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Starting from the South

Advancing Southern leadership in civil society advocacy collaborations

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Introduction

The idea that development should be owned by people and organizations 'on the ground' is widely accepted. When it comes to civil society organizations (CSOs), a long-term goal in the field of international development is to create conditions where responsibilities and leadership increasingly lie with Southern CSOs. If Southern CSOs are to do more leading, their contexts, understandings, and ambitions must move more to the centre of programmes and collaborations. But what could that mean in practice?

Over the past two years, we researched this question, taking the perspective that CSOs in the global South navigate the possibilities of their roles as agents. We explored how CSOs construct these roles from their own perspectives and on the basis of their own capacities, while engaging with various opportunities and constraints.

Considering Southern CSOs as agents can help to develop perspectives on how their roles take shape. This, in turn, can help to reveal how donors, Northern CSOs, and other Southern CSOs can contribute to these roles.

We studied CSOs' construction of their roles from three angles that are fundamental to CSOs' advocacy: representation, collaboration, and state–CSO interactions. We also researched how questions of autonomy emerge in the construction of CSOs' roles and how can these be addressed.

Our research was situated in India. We carried out seven studies engaging a wide array of CSOs working on disaster risk reduction and the rights of marginalized sections of Indian society. We conducted these studies in three Indian states (Gujarat, Jharkhand, and Bihar) and in Delhi.

In this policy brief, we present a synthesis of our findings and recommendations for donors and CSOs in the global North seeking ways to advance Southern leadership in advocacy collaborations.

Findings: contextualized agency

A first overarching finding from our work is that CSOs' advocacy roles and contributions to development can only be understood if we **look closely at what CSOs actually do**, embedded in relations and contexts and engaging with these dynamically. We call this capacity to act while relating to the context *contextualized agency*. More specifically, we define contextualized agency as agency that emerges through how actors relate to the possibilities and constraints of the contextual setting, as interpreted by the actors involved. The following points clarify the concept of contextualized agency:

CSOs shape their roles **contextually**. In important ways, CSOs' strategizing is grounded in their understandings of their possibilities within their specific domestic contexts. Crucially, the capacity to engage with their own contexts defines their capacity and will to act. International collaborations or influences may often be seen as complementary rather than leading and, ideally, as supportive. Depending on their individual perspectives and capacities, however, CSOs understand their possibilities differently and develop different approaches to these possibilities.

CSOs shape their roles while **embedded in relations with constituencies, other CSOs, and the state**. Engaging their contexts from their own perspectives, CSOs construct the nature of their work and their way of relating to constituencies, decide which approaches to follow, choose partners, and identify agents that may support or oppose their undertakings. Their roles are thus relationally defined rather than being simply a matter of 'traits' such as organizational type, capacities, and preferred strategy.

CSOs' roles are **dynamic**. These roles evolve depending on how the organizations progress. This, in turn, changes access to and relations with both the state and constituencies. In response to opportunities and barriers that arise in different contexts and at different moments in time, CSOs' roles can change or manifest in different ways.

A second overarching finding is that contextualized agency at least partly explains how CSOs' roles emerge. **CSOs engaging the same context may construct very diverse roles.** Diversity in civil society is thus not only about organizational form or strategy. It also relates to differences in how CSOs construct their roles through interpreting their contexts and in how they see and engage possibilities and constraints. Agency is not just the capacity to act. It is also the capacity to act on the basis of diverse analyses of possibilities and constraints and using different approaches; these differences lead to very different roles. For example, the representation of marginalized and vulnerable groups can mean very different things. Depending on who is doing the representing, CSOs pursue different possibilities within the same context. In line with this idea, different CSOs respond to the Indian state's constricting of civic space for CSOs in highly divergent ways. This second overarching finding on contextualized agency points to the need to do justice to the agents involved as the **organizations** that they are—entities engaged in interpretation and action and working from certain perspectives, capacities, and rationales.

A third overarching finding concerns the question of why all of this matters. Because we studied a broad array of CSOs, we were able to clearly observe the diversity among them. This allowed us to expose the **nature of some important yet implicit differences among CSOs** and to demonstrate that this **diversity has implications for CSOs' roles**. We learned that it is important to make sense of and examine the diversity among different CSOs. Given how diverse, implicit, and dynamic their roles are, **we cannot take for granted the nature or extent of CSOs' contributions to inclusiveness**. We also learned that such **diversity is valuable**. Diverse CSOs play complementary roles, and different forms of engaging the state can contribute to inclusive and sustainable development in different ways.

A final overarching finding logically flows from the above. Given that roles are shaped to a great extent by navigating the context, **contextual understanding** is of prime importance. This implies a fundamental role for locally embedded organizations and their capacity to understand and navigate the context. It also implies the need for Northern CSOs and donors to engage with the context.

Recommendations: Starting from the South

The dominance of Northern CSOs and donors in many North–South collaborations has been widely established and problematized. The solutions proposed thus far mostly address power relations. Some of these are presented in material terms, seeking answers in direct funding. Other proposed solutions seek to reshape working relations, mostly in terms of 'partnership'—a concept that has itself frequently been problematized. A related discussion addresses the reclaiming and resistance through which some Southern CSOs carve out space for alternatives. Although these perspectives are important for understanding and addressing existing forms of dominance, none of these existing approaches offers direction regarding how to advance Southern CSOs' leadership in collaborations with Northern CSOs and donors.

Engagement with the contextualized agency of Southern CSOs can offer a way forward. We recommend advancing Southern leadership by 'starting from the South'. In this approach, we see roles for diverse CSOs—both Southern and Northern—and donors in complementary relations. To strengthen the leadership of Southern CSOs, we advise against starting with programme development led by Northern actors and subsequently identifying suitable partners. Instead, we advise taking the starting point that Southern CSOs are already trying to be something and already pursuing agendas. They are doing these things with an understanding of what is possible and desirable, and often as expert navigators of their own contexts. In important ways, this is what makes their roles possible. They are also frequently already embedded in multiple relations shaping their roles. Their Northern (donor) partner is often just one of these.

However, this does not imply that Southern CSOs always relate effectively to their contexts. Rather, these CSOs may engage with their contexts only in limited ways, and this may be at least partly because of prioritizing donor relations and pressures to perform in a certain way in that relation. Strengthening CSOs that do relate to

their contexts can help to turn this pattern around. Moreover, this approach can help to counter ongoing assaults on CSO activity as foreign-led and to advance the legitimacy of CSO activity as home-grown.

In short, our recommendations are (1) to turn programming upside down, starting from the global South rather than the global North and (2) to think of Northern CSOs as part of relatively Southern-centred networks rather than as the leading organizations in linear North–South relations.

From these starting points, we propose that donors and Northern CSOs develop support for and collaboration with Southern CSOs working on a given issue while addressing a set of interrelated questions (elaborated below). These questions offer a framework for reshaping the terms of engagement between Northern and Southern actors by making Northern CSOs or donors part of a network rather than the central node or the top end of an 'aid chain'. The questions conceive of support and collaboration as contributions to change processes rather than as stand-alone interventions.

1. *How can we acknowledge and link up with existing civil society and what is already going on in a specific Southern context?*

To engage this question, Northern CSOs can seek to identify ongoing change processes pursued by Southern CSOs in a specific context to which they can make a meaningful contribution based on their own strengths at domestic and/or international levels. Collaboration can then be grounded in the acknowledgement of existing agendas, understandings, and self-defined support needs, as well as in an analysis of where these can be meaningfully engaged. The selection of partners should then involve consideration of the extent to which these partners are locally grounded and have a capacity and will to engage their context strategically as agents in their own right—rather than their capacity to conform to a Northern CSO's programme requirements. Collaboration can involve individual

Southern CSOs, but it is also important to engage with existing networks working on an issue in a Southern context. This can help to link up with advocacy processes in the South that are already underway in a doable fashion. It would also move advocacy programming away from an intervention orientation, making it more process-oriented and contextually embedded. Linking up in this way may require Northern CSOs to reconsider how much (and how) the 'universality' of their driving values can fit with Southern CSOs' diverse and particularistic understandings and forms of representation.

Donors can advance the acknowledgement of and linking up with existing civil society in Southern contexts by stimulating the creation of programmes in which Southern CSOs and their understandings, agendas, and support needs form important starting points. In addition to turning programming upside down, this would also mean asking more of Northern CSOs when it comes to their engagement with Southern contexts. Only Northern CSOs with deep awareness of CSO processes in Southern contexts would be in a position to develop the analyses required for engaging this question and the other questions raised in this framework.

This also raises questions for donors to address for themselves: To what extent are we driven by a specific development agenda vs. by an aim to strengthen civil society? How do these two agendas relate to each other for us, and how can they be reconciled? For example, human rights and marginality can be understood very differently by CSOs in different contexts. To illustrate: in India, caste marginalizes a substantial part of society, and many CSOs work on this issue. Taking Southern leadership as a starting point, donors can consider whether and how to acknowledge and support such differentiated understandings around fundamental starting points.

2. *How do different types of CSOs working on an issue complement each other? How can we relate to the diversity in the roles sought by these CSOs? What existing complementarities and ongoing networking could we add to or stimulate?*

CSOs in Southern contexts may engage in multiple collaborations beyond the 'aid chain'. Many of these are domestic in nature. Northern CSOs can explore how already existing CSO advocacy on an issue in a Southern context involves diverse civil society actors and complementarities among them. This involves answering fundamental questions regarding CSOs' contextualized agency: What, exactly, are the different CSOs working on an issue trying to achieve? From what understandings and with what capacities? Through what kinds of relating to the context and to other actors? What forms of support from the Northern side can best strengthen ongoing collective efforts? Northern CSOs can engage such questions with an openness to working with actors that are meaningfully contributing to change but that would not normally be considered eligible as partners. One can think here, for example, of social movements, platforms, or individuals. It is likely that engaging with existing networks in a Southern context would help to lead Northern CSOs to such actors and assist them in learning who matters for what reasons, as well as how the Northern CSOs could contribute.

From donors, this requires flexibility in their requirements regarding partnerships—the creation of funding programmes that allow for unconventional partners and programming. Although this may carry risk, it would facilitate engagement with social movements and other (locally) highly relevant and legitimate forms of civil society organizing. The analysis of the relevance and legitimacy of different forms of civil society by network partners in a particular change process can help develop proper rationales and legitimation for support.

3. *What is the potential contribution of different CSOs in a (proposed) partnership to inclusive and sustainable development—What forms of inclusiveness are being pursued, and by what means? What potential do the CSOs have for addressing inequality and exclusion? What are their relative contributions to development, and how do these relate to each other?*

We found that different CSOs working in the same domain and holding apparently similar principles (such as inclusion) may advance inclusive and sustainable development to very different degrees and in very different respects. When exploring options for partnerships with Southern CSOs, Northern CSOs could research how specific CSOs are advocating for certain populations' voices or values. This would require close knowledge of the capacities and approaches taken by specific (potential) partners, as well as their added value in the CSO landscape in a certain context. This also involves exploring which voices in that constellation need support, for example to advance inclusion most effectively, and considering which voices are not weak only because of a lack of resources or capacity, but also because they are muted—marginalized to the degree that they are silenced—and in need of adjusted forms of support. In addition, it is good to consider that many Southern CSOs seeking to represent marginalized populations are staffed by relatively privileged people, and the extent to which collaborations advance the capacity of these populations to represent themselves requires attention. All this would also require a close understanding of the context in which CSOs operate.

Donors can ask of applicants to clarify exactly how proposed collaborations would advance inclusive and sustainable development in a certain context. This can help to do justice to the diversity of ways in which this can happen and give insight into partners' approaches and capacities. Donors can also ask for explanations of how chosen approaches and capacities match the possibilities of the specific contexts where the programme is to be carried out.

4. *Through which capacities, perspectives, resources, and strategies can Northern actors complement ongoing CSO efforts rooted in the global South, and vice versa?*

For Northern CSOs, this would mean building relations with Southern CSOs based on mutual respect and recognition and a developed and articulated understanding of specific CSOs and their efforts and contributions to development. It would also mean acknowledging how these efforts and contributions may diverge from one's own, exploring where agendas can meet, and uncovering how different approaches and strengths can complement each other. This would imply defining the relative roles of specific Northern and Southern partners in a change process. For Northern CSOs, this means showing their added value as Northern CSOs. This in no way marginalizes Northern CSOs; rather, it capitalizes on their power. It can help bring out and strengthen Northern CSOs' roles in new ways, highlighting and advancing the importance their specific capacities and contributions. These include e.g. mobilizing public opinion in the global North, raising funds, bringing in the international dimensions of issues, contributing technical expertise and services, engaging Northern institutions, convening, and brokering.

Donors can ask for engagement with questions around this kind of diversity and complementarity in applications: They can ask applicants to address self-identities, as well as the differentiated capacities and agendas of the Northern and Southern CSOs involved. They can also ask how this diversity is integrated into the programme and require articulation of the exact nature of the complementarities. In case donors seek to partner with civil society in advocacy (as in the case of the Netherlands), they can seek to similarly choose to capitalize on differentiated strengths.

5. *How can we facilitate flexibility in the roles that CSOs may seek, navigating the possibilities of their contexts?*

Northern CSOs can develop their programmes in partnership with Southern CSOs, giving space to flexibility, as required for partners working in a specific context when it comes to roles, activities, and evolving collaborations, and budgeting accordingly. Changing conditions and the opportunities and barriers they present may also require enhanced communication and analysis of the strategic implications of developments.

Donors can facilitate and promote such flexibility in different ways. For example, they can allow for flexibility in programming that can be justified by the requirements of CSO advocacy in certain contexts. For example, donors can relativize the distinction between advocacy and service delivery, take into account the evolving patterns of collaboration, and facilitate support for informal organizing and action. Flexibility can also be facilitated when it comes to reporting requirements by considering the sensitivity of information or the limited reporting capacities of informal organizations. To meet accountability requirements, however, reporting can be strengthened in ways that justify this flexibility and show its rationale. This can be accomplished, for example, by working with newly emerging monitoring and evaluation approaches that seek to do justice to advocacy as a complex process of navigating possibilities and challenges.[1]

1 For example, the approach proposed by Margit van Wessel and Wenny Ho in their 2018 publication, *Narrative Assessment*, available at www.hivos.org/news/narrative-assessment-bringing-out-the-story-of-your-advocacy/, or that put forward by Jim Coe and Rhonda Schlangen in their 2019 publication, *No Royal Road*, available at www.evaluationinnovation.org/wp-content/uploads/2019/03/No-Royal-Road.pdf.