

[David Lewis](#)

## Guest editorial: should we pay more attention to South-North learning?

**Article (Accepted version)  
(Refereed)**

**Original citation:**

Lewis, David (2017) *Guest editorial: should we pay more attention to South-North learning?* [Human Service Organizations: Management, Leadership and Governance](#), 41 (4). pp. 327-331. ISSN 2230-3131

DOI: [10.1080/23303131.2017.1366222](https://doi.org/10.1080/23303131.2017.1366222)

© 2017 [Taylor & Francis Group](#)

This version available at: <http://eprints.lse.ac.uk/84462/>

Available in LSE Research Online: November 2017

LSE has developed LSE Research Online so that users may access research output of the School. Copyright © and Moral Rights for the papers on this site are retained by the individual authors and/or other copyright owners. Users may download and/or print one copy of any article(s) in LSE Research Online to facilitate their private study or for non-commercial research. You may not engage in further distribution of the material or use it for any profit-making activities or any commercial gain. You may freely distribute the URL (<http://eprints.lse.ac.uk>) of the LSE Research Online website.

This document is the author's final accepted version of the journal article. There may be differences between this version and the published version. You are advised to consult the publisher's version if you wish to cite from it.

## **Guest editorial: Should we pay more attention to South-North learning?**

Human Service Organizations: Management, Leadership, & Governance

David Lewis  
London School of Economics & Political Science

### **International learning and exchange**

In an ever-globalizing world, opportunities for exchanging ideas across national and regional boundaries that address problems of poverty and inequality are increasing. In particular, much attention is now given within the worlds of international development policy and practice to the importance of promoting the idea of "South-South" cooperation, learning and exchange.

Since the colonial era, many in the "Global North" have simply assumed that rich Western countries know best, and that a transfer (rather than exchange) of knowledge, technology and expertise needs to take place from "developed" to "developing" countries. South-South cooperation challenges this assumption by drawing attention to the ways poorer countries can support and help each other. The key idea is that successful ideas and innovations developed in one developing country may be more likely to be successfully transferred to another poor country where local conditions and institutional realities have more in common than those originating in the usually very different context of the "Global North". South-South cooperation has become a new buzzword among development policy makers, bringing a timely and necessary shift that can support efforts to counteract years of one-way travel, and generate organizational and policy innovations.

Should we – and by "we" I mean people such as myself who live in a rich country of the North - now go even further and ask: "Can ideas drawn from organizations of, or working in, the poorest countries also help to improve the work of human service organizations in the wealthy countries of the world?"

In this brief editorial, I argue that in this rapidly-changing world that we should, and that furthermore, we in the Global North might also want to go further and also throw away our outmoded cognitive maps that have been based on unhelpful binary thinking and participate more fully in the global marketplace of ideas.

### **The end of the "developed" and "developing" country binary?**

Why is now a good time for us to begin to think differently about this? The reason is that the world is changing rapidly, away from the old dual categorization of "developed" and "developing" countries towards a new multi-polar world in which there are varying shades of gray and fewer bold lines and boundaries, with complex

patterns of poverty and inequality scattered across rich, poor and middle income countries. Many factors have contributed to the unsettling of this dualist worldview. One has been the rise of the so-called "the BRIC" countries (Brazil, Russia, India and China). Another is the weakening of the established financial order following the 2008 financial crisis has already.

The international system is also changing rapidly. International aid remains a key global policy instrument, but is no longer the monopoly of the countries of Europe and North America as it was in the 1990s. Today, there are increasing numbers of new non-Western donor agencies from China, South Korea and the Gulf states all of whom have become major new players in the field of international development. In this new reality, development organizations in both rich and poor countries may increasingly face a set of common challenges around impact, learning, effectiveness, accountability, resource mobilization, and legitimacy.

As the UNDP's Human Development Report 2013 entitled "*The Rise of the South: Human Progress in a Diverse World*" pointed out, growing interconnectedness is apparent among richer and poorer nations: "the South needs the North, and increasingly the North needs the South... The world is getting more connected, not less" (UNDP 2013). While we must acknowledge that the extent of disadvantage and its challenges remains proportionally different between much of the Global North and the Global South, and that all organizations and policy interventions are (or need to be) distinctively shaped by different national and local contexts, South to North learning is not only a potentially good idea that is becoming increasingly possible across these previously separate spheres, it is already taking place. Emerging evidence suggests that exchange and learning across this boundary is becoming more common among activists, policy makers and professionals across the old boundaries of so-called "developed" and "developing" countries.

### **Participatory approaches to grassroots action and microfinance**

One well-established example of useful ideas that have for some years been traveling from the Global South to the North is the application of 'participatory' ideas around planning, evaluation and learning. For example, the international practitioner journal Participatory Learning and Action (PLA) Notes (2000) reported extensively on several cases of North-South exchange around the use of increasingly sophisticated types of participatory approaches by community groups, local authorities and voluntary organizations. Participatory monitoring and evaluation has also traveled from developing country settings to those in the rich countries via NGO and public sector innovators.

Another example is the use of micro-finance approaches as tools for building small-scale entrepreneurship and addressing household level poverty. The central idea for this type of intervention originally came from the forms of traditional rotating credit associations that are found in some Asian societies. This principle was famously developed and adapted by Bangladeshi economist Professor M Yunus who founded the Grameen Bank. The Grameen Bank's early experiments back in the 1980s

developed into national level programs and spread to other countries in both the developed and developing world. Microcredit approaches to addressing poverty began to appear in the UK more than a decade ago (Pearson, 2000). More recently, microfinance work has been undertaken by organizations such as Acción USA, Grameen America, and Grameen Foundation partner Project Enterprise in the US.

More recently, the Scottish government has embraced participatory budgeting as a resource in support of the objectives of its Community Empowerment (Scotland) Act 2015, which aims to support the strengthening of participatory democracy. Participatory budgeting is a tool that offers local people the chance to have a direct say in the ways that public funds can be addressed to local needs. Indeed it is urban contexts that have seen the expansion of exchange relationships between North and South, and challenges to the one-way direction of learning that has been the norm. Participatory budgeting first emerged in the city of Porto Alegre, Brazil during the late 1980s and from here spread around the world to hundreds of cities and towns across the world.

### **The rise of new forms of “social protection”**

Another area that has seen new ideas and innovation in the so-called developing world in recent years is in relation to social protection, the broad range of public and private initiatives that provide income or consumption transfers to low income people, reduce vulnerability and strengthen their rights. For example, Conditional Cash Transfer (CCT) programs such as Brazil’s Bolsa Familia and Mexico’s Oportunidades has been seen by agencies such as the World Bank as one of the major international development success stories within the countries of the Global South.

The idea of the cash transfer as a citizen right, rather than the better-known global story of the microfinance movement’s approach to the fight against poverty, has perhaps been the more important innovation (given the doubts raised in recent years over the reliability of the evidence relating to microfinance as a sustainable route out of poverty). Latin American style CCT ideas have begun to reverberate within parts of the developed world. In 2007 New York City Mayor Bloomberg set up the first CCT program of this type in the Global North in the form of the Opportunity NYC pilot scheme. Supported by private funders, the project’s components included children’s education, family preventative health care, and parents’ workforce and subsidized housing. This was inspired by experiences in Latin America.

### **Social worker exchange for professional development**

Exchanges of professionals across contexts in the Global North and South are also taking place within the professional social work field. Back in the 1980s, James Midgley (1981) complained, with some justification, that social work in former colonies was characterized by a severe case of “professional imperialism” arising from the ways that colonial regimes structured the emergence of the professional social work field in many developing countries.

The remains of colonial systems and structures are still present in the administrative systems of former colonies but this too is changing. In 2013, British social workers travelled to India to meet and learn from frontline social workers there. According to one participant who was reported in *The Guardian* newspaper: "I learned so much about how their approach differs from ours; especially their emphasis on community development and advocacy, and how that shapes the way social work is done in India. It really inspired me". An initiative of this kind turns on its head the earlier traditions of the imposition of social work models and ideas, and offers the promise of renewal and learning based on a far wider range of ideas, contexts and experiences than ever before.

### **Unsettling binary "third sectors"**

My own interests have always been in the area of the third, non-profit or non-governmental sectors. Here there have been traditions in countries such as the US and the UK of keeping domestic and international work separate, reflecting the old binary we have discussed above. The organizations of the third sector that worked "at home" addressing problems of poverty and inequality in communities and the part of the sector that worked on the same issues but overseas – the "NGOs" - had traditionally kept themselves separate from each other with relatively little communication or exchange of ideas between them. Even when the same organization had operations both "at home" and "away" – as in the case of Save the Children – until recently tended to keep the two spheres of operations entirely separate, compartmentalized in different buildings with separate staff (Lewis 2011).

Progress around North-South exchange and learning has been relatively slow among third sector organizations, but is now happening on a larger scale (Lewis 2015). In the UK, NGOs such as Oxfam long accustomed to working overseas have now opened up domestic operations, establishing community level programs to address poverty and exclusion "at home". For example, Oxfam brought over an Indian community organizer used to working in the Nilgiri Hills in order to develop new ideas for tackling social isolation, poverty and exclusion on the deprived Matson public housing estate in Gloucestershire, England. Save the Children Fund (UK) decided to raise money through a public media appeal to assist poor families in the UK affected by domestic austerity policies even though it attracted "disapproval in some quarters that a charity best known for its work with victims of war and famine in troubled parts of the world should be turning its attention to problems at home" (Gentleman, 2013).

As the traditional division of labor is becoming unsettled, the outward and inward facing parts of a country's third sector are now beginning to meet in unexpected ways. In Japan, for example, during the post 2011 *tsunami* humanitarian and reconstruction efforts, it was reported that the country's international NGO "sub-sector" that has long worked in India, Bangladesh and other poorer Asian neighbor countries was able to carry out relief and emergency work more effectively than the organizations found in Japan's own domestic nonprofit sub-sector. These

internationally-focused development and humanitarian third sector organizations had honed their emergency planning and operational skills in more unstable and extreme situations that they could now apply to their own country. They had also built strong relationships based on fellow Asian country solidarities rather than on traditional top-down internationalism that had all too often simply imposed ideas and practices, allowing them to learn and exchange ideas more effectively.

This has parallels with the solidaristic idea of “accompaniment” developed by some Latin American NGOs as a counter-narrative to the way that they felt that some international NGOs had used the term “partnership” merely to try to mask their unequal top down relationships with their counterpart NGOs in the Global South (Lewis 2014).

### **Management and organization in the third sector**

In my book *Non-governmental Organizations, Management and Development* (2014) I outline the burgeoning field of NGO management that provides a rich and varied of experiences and innovations which may be of interest to people working in human service organizations in the Global North. The book argues that in many ways these NGOs that are engaged in delivering services or doing humanitarian work at the grassroots are stretching the definition of what it means to manage. In the typically complex, insecure, rapidly changing and multicultural settings where development or humanitarian encounters take place the evidence shows that to be effective, an NGO needs to simultaneously attend to the multiple levels of managing its activities, building and maintaining its organizational systems, and balancing its internal and external relationships – and that all of this activity needs to take place against an often highly challenging contextual backdrop of instability, scarce resources and lack of security. An important part of the management challenge is therefore one of building up detailed useable knowledge of the wider environment in which the work takes place, including its cultural, political and historical dimensions.

To be successful, development and humanitarian organizations also need to draw upon and synthesize ideas from other sectors (such as the public and private) and improvise (including building flexibility and informality alongside more formal structures) in order to build and maintain systems that ensure sustainable values and outcomes. A key challenge here is to make sure ideas are carefully contextualized not just with the environment, but within the organization’s own values and purposes, which means that notions of “one size fits all” best practice rarely work very well.

In Bangladesh, BRAC, the world’s largest development NGO, has been one of the recent pioneers of the South-South cooperation agenda. Having honed its ideas and approaches for four decades as a national NGO in one of the world’s poorest and most vulnerable countries, it has successfully begun to extend its work to countries across Africa and Asia, opening up country offices and introducing its distinctive development programs (Smillie 2009).

BRAC's work offers valuable new lessons for organizations in the Global North around management, training and strategy, and challenges some of the long held assumptions and approaches of their Northern counterparts. International NGOs have long viewed one of their central roles as "building the capacity" of their local organizational counterparts through the building of partnerships, but the one-way view is increasingly open to challenge. BRAC's approach is to "create entire new frontline organizations in the new countries, rather than to act as brokers for international aid" (Hossain and Sengupta 2009, p.28).

BRAC also tries to align its domestic learning with its overseas programs by blending its ideas with those in the new country, for example by building collaborative (rather than adversarial) relationships with government (Srivastiva et al 2012), taking time to build a strong identification with the organization among its workers, closely monitoring its field level personnel, and celebrating and rewarding strong performance in the field. Authoritarian forms of individualized top town leadership and management are discouraged, and instead "the views of staff lower down the hierarchy feed effectively up the chain" (Hossain and Sengupta 2009, p.29).

### **Conclusion**

Now is the time to acknowledge and challenge the fact that "learning in the North from the South is undervalued and insufficiently acknowledged" (Bontelbal 2009, p.55). We are now entering a period in which there is a far more geographically complex and diverse global landscape of countries, resources and relationships. There is potential strength and richness in this diversity that brings the need to leave behind the old forms of binary thinking around North and South, developed and developing, and us and them. Today, it makes little sense to obscure or deny the global relationships and continuities that increasingly connect organizations and individuals concerned with social and economic change processes within different contexts. If we were to do so, we might preclude other opportunities for experimenting and learning across contexts where challenges, and the responses to them, may be converging in new ways.

### **References**

Bontelbal, Marike (2009) *Cities as partners: the challenge to strengthen urban governance through North-South city partnerships*. Eburon Delft, Netherlands.

Hossain, N. and Sengupta (2009) *Thinking Big, Going Global: The Challenge of BRAC's Global Expansion*. Institute of Development Studies (IDS) Working Paper 339.

Lewis, David (2014) *Nongovernmental organizations, management and development*. London: Routledge.

Lewis, David (2015) "Contesting parallel worlds: time to abandon the distinction between the 'international' and 'domestic' contexts of third sector scholarship?" *Voluntas: International Journal of Voluntary and Nonprofit Organisations*, 26 (5), 2084-2103.

Smillie, Ian 2009. *Freedom from want: The remarkable success story of BRAC, the global grassroots organization that's winning the fight against poverty*. Stirling VA: Kumarian Books.

Srivastava, Lalima, Michael J. Austin, and Niaz Murtaza (2012) *Pioneering Human Service NGOs in Developing Countries: A Cross-Case Analysis*. Chicago: Social Development Issues.

UNDP (2013) *The Rise of the South: Human Progress in a Diverse World*. Human Development Report. New York: UNDP.