Between Rhetoric and Reality:

ESSAYS ON PARTNERSHIP IN DEVELOPMENT

Kamal Malhotra

The North-South Institute

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Lynne Hately and Kamal Malhotra

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The North-South Institute (NSI) is the only independent non-governmental research institute in Canada focused on international development. The Institute conducts research on Canada's relations with developing countries and on a wide range of foreign policy issues. Established in 1976, NSI is a not-for-profit and non-partisan organization. The Institute's research helps generate greater understanding and informed discussion of the problems and opportunities facing Canada and countries in the developing world.

The contents of this book represent the views and findings of the authors alone and not necessarily those of The North-South Institute's directors or supporters, or those consulted in its preparation.

Table of Contents

Acknowledgements

About the Authors

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Introduction

Alison Van Rooy

The North-South Institute

The following two papers on partnership are, in a sense, the measurement of the pulse of an idea. What are critics and proponents alike thinking about the idea of partnership in North-South relationships? How has that thinking affected the practice of development? Its policies? Its relationships? Even the very relevance of the endeavour?

This booklet began with the International Development Research Centre (IDRC), Ottawa, and its quest to explore the most current thinking—and vibrant debates—on partnership. Responding to debates within its own network, IDRC wanted to provide a resource for other agencies in the North grappling with the repercussions of that debate. They invited Lynne Hately, a Canadian researcher with The North-South Institute—now working in social forestry with CUSO in the Lao Republic—to write on perspectives from the North based on her graduate research. Indian Kamal Malhotra, Co-Director of Focus on the Global South, a policy research centre in Thailand, was then asked to cast a critical eye on the debate from a Southern vantage point. These essays, like bookends, are thus meant to showcase the debate's main issues.

Both Malhotra and Hately are critical of the use of "partnership" and both explore the idea in an effort to resuscitate the principle from the often sad examples in practice. Yet the papers differ markedly in tone and approach. Hately treats the debate in a methodical fashion, tracing its history through good and bad examples in Canadian experience with organizations in the South, drawing from an extensive literature. Malhotra, arguing from a more experiential position, proposes to jettison the term "partnership" altogether, suggesting in its place the idea of a development alliance which pulls together development efforts on a global, not only "North-South," axis. Only here, he argues, is there a potential for real social, economic, and political transformation.

What is remarkable, however, is the congruence of their findings on best practice. Both authors cite the successes of genuine partnerships that have involved Canadian voluntary and governmental organizations. The criteria for those successes are underlined in each essay, bringing home more forcefully the central issue that the very language of partnership must be excavated because it can hide its antithesis—unequal and destructive power relationships. For those in search of social change, "partnership" must be practiced in its most profound sense: in the meeting and actions of equals.

A Sampling of Partnership

The two essays in this booklet offer thought-provoking examples of the use of the language of partnership. How do organizations use and understand the term? What practices are identified with partnership? Throughout the text, thoughts on partnership by various writers demonstrate the breadth of meaning and politics attributed to the idea.

The Power of Partnership
Lynne Hately
The North-South Institute

> The truth of the matter is that, whatever the rhetoric, donors
> frequently have little intention of granting "ownership" to
> local decisionmakers unless these decisionmakers have, on
> their own, come up with policies with which the donors
> agree. Indeed, I have heard an official of one donor agency
> say that ownership means that "recipients do that which we
> want but do so voluntarily." (Helleiner, 1994)

Introduction

This paper sets out to explore "partnership" as it has evolved in
international development, exploring seriously the problems and the
opportunities associated with this very popular concept. Since little
work has been done to address the integral role power plays in
partnerships, the paper seeks to uncover the inherent imbalances in
such linkages. The fundamental inequities underlying the aid
transfer must be explicitly acknowledged and addressed for reasons
of both equity and efficiency. A first step in designing a menu of
mechanisms to assist donor agencies and organizations in addressing
these inequities and in moving the partnership rhetoric to reality is
presented.

The paper examines the donor-recipient relationships between
Northern donors and Southern institutions and people.[1] Given the
diversity of donors, the varying contexts in which they work and their
differing approaches to development problems, a blueprint on how
to attain the ideal partnership is not possible. Raising questions about
partnership, however, is possible and necessary: donor governments
and non-governmental organizations need to examine their usage of
the language and practice of partnership.[2]

Two broad kinds of partnerships are examined—those that tinker
with the conventional aid relationship to make it better and those that

attempt to overhaul the traditional way of working. While conventional one-way partnerships are characterized as unequal, vertical in structure, and motivated by charity, reciprocal partnerships are defined as more equal, horizontal, and based on solidarity.

The paper analyzes the important role donors can play by shifting the focus from "partnership" to the more controversial issues of control and ownership. In response to the growing recognition of the links between the global and the local, the paper suggests that North-South relations have never been so important. It recommends that donors first be more responsive to the needs and demands of local populations to ensure ownership of development initiatives remains in the South with local initiators, and second, broaden the scope of development assistance by working more closely on development issues in their home countries.

Over its 50-year history, the World Bank has become a global partnership in which more than 175 countries have joined together for a common purpose: to improve the quality of life for people throughout the world and meet the challenge of sustainable development.
(Lewis T. Preston, President, The World Bank, 1994)

The "Power of Partnership" raises more questions than it answers. It is hoped that the identified areas of needed research proposed in its conclusion intrigue others to build on this work.

Partnership Trends and Tensions
The term partnership became popular in the early 1980s and continues to be used widely nearly 20 years later. Not only are Northern non-governmental organizations (NGOs) using the positive language to describe their relations with Southern institutions and people, donor agencies are climbing on the bandwagon. Consider the 1995 policy statements of the United States Agency for International Development and of the Development Assistance Committee (DAC) of the Organisation for Economic Co-operation and Development (OECD):

> Partnership is a two way street based upon shared rights and responsibilities. Each partner brings different, but complementary, skills, expertise and experiences to a

common objective. Each contributes to areas of comparative advantage that complement each other and are fundamentally compatible. (USAID, 1995)

...this new declaration implies a relationship based upon agreement, reflecting mutual responsibilities in furtherance of shared interests. A true partnership model for development co-operation begins to define a structure for more productive relations between the industrialized and the developing countries into the next century. Further defining and improving that model—with its emphasis on self help, policy coherence, putting people first, efficiency and effectiveness—will be a major focus of the work of the DAC in the coming years. (Michel, 1995)

One of the greatest criticisms of partnership, however, stems from its Northern origins. Critics contend that the language serves merely as a ruse for Northern donors to maintain control over the Southern development agenda. In fact, most Southern organizations and people disassociate themselves from the term and shy away from calling their Northern counterparts "partners." They prefer to call them as they see them—donors and funders operating in an inequitable environment. Similarly, instead of referring to themselves as "partners" they tend to call themselves "recipients" or "conduits" (Muchunguxi and Milne, 1995:23).

At the same time that donors are singing the praises of partnership, government accountability processes are being tightened and the availability of resources for international development cut back. In the face of domestic deficit reduction strategies and the perceived failure of international development efforts, donor governments are demanding more control over the disbursement of funds, introducing more conditionalities, insisting on more centralized management structures, and offering less flexibility (Bossuyt and Laporte, 1994). The emphasis on these concerns is overshadowing the important concepts associated with partnership—ownership, local participation, empowerment, and decentralized control. Although such concepts are gaining wide acceptance in Northern donor policy documents, their practice is limited. All this talk about partnership is not translating into action.

The gap between theory and actual practice is not a new problem for donors. This is partly due to their operational structures—the

funding, evaluation, accountability and management systems—that encourage Northern rather than Southern control. For donors, a real tension exists between creating enabling environments for recipient-driven development strategies and the concepts associated with partnership, and ensuring resource accountability back to donor governments. Concurrently, a real tension exists for recipients when donors refuse to acknowledge the reverse resource flow—financial, technical, and human—from certain regions of the South to the North. Addressing these structural and political constraints may be the most fundamental issues that donors and recipients deal with in the coming decade.

The Meaning of Partnership

The meaning of partnership is as diverse as the variety of institutions involved in international development. Consider the range of Northern players: large multilateral, inter-governmental agencies like the World Bank, the specialized agencies of the United Nations, official aid agencies, private businesses, trade organizations, exporters and importers, foundations, regional development banks, and the host of NGO organizations, including women's groups, environmental organizations, community groups, churches, labour unions, cooperatives, and research centres. In light of this diversity, it is virtually impossible to define one kind of partnership. While many use it to refer to the bilateral relations between Northern and Southern NGOs or governments, others, like the Canadian International Development Agency (CIDA), use it to describe their links with the non-governmental sector.[3]

> Partnership...is intended to help Canadians build a more equitable relationship with the people of developing countries by helping to bring Canada's cooperation into line with major improvements that have taken place not only in the ability of developing countries to carry out development on their own, but also in the capacity of Canada's domestic and international partners as well. (CIDA, 1993)

It is useful to think of partnerships as mechanisms by which new value is created through the collaboration of two parties to solve problems and meet each other's needs. These relations operate on

principles of demand and supply—I have something you need and you have something I need. Such relationships are very much like those between people—they depend on trust, comfort, and mutual respect.

The extent of this combined effort differs from relationship to relationship and depends largely on how the two parties share responsibilities. This division of labour reflects how the "partners' deal with issues of control and ownership. Is the partnership designed to benefit one party more than another? Does each party have as much to lose by being part of the relationship? Does one party have more control of the decisionmaking? Is this control separate from the consequences of the decision? Is the control of decisionmaking decentralized to local people (do the two parties support anti-poverty projects in which those living in poverty are driving the project's funding, evaluation, accountability decisions)? Is the partnership as accountable to the "beneficiaries" as it is to the donors?

The Appeal of Partnerships
There are a variety of reasons why partnerships are so appealing to such a wide range of development institutions. These can be summarized as follows: to ensure Southern ownership, to better address global interdependent problems, and as a strategic mode of operating.

Southern Ownership

> ...the goal should be to move away from the existing relationship of "donor" and "recipient." Southern NGOs want to manage their own affairs and want the North to recognize the important role they play in their own development. (Muchunguxi and Milne 1995)

Northern donors create partnerships with Southern organizations and people for reasons of both equity and efficiency. For decades now, Southerners have been demanding the equal right to control their lives and to have ownership over their development strategies. Southerners feel they have the solutions for what Northern donors have identified as problems; "in their own way they have identified the source of the problem(s)" and "in their own way they have tried and tested alternative solutions" (Roy, n.d.).

Furthermore, sustainable development appears more attainable when Southern communities and local people are ensured "ownership" of their own development. This message has been passed from NGOs through to the World Bank: "projects tend to be more sustainable and yield higher returns when they involve those they are intended to help" (Bhatnagar and Williams, 1992:iii). This claim is also supported by the experience of UNICEF. Over 40 years of service to children has taught UNICEF "that benefits to people are short-lived unless the people themselves recognize their ownership over the goods and services we help provide and take on the responsibilities that come with ownership" (Rachelis, 1992:67). There is some evidence that projects tend to fail when organizations and people at the local level are not central to the design, implementation, and follow-up (World Bank, 1994:5). These findings provide justification for the bottom-up, people-centred approach and the imperative of establishing linkages with local organizations in the South and funding the development of Southern institutional capacity.

Canadians building partnerships so that co-ops and community-based groups may build housing – that's the work of Rooftops Canada, the international program of the Cooperative Housing Federation of Canada. Rooftops has established partnerships with co-op housing organizations in Latin America, Africa, Asia, and the Caribbean. Partnership means solidarity not charity. Rooftops programs and partnerships begin with people and focus on their efforts to create improved and sustainable housing for themselves and their communities.
(Rooftops Canada, 1995)

This desire to link with local people and their groups has also arisen in part from the structural fiscal and debt constraints perceived by donor governments. As deficit reduction strategies result in large spending cuts in domestic and overseas programming, governments rely on people and their organizations to carry out more responsibilities in the public policy domain—deliver human services, promote grassroots economic development, reduce environmental degradation, protect human rights. Despite the heterogeneity of the NGO sector, it is argued that local groups are more cost-effective and

efficient—they often subsist on shoe-string budgets, they appear to be more in tune with people and communities in which they are based, they are better able to reach the poorer sectors of the population, and are better at involving members of the community.[4] In their search for more efficient mechanisms, donor governments therefore increasingly collaborate with local institutions and people. For instance, estimates from the World Bank indicate that non-governmental groups in India handle 25 percent of foreign aid (OXFAM, 1995:207).

At the 1994 United Nations Conference on Population and Development in Cairo, governments agreed in principle to support people and their local groups. More than 120 heads of state attending the 1995 World Summit for Social Development in Copenhagen acknowledged the essential roles of the NGO sector and pledged to support the efforts of these groups to achieve human development objectives. They endorsed the notion that organized people, working outside the state structure, are integral to the development of democratic societies and central to supporting the development of people.

> Enhanced partnerships with Canadian organizations and institutions will also be developed....Involvement with other Canadian institutions should look beyond the traditional concept of North-South technical assistance and should focus on the mutual interests of Canada and developing countries. (IDRC, Canadian Partnerships Division, 1994)

While some donor governments work with Northern NGOs linked with Southern-based groups, other agencies establish direct funding relationships with Southern groups. The success of these activities depends greatly on the ability of the funders to ensure that Southern groups control and "own" their own development planning and decisionmaking. It is not enough for donors to encourage local participation. Recipient ownership will only result when funding, planning, and reporting processes are, at a minimum, equally controlled by recipient institutions (CIDA, n.d.).

Interdependent Global Problems

Another reason partnerships are so appealing is the interdependent and complex nature of today's development problems. In an increasingly interdependent world, the traditional model of resource transfers from the developed to the developing countries is no longer seen as the sole basis for North-South relationships. Problems of development have widened in scope and are not limited (if they ever were) to developing countries alone. Poverty, unemployment, insecurity, environmental degradation, and population pressures concern both the North and the South. In February 1995, the Canadian government issued federal Foreign Policy statement which cited the importance of protecting the security of Canadians within a stable global framework by addressing poverty, inequalities, political oppression, ethnic, and religious tensions.

Addressing these issues through North-South collaborative relationships may therefore never have been so important. Northern-based institutions searching for solutions can no longer afford to work solely in the South; global strategies are needed to solve global problems. Development cannot be viewed as a continuum leading from poor to rich or developing to developed. The North exists in the South and the South in the North. In many parts of the world, for instance, it is women and children who are most likely to live in situations of poverty and powerlessness. Women's groups, feminist academics, and government policymakers and officials have realized the tremendous opportunities that come through sharing analyses and strategies with their counterparts in other countries. Forty thousand women from all around the world met at the Fourth World Conference for Women in Beijing in 1995 to do exactly that.

> Countries with different languages and cultures than ours used to seem a world away from us. It is now becoming clear that we are living in one global village. What happens to people and the environment elsewhere increasingly affect our lives. Horizons recognizes that new forms of cooperation are needed and is moving to develop relationships with organizations in the South which we call "partnerships." We believe that only by working together, North and South, can we build a better future for all. (Horizons of Friendship, 1992)

This trend to link the global and the local has had an impact on the overall frame of reference for development agencies. Development problems pertinent to the South and the North are being examined simultaneously by institutions focusing on domestic issues and those focusing on international concerns to determine the causes and find appropriate solutions. For instance, at the World Summit for Social Development, problems associated with poverty, unemployment, and social exclusion were discussed. The conference brought together representatives of government, advocacy groups, development organizations, anti-poverty organizations, people and institutions from communities and countries throughout the world. The conference themes were discussed in the context of both the South and the North and representatives from around the globe shared their strategies for tackling these problems.

> One of the values of recognizing the South in the North is that it undermines the concept of northern superiority, and creates new possibilities for working together as equal partners confronting a common problem. (French, 1991)

Strategic Mode of Operating
Within many sectors there is a trend toward building more cooperative alliances and modes of operating for strategic advantage (Powell, n.d.). Many institutions within the field of international development are using the concept of partnership to link themselves more effectively with organizations that they have not worked with in the past.

Partnerships are common in the corporate sector to expand market share to ensure the viability of businesses. Over the last decade, more and more companies have moved to develop alliances, networks, and links with other firms around the world (Gomes-Caseres, 1994; Kanter, 1994). The same is true in the public sector where inter-organizational linkages between local groups, the private sector, and governments are fundamental to public decisionmaking and local governance (Brown, 1991). As well, the trend is becoming more common for NGOs as they seek out new private sector funding sources in the face of fewer public resources in a context of greater social needs:

> Government cannot "do it all," nor can private citizens.
> Both can do far more if they work in partnership.
> Sustainable development requires the active engagement
> of a broad range of development partners and a harnessing
> of the enormous reserves of creativity and energy of all
> segments of society through the emergence of a public
> culture of citizen participation. (USAID, 1995)

Framing Partnership

The usage of the partnership language is intricately linked to an institution's understanding of the nature of development and the approach adopted to meet its development objectives. Some relationships, for example, are based solely on a transfer of resources from North to South, while others attempt to build on common agendas and notions of solidarity. While some tinker with the conventional aid relationship, others attempt to overhaul the traditional way of working in favour of a more political agenda that supports Southern ownership and control.

Although numerous classifications have been designed to analyze and evaluate development approaches and goals, few delineations of the partnership concept exist.[5] The design of a simple framework of partnership is useful for two reasons: it illustrates the association between development philosophy and partnership practice, and it is a first step toward understanding the dynamics of control and ownership.

For the purposes of this paper, the partnership concept is analyzed from two different perspectives: those that are one-way, unequal, and vertical in structure and those that are two-way, more equal, and horizontal. This categorization is not meant to be viewed as dichotomous, but rather as a simple framework from which various parts of the donor-recipient relationship can be examined. Nor is it meant to be interpreted in a way that disregards the fact that some donors may practice reciprocity in a particular part of their relationship but not as an overall priority.

Conventional partnerships are characterized by a one-way transfer of resources, skills, and methods in a vertical or top-down manner where the majority of control and decisionmaking power is retained by the Northern donor. Projects often are identified and designed to fit the interests of the donor, Southern recipients channel

the resources to an agreed-upon target, and submit evaluations to fulfil Northern reporting criteria. Participation of local people is valued primarily for its contribution to the efficient implementation of the project and any attempts to transfer ownership from the donor occurs only during implementation.

In contrast to one-way relations, the distinguishing factors in reciprocal partnerships are solidarity and a two-way exchange. Although a transfer of resources to the South might be an element in these links, it is not the sole basis of the relationship. Instead, these partnerships are characterized by the work of both Northern and Southern activists, researchers, and program staff toward a common end. The two-way relationship is an explicitly *political* strategy, in contrast to a more bureaucratic funding relationship. It is demand-driven from the Southern organization rather than supply-driven by donor funds. It is one that facilitates the organization of people to better their situation rather than relegating them as victims desperate for assistance. These relations are practiced more widely by progressive donor organizations than many charity-oriented NGOs and government donor agencies. The Steelworkers Humanity Fund, Common Frontiers, and Solidarityworks are three Canadian organizations that have positively linked up with Southern labour unions with the aim of advocating better working conditions for employees in a context of free trade and globalization.

> True partnership is complex, sometimes difficult, and always exciting. It is difficult because each partner needs and must retain, its own identity and uniqueness. Partnership is complex because as individuals and organizations, partners each have their own values and needs. Yet partnership within the co-operative sector is also an exciting opportunity. Common values provide a basis for understanding, and the creative synergy that results is often greater than the sum of the parts.
> (Canadian Co-operative Association, 1994)

Partners who are engaged in popular and social movements characterized by a strong sense of international solidarity and political alliances have a greater propensity to develop bonds and a higher quality of partnership (Lesson learned from PAC evaluation, PAC, 1995:39).

Characteristics	Conventional Partnerships	Reciprocal Partnerships
	Unequal	More equal
Intervention	Charitable; top-down	Solidarity
Management orientation	Short-term, Southern projects	Long-term global development programming
Decisionmaking	Vertical and top-down	Horizontal, bottom-up, decentralized, authority at site of responsibility
Chief parties	Northern donor agencies and organization; recipient governments and groups	All those with a stake in the common issue, particularly local people and their groupings
Extent of involvement of local people	Implementation phase	Southern ownership throughout problem identification, design, implementation, evaluation, follow-up
Accountable to	Donor agencies and funders (taxpayers)	Southern peoples and organizations involved in programming, in addition to donors
Evaluation criteria	Evidence of positive impact of project; cost effectiveness	Those with a stake in the issue (local people and governments and donors) assess successes and failures relative to impact and sustainability.

Ownership by Southern people of their development initiatives, plans, and programs is an essential element of reciprocal partnerships. Inter Pares, for instance, primarily builds relationships that support its own efforts and the efforts of Southern groups to bring change in Canada and the Southern country. In Bangladesh, its linkage is with UBINIG (Policy Research for Development Alternatives) a private policy research organization which focuses on alternative development strategies and conducts extensive research in the area of women's health. While UBINIG focuses its efforts on Bangladeshi women, Women's Health Interaction—a sister organization to Inter Pares—monitors Canadian policy and its implications for women's reproductive rights in the South and the North. The two groups successfully lobbied CIDA to opt out of its population control programs in Bangladesh. Indeed, Inter Pares attests that its most successful partnerships have been with women, largely due to the shared experiences and the common political goal that bring women together (Seabrooke, 1993:5).

Organizations may claim to practice partnership when, in fact, they operate merely as funders. Although funding is an essential contribution, the manner in which donors fund, whom they choose to fund, and the other roles they play are important factors in assessing reciprocity in a partnership. For instance, African counterparts reported in the 1995 Partnership Africa Canada evaluation that the partnership relationship had the "potential to be constrained by the presence of a field office of a Canadian NGO which may sometimes exhibit a tendency of 'breathing down the necks' of their African partner" (GAS Development Associates Ltd, Accra, Ghana and ET Jackson and Associates Ltd, 1995:39). In other words, the field office seriously impeded the development of the relationship and possibly the autonomy of the African organization itself.

The Evolving Nature of Partnership

The Aid Relationship Revisited
A series of independent critical reports released two decades after the official commencement of development assistance reflected the growing dissatisfaction with the conventional model of international cooperation. The first was *Partners in Development*, the findings from a

World Bank commission published in 1968 under the direction of former Canadian Prime Minister Lester B. Pearson. It assessed the consequences of development cooperation and designed recommendations for economic development in the next two decades. Similarly, the second report—*The World Development Plan: A Swedish Perspective*, released in 1971 as part of an evaluation of the first development decade—was charged with designing a strategy for the second decade:

> The donors of aid have made more grave mistakes both at home and in the field than have the recipients. The less developed countries, after all, have had neither the opportunities nor the means to make too many mistakes. "Donor" is, by the way, an unfortunate concept, since the value of the donor-recipient relationship is greatest when both sides feel that they have something to give and something to gain. (Michanek, 1971:34)

The release of these reports represented a turning point in development assistance analyses. Both reports called for the design of new partnerships that recognized the reciprocal rights and responsibilities of recipients and donors. Increased coordination between parties, based on a clear delineation of obligations, was considered essential to sustain positive relations.

The notion that Southern countries should design and control their own development agendas was not prominent in the early 1970s. Even so, Ernst Michanek, author of *The World Plan for Development*, strongly suggested that "developing countries should be the ones to draw up their own development plans." The design of development strategies was seen as the responsibility of the recipient, yet channels were needed to enable recipients to ask for and receive advice (Michanek, 1971:30). Similarly, according to the Pearson Commission, recipients should not only be willing to ask, but they also had the obligation to thoroughly inform donors of major events and decisions that had implications for the donors (Pearson, 1969:127).

The Pearson Commission agreed that "less uncertainty and more continuity" was needed from donors to ensure the delivery of timely and committed assistance so recipients could plan for the future (Pearson, 1969:128). It analyzed the global environment within which aid was transferred, and made several recommendations to donor

governments to ensure that development and aid policies and practice were linked to those of trade, monetary policy, and private capital movements.   The Commission recommended the use of multilateral fora to ensure mutual cooperation and positive dialogue between donors and recipients. In bringing many parties together, donors could be monitored, donors could monitor each other, and recipients could lend each other needed support.   Within this organizational structure, clearly defined and accepted channels for reporting, providing advice, carrying out consultations, and debating issues were imperative to sustain positive relations.

The Southern Non-Governmental Critique

By the 1980s, conventional development relations were coming under attack from another direction. Southern organizations and people dissatisfied with development policies and practice demanded that they be given full ownership over the development of their countries. By this time, the number of strong Southern-based groups had increased. Although this growth and the reasons for it differs from country to country, the general phenomenon can be attributed to three factors: the increased flow of resources into the South from Northern donors; the opportunities for political organizing that independence from colonial rule brought; and the abundance of laid-off state employees and gap in service delivery following the privatization of government institutions that came with the advent of structural adjustment policy.

As a result, many Southern groups developed as offshoots of their Northern counterparts, others on the energies of local activists, and others as providers of needed social services. As these groups gained sophistication and caught the attention of Northern development professionals, Southern groups demanded more autonomy and control over the design and delivery of aid programs and insisted that Northern donors redefine their roles and demonstrate their relevance.   They began calling for fundamental changes in the donor-recipient relationship.   At the same time, within Southern countries, some organizations—most of them small and rural-based—were pressuring their governments and the larger development institutions to involve them more in the shaping and implementation of their country's development agenda (Muchunguxi and Milne, 1995).

The demands from these Southern groups grew out of concern over the difficult economic conditions many developing countries were experiencing in the 1970s and 1980s. A combination of factors was involved, including falling primary commodity prices, rising debt loads, shifts to export-oriented production, and decreasing social spending. Out of concern that they had little input and influence into the design and implementation of these economic reforms, Southern people aimed their criticisms of structural adjustment policies at Northern donor governments and international financial institutions in particular.

These concerns coming from local groups were reinforced by prominent Southern institutions. The South Commission, composed of respected expert representatives from Southern countries, was formed in 1987 to analyze the problems Southern countries face, consider past strategies, and compile a series of lessons learned. As they reported:

> The fate of the South is increasingly dictated by the perceptions and policies of governments in the North, of the multilateral institutions which a few of these governments control, and of the network of private institutions that are increasingly prominent. Domination has been reinforced where partnership was needed and hoped for by the South. (The South Commission, 1987:3)

The Commission argued that the responsibility for development and the design of solutions to the many problems in developing countries lay firmly with the South. Since the people in the South most urgently need change, it is they who have to take the initiative to make this vision a reality (The South Commission, 1990:10). The Commission was mindful of the role Northern governments and donors played in creating and maintaining relationships of dependence and suggested that a more equitable and balanced management of global affairs should replace the current domination by the North.

Redefining Partnerships

> It is not enough to support community groups, in the hope that their local efforts alone will add up to significant change. We must also work with them to promote

> fundamental change in the political and economic structures which perpetuate their poverty and marginalization. (Inter Pares, 1990)

In response to Southern pressure and combined with their own disillusionment with development, Northern development professionals were forced to re-examine their roles and responsibilities. Concerns were growing that Northern interventions created or deepened dependence on outside resources (Brown, 1992:19). As a result, both donor agencies and organizations began to restructure. One strategy tried by CIDA and the Swedish International Development Agency (SIDA) involved the decentralization of their programs. SIDA introduced recipient-led approaches to the management of its aid with the intent of ensuring local ownership of projects and programs. Within two years of introducing its new policy, management authority was moved to the field, half of the procurement of goods and services and the production of training manuals and packages were shifted South, and long-term technical cooperation decreased by 75 percent. CIDA introduced a similar decentralization policy to enhance the effectiveness of aid programming in the late 1980s. Although its primary intent was to improve project selection and management, it was recognized that the strategy could address the "fundamental objective of Canadian ODA—to strengthen the institutions and thereby the self-reliance of our developing country partners" (Winegard report, 1987:83). Such experimentation has been curtailed as both agencies seek to gain more control in a more difficult financial climate (Bossuyt and Laporte, 1994:2).

Northern NGOs were faced with similar pressure from their Southern counterparts as these increasingly sophisticated groups took on direct project implementation. In response, the partnership phenomenon gained new impetus and the concept of sharing control and ensuring ownership was discussed widely among Northern organizations.[6] Yet, as we have seen, the meaning and practice varied widely. Some groups began to focus more on policy analysis and advocacy work in the North and less on direct programming in Southern countries. Funds were directed at building the institutional capacity of Southern groups and their staff and the promotion of development education in high schools and community centres in Northern countries. Discussions centred on how locally based

groups with country and community expertise could have the responsibility for on-the-ground development planning. The partnership vision emerging from these discussions was based on a perspective that recognized development problems as global and interdependent. Northern development groups began to broaden their work from a focus on North-South relations to one that shared the agenda of anti-poverty groups, trade unions, and women's organizations.

A number of innovative funding mechanisms were designed in Canada in the 1980s to address the problems of Southern control. Partnership Africa Canada (PAC) was created in 1986 as a coalition funding mechanism linking Canadian NGOs with organizations in sub-Saharan Africa. Five years later the group received a second five-year, $5 million grant to support the development of African institutional capacity and linkages with Canadian groups (although the group's core funding was almost entirely cut in 1996). The Philippine Canada Human Resources Development (PCHRD) Program was designed in 1989 to strengthen the skills of local organizations in advocacy, networking, development education, and coalition building. The five-year, $15 million program was administered by a joint Philippine-Canada committee, with the Filipino groups holding majority decisionmaking. South Asia Partnership (SAP) began in 1981, linking small village level organizations in India, Bangladesh, and Sri Lanka with agencies in Canada. It developed into an organized network of Asian SAP institutions that, together with selected Canadian organizations, make decisions about projects and programming.

Even with these funding mechanisms, the attainment of quality partnership relationships is difficult. A great deal of organizational change has to occur to shift the management focus from a relationship controlled by the North to a more mutually one. For instance, South Asia Partnership estimated in 1991 that fewer than 15 percent of its projects had moved beyond a relationship based almost exclusively on the disbursement of funds to one based on solidarity and characterized by a strong dialogue and mutual accountability, with benefits accruing for both organizations (SAP, 1991).

Despite these obstacles, the debate on partnership has nonetheless generated an interesting new idea in the 1990s. Thorvald Stolenberg, Norway's Foreign Minister, in 1989 proposed the concept of

development pacts. These innovative contracts are designed to bring a Southern and Northern country together, over a period of years, represented by both government and the "independent sector," to discuss development policy. Rather than focusing solely on Southern development policy, the responsibilities and implications for both countries are discussed. For instance, the examination of tropical forest management would also include an analysis of Northern energy consumption. The government of the Netherlands recently established three pilots with Benin, Bhutan, and Costa Rica. The cycle of policy discussions is planned for 10 years; the kind of timeline that proponents for true partnership have been advocating all along.[7]

Partnership Problematics

Although many institutions are using the language of partnership to describe their relationships with Southern groups and people, and much has been written on the subject, little reference has been made to the issues of power and the power imbalance in partnerships. Ironically, the essence of partnership—sharing control and ensuring Southern ownership—lies in sharing power equitably. The failure to acknowledge and sufficiently address this fundamental aspect at the heart of the concept has serious implications for the practice and attainment of reciprocal partnership.

The Language of Partnership

> Modern jargon uses stereotype words like children use Lego toy pieces. Like Lego pieces, the words fit arbitrarily together and support the most fanciful constructions. They have no content, but do serve a function. As these words are separate from any context, they are ideal for manipulative purposes. (Majid Rahnema, 1992:116)

One of the most serious problems is the language of partnership itself. Partnership implies a sharing of decisionmaking and control, a working together for the same goals and objectives, mutual respect and trust, and equality. It suggests a sharing of comparable and equal benefits and risks between two distinct parties. But there is a real contradiction in using words that imply a balanced relationship to describe one that is often inherently unequal. The words that we

choose are crucial because they define our limits and parameters (Kajese, 1987; Jonhston, 1995; Murphy, 1993). By veiling the imbalance of power with the language of equality, the existence of inequality is ignored and even denied.[8] A major consequence has been the failure to thoroughly analyze the ownership and control issues in the aid relationship.

These inequalities are masked not only by the language, but also by the ambiguity associated with the overuse of the term by such a diversity of actors. The public sector, the for-profit private sector, and the local, national, and international non-profit sector (from both donor and recipient countries) are involved in international development. Although there is a variety of actors with differing philosophies of development, partnership is the overarching term used to describe the multitude of relations practiced in international development. The tendency to lump various kinds of partnerships together has both diluted and confused the objectives, meaning, and outcome of partnership. The uncritical use of a politically loaded term is a dangerous trend and the resulting rhetoric partly explains why reciprocal partnerships have been so unattainable.

The language of partnership has received resounding criticism from the South for perpetuating the current unequal relationship. Critics contend that the partnership concept primarily grew out of a Northern response to Southern demands for more autonomy and hence has evolved as a reformist agenda rather than a transformative, change-oriented one. Although Northern and Southern institutions often design a partnership together, it is clear that when one is reformer (the funder) and the other a transformer (the recipient), the two seldom perceive or approach the relationship in the same way.

The Imbalance of Power

> Already the UN has launched the Second Economic Decade with the same zeal and fanfare as they did with the first. The same appeal has gone out to the developed countries to be charitable and contribute "one percent of their national income" for helping the developing countries, as if the population of the world can continue to condone poverty so that the rich can be charitable! (Babu,1971)

To a great extent, international development assistance operates within a charity framework: Northern countries and people give and

Southern countries and people receive. No matter what the intention, aid delivery creates beneficiaries and clients and not a relationship between equals (Brodhead, 1994). The origins of this activity of transferring resources from the North to the South are found in the colonial period and grew considerably at the end of World War II with the launching of the Marshall Plan. Although the language of charity is not as common today as it was 40 years ago, it is important to recognize that its roots are still influential.

It is not that all charitable giving is inappropriate. What is important to recognize is that the charity model of assistance sets up a dynamic between givers and receivers in which the one doing the giving is in a position of control. The contribution of capital is seen to be more important to the relationship than the expertise and human resources associated with the recipient party (Muchunguxi and Milne, 1995:22). The resulting reality is that donors can do to recipients what recipients cannot do to donors (Elliot, 1987:65). Donors are able to define the parameters of the relationship, the partners they want to work with, the conditionalities, the accountability mechanisms, and the funding structure. In doing so, donors are often criticized for their propensity to support a donor-driven agenda manifested through rigid funding methods, strict reporting mechanisms, and one-way information flows. Over time these systems, rather than the professionals among them, "develop a mind of their own" and the actions of both donors and recipients maintain this manner of operating:

> Some big NGOs are like the World Bank. They cannot move from their own procedures and they oblige you to follow those procedures without having any input regarding them. (Mazide N'Diaye, RADI, Senegal in Chatterjee, 1986)

Consider the three-tier funding structure in which a donor agency supplies funds to a NGO that then transfers the resources to a chosen group in a Southern country. Accountability systems back to the government and the taxpayer demand that both Northern and Southern NGOs complete financial and descriptive reports on a regular basis during the project cycle. Seldom do evaluation and accountability procedures reverse themselves to ensure impact accountability to recipients. And seldom do recipients risk potential future funds by lobbying for changes to the mechanisms underlying

their funding relationship. As a result of this dependence, recipients become silent accomplices in perpetuating inequitable relations. This is true for both Southern recipients as well as the Northern NGOs responsible for channelling the resources. These constraining relationships with government agencies help explain why many Northern organizations develop into mini-aid bureaucracies while losing their edge as activists lobbying for development change.

It can be argued that donors are dependent on recipients for the existence of the donor-recipient relationship: "without the South, a number of Northern NGOs—especially those who do not have any projects in the North—would just die a natural death" (Muchunguxi and Milne, 1995:24). However, this dependence is often less than that of the recipient on the donor, reinforcing this imbalance of dependence in favour of the donor. Michanek suggests that this control is maintained by donors' use of both stick and carrot techniques; they can refuse to help those who cannot fulfil their standards of behaviour, and they can reward diligent work and good habits such as completing work on time and fulfilling reporting procedures. This manner of operating reflects "the bygone era of social-welfare work" when "friendly ladies working for voluntary charitable organizations demanded of their unfortunate charges a far higher standard of temperance, patience, and conscientiousness than they demanded of ordinary people" (Michanek, 1971:31).

Although charity is associated with images of kindness and generosity, it is burdened with subtle yet insidious power inequalities. The fundamental premise of charity, that of helping others, creates a hierarchical relationship in which the donor chooses to help solve the problems of the recipient. Not only do recipients not always realize the existence of these hidden inequities, but donors are often oblivious to them as well. Donors are able to hide behind the belief that they are doing good—they are able to excuse sloppy work and to explain away the lack of self-criticism (Brodhead, 1994). This elegant power—a phrase coined by Marianne Gronemeyer—is characterized as being unrecognizable, concealed, and inconspicuous (Sachs, 1992:53).

As a result, the nature of a Northern institution's involvement, no matter how well intentioned, differs from that of people and organizations in developing countries. While Northern donors have the option to choose whether they want to become involved in a

project, the majority of those doing the receiving do not have the luxury of opting in or out. Unlike those organizations from the North that can leave at any time, for many people living in the South, it is their lives and livelihoods that are at stake. This history and context create Northern donors that tend to be more reformist and bureaucratic in contrast to more change-oriented Southern groups (Johnson, 1994). It would certainly be wrong to assume that all Southern groups base their work on opposing the status quo or that all of them are more political than their Northern counterparts. For example, the relationships between the Canadian and Filipino member networks under PCHRD came to a close in part because of the tension created by differing political positions.[9] While the Canadian groups understood that part of their role was to participate actively in lobbying for change to Canadian foreign policy and CIDA's operations, the Filipino groups were concerned that such activity could put their CIDA funding at risk. The "Steering Committee," of which nine of the 13 members were representatives of Filipino groups (as established in the original partnership design), voted to wrap up the partnership in 1996.

Robert Chambers uses the term "outsiders" to describe those who are concerned about the poor in the South but who themselves are neither poor nor from the South.[10] Northern assessments of Southern problems, however, are often the basis for development assistance, reinforcing an interaction based on an unequal relationship between "colonizer and colonized, the oppressor and the oppressed, the self and the other" (McKenna, 1991:114). Such a relationship is historically grounded in a world view composed of two parts: the perceived dynamic and progressive peoples of the North and the undeveloped, helpless, poverty stricken people of the South (Chamber, 1983:73). Rather than correctly informing development practice, in many cases, this knowledge and practice has imposed Northern assumptions on to the lives of women and men in the South and has served to perpetuate the unequal balance of power between Northern and Southern organizations and people (Chambers, 1983:3).

A Menu of Mechanisms

The Broadening Base of Work

When donors become involved out of a concern for others coupled with a sense of shared responsibility, their involvement goes beyond charity. This combination of concern and co-responsibility is at the heart of the shift from a focus on Southern development to one of global development. With it comes a desire to change how one is working in the South *and* how one can work in the North. The activity of donors working to bring about change in their own context creates a trust and a legitimacy between donors and recipients—essential elements of more equitable relationships.

It is becoming more frequent for donor institutions to focus some of their efforts on their home country's domestic development. The work around the World Summit for Social Development provide some excellent examples: by starting at home, it is sometimes easier to understand issues in other countries. The expertise and knowledge gained from work in one's own country provides the crucial context from which work in other countries is analyzed and planned. It is difficult, and perhaps even inappropriate, for Northerners to enter a foreign country and make recommendations about eliminating poverty when these same "experts" have no experience in poverty reduction in their own countries:

> How can you feel pity for me in Africa and let me believe
> you when you are not doing something about your own
> people here who are in a third world. (Connie Nkomo,
> ORAP, Zimbabwe, in Inter Pares, 1991)

It is not only the substantive issues surrounding poverty that Northern professionals can learn from their own countries. The funding process and the inequities associated with it create similar problems for Canadian government agencies and community groups working on domestic development problems. The funding relationships that exist between the North and the South are merely extensions of social transfers that are common place within Northern economies.

Clearly, we can all learn about development in our own countries. Shifting the focus of work from the South to the North provides a more appropriate context for overseas work *and* shows respect for the knowledge that Southerners have about development in their own

countries. Outsiders who choose to intervene in the South without experience at home risk participating in a Northern-led agenda that fails to tap into the most important issues and most suitable processes.

Meaningful Southern Engagement

> Effective international assistance helps people do what they are already trying to do with their own means. It recognizes that what people bring to the struggle—their talents and their courage and their will to live— is far more important than the modest assistance that we offer.
> (Inter Pares, *Annual Report*, 1993)

There are important reasons for donors to shift their efforts away from controlling the Southern development agenda. Development projects appear to be more sustainable and effective if they are designed by local organizations to meet priorities determined by local people. Although the most marginalized segments of the population have the greatest stake in development policy and practice, they are the ones most often excluded from the decisionmaking process. As cited in a 1995 UNICEF report: "The poor remain poor principally because they are underrepresented in political and economic decisions, because their voice is not sufficiently loud in the selection of society's priorities, and because their needs do not weigh sufficiently heavily in the allocation of public resources" (UNICEF, 1995:47).

Moreover, it is much more difficult to involve people if they do not consider the project a priority. The failure to make programming relevant is possibly the greatest obstacle to ensuring people's participation and involvement in a project. The perceived lack of commitment by the local population in the long term might say more about the structure of the donor-recipient relationship than the commitment of the recipients themselves (Ukpong, 1995:7).

Focusing on Northern issues
The reciprocal focus on development issues in North and South has been undertaken by a number of interesting organizations. Scottish Education Action for Development (SEAD) is aware of the need to both broaden its base of work and engage Southerners in a meaningful way. SEAD therefore encourages people in Scotland to tackle poverty and unsustainable development at home and to lobby

for sound international development policies by the UK government. SEAD's uniqueness lies in an analysis of development issues which begins with the Scottish experience: SEAD researches, runs events, and publishes materials to show people in Scotland how they can help set their own development agenda.

SEAD's approach has been welcomed by many of its Southern contacts "who have long since grown tired of Northern 'experts' giving advice on everything from sustainable forestry to women's education when they have no comparable analysis on the same issues in their own societies." From their experience with SEAD, community-based groups in Scotland have learned about "challenging the so-called 'experts' who consistently overlook or dismiss the knowledge and experience of the ordinary people who live with the problems of 'underdevelopment' 24 hours a day" (Gray, 1993).

As noted earlier, a Canadian example is the work of the Steelworkers Humanity Fund to make the union's relationship with the South more tangible to its members. By exploring the differences between solidarity and charity with union locals, the education program analyzes members' ideas about poverty and developing countries and uncovers their genuinely and deeply felt notions about charity. Moving beyond charity is a recurring theme in the Fund's work. One of its newest programs, the Labour Development Program, was established in 1994 to provide more support to unions and solidarity work. The Fund finances, among others, the National Union of Mineworkers in South Africa and the Nampula General Union of Agricultural Cooperatives in Mozambique. The intent, in the long run, is to facilitate and institutionalize the development of practical solidarity linkages with unions from different countries, all faced with the implications of global economic restructuring.

Since it was founded in 1976, Inter Pares has provided another example of establishing ties of solidarity with Southern groups. This Canadian non-profit organization builds relationships with Southern groups to support their self-help, community-based programs and their efforts to challenge structural obstacles to change, their struggle for self-determination, and their alternative development approaches. Additionally, Inter Pares attempts to learn from these efforts, make them known to Canadians, and advocates nationally and internationally for global justice and equitable development.

New Institutional Linkages
Some internationally oriented organizations are also choosing to focus on domestic development issues by linking themselves with domestic groups. In this way, both groups use their comparative advantage to inform each other about the issues from their specific perspectives. For instance, OXFAM Canada and the National Anti-Poverty Organization (NAPO) co-chaired the Canadian NGO Coordinating Committee for the World Summit for Social Development. This was the first time that these two organizations—one domestic in orientation and the other focused on international concerns—coordinated a project together.

Inter Pares has also done a lot of thinking on linkages with domestic groups. From the start, the organization mandated itself to be actively involved in Canadian development issues, and successful attempts have been made to establish relationships with churches, trade unions, and women's groups. However, with little funding to support this work and skepticism on the part of other organizations about the importance of linking international and local issues, consistent relations have been difficult to establish.

Staffing
The argument for increased Southern control weighs heavily on the composition of staff working in donor offices. There is a stark comparison between the typically middle class, well educated professional working in a Northern donor organization and the local populations with whom they are trying to work, although their counterparts in recipient organizations are often equally well educated professionals. Although working on a common agenda to eradicate poverty, it is the Southerners who have experienced the realities of poverty.

The lack of lived experience is as much a problem for Northerners working on Southern poverty issues as it is for Northerners working on domestic issues. NAPO, for example, was keenly attuned to the need to involve anti-poverty activists in Canada in the preparations for the World Summit on Social Development and so financially supported their attendance. Even the official Canadian government delegation was aware of the importance of including those living in poverty in the debates on social development and, for the first time in such a forum, included a single mother receiving social assistance.

The impact these Canadian representatives had on the meeting is difficult to measure, but the intent of these decisions is clear. Policy discussions on poverty must be informed by first hand experience—those who understand why people live in poverty and why people have trouble escaping it must have a seat at the table.

Board Representation

Some Northern donors make attempts to include their Southern counterparts in their organization's direction-setting processes; the Inter-Church Fund for International Development (ICFID) is one such example. ICFID is an ecumenical funding coalition composed of six Toronto churches working with organizations promoting sustainable agriculture and community-based health care in the Americas, Africa, and Asia. Since 1974 it has served to extend the development programs of the Catholic, Anglican, United, Lutheran, Mennonite, and Presbyterian Churches. The Inter Church Fund has actively pursued open dialogue with its Southern counterparts, and its board of directors includes representatives from the six major churches in addition to three Southern members.

While the inclusion of a few Southern representatives does not necessarily mean equitable relationships or wholly shared decisionmaking, it has meant the introduction of entirely different perspectives and valuable insights to programming. The Southern analysis on the ICFID board led, for instance, to the controversial 1991 report on CIDA assistance, titled *Diminishing Our Future*, that criticized supporters of structural adjustment.

Participatory Methodology

To determine local priorities, many donors have adopted participatory techniques. Sound participatory method improves the quality of the inquiry since the emerging knowledge is based on the priorities of the recipients rather than on needs as perceived by outside researchers. This bottom-up approach assures a more demand-driven orientation to development assistance, even though participatory methods may be tricky politically. For instance, how can researchers be sure that they are talking to those who are most in need? How can donors identify which Southern organizations are best engaging local people?

Many Northern institutions claim that they have used participatory techniques successfully, however, and are climbing on the participatory bandwagon. The International Development Research Centre (IDRC) has used participatory research techniques fairly extensively with Southern populations to identify problems and research methodologies, evaluate results of development programming, and design follow-up programming. The Women in Development and Gender Equity Division at CIDA has embarked on the development of a more participatory structure and operational procedures to ensure more participatory approaches to projects and programs.

Programming Consultations
The MATCH International Centre, a Canadian development organization working exclusively with and for women in both the South and Canada, has experimented with some program-determining decisionmaking processes. The organization raises money to support women's projects in the South and develops programs with Canadian and Southern women to strengthen the links among women working on similar issues. Their mandate is grounded in the philosophy that women everywhere are confronted with barriers that block them from contributing economically, socially, and politically to their own and their community's development. Problems of violence, poverty, and landlessness cannot be eradicated unless women themselves are actively involved in the creation of solutions.

In 1988, MATCH coordinated a consultative process to determine the most appropriate funding criteria for their future programs. Instead of debating this issue solely internally and with their donors in Canada, the organization arranged a meeting with representatives of the Southern women's groups they supported. The overwhelming response from the Southern guests was to channel funds to combat violence against women, a decision that came at a time when funding work on violence against women, particularly in Southern countries, was almost unknown. Without this input, it is unlikely that violence would have been adopted as a major programming area.

Reciprocal Accountability
Although development projects are geared to assist Southern beneficiaries, accountability has almost always been to Northern donors. And, as some have noted:

> Most donors still operate on the basis of a "transaction" accountability—that is, an elaborate system of controlling the inputs and outputs of the aid planning and delivery system to ensure efficiency and effectiveness. One result of this is an inexorable pressure on donors to lower risk and uncertainty by managing (i.e., controlling) as many project activities as possible. (Morgan and Baser, 1992:18)

Treasury board controllers within multilateral and bilateral aid agencies insist that accountability systems flow in the direction of the donor. Those that spend the funds are accountable to Northern governments and Northern taxpayers. But how can Northern donors delegate and pass on control to the South when treasury boards have such standards? Seldom are systems put into place that flip the accountability right side up to ensure that interventions by Northern donors are accountable to Southern beneficiaries.

We need accountability systems that ensure programs and projects and all those working on them are accountable to the beneficiaries. More work is necessary to ensure that beneficiaries are driving the process rather than acting as mere participants or onlookers. Canadian NGOs, *Horizons of Friendship* and *Development and Peace*, have met with recipients to monitor the success of their work, and ICFID and CUSO both have Southern representatives on their boards. Ideally, the reporting system at the completion of a project should be reciprocal—just as recipients have to report to donors on how the project funds have been spent, donors should answer to recipients about their involvement. Forums should be available for recipients to give critical feedback to donors about their thematic areas of focus, operational mechanisms, and management of the relationship.

Concluding Words: A Future Research Agenda

This paper poses a number of challenges for donor agencies and organizations to address in their relations with Southern people and

institutions. Although first steps have been taken to reorient and rethink the concept of partnership, a great deal of work remains to be done.

There is no blueprint offered, nor should there be. What is needed at this point is a collection of experiences, of models of partnership that sufficiently address the issues raised here—how to ensure ownership and engage Southerners in a meaningful way. In the search to define solidarity, the paper spends some time discussing how people in the North and the South can work together to bring about political, economic, and social change. How are such people's movements most effectively organized? What ingredients are needed for political coalition building? In the words of Honor Ford Smith:

> Agencies funding projects in the third world have an enormous amount of power. One only has to glimpse the files of any agency involved in so-called "development" to recognize the enormous amounts of information they have accumulated about progressive organizations and the amount of power the dispensing of funds gives them over people's lives all over the world. They are able to shape the lives of the organizations they support, not simply because they fund them, but also because of the processes and disciplines they require the organizations to become involved in. The term "partner" currently being used by donor agencies to describe their relationship with recipient organizations only obscures what remains a very real power relation. This egalitarian label does not change the reality. (Smith, 1989)

What is needed, therefore, are changes in that reality.

Notes

1   For the purposes of this paper, the North refers to member countries of the Organisation of Economic Co-operation and Development (OECD), excluding Mexico, and the South to those countries receiving international development assistance funding.

2   This paper primarily examines the activities of Northern-based donor agencies and organizations that transfer resources to the South. "Donor agency" refers to government funding bodies, including bilateral donors like CIDA and multilateral donors like the World Bank. "Donor organization" is used to refer to non-governmental groups such as international development non-governmental organizations (NGOs), groups with a domestic issues focus, and volunteer-driven organizations that transfer funds and technical assistance to Southern countries.

3   It is noteworthy that NGOs refer to their government ties in a similar manner much less frequently.

4   Numerous authors have documented these comparative advantages including Judith Tendler, 1982; Robin Poulton, 1988; and Tim Brodhead, 1988.

5   David Korten, 1987; 1990; Laura Macdonald, 1992; 1994; and Kevin Murchie, 1991, distinguish various NGOs on the basis of their operational approach and their political orientation. Sandra MacLean, 1995, categorizes three basic forms of association—issue-oriented, bridging institutions, and facilitative networks. Vangile Titi, 1993, describes a partnership spectrum ranging from a working relationship of a few parties to a more complex consortia of many members.

6   Numerous development organizations have held seminars and have been involved in such discussions—Partnership Africa Canada, 1989 and 1995; the Canadian Council for International Co-operation, 1992; the Inter Pares, 1991; the MATCH International Centre, 1992; The Inter-Church Fund for International Development, 1990; ESPIRAL, 1992.

7   I am grateful for Tim Dramin's discussion of development pacts in CCIC, 1995.

8   Other authors who have touched on these issues include Alan Fowler, 1992; Carmen Malena, 1995; Kevin Murchie, 1991; and Piers Campbell, 1989.

9   The Philippines-Canada Human Resource Development Program was a CIDA funding mechanism.

10 According to Robert Chambers, outsiders include government staff working in Southern countries, researchers, aid agency and technical cooperation staff, bankers, business people, consultants, doctors, engineers, journalists, lawyers, politicians, priests, school teachers, staff of training institutes and voluntary agencies, and other professionals.

"Something Nothing" Words: Lessons in Partnership from Southern Experience

Kamal Malhotra
Focus on the Global South

"Partner" is a "something nothing" word in Papua New Guinea's pidgin language. (Saxby, 1996)

Introduction

The past 15 years have brought one of the most rapid paces of change in the external global environment in recent human history. Any serious analysis of "partnership," Southern or Northern, and indeed even of what "Southern" means (especially if one is looking at the future rather than only at the past or present) will need both an understanding of this changed and changing global environment and the resulting context for non-governmental organizations (NGOs) and their relationships, both among themselves and between them and other national and international organizations (e.g., national governments, bilateral, and multilateral organizations).

The Changing Global Context

The New World Order, or what some have called the New World Disorder, is shaping our global context. The end of the Cold War; the supposed victory of the neo-liberal economic and political agenda; accelerating economic globalization, privatization and the increasing breakdown of the nation state as the fundamental unit of sovereignty in an increasing number of critical areas (e.g. business, investment and capital flows, the environment, human rights, and possibly even social development); transnational capital flows of unprecedented magnitude unevenly spread across the globe which are increasingly

dwarfing the role of aid; and escalating international and especially intra-national conflict in the absence of new, appropriate global, regional, or national mediation institutions or mechanisms in a post Cold-War world are just some of the more visible aspects of this new scenario.

Dramatically increasing wealth for some and escalating poverty and inequality for already poor and marginalized groups of people, particularly poor women, poor children, and indigenous peoples are other important aspects of this world order which are less often acknowledged in mainstream debate.

Indeed, the current economic globalization process and its concomitant effect on wealth, poverty, and inequality creation is making the traditional definition of South and North both less clear-cut and less relevant. There is a rapidly growing North in the traditional South, especially in parts of East and Southeast Asia and Latin America, while at the same time there is a rapidly growing South in the traditional North. The very definition of what a Southern perspective means has changed and it is now much easier to find this in the traditional North while, similarly, a Northern perspective is now quite widespread in some parts of the traditional South!

South and North are increasingly being redefined as concepts to distinguish between those who are economically able to participate in and benefit from regionalized and globalized markets (regardless of where they live), and those who are excluded or marginalized from them.

The Emerging Context for NGOs

The context for NGOs in the second half of the 1990s and well into the 21st century will continue to change rapidly for a multiplicity of interacting reasons. Changing relationships between Southern and Northern NGOs due to shifts in the external environment changes is one reason; another is the emerging challenges in the relationships between NGOs (both Southern and Northern) that prioritize humanitarian and poverty reduction concerns, and the broader social movement for change dealing with larger social justice issues, such as human rights, gender, and environment, of which humanitarian and development NGOs are only a small but highly visible part.

These changes raise many important issues both for the roles of NGOs in the New World Disorder and the relationship between NGOs from the traditional North and South. These include:

- Are NGOs, as Fowler says, "ordained to be ladles in the global soup kitchen" (Fowler, 1994), institutions that will provide the global social safety net necessary to further the New Policy Agenda in the post-Cold War international system?

- What are the implications of increased direct funding of Southern NGOs (SNGOs) by Northern bilateral and multilateral agencies for the already imperfect partnership that exists between Northern and Southern NGOs?

- What are the implications for the roles of Northern NGOs (NNGOs) of increasing inequality and a growing South in the traditional North; how will/should this affect their partnerships with NGOs in the South?

- Likewise, how are we to understand the implications of increasing wealth and a growing North (even if it is still small) in the traditional South for the roles of Southern NGOs and their partnerships with Northern NGOs?

- What are the implications for relationships between Northern and Southern NGOs and for the possibility of policy influence in the changed global environment, particularly one which is witnessing the incremental and instrumental (even if not fundamental) opening up of the multilateral development banks (e.g., the World Bank) and some parts of the United Nations system to NGO concerns and participation?

This paper provides a Southern perspective (in both its definitions) on the changing relationship between Northern and Southern NGOs and their "partnership," focusing on the history and current state of this relationship and the effects of global change. While much has already been written on aspects of this relationship, most is written by Northerners and reflects the perspectives of thinkers and writers from the traditional North.[1]

Surprisingly little serious analysis has been done on this issue from a Southern perspective, by people from the South knowledgeable about both Southern and Northern NGOs and their evolving relationship in the changing overall external context for

international aid.[2] This paper, therefore, is a modest attempt at rectifying this imbalance.

Partnership: What and Where is it?

"Partnership" has become one of the sacred terms of the development lexicon over the last 10-15 years and like many other such terms is increasingly and equally espoused by NGOs and bilateral and multilateral development agencies. While the term may have a sound ideological basis, the motivations for its use and the meanings ascribed to it by different agencies have been varied and not necessarily well-intentioned or genuine.

The term is also another example of an unwelcome import to the South. The history of its usage is closely tied to the need of Northern NGOs to establish a legitimacy for their existence in their countries of origin and to demonstrate their "added value" in the development process to their publics and governments. The partnership issue, of course, is not just relevant to relationships between Northern and Southern NGOs: partnerships between governments and domestic charities and NGOs in Europe, North America, and Australia are characterized by the same issues and dilemmas as are the so-called partnerships between bilateral and multilateral agencies and NGOs from both the traditional North and South. Indeed, the use of the term "partner" by bilateral and multilateral agencies for Northern or Southern NGOs reflects a rhetorical acceptance of the values implicit in the term and the need to move in that direction if they are to be viewed as legitimate.[3]

> Partnership consists of a mutually beneficial relationship between two or more organizations that is based on mutual trust and respect and attempts to move beyond the traditional donor-recipient paradigm.
> (South Asia Partnership, 1991)

While partnership issues are, therefore, relevant to a range of different types of institutions and their interrelationships, this paper focuses primarily on the relationships between NGOs from the traditional North and South. "Partner" is defined by the *Macquarie*

Dictionary as "a sharer or partaker; an associate," whereas the term "associate" is defined as "to join as a companion or ally." Applied to the development context, AusAid's *Development Dictionary* defines project partners as "Third World local community organizations working in partnership with NGOs on development projects. The implications of the term partnership is that the givers of aid and the Third World receivers are on a more equal footing."

Partnership has become a part of the rhetoric that development practitioners and researchers alike espouse. It has become jargon akin to conventional wisdom that provides many Northern agencies with a warm, fuzzy feeling of fellowship that is often projected onto their partners in the South. Yet the term has little relevance to the relationship between most NNGOs and SNGOs (or, for that matter, between Northern bilateral agencies and the NNGOs or SNGOs they directly fund). Indeed, most Latin American and Caribbean NGOs use the word "counterpart" rather than "partner" to more accurately define their intended relationship with NNGOs. Further, there is often resentment by SNGOs over the use of the term partner, in part because it is not a true reflection of the relationship

> ...until the resources traditionally supplied to recipients, such as field experience, organizational capacity, labour, materials and legitimacy are valued equally to those supplied by donors (i.e., money) "true partnership" can never be achieved. (Muchunguxi and Milne, 1995)

that currently exists between NNGOs and SNGOs (this partly explains why Southern NGO practitioners have accorded this topic such a low priority so far). Resentment also arises because the term means different things in different languages and cultural contexts and may be insulting. For example, the English word "partner" is used in Thailand by Thai people to describe the relationship between a prostitute and her client.

My own preference is not to use the term at all but, instead, to describe the "ideal" intended relationship between NNGOs and SNGOs (or between other sets of development actors), as establishing effective and mutually beneficial "development alliances." The Latin American and Caribbean concept and usage of the term "counterpart"comes closest to the development alliance formulation

even though we are still far from achieving this ideal. Why is this the case after four development decades in the traditional South?

Brief History and Current Status

While overarching generalizations about the extent of partnership achieved by Northern and Southern NGOs are impossible to make given the wide diversity of NGO philosophical and experiential histories, at least a few generalizations about partnership are possible. The ideal development alliance between NNGOs and SNGOs should comprise at least the following prerequisites:

- **Vision.** A common organizational vision, set of objectives and methodological compatibility

- **Time.** Adequate time to build a relationship which then extends over a long period of time

- **Reciprocity.** Mutual transparency and accountability

- **Criticism.** Willingness and ability on the part of both sides in the relationship to be constructively critical of each other, within an overall framework of support and solidarity

- **Organizational Ties.** Organization-to-organization relationships and exposure rather than relationships dependent merely on rapport between individuals

- **Funding.** Funding as only one (preferably small) part of the overall organizational relationship.

Judged against these prerequisites, it is not difficult to see why most NNGO attempts at partnerships have not been successful.

First, it is generally true that historical and current attempts to put the rhetoric and concepts of partnership into practice have been within a donor-recipient funding relationship. Yet relationships between NGOs, even without the funding dimension, are fraught with problems, dilemmas, and inequities (e.g., access to information). Building genuine partnerships requires bridging gaps and often takes years. Partnerships must be based on a foundation of growing mutual trust and respect, recognition of the equality of different types of contributions to the relationship—knowledge, experience, and

money, for example—ethical behaviour, and transparent, accountable processes and communication. When funding is introduced as a major variable, achieving genuine partnership becomes more complex and is often unattainable.

While money is not always a determining factor, control over such a key resource provides a large part of the control in any development situation. While some NNGO funding agencies have clearly become more aware of the inequity in relationships based on funding and more sensitive to its implications, the fickleness of Northern funding as a consequence of "structural adjustment" in both Official Development Assistance (ODA) agencies and NNGOs is increasingly making SNGOs less trusting of even their most sensitive Northern partners.

Second, project funding rather than program, institutional, or block funding remains the predominant form of the NNGO funding relationship with SNGOs. This type of funding, usually time bound and activity-centered, often precludes discussions about broader issues of vision and alliance-building around policy issues—elements which are prerequisites to genuine long-term partnership. When block funding has been the norm (as practiced by some Northern church and secular agencies), some of these problems have been mitigated. However, such relationships have sometimes resulted in an unquestioning acceptance of Southern NGO decisions, leading to a situation of inverse (and oftentimes perverse) power relations. These kinds of power dynamics are not conducive to a healthy partnership by their very nature.

> The issue for the South is not whether to cut its links with the North, but how to transform them. The relationship must be changed from exploitation to shared benefit, from subordination to partnership. (The South Commission, 1987:11)

Third, since Northern NGO funding decisions have often been fickle or are increasingly heavily dependent on the whims of their official bilateral development assistance agencies, genuine partnerships have been difficult to foster and nurture. Short timelines and the narrow financial accountability of bilateral donors—and often, by extension, of NNGOs as well—have also worked against the investment of time to establish relationships of trust, mutual respect, and transparency based on both funding and "non-funding" dimensions.

One thoughtful Northern writer has, in fact, likened the extremely tight outcome-based contracts between Northern NGOs and their government funders to a partnership between a wardens and their prisoners.[4]   If this is as true as my experience suggests it may be, then the implications for partnerships between NNGOs—increasingly dependent on their governments for funding—and their SNGO partners cannot but be negative.

Fourth, transparency and accountability requirements have largely been one-way rather than reciprocal—from SNGOs to NNGOs. This remains a major arena for change, but prospects remain bleak as long as institutional imperatives by Northern donors, boards, and charity commissions such as in the UK continue to take precedence over development and empowerment imperatives. These empowerment imperatives require an emphasis on accountability to the so-called beneficiaries of development assistance and the broader publics of developing countries receiving assistance from NNGOs.

> Both sides have learned that cooperation for development means more than a simple transfer of funds. It means a set of new relationships which must be founded on mutual understanding and self-respect. Good development relations also require the acceptance of a continuing review of performance on both sides, not dominated by either the donor's or the recipient's immediate political or economic interests or pressures. (Lester B. Pearson, 1968:6)

Fifth, most NNGO and SNGO relationships remain between individuals in different agencies rather than between organizations in the North and South. As a result, SNGOs have very little exposure to NNGOs in their home environment unlike NNGO individuals who make repeated and frequent visits to SNGOs in their home contexts. This largely one-way exposure is not conducive to establishing development alliances or partnership-building.

The numerous reasons that have precluded the achievement of partnership are in danger of being compounded by the range of complex institutional survival issues currently facing most NNGOs. These include but are not restricted to the following:

- **De-operationalization from the South.** The cessation of Northern presence on-the-ground has been welcomed, at least rhetorically, by many NNGOs as evidence that they have "done themselves out of a job" by nurturing SNGO capacity. Yet many of the operational NNGOs view this change as a threat to their size, viability, profile, and institutional survival—a survival that has depended on a long-standing direct operational role in the South.

- **Direct funding of SNGOs by bilateral and multilateral agencies.** Viewed as threatening even by many of the more progressive NNGOs, this growing phenomenon challenges a key rationale for their institutional existence and the conventional wisdom that they have a "value added" contribution to the development process, different or separate from the role of SNGOs (Riddell and Robinson, 1995). Direct funding will become an increasingly important issue as official Northern donors show less interest in funding Northern NGOs because of the growing experience, expertise, and operational capacity of SNGOs. NNGOs will need to urgently respond to this opportunity by appropriately redefining their roles and "value added" if they wish to ensure their institutional relevance and survival into the 21st century.

- **Decline in independent income and increasing dependency on official Northern donors.** The decline in funding by individuals to NNGOs has many interrelated reasons: market competition among different NNGOs, structural adjustment in the North, and competition for the donor dollar with domestic charities as a result of the gradual privatization of the welfare state in countries such as the UK, Canada, Australia, and even Scandinavia, for example. The fundamental crisis in NNGO identity and roles is the underlying disease, however, which has exacerbated the incidence of these symptoms and forced either their permanent downsizing or increased dependency on official bilateral and multilateral sources for an ever expanding part of their program and institutional budgets.

In my view, such dependency on official funding sources will inevitably, even if only gradually, compromise the independent identity that many NNGOs have zealously guarded. Moreover, funding will become increasingly unreliable as official aid budgets

are repeatedly cut (as has happened in the UK, US, and Canada), and as official direct funding of SNGOs grows. As evidence continues to mount that SNGOs can achieve the same or higher levels of quality in their operational work at lower cost (at least in some parts of the world like India and Bangladesh), the diversion of funds to SNGOs will likely only increase.

- **Policy advocacy and influencing in the North.** Progressive NNGOs have traditionally sought to derive one crucial part of their current legitimacy from their burgeoning role as speakers on behalf of their Southern partners and/or "poor and marginalized peoples." However, as Southern-supported NGOs (SSNGOs), especially those closely linked to popular social movements, have grown in number and in their analytical, policy research and influencing capacity, the legitimacy of NNGOs directly doing policy analysis, research and advocacy on behalf of SNGOs, is increasingly being questioned. While such questioning is still in its infancy, it is likely to escalate rapidly, given the growing maturity of many SNGOs. As more NNGOs withdraw from their traditional operational roles in the South, they will also become more vulnerable to such criticisms.

Current Challenges for NNGO-SNGO Partnerships

While institutional survival issues facing NNGOs can potentially complicate the already difficult historical and current legacy of their partnership practice, they also potentially provide a historic opportunity to steer the NNGO-SNGO relationship in a favourable, more genuine development alliance direction. However, this change of direction is likely to require radical surgery on the part of NNGOs that will need to consciously shift the balance between institutional survival imperatives and the imperatives of SNGO empowerment which have been given a backseat.

Sadly, however, there seems little in the NNGO make-up, funding structure, or reward and incentive systems to ensure this change occurs. More genuine partnerships with SNGOs will likely not occur without sustained, relentless pressure from the South. Ironically, this obstacle remains despite the likelihood that self-directed transformations would ensure greater long-term institutional

credibility and relevance (and, for many, even survival) than the current widespread myopic focus of many Northern organizations on short-term survival measures. Even if NNGOs continue to survive, as some will, they will no longer qualify as "organizations of social change" which many NNGOs now believe themselves to be. Indeed, NNGOs must decisively counter SNGO criticisms which suggest that:

> if they (NNGOs) have any legitimate functions in development in the South, they must first transform themselves, and seek new and more timely roles in developing the capabilities of indigenous organizations and voluntary sectors. Even more important is the assumption of new functions as global partners in policy dialogue and development education. (Korten, 1987)

SNGOs will need to play their part in ensuring that appropriate changes take place in NNGOs, both for the sake of partnership and to protect their own self-interest. Indeed, SNGOs need NNGOs as much, if not more than before, given the challenges of global change. While funding will remain a part of the relationship, the crucial role for NNGOs will be in influencing publics and governments in the North whose consumption, lifestyle patterns, and public policies constitute a substantial part of the causes of structural poverty and inequality in the global South. NNGOs have a clear responsibility here, one which complements the tasks of SNGOs in a new division of labour. Since there is no prospect of reducing poverty and inequality in the developing countries of the South

> Constructive partnerships should be based on negotiated "frameworks for policy dialogue" or Development Pacts, involving the government of Canada and governments, as well as inter-governmental bodies and elements of civil society in the developing world. (CCIC, 1994)

without NNGOs actively playing such a policy role, SNGOs must consciously pressure and push their Northern partners to change before it is too late.

Such change, if it was to take place, should lead to the radical metamorphosis of NNGOs, resulting in the inclusion of the following

strategies, some in addition to, and others instead of, their existing ones:

- **De-operationalizing.** In the case of operational NNGOs, further de-operationalization in the South and more conscious capacity-building of SNGOs and people's organizations (POs) to take over this role from NNGOs is needed. While this decommissioning will no doubt have implications, both for the knowledge needed from "the field" for NNGOs' policy influencing work and for their accountability to donors, these impediments should not be used as an excuse for inaction. There are effective and credible ways to overcome these obstacles if NNGOs have the political will and genuine desire to achieve partnerships with SNGOs.

- **Redefining their policy role.** Another change should involve developing policy capacity in the South and redefining their institutional role in policy advocacy and lobbying, focusing more on mobilizing, synthesizing, and disseminating information (which is often much more readily available in the North) rapidly and in popular form to POs, SNGOs, and SSNGOs, rather than primarily emphasizing doing advocacy "on behalf of the South."

- **Working at home.** Another necessary change for NNGOs is an increased emphasis on undertaking development work in *Northern* countries, a change that will enable NNGOs to truly become part of a North-South "development alliance." Such an engagement can be achieved in a variety of ways: under Community Aid Abroad, Australia opened its Aboriginal program in the mid-1970s; and Oxfam UKI, at the spurring of its Southern partners at its first global assembly in 1994, launched its domestic program. In my view, this change of mandate does not necessarily imply project-based poverty alleviation programs in the North—even though many SNGOs consider this experience to be integral to NNGO legitimacy and credibility in the South. Nevertheless, I do believe that the onus of demonstrating a more intense, appropriate, and effective engagement with traditional Northern publics and policymakers will increasingly rest with NNGOs.

From my perspective, such engagement should at the very least involve a more substantial relationship of development education,

mobilization, and conscientization of Northern publics about international development issues, many of which they should be able to find in their own countries in this era of accelerating economic globalization and regionalization. This role, which very few NNGOs adequately prioritize and which many are *de*-prioritizing under pressure of institutional survival issues, is elaborated below.

- **Building domestic constituencies.** There is an urgent need for NNGOs to build a genuine constituency in their home countries for reasons of legitimacy, accountability, and effectiveness. Very few NNGOs appear willing or able to undertake this task on a significant scale, and of the few that have, many are now retreating because of institutional survival concerns. Yet a solid, educated, and aware constituency will be a better guarantor of long-term funding than official bilateral donors.

- **Educating domestic constituencies.** The key focus of NNGO domestic programs should be on interpreting the work of their SNGO partners and broader South development issues to Northern publics, with a view to raising awareness leading to action and subsequent changes in the latter's attitudes and lifestyle choices, in addition to Northern government policies and programs. This role, which few NNGOs adequately prioritize and which many are forced (under preoccupation with institutional survival issues) to drop, continues to be of prime importance.

These changes, if implemented, are likely to imply considerable financial and organizational downsizing and lowering of profile. However, they are more likely to ensure NNGO institutional dynamism and relevance and, therefore, survival well into the 21st century. They will also provide a more solid foundation for genuine partnerships and development alliances between NNGOs and SNGOs. We would then be able to move closer to Chris Roche's vision of "a more global view of development problems built upon alliances of competent agencies having wide experience and bringing complementary resources and skill to bear—such alliances must be made up of a wide variety of non-governmental agencies, people, organizations, women's movements, environmental groups as well as those human rights, peace and lobbying organizations who are dealing with the broader issues" (Roche, 1995).

Some Practical Ways Forward for NGOs

First let me acknowledge that a number of NNGOs that I know well have been seriously discussing how to make partnerships and development alliances more real in practice. There are a number of positive examples, even if they are few and far between. Indeed, Canadian NGOs have been among the leaders in both the debate and practice of North-South development alliance-building. It would therefore seem appropriate to quote positive, practical examples from the Canadian experience in this area.

One of the best examples appears to have been the work of Canadian-Mexican-US networks focused on continental free trade, particularly the *Common Frontiers/Fronteras Communes* project. This endeavour was started in 1988 by Action Canada Network's (ACN) continental free trade policy research and analysis project. ACN is a multisectoral coalition of labour, student, women, religious and cultural groups, seniors' organizations, anti-poverty groups, and a few international development and funding organizations. The network was formed in 1987 to critique and fight the free trade agenda which became best known when it was embodied in the North American Free Trade Agreement (NAFTA). Labour and ecumenical groups from Canada undertook fact finding trips to the *maquiladores* of Mexico and *Fronteras*, a counterpart Mexican body, was established soon after. The Canadian and Mexican network expanded in 1990 to include similar groups in the US and has since promoted dialogue, research, and mutual education among its members. It has also both challenged the official and corporate agendas for NAFTA and provided an alternative vision.

While the history of this work and the dynamics of the network are too complex to be adequately summarized here,[5] the project offers interesting lessons for the NNGO-SNGO partnership issue. Three key aspects were:

- **Continuous negotiation of roles.** The members of the different networks were largely able to work as equals by constantly negotiating and defining their roles, relationships, and methodologies. While not easy, common interests and the process undertaken appear to have led, through a dynamic process of interaction, to a genuine partnership between Northern and

Southern groups on some of the most crucial economic and social justice issues affecting the three countries involved.

- **Relative unimportance of funding.** Money and funding provision, the traditional Northern donor role, does not appear to have been a key factor in the relationship since the Canadian financial contribution to Mexican NGOs was very limited. Ironically, this may have had something to do with the success in establishing a more genuine partnership.

- **Multisectoral involvement.** Sadly, Canadian development NGOs appear to have played only a limited role within *Common Frontiers* in Canada, mainly by way of providing modest grants and administrative infrastructure (notwithstanding the active role of key NNGO individuals such as John Foster, then the National Director of OXFAM-Canada). Labour, solidarity, religious, and development research/advocacy groups appear to have led on the more substantive issues.

More recently, Focus on the Global South had a similar experience in Thailand where we led in organizing an NGO Summit just before the first Asia-Europe Summit (ASEM) in Bangkok in early 1996. Approximately 300 NGO participants from Asia and Europe came together as equals for three days in Bangkok (February 27-29, 1996) as part of panels on security, human rights, and economic and trade issues, and touching equally on the current situation and historical record in Europe (e.g., Bosnia and Ireland on human rights, UK on economic justice) and Asia. Once again, traditional Northern funding NGOs were only marginally represented and did not lead or participate in the substantive panel discussions, even though some of them (especially those from Holland) provided significant funding. The same was by and large true for development NGOs in the South. Labour, policy research, and advocacy and human rights groups—in addition to some grassroots people's organizations—actively participated in the discussions. Since there was not a funding relationship between them, a more genuine dialogue appears to have emerged.

Even when funding has been central to the North-South relationship, however, there have been positive examples of partnership. Canada has some of the better examples through NGO partnership programs (like the Philippines PCHRD program)

sponsored by CIDA in the late 1980s. While the NNGO-SNGO consortia and partnerships fostered as a consequence were far from perfect, the locus of program/project decisionmaking substantially involved SNGOs and was thus moved much closer to them (Manila). Most of the projects prioritized capacity-building, training, and strengthening the policy advocacy abilities of SNGOs. Even though CIDA influenced the broad objectives of the program, specific objectives were set by NNGOs and SNGOs together, while the latter had considerable decisionmaking control over individual project decisions through joint NNGO-SNGO structures. While the PCHRD example was largely project- and program-focused, it did have important policy influencing aspects. For example, other bilateral donors were pressured to consider similar partnership arrangements by Philippine NGOs, even if with mixed success.

These positive examples illustrate immediate, practical ways in which NNGOs can improve their relationships with their Southern counterparts. Other possibilities which go further include:

- **Program decentralization.** Program decentralization to the South is needed to mark a genuine shift in the balance of power to SNGOs, enable them to influence NNGO strategic, decisionmaking as well as individual project/program decisions, and eventually, control the specific use of project/program funds. Through the creation of in-country program advisory and decisionmaking committees in the South (to replace those already existing within NNGOs in the North), such a shift would also serve to strengthen local capacity, emphasize the NNGOs strategic non-funding roles, and ensure greater transparency and accountability to a broader range of people in the South. Establishing close links with in-country committees should also strengthen the NNGOs' domestic public policy and development education efforts, as well as policy influencing both at home and internationally.

- **Clarity of policy and procedures.** It is also necessary that NNGOs present their policies to partner SNGOs and other key civil society actors at an early stage for feedback and comment. The organization of international meetings with key SNGO partners to discuss overall policy development, including emerging NNGO analyses, new country policy documents, and especially their strategies are equally important.

- **Independence of advisory boards.** The establishment, at an international level, of advisory committee(s) made up of independent people and networks from the South who have a track-record in either development, social movement, policy research, and/or civil society work is vital. These committees should be asked to advise NNGOs about the development and implementation of their policies, both globally and in different Southern national and regional contexts.

- **Inclusion of Southern voices.** The inclusion of Southern voices in NNGO governance structures (e.g., Board of Trustees) is a further step. A combination of Southern people living in the North and South should be promoted and, to avoid tokenism, there should be clear guidelines regarding the representation and responsibilities of people from the South at NNGO governance levels.

Yet we need to be wary of the current trend of "transnationalization" of development NNGOs, a tendency motivated largely by fundraising (hence including representation from countries like Japan, Taiwan, South Korea, Hong Kong, or Singapore), or sometimes, by *realpolitik* policy concerns (hence including countries like Japan because of its status as the world's largest donor of Official Development Assistance (ODA) and Germany because of its increasing economic strength). In the few cases where Southern members have been discussed for NNGO board membership or as part of a global network (for example, OXFAM International, International Save the Children Alliance) that I am aware of, the discussion is still driven from the North; the network or "alliance" resulting may be international in name but not in representation or substance.

- **Altered accountability.** New mechanisms to ensure that NNGOs are accountable to their SNGO partners are needed. Such mechanisms should include the "social audit" tried by the New Economics Foundation and Tradecraft Exchange in the UK and periodic mandatory "reverse evaluations" of NNGOs (including their publications) by their SNGO partners. Such evaluations should focus not just on what new partnership policies NNGOs have developed, but on whether they have actually been consistently put into practice. Also needed are accountability and mediation mechanisms which will allow SNGO partners to lodge

complaints (if they feel they need to do so) about NNGO policy implementation, quality of service, and communication, or about project/program decisions. An ombudsperson should arbitrate conflicts or disagreements and be sufficiently independent of the NNGO and SNGO so that the issues which SNGOs and NNGOs complain about in the World Bank's Inspection Panel do not arise in the NNGO-SNGO relationship.

- **Quality standards.** We also require the development of quality standards for NNGO and SNGO efforts: how and in what time frame decisionmaking occurs, how funding and program discussions are held with partners, and whether performance evaluation and communication are two-way processes. We need regular NNGO documentation and research on SNGO partner satisfaction with their performance, including how NNGO policy is developed, the quality of service, and communication between NNGOs and their SNGO partners. These quality standards should be jointly discussed and agreed to by NNGOs with their SNGO partners.

Conclusion

NNGO-SNGO partnerships or development alliance-building has a long way to go. There are positive examples but these must be multiplied manifold if North-South alliances are to triumph over the forces that create and accelerate the globalization of poverty and inequality. There are no short-cuts in this process and NNGOs, in particular, will need to make painful choices if they wish to be part of such a historic alliance. Unfortunately, there is little indication that NNGOs are ready or willing to make the radical, transformative changes that the current situation demands on their own. Indeed, unless Southern NGOs take the lead in pressuring their NNGO "partners" to make the necessary changes, we will lose the opportunity that the current NNGO soul-searching, brought on by crises of institutional survival, presents.

However, partnership is not accorded the urgent attention it deserves by most SNGOs. This neglect may be caused by SNGO cynicism over the possibility of more genuine partnership with NNGOs, or by their own myriad daily crises in the "field" and their

own day-to-day institutional survival in the current global climate. SNGOs will also urgently need to make important changes to their priorities and approaches and give their Northern NGO allies all the support they can muster if we are to collectively achieve the changes we seek in the New World Disorder.

Notes

This paper on the "partnership" theme relates primarily to the relationship between industrialized country (Northern) funding NGOs and their counterparts in developing (Southern) countries. I puposely set out to write an experience-based paper, rather than one based on either a literature review or quotations from (mainly) Northern thinkers and writers on this topic. Discussions with—and the writings of—others, including many Northern friends and colleagues, have clearly influenced my thinking and/or have often been compatible with my views (just as my views, I believe and hope, have influenced some of their thinking and writing). However, I have seriously attempted to bring a "Southern voice," with over 15 years of firsthand experience in both the traditional South and North, to what has been a predominantly Northern-focused and dominated debate. The time and energy spent on this paper and my cumulative experience over the years will have been worthwhile if I have succeeded—even partially—in this endeavour.

1   To name just a few, see the recent articles or books of Alan Fowler, Michael Edwards and David Hulme, Ian Smillie, Anthony Bebbington and Roger Riddell, David Sogge, and David Korten, in addition to ongoing research by INTRAC, Oxford, UK.

2   An important exception is Dennis A.K. Muchunguzi and Scott D. Milne, *Perspectives From the South: A Study on Partnership,* (AFREDA, 1995).

3   This need for legitimation is true even though bilateral and multilateral agencies do not need to seek formal legitimacy for their existence in the same manner as NGOs since, at least in formal democracies, this is conferred on them through the election of the governments of which they are part.

4   Ian Smillie, personal communication after an Australian visit, 1996.

5   My analysis and reasons for using this example are largely based on discussions with people (too numerous to name individually) in Mexico, USA, and Canada over a two-to-three year period. This analysis is also echoed in John Saxby's chapter in Sogge, 1996. However, it is with John Foster, previously National Director of Oxfam Canada, that I had the longest discussions in Canada. For more detailed accounts, see John W. Foster, "Redefining Governance: The Transnationalization of Civic Participation in North America," Ottawa, 1993, mimeo; and Cathryn Thorup, "The Politics of Free Trade and the Dynamics of Cross Border Coalitions in US-Mexico Relations," in *Columbia Journal of World Business,* volume XXVI, number 2, Summer 1991, pp. 12-26.

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Résumé

Le fossé entre rhétorique et réalité : Deux essais sur le partenariat en matière de développement
Lynne Hately et Kamal Malhotra

Au cours des deux dernières décennies, l'idée du «partenariat» entre donneurs et bénéficiaires s'est popularisée dans le monde du développement international.

Mais en quoi consiste le partenariat Nord-Sud? Comment détracteurs et partisans perçoivent-ils son rôle? Comment leurs façons de penser ont-elles influé sur le développement pratiqué? sur ses politiques? sur ses relations? sur sa pertinence?

Ce sont quelques-unes des questions auxquelles tentent de répondre les deux essais publiés dans ce petit livre. Ces exposés découlent de la démarche qu'a entamée le Centre de recherches pour le développement international afin de scruter les plus récentes idées—et les débats passionnés—qui entourent le partenariat. Présentant les points de vue du Nord et du Sud, les deux essais creusent les grands dossiers du débat et citent les succès de vrais partenariats menés avec des organisations gouvernementales et bénévoles du Canada. En quelque sorte, ils «prennent le pouls» de l'idée du partenariat en matière d'aide au développement.

Dans son essai «The Power of Partnership», Lynne Hately, une ancienne chercheuse de l'Institut Nord-Sud qui travaille maintenant pour le développement au Laos, entreprend de sonder la relation donneur-bénéficiaire entre donneurs du Nord et institutions et populations du Sud, dont elle examine à la fois les problèmes et les possibilités. Comme peu de travaux se sont penchés sur le rôle intégrant que joue le pouvoir dans les partenariats, l'exposé tente de découvrir les déséquilibres inhérents à ces associations. Il présente un premier pas à faire en vue de concevoir un menu de mécanismes pour aider les agences et les organisations donneuses à corriger ces

rapports inéquitables et à transformer la rhétorique du partenariat en réalité.

Sont examinés deux grands types de partenariats : ceux qui remanient quelque peu la relation d'aide classique en vue de l'améliorer (les partenariats «verticaux» inégaux, motivés par la charité) et ceux qui tâchent de réformer la façon traditionnelle de procéder (les partenariats «horizontaux» réciproques, appuyés sur la solidarité). L'exposé analyse également le rôle important que les donneurs peuvent jouer en changeant le centre d'attention, du «partenariat» aux questions plus controversées du contrôle et de la propriété. En réponse aux liens de plus en plus reconnus qui existent entre «le mondial» et «le local», l'exposé recommande, premièrement, que les donneurs se montrent plus sensibles aux besoins et aux demandes des populations locales pour veiller à ce que les initiatives de développement restent la propriété des initiateurs locaux dans le Sud et, deuxièmement, qu'ils étendent le champ de l'aide au développement en travaillant de plus près sur les questions de développement dans leurs pays d'origine.

Ces recommandations trouvent un écho dans l'essai «"Something Nothing" Words : Lessons in Partnership from Southern Experience» de Kamal Malhotra, codirecteur du centre de recherches Focus on the Global South à Bangkok. Son exposé commence par examiner le changement d'environnement mondial, le contexte d'activité des ONG (organisations non gouvernementales) et les relations qu'elles ont à la fois entre elles et avec les organisations nationales et internationales. D'après Malhotra, le mot «partenariat» n'a pas grande pertinence dans le Sud, et son usage dans les programmes de développement est en fait une idée du Nord. Il propose plutôt de décrire la relation comme «le nouement d'"alliances de développement" efficaces et mutuellement bénéfiques».

Après un survol des facteurs du passé qui ont empêché la réalisation d'un vrai partenariat, il examine les défis d'aujourd'hui, y compris les problèmes complexes de survie que doivent affronter les ONG du Nord. Tirant les enseignements des partenariats réussis avec des ONG du Canada, il énumère divers moyens pratiques par lesquels les ONG du Nord et du Sud peuvent rapprocher l'idéal de la réalité. Mais, conclut-il, il y a peu de chances pour que les ONG du Nord opèrent les changements nécessaires en l'absence de pressions dans ce sens par leurs homologues du Sud.

The North-South Institute

During the past two decades, "partnership" between donors and recipients has become a popular concept in international development. But what does North-South partnership involve? How do its critics and proponents perceive its role? How has that thinking affected the practice of development? Its policies? Its relationships? Its relevance?

These are some of the questions addressed in the two essays in this booklet. The papers originated with the International Development Research Centre's quest to explore current thinking — and vibrant debates — on partnership. Presenting Northern and Southern perspectives, the essays explore the debate's main issues and cite successes of genuine partnerships involving Canadian voluntary and governmental organizations. In a sense, they take the pulse of the idea of partnership in development assistance.