Reflections on relationships: the nature of *partnership* according to five NGOs in southern Mexico

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This article is based on interviews with several staff members of NGOs located in San Cristóbal de Las Casas, Chiapas, Mexico, regarding partnerships between them and their funding sources, such as foundations or agencies of the North that do or support development work in the South. The motive behind the interviews was an interest in the word 'partnerships', in particular strategic ones. Do partnerships exist now and, if they do, what does it mean for the NGOs to have a partnership with a funding source? The general conclusion was that strategic partnerships have indeed existed in the past, and may again emerge in the future, but that currently they exist only sporadically, given the distinct ways of viewing and carrying out development work within NGOs on the one hand, and foundations or agencies on the other.

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Introduction

Funding organisations have a plethora of terms for the intended targets of their largesse: *recipients, beneficiaries, counterparts, clients, grantees, partners*, etc. But what do these terms mean? Are they equivalents, interchangeable synonyms? And, specifically, under what circumstances is a *partnership* said to exist between development-oriented funding organisations in the global North and their, well, whatever, in the global South?

What follows is a general reflection on the term *partnership*, undertaken by activists working in NGOs in Mexico. We suggest here that *partnership* denotes a special relationship between equal participants or, yes, *partners*, who enjoy a distinctive bond of trust, a shared analysis of existing conditions in society, and thus in general a common orientation of what needs to be done to construct a more just, equitable, and democratic world.

This article surveys how partnerships are regarded in the eyes of five informants, all of whom are currently working at NGOs in southern Mexico. The work of these non-profit NGOs centres on specific themes: for example, economies of solidarity, conflict resolution, human rights, citizens' participation in formal electoral politics, and alternative information and analysis for grassroots organisations. It is worth stating at the outset that these themes are not the

NGOs' *raisons d'être*. Rather, they are *means* to a greater end, which might be summarised as a long-term commitment to the empowerment of social and civil organisations. These NGOs believe in general that such organisations will be the agents of change, or perhaps will combine, mutate, and permutate into new *social actors* or *agents* who will undertake the task of societal transformation.

For the purposes of this article we use two (what we hope are) generic terms for donor and donee within the 'development' field: *agencies* in the North and *recipients* in the South. The term *agency* annoys some Northern aid workers, yet it is our generic term in Mexico for external, non-government, non-corporate sources of funding, and it is used here and in general with no derogatory intention.

The NGOs surveyed share one important trait. We are dependent on funding from Northern agencies for our existence and survival. There is no tradition in our area of the global South, or an extremely weak one at best, of individual donations to 'good and noble causes'. Self-financing schemes cover at best only a small percentage of the budget. The only in-country sources of funding in our field are government coffers or corporate profits. To accept funds from the first would, in the minds of many, convert NGOs to Government Organisations, and corporate funding is seen to be too tainted, especially in a moral or ethical sense, to accept. None of the NGOs interviewed for this discussion accepts corporate funding. One does accept government funds within a trilateral (government/NGO/agency) scheme described below.

A word about the word

There is no universal standard definition of partnership within the development world. For our purposes here, we have imbued it with a particular meaning, as noted above. For this reason, there is no exact translation of 'partnership' into Spanish. It is a word that must be given meaning within a specific context, although one informant reports that the Spanish equivalent of *strategic relationship* is one 'real-life' term for what one agency and one NGO established at the start of this century. In any event, the word is generally construed to mean equal standing among participants, with perhaps differentiated responsibilities. And once this was explained, informants readily accepted that a partnership can, in fact, exist between aid agencies and recipients in certain situations, as we shall see.

The fact that funding flows from North to South may, however, have important implications for the theoretical equality of standing within a partnership. One informant rejects the proposition that a proper partnership can ever exist where, at some point in the relationship among agencies and recipients, financial assets are transferred in a non-commercial transaction from the former to the latter. Only agencies have final judgement in the matter of grants, while recipients can do little more than wait for the decision on their funding request. The power to grant or withhold funding is unequally shared, and so, for our informant, a true partnership can never be said to exist, since an unequal power relationship inevitably prevails, at least on the question of funding.

A historic setting

For two of our informants, chequered relationships between Northern agencies and Southern recipients have been the rule for the past several decades. After World War II, the relationship was essentially paternalistic, even neo-colonial. One part of the world was 'developed', the other 'underdeveloped'. One part of the world had 'solutions' to underdevelopment, the other lacked them, and the received wisdom of the time posited simply transferring knowledge,

technology, and resources from the North to jumpstart development in the South. In this rather linear way of thinking, development was a matter of inputs.

During the late 1950s and into the 1960s, as the global South gained greater political independence, the prevailing development paradigm increasingly met with criticism and rejection. After decades, transfers of millions of dollars had had no appreciable effect on poverty or underdevelopment. With time, development practitioners and academics agreed: poverty in the developing world was less a cause, and more an effect, of overarching structural problems. It was these structures, then, that had to be transformed or eliminated in order for poverty to be reduced. The focus of attention shifted from poverty to the root causes of underdevelopment.

In Latin America during the 1970s and 1980s, wars of national liberation, though often unsuccessful in overthrowing political and economic elites, nonetheless were important in instilling at the grassroots a sense of nationalism and self-determination. This idea percolated to the development sector, where, over time, it altered the existing paternalistic and neo-colonial paradigm.

What emerged was the determination of stakeholders in developing countries to be considered 'social subjects', i.e. actors fully capable of participating in the development debate and proposing innovative and 'home-grown' solutions to structural problems affecting the majority of the population. These local social subjects had to be seen as autonomous, in the sense that they had a particular, perfectly valid understanding of their own reality and could act to transform it. Thus the global South was more than capable of generating its own objectives, perspectives, and strategies. The top-to-bottom, North-to-South chain of command of ideas, methods, and strategies in the development field underwent a radical transformation. Other more horizontal, or democratic, models appeared. And Northern agencies that resisted changes found themselves increasingly estranged from their Southern counterparts.

Increasingly, the proper role of development agencies was thought to be participation with, and strengthening of, 'local social subjects', to collaborate in building alternative social and economic paradigms. From a Southern perspective, it was incumbent upon the Northern agencies to join the South. As participants in an effort to help to eradicate the structural causes of poverty, Northern agencies were always welcome, but now the relationship with the South had to be put on a more equal footing.

Some Northern agencies enthusiastically took up the challenge. In this new context, the idea of a shared commitment between Northern and Southern organisations to help to create socially based alternatives took hold. One informant says that during this period, which covered roughly the 1970s, 1980s and into the 1990s, Northern and Southern entities considered themselves 'allies'. In fact, a wide range of terms came into the development lexicon to describe this new-found relationship. For some Northern agencies, the Southern allies were counterparts, colleagues even; one agency in Germany coined the term 'mutual parts', in an effort to express the commonality of action and commitment, harkening back to our word 'partnership'. A US agency preferred to talk of 'associates'. It is at this time that informants agree that something akin to a partnership existed among the Northern and Southern institutions working to eliminate the root causes, or structural reasons, behind the lack of opportunity that characterised the lives of most of the world's population.

Behind this blossoming spirit of collegiality there was in addition an effort to define what a new society might look like. This was a joint activity among various actors within the development field, such as Northern agencies, Southern social and civil organisations, and the greater civil society. And, as such, a new actor (or, to use the Latin American term, 'social subject') was in the making. This actor undertook actions in favour of social change, thought about social change as a strategic goal, and recognised that, in order to create, change introspection and

self-criticism were necessary, as was a willingness to change established modes of thinking, acting, working, and relating to the greater community.

In other words, belonging to a partnership required a shared vision; but, just as important, that vision had to be jointly constructed, never imposed. It also, in the end, required a shared ideology, though not necessarily one that arose from any particular political current. It was rather a matter of opposing the *status quo* where it had proved unjust, undemocratic, discriminatory, and exclusionary. Structural changes could be brought about through greater political awareness and mobilisation on the part of the oppressed majority, not only by resisting and rejecting existing structures and ways of thinking, but also by building alternatives.

Importantly, within this partnership a common dialect evolved which recognised the role that imperialism, colonialism, racism, capitalism, and (later) patriarchy had played in forming the current *status quo*.

Given this search for greater equality and collegiality, most Southern partners sought to ensure that funding from outside sources would not interfere with their own priorities, objectives, and goals. Suggestions from the North were of course welcome, and so were technical, methodological, or knowledge inputs, but funding had to be given without attached strings. It was impermissible to use funding to influence a Southern partner's activity to conform to Northern priorities. A new ethics became a part of this new-found *partnership*: the South gained a greater independence in thought and movement, and funding requests were granted for overall strategic objectives, rather than mere specific activities. But likewise, Southern partners were expected to exercise grants with professionalism, with timely and transparent accountability.

Further, mutual commitments were intended to apply to the long term. Structures were not easily modified, and it was thought quite useless to insist on deadlines. Northern partners either had to commit support for an undefined future in the South or, if they withdrew earlier, had to be satisfied with having contributed to modifying the *status quo*, even if concrete results were difficult to identify. That was the nature of the beast, or so it appeared at the time.

The paradigm shifts

The majority of our informants agree that the 'good times' of shared hopes and visions between Northern and Southern partners began to show signs of strain in the late 1990s, although one claims to have seen the writing on Northern walls years before. Several reasons are behind the disaffection.

One is identified as a general conservative political attitude that accompanied the implementation from the mid-1980s of neo-liberal economic policy virtually throughout the world. Another reason was, surprisingly, the transition to more democratic regimes in many Southern countries, particularly in Latin America. As governments became more democratic through the exercise of formal democracy, particularly at the ballot box, their legitimacy increased, more so in the global North than in the South. People in the South continued to be disenfranchised, disempowered, and mired in a stubbornly resistant poverty that seemed to deepen and spread, notwithstanding the democratic veneer of political representation.

Yet an important shift in emphasis occurred: funds and efforts now poured into the South to support fledgling democracies. The logic was seemingly irrefutable: if impoverished countries were remodelled after European or North American democracies, diverse 'stakeholders' would be able to push their particular agendas forward within the political arena and generate an overall distribution of political power and economic resources. But it did not take long for reality to trump logic. Entrenched elites learned to play the democratic game and gain legitimacy on the world stage, while denying their population real access to power.

One effect of more legitimate Southern governments among Northern agencies was the willingness of the latter to work with the former to find supposed new ways of overcoming poverty. Schemes of 'co-investment' were hatched, whereby local governments equalled or exceeded funds transferred by Northern agencies. Multilateral organisations, such as specialised agencies of the United Nations, were often eager to make their own contributions. In line with the democratic glaze that accompanied this new age, 'trilateral' or 'multilateral' boards of directors were established over these joint investments, giving Northern agencies, local governments, and grant recipients voice and vote to administer funds and decide on specific grant proposals.

These new arrangements pleased some Southern recipients. They took pains to argue that the boards were indeed representative and non-coercive, and, perhaps most importantly, afforded innovative means whereby Southern organisations could legitimately access tax revenues, since 'part of that money is ours to begin with'. The funding, they argued, could be destined to meeting the needs of the poor, the disenfranchised, the disempowered. Other Southern organisations were less than pleased, however, and refused to participate, alleging that involvement in these schemes legitimised governments that still did not represent majority interests.

Further, in the intervening neo-liberal years, efforts to *eliminate* poverty had given way to *alleviating* poverty and *attending* to the poor, or rather, to the 'losers' of the new economic game. And neo-liberal economists were quite willing to admit that there would be losers. A large amount of government funding for social causes was admittedly used to prop up the consumption of the most impoverished. And with token exceptions, governments had little tolerance for rude questions regarding the *status quo* or even ruder talk of changing it.

Yet another reason behind the paradigm shift was the supposed accession of some countries to the status of 'developed' countries. For example, in the case of Mexico, one president's decision to join the Organisation for Economic Co-operation and Development (OECD), and then negotiate a free-trade agreement with the USA, was sufficient reason for some Northern agencies to channel grants elsewhere A publicity campaign to convince world opinion of the country's arrival in the 'First World' was successful, but unsubstantiated by basic economic data that pointed to persistent and widening poverty and unemployment, greater wealth concentration, and increasing rates of emigration.

Finally, another turning point during the 1990s was the shift of fundraising strategies among Northern agencies. The decades-old practice of appealing to the general public for funds was not entirely forgotten, but certainly downgraded in importance. Agencies of all sizes chose to accept increasingly wider slices of their budget pie from their governments. Southern recipients immediately detected the change. Beholden to government back-funders and anxious to demonstrate 'success' of resources applied, or required to do so by management in order to justify renewed grant applications, Northern agencies now distanced themselves from the previous thinking that associated poverty reduction with long-term processes.

Unfortunately for all, those processes had been especially difficult to document. They involved qualitative changes that were nothing if not subjective. Since such processes involved inherently slow social evolution, many agencies, as mentioned earlier, had to end their commitments without conclusive proof that their participation had indeed wrought greater empowerment of the people.

By accepting government funding and quickly becoming dependent on it to sustain programmes, projects, and bureaucracies, Northern agencies began to turn screws on Southern recipients to show conclusive 'results'. Indicators, especially quantifiable ones, became important. Certain agencies emphasised particular themes (gender, AIDS, environmental issues, agro-ecology, fair trade) in an effort to distinguish their 'brand' of overseas aid, or to hop on to fashionable development bandwagons in order to please governments in the North.

At times, concern about particular themes was welcomed in the South; one informant says that, for example, stimulating greater gender awareness was in itself not a problem, although sometimes the way it was done caused friction.

But more importantly, there was a dramatic change in the way in which priorities were determined. Harkening back to the 1950s, once again it was the North that set priorities, often unilaterally. Conceptual gains of previous decades were wiped away, as Northern agencies scrambled to satisfy back-funders' criteria. For example, the idea that partners in the North and South had to jointly design priorities and strategies to have an impact on a long-term process suddenly disappeared. Now, funds were very often conditioned on recipients taking on particular themes, or adjusting on-going programmes and projects to highlight aspects thought to be important in the North.

Part and parcel of this shift towards quantifiable and supposedly more objective criteria was the emphasis on finding indicators of 'success'. This continues to be an on-going debate (or battle) between Northern funders and Southern recipients, given the latters' frequent insistence on working within long-term processes of social transformation that are unsuited to easy, short-term quantification. The main problem, says one informant, is that funders are asking to see quantitative indicators that come from financial-investment circles and have nothing to do with social processes. At best, says another informant, these indicators are an interesting and useful means of looking at activities but they cannot, and should not, be converted into objectives. In other words, she adds, Northern funders have begun requesting 'a logic of methodological construction that does not respond to the construction of social subjects'.

A consequence of the paradigm shift and the newly imposed emphasis on quantifiable indicators was that some Northern agencies concluded that Southern counterparts lacked the basic skills to address basic poverty. This, once again, was a task to be carried out at the behest and direction of Northern agencies, which supposedly did have the required skills set. Southerners could be selected to help with specific inputs, according to demonstrated competencies. What ensued was the contracting-out of these competencies, so that a local NGO could be called in to conduct workshops on specific topics, from bee keeping to human rights. One informant recounted the unsettling prospect of being hired to give human-rights workshops to indigenous communities selected by a Northern agency. Rather than 'accompanying' communities, establishing long-term relations of confidence and trust, the NGO faced the prospect of 'dropping in' for the sole purpose of a workshop that would conceivably be entirely disconnected from the local context. Although the option might be a means of funding this particular human-rights centre, in the end it was rejected since it ran counter to its logic, strategies, methodology, and *raison d'être*. But it pointed to disturbing trends within the development field.

In summary, real development, as understood by a great many Southern organisations, e.g. designed, controlled, and operated by social agents, is being thwarted by a Northern vision too often driven by the need to please back-funders. When these back-funders are governments controlled by parties (of whatever complexion) with neo-liberal economic worldviews, there is often a regression to the logic of decades past, when development was thought to entail a transfer of resources. The current received wisdom emanating from governments adds new requirements for approval of Northern agencies' funding requests: transparency, accountability, input–output methodologies for tabulating indicators. These are useful tools that should be incorporated as auxiliaries in all processes of transformation. But the essence of social-development processes lies elsewhere, in the empowerment of social-change agents, many of which are nascent, or under construction, and by definition resist quantification.

Real epistemological and ideological barriers currently prevent *partnerships* from prospering. In the unanimous opinion of those whose views have contributed to this study, real partnerships within the development world will again be forged and thrive when Northern and

Southern organisations meet on an equal footing and support social subjects working to construct a new world order.

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