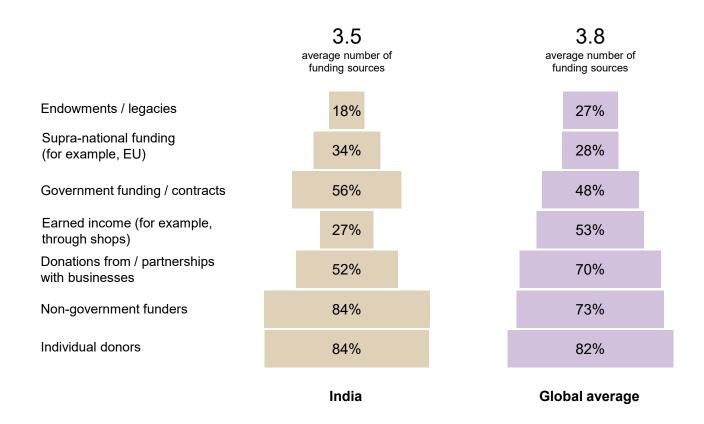
Indian charities draw from an average of 3.5 funding sources, slightly below the global benchmark of 3.8, reflecting moderate diversification.

The majority rely on nongovernment funders (84%) and individual donors (84%), underscoring the sector's dependence on philanthropy over institutional mechanisms.

Government contracts (56%) and corporate partnerships (52%) form secondary pillars of support, while earned income and endowments remain underdeveloped.

This pattern points to a fundraising ecosystem still heavily driven by donor relationships rather than self-generated or sustainable revenue streams, highlighting the need for broader income diversification.

The proportion of charities that receive each type of funding: (All charities answering, n = 149-153)



# Where funding comes from geographically.

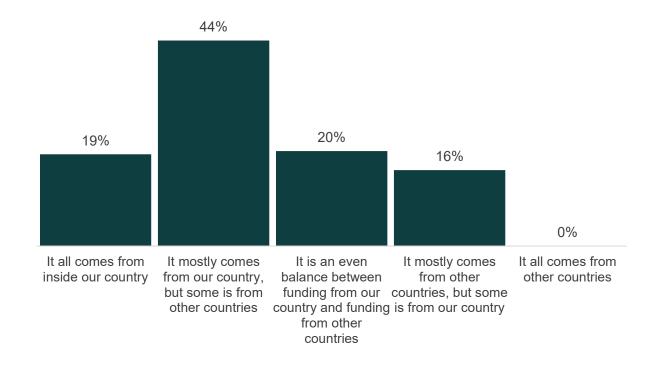
Funding for Indian charities remains predominantly domestic, with 63% reporting that all or most of their income originates within India.

This reflects a shift toward homegrown philanthropy and reduced dependence on foreign contributions following evolving FCRA regulations and rising corporate and individual giving.

About one-fifth of organisations maintain a balanced mix of domestic and international sources, while only 16% rely primarily on foreign funding.

The data indicates a maturing ecosystem increasingly sustained by national donors, though diversification across geographies remains limited — underscoring the need to expand global collaborations for long-term financial resilience.

Q. Geographically, where does your funding come from? (All charities answering, n = 149)



## Confidence in the diversity of income streams.

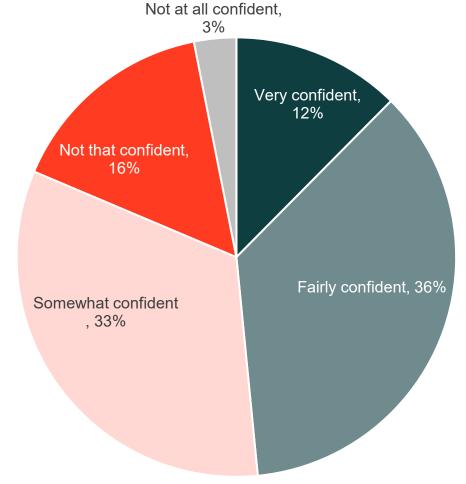
While 48% of Indian charities express confidence in their income diversity, this remains below optimal levels for long-term resilience.

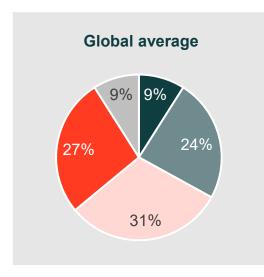
Only 12% are very confident, indicating that most organisations remain vulnerable to sudden funding disruptions.

A significant 49% fall into the somewhat or not confident categories, reflecting dependence on limited or project-based sources.

The findings underscore the need to expand sustainable revenue channels, strengthen financial planning, and promote unrestricted or flexible funding to safeguard operational continuity and sectoral stability.

Q. How confident are you that your income streams are diverse enough to cope easily with sudden decreases from any one of them? (All charities answering, n = 161)





### Restricted versus unrestricted funding.

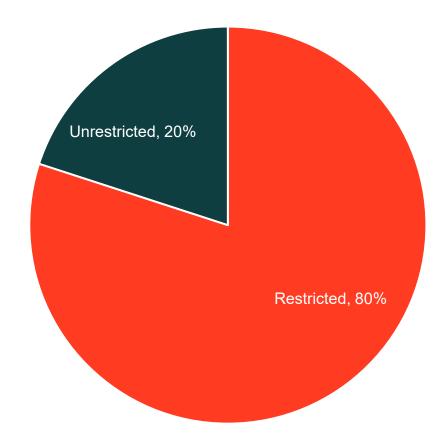
Indian charities report that around 80% of their funding is restricted, well above the global average of 64%.

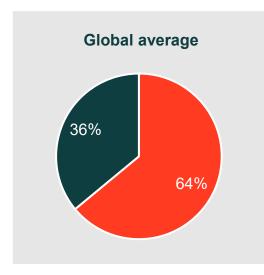
This heavy reliance on projecttied grants limits flexibility for institutional development, innovation, and long-term capacity building.

The findings reveal a funding ecosystem still shaped by donor-driven priorities rather than organisational autonomy.

Strengthening trust-based philanthropy and encouraging core or multi-year support will be key to enabling Indian nonprofits to invest strategically, adapt to changing needs, and sustain impact beyond project cycles.

Q. How much of your funding is given as 'restricted' funds (for example, only able to be spent on a specific project / purpose)? (Charities that were able to provide an answer, n = 127)





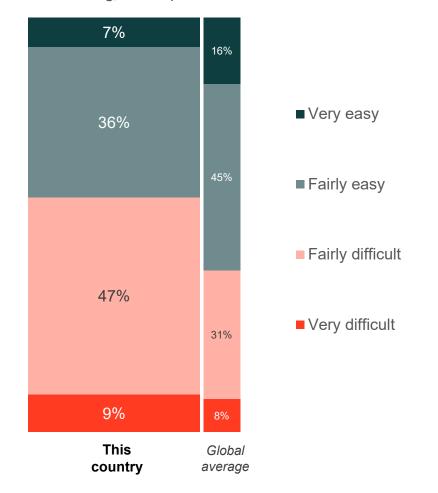
## Satisfaction with their funding mix.

Most Indian charities find their current funding mix challenging, with 56% stating it makes achieving organisational goals difficult.

Only 43% describe it as very easy or fairly easy. This dissatisfaction largely stems from an overreliance on restricted or short-term project grants, limiting flexibility and strategic growth.

Charities note that "funding is plentiful but fragmented" and that "administrative costs often go unsupported." Compared to global averages, Indian organisations express slightly greater strain, reflecting a funding ecosystem that prioritises compliance over capacity.

Strengthening multi-year, flexible support remains key to fostering stability and missiondriven impact. Q. Does this mix of funding make it easy or difficult for you to achieve your goals? (All charities answering, n = 138)



While 56% of Indian charities report that their funding mix makes achieving goals difficult, qualitative responses reveal deep frustration with project-based and short-term funding cycles. Many note that "donor priorities change quickly", and "funding is restricted to visibility-oriented work". Others highlight limited flexibility for core expenses, with one respondent stating, "we struggle to pay staff though projects are fully funded". Charities that found it easier cited "corporate partnerships with multi-year commitments" as stabilising factors.

Overall, the data and voices reflect a funding environment rich in opportunity but low in autonomy — prompting calls for trust-based, flexible support.

## Operational fitness to meet demand.

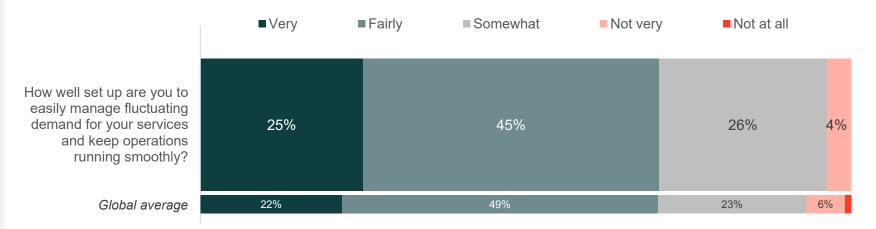
India's charities show moderate confidence in their operational fitness, with 70% feeling "very" or "fairly" prepared to handle fluctuating demand.

Yet 30% remain only "somewhat" or "not at all" confident, citing staffing limitations, administrative delays, and dependency on project-specific funds.

Verbatim responses highlight "capacity stretched across too many priorities" and "lack of reserves for emergency needs."

Many organisations rely on volunteer or temporary support, which restricts scalability.

Overall, while operational systems are improving, resilience is hindered by funding rigidity and human resource gaps that affect longterm agility and continuity. How they would rate their charity: (All charities answering, n = 132)





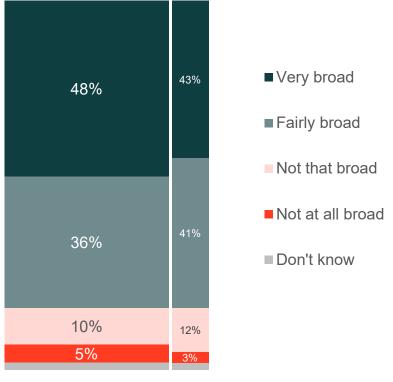
#### The senior team.

Nearly half (48%) of Indian charities report a "very broad" range of skills within their senior leadership teams—slightly higher than the global average (43%).

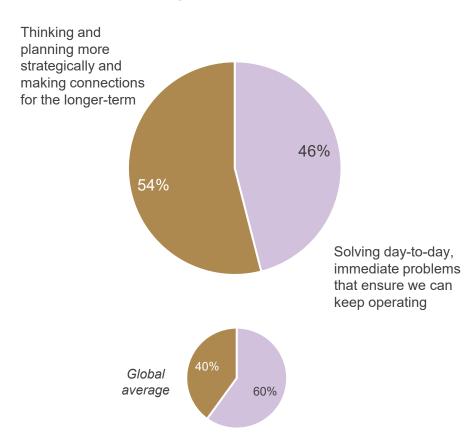
This indicates growing institutional maturity and diversified governance capabilities across finance, programmes, and strategy.

Indian charity leaders are also far better than their global counterparts at spending more of their time on strategy.

While leadership depth is strengthening, organisations can still remain operationally reactive, highlighting the need to delegate more effectively and build middle-management capacity. How broad are the skills and experience of the most senior leadership team in your organisation? In some cases, this might be your board, an external board of trustees or a C-suite team (e.g. CEO, CFO, etc.) (All charities answering, n = 132)



Roughly speaking, what proportion of time does your senior team spend on each of the following? (All charities answering, n = 128)



Global average

#### Recruitment and retention.

# Recruitment and retention remain major pain points for Indian charities.

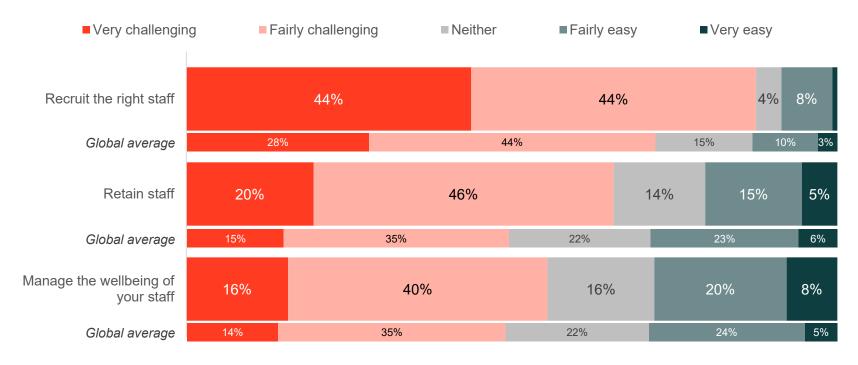
Nearly 9 in 10 organizations (88%) find recruiting the right employees either fairly or very challenging — well above the global average.

While retention appears slightly easier, two-thirds still report it as a concern, citing "limited funding for salaries" and "unclear career pathways" in verbatim responses.

Managing employee wellbeing also emerges as a growing issue, with over half finding it difficult to sustain morale amidst heavy workloads and uncertainty.

The data reveals a sector stretched between mission and means — where passion drives performance, but resourcing and professional development lag behind.

#### How challenging is it to do the following? (All charities answering, n = 128)



#### Strength and depth of the team.

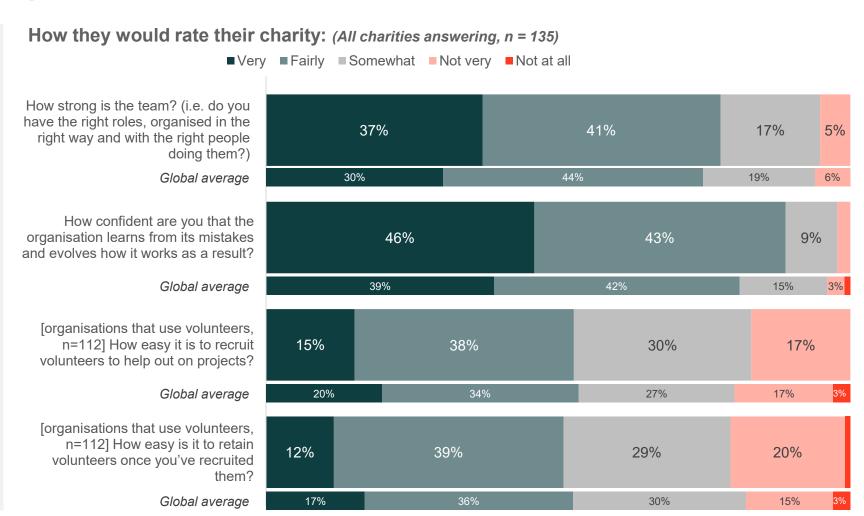
Indian charities report strong internal structures, with 78% rating their teams as very or fairly strong higher than the global average.

This suggests that most organisations have well-defined roles and capable personnel driving operations.

Nearly 9 in 10 charities express confidence in their ability to learn from mistakes and adapt, reflecting a culture of resilience and reflection.

However, challenges persist in volunteer management. Only 53% find it easy to recruit volunteers, and retention proves even harder, with one in five describing it as "not at all easy."

This indicates growing dependence on volunteers without corresponding systems for sustained engagement.



## Deep dive: the importance of the right people.

# Strengthening from Within: Dalit Vikas Abhiyan Samiti

Dalit Vikas Abhiyan Samiti (DVAS) demonstrates how investing in people can amplify impact. Through structured leadership mentoring and a focus on inclusive team culture, the organisation has built internal resilience that mirrors its community goals. By empowering local staff and volunteers to take ownership of planning and execution, DVAS has improved retention and deepened community trust.

This distributed leadership model has enhanced adaptability — especially during funding fluctuations — and strengthened field-level accountability.

The organisation's experience underlines a key insight: when a team is nurtured with purpose, its capacity to serve expands exponentially.

"Strong teams build stronger communities."



Women from rural Bihar being trained on Sustainable Development Goals



## External awareness & partnerships.

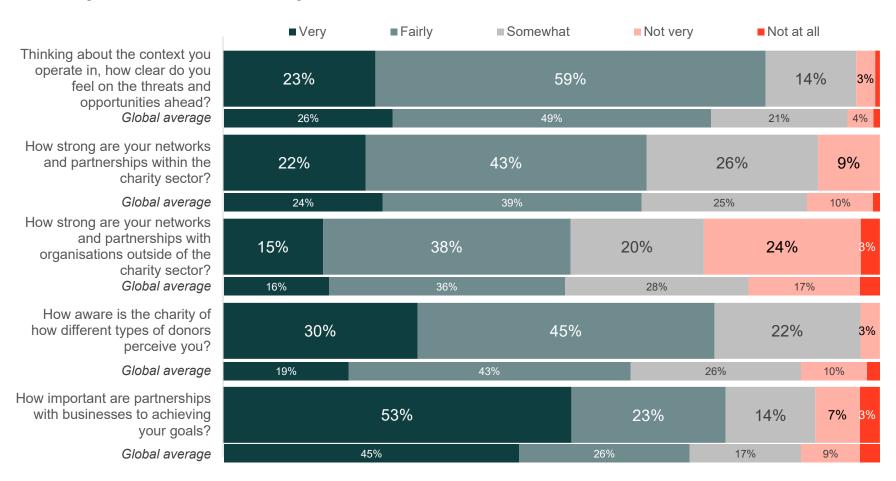
Charities in India show remarkable clarity of purpose and a growing confidence in navigating external contexts — 82% feel clear about emerging threats and opportunities.

Yet, their greatest strength lies in their partnerships. Over half of respondents recognise collaborations with businesses as vital to achieving goals, signaling a shift toward crosssector problem-solving.

However, the relatively lower engagement with organisations outside the charity ecosystem highlights room for broader coalition-building.

Building bridges beyond traditional networks — into private, academic, and community spheres — could unlock new pathways to resilience and innovation.

"Partnerships are where purpose meets possibility." **How they would rate their charity:** (All charities answering, n = 138-132)



#### Trust in charities.

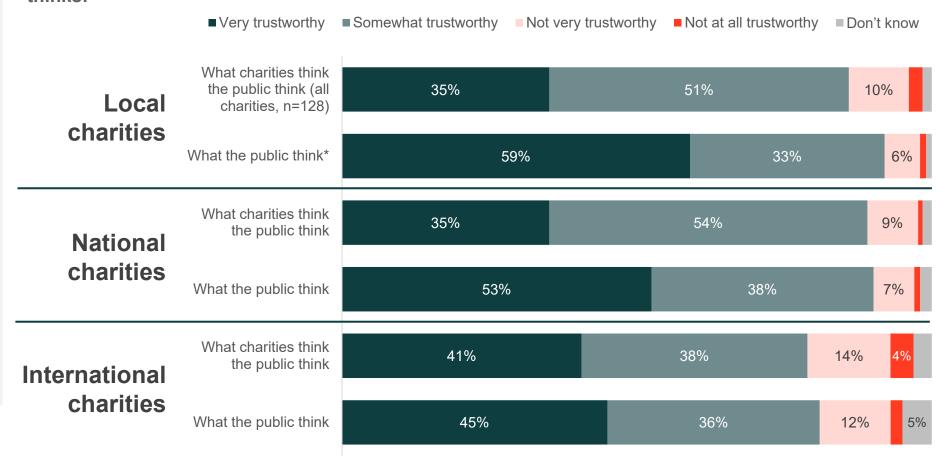
Trust remains the cornerstone of charitable action — and India's charities underestimate it.

While only 35% of charities believe the public views them as "very trustworthy," actual public confidence is much higher, at 59% for local and 53% for national charities.

This trust premium reveals a disconnect — charities may be too self-critical or unaware of the goodwill they've earned through community engagement and transparency.

The lower perception of international charities (45%) highlights the enduring value of local rootedness. Reaffirming authenticity, accountability, and visibility can help bridge this perception gap.

Trustworthiness of charities — what charities think the public thinks, and what the public actually thinks:



<sup>\*</sup>Data from CAF World Giving Report – Donor Insights, 2025.

## Deep dive: building trust.

# Deep Dive: Building Trust — The OneStage Approach

At OneStage, trust is not just a value — it's the foundation of every partnership. Over the years, OneStage has invested deeply in systems of transparency, accountability, and continuous dialogue with donors and grassroots partners.

Through rigorous due diligence, open reporting frameworks, and joint implementation models, the organisation has redefined how credibility is built in the development sector.

This commitment has translated into long-term collaborations with leading corporates, international foundations, and NGOs — each grounded in shared ownership and measurable impact.

As a senior partner noted, "Trust isn't claimed—it's demonstrated, consistently". For OneStage, trust has become both the means and the multiplier of change.



OneStage's OneCare in action — building trust through compassionate, on-ground impact.

#### Charities' perceived role and reputation.

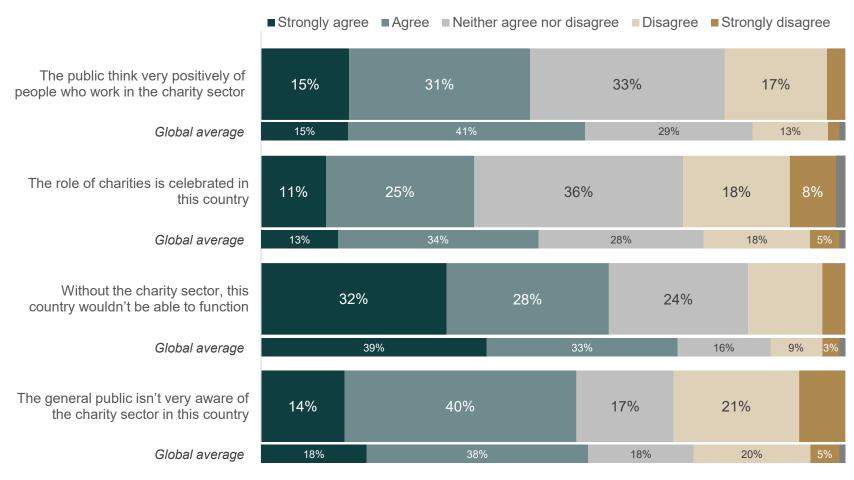
Charities in India continue to serve as the connective tissue of social progress yet their role is often underacknowledged.

Only 36% feel their work is celebrated, and just under half believe the public views charity professionals positively.

This modest recognition contrasts sharply with their indispensable contribution — 60% agree the country couldn't function effectively without the sector.

The data underscores a quiet paradox: immense impact, limited visibility. Strengthening storytelling, public engagement, and advocacy could help bridge this perception gap and affirm the charity sector's vital role in nation-building.

Do you agree or disagree with the following statements about the charity sector? (All charities answering, n = 126)



## Overall influence of government on charities.

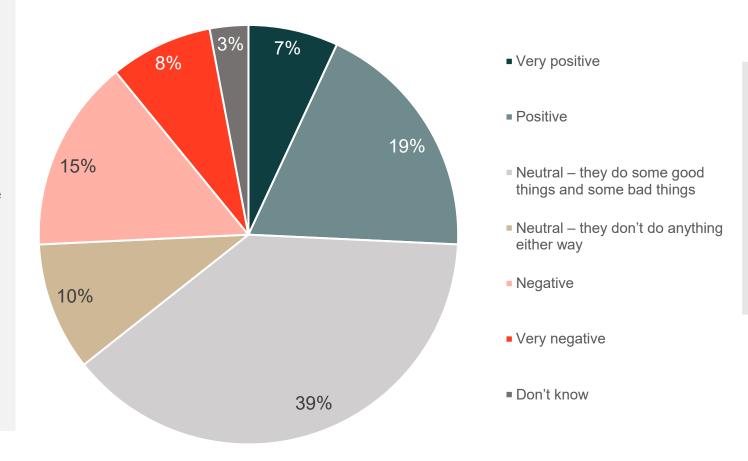
Perceptions of government influence on the charity sector remain largely ambivalent.

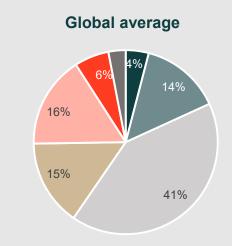
Nearly half (49%) of charities describe it as neutral — acknowledging both supportive and restrictive actions — while only one in four (26%) view it positively.

This mixed sentiment reflects a landscape where progressive policy intent often coexists with procedural hurdles, compliance burdens, and inconsistent recognition of nonprofit value.

Despite this, the data suggests space for constructive partnership: the sector seeks clarity, continuity, and collaboration rather than independence from regulation. With a more enabling ecosystem, government and charities together could unlock far greater social impact.

Overall, do you think the Government is a positive or negative influence on the charity sector? (All charities, n = 116)





## Specific opinions on the role of government.

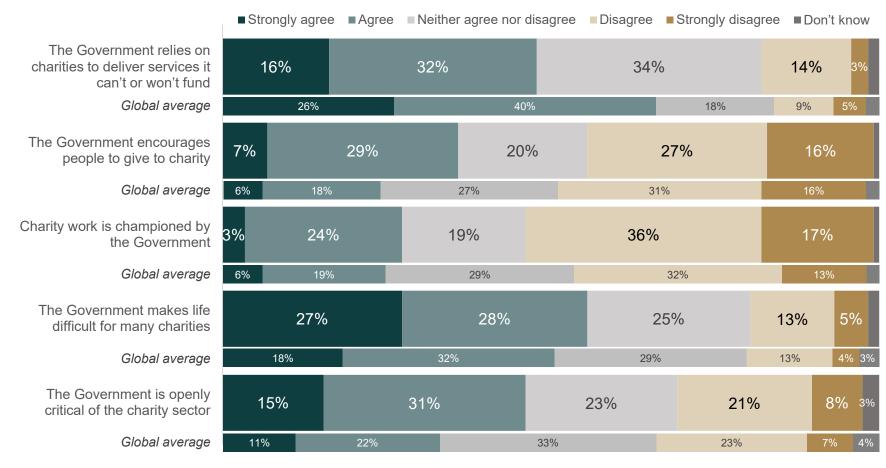
Charities paint a nuanced picture of the Government's role — one marked more by dependence than partnership.

Nearly half (48%) believe the Government relies on charities to deliver services it can't or won't fund, yet only a third (36%) feel it actively encourages giving.

Few (27%) feel their work is championed by policymakers, and a notable 55% say the Government often makes their work harder through bureaucracy or regulatory ambiguity.

This underscores a recurring theme across conversations: the sector seeks not handouts but handshakes — a relationship grounded in trust, shared purpose, and respect for the critical role charities play in nation-building.

Do you agree or disagree with the following statements about the Government's involvement in the charity sector? (All charities answering, n = 117)



#### Effectiveness of regulation.

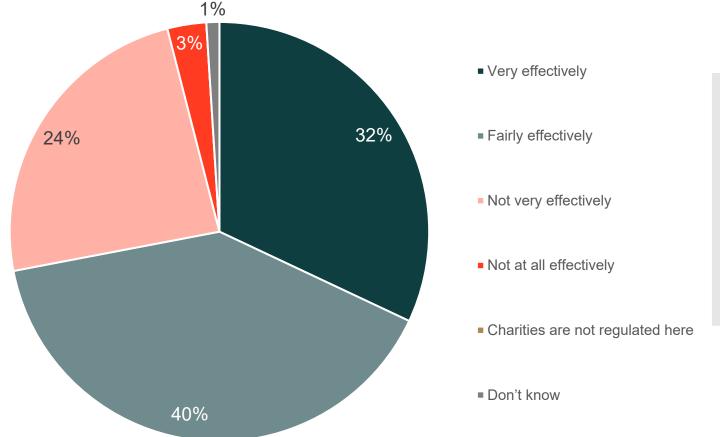
Charities in India express relatively strong confidence in the effectiveness of regulation, with 72% rating it as either very or fairly effective — above the global average of 67%.

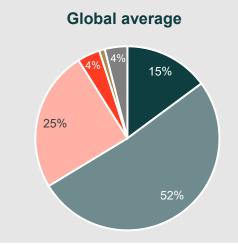
This reflects growing institutional maturity and improved oversight by statutory bodies such as NITI Aayog and CSR regulators.

However, nearly a quarter (27%) still view regulation as not very or not at all effective, citing delays, inconsistency, and limited support in navigating compliance frameworks.

The sentiment underscores a call for smart regulation — one that ensures accountability without dampening innovation or trust. In the words of one respondent, "We need clarity, not complexity."

Overall, how effectively do you think charities are regulated in your country? (All charities answering, n = 118)







## Clarity of purpose.

Indian charities demonstrate a strong sense of internal clarity, with 94% reporting that their mission is well understood within their teams.

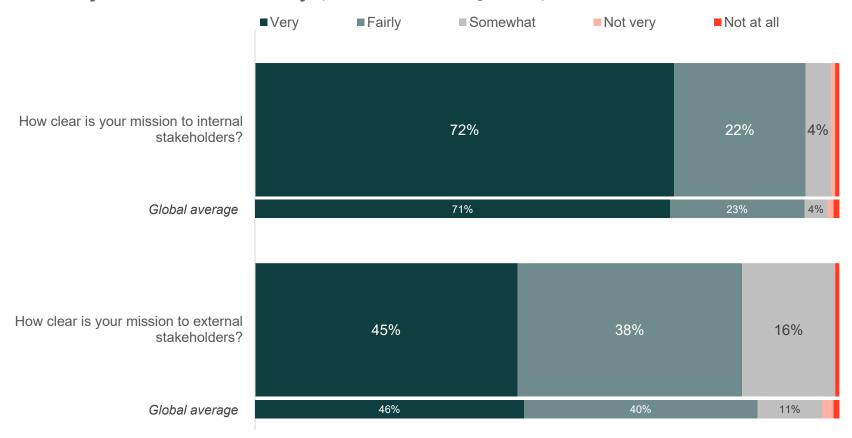
This suggests that despite operational and financial pressures, purpose remains an anchoring force.

However, external articulation lags, with only 45% saying their mission is very clear to external stakeholders.

This gap points to a need for stronger communication and narrative framing to build alignment with donors, beneficiaries, and partners.

As one respondent noted, "We know why we exist — but we need to tell our story better".

How they would rate their charity: (All charities answering, n = 138)



## Translating purpose into impact.

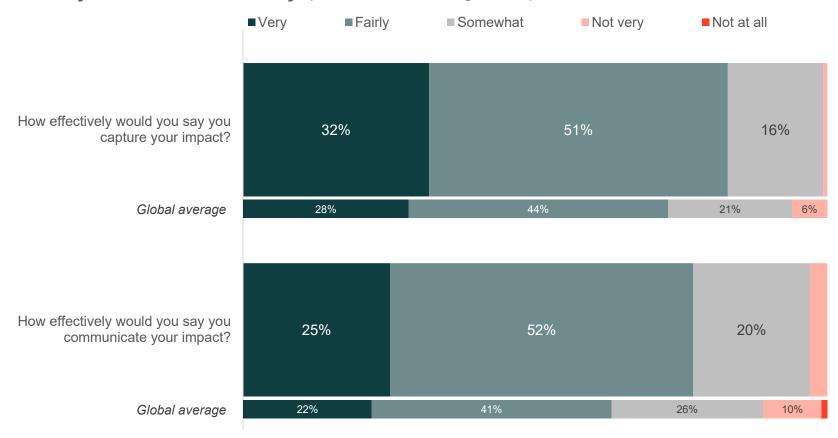
While clarity of purpose remains a strength, translating that into measurable impact is still a work in progress.

Eight in ten Indian charities (83%) believe they capture their impact fairly or very effectively, surpassing the global average. Yet only 25% say they communicate it very effectively, suggesting that strong work on the ground isn't always matched by strategic storytelling.

The data reveals an emerging shift — from activity-based reporting to outcome-driven evidence — but the communication gap remains.

As one charity leader reflected, "Our impact is visible in communities, but not always on paper". Bridging that gap is the next frontier.

How they would rate their charity: (All charities answering, n = 138)



# Deep dive: communicating purpose and impact clearly.

**Action Initiative for Development** (AID) stands out for its clarity in both purpose and communication.

Rooted in the mission to uplift socially excluded communities — Dalits, manual scavengers, sanitation workers, and waste pickers — AID ensures that every intervention is grounded in dignity, opportunity, and empowerment.

The organisation excels in transparently conveying how education, skills, and rights-based advocacy intersect to drive lasting change.

Its storytelling reflects real voices from the ground — of women gaining livelihood independence, young people accessing education, and communities breaking generational barriers.

Through authentic narratives and measurable outcomes, AID demonstrates how communicating purpose with honesty can amplify both trust and impact.



Building confident, skilled young people who drive dignity, opportunity, and change in their communities.



## Civil society in India

#### Civil society in India continues to be a vital force in bridging the gap between policy and people.

It has evolved from service delivery and relief work to playing a more strategic role in shaping narratives around inclusion, accountability, and sustainable development.

Today, non-profits and grassroots organisations are at the forefront of addressing complex, interconnected challenges — ranging from climate resilience and livelihoods to gender equity and healthcare access.

However, the sector also faces growing demands for transparency, agility, and measurable impact. Increasing regulatory oversight, donor expectations, and digital transitions have reshaped how organizations plan, operate, and communicate their value.

Amid these shifts, collaboration has emerged as the defining strength of India's civil society.

Multi-stakeholder partnerships — linking corporates, governments, and communities — are enabling scalable, system-level impact.

The path forward lies in building trust, embracing data-driven approaches, and nurturing local leadership. As India's development landscape grows more dynamic, civil society will need to act as both innovator and integrator — translating grassroots realities into policy influence.

With greater collaboration, credibility, and community engagement, the sector has the potential to redefine how social change is imagined and implemented across the country.



Empowered young people shaping India's future through education and collective action.

# **THANK YOU**

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