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TECHNOCRATIC SHEPHERDING IN THE HUMANITARIAN SECTOR: THE LOCALIZATION AGENDA'S FAILURE TO DELIVER ON A GRAND PROMISE

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LA TUTELLE TECHNOCRATIQUE DANS LE SECTEUR HUMANITAIRE : L'ÉCHEC DE L'AGENDA DE LOCALISATION À TENIR UNE GRANDE PROMESSE

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To write is to carve a new path through the terrain of the imagination.

(Solnit, 2001, p. 72)

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ALNAP:	Active Learning Network for Accountability and Performance in Humanitarian Action
CERF:	Central Emergency Response Fund
C4C:	Charter4Change
CHS:	Core Humanitarian Standard
CBPF:	Country-based pooled funds
DAC:	Development Assistance Committee
GAC:	Global Affairs Canada
GHD:	Good Humanitarian Donorship
HAG:	Humanitarian Advisory Group
HPG:	Humanitarian Policy Group
IASC:	Inter-Agency Standing Committee
ICRC:	International Committee of the Red Cross
IFRC:	International Federation of the Red Cross and Red Crescent Societies
IOM:	International Organization for Migration
INGO:	International non-governmental organization
MSF:	Médecins sans frontières
NEAR:	Network for Empowered Aid Response
NGO:	Non-governmental organization
NPM:	New Public Management
OCHA:	Office for the Coordination of Humanitarian Affairs
ODA:	Overseas development assistance
ODI:	Overseas Development Institute
OECD:	Organisation for Economic Co-operation and Development
PIANGO:	Pacific Islands Association of NGOs
PRSP:	Poverty Reduction Strategy Paper
RBM:	Results-based management
SDG:	Sustainable Development Goals
SAP:	Structural adjustment program
SOHS:	State of the Humanitarian System report
UN:	United Nations
UNDP:	United Nations Development Programme
UNDRR:	United Nations Office for Disaster Risk Reduction
UNHCR:	United Nations High Commission for Refugees (UNHCR)
UNICEF:	United Nations Children's Fund
VANGO:	Vanuatu Association of NGOs
WHS:	World Humanitarian Summit

RÉSUMÉ

Le programme de localisation de l'aide, en tant que dernière tentative de réforme du système humanitaire, se heurte à des défis de mise en œuvre qui entraînent des progrès limités. Bien que cela soit souvent attribué à des problèmes techniques, tels que les exigences des donateurs, les mécanismes de financement et la faible capacité des fournisseurs d'aide dans les pays touchés, cette étude soutient qu'un manque d'engagement du système d'aide international avec ses paradoxes internes est à blâmer. Elle aborde l'aide en tant que territoire épistémique dans lequel l'expertise, monnaie courante des régimes technocratiques, est produite et protégée par des gardiens détenteurs du pouvoir qui déterminent ce que constitue un intervenant légitime. Les ONG internationales et des organismes normatifs accompagnent les intervenants locaux « non conformes » vers l'assimilation des savoirs « légitimes » par le biais du renforcement des capacités. Cela leur fournit un accès au territoire de l'aide internationale. Ainsi, les hiérarchies épistémiques qui perdurent dans le milieu sont réaffirmées par de tels processus, nuisant à une redistribution du pouvoir telle qu'envisagée par la localisation. L'action humanitaire demeure dirigée par des experts qui exercent un contrôle sur les intervenants locaux dont les intérêts font paradoxalement l'objet de la réforme, entraînant de l'injustice cognitive et épistémique. La transformation envisagée par le programme de localisation peine ainsi à se manifester. La recherche mobilise une approche qualitative inspirée de la théorisation ancrée, et conclut que la source d'une réforme profonde se situe à l'extérieur, plutôt qu'à l'intérieur, du système de l'aide internationale.

Mots clés

Programme de localisation, injustice épistémique, intervenants humanitaires, connaissances, réforme humanitaire

ABSTRACT

The localization agenda, as the humanitarian system's latest attempt at reform, is fraught with implementation challenges resulting in limited progress. While this is often attributed to technical issues, such as donor requirements, contracting mechanisms and the weak capacity of aid providers in affected countries, this study argues that the international aid system's lack of engagement with internal paradoxes is to blame. It addresses aid as an epistemic territory in which knowledge, as the currency of technocratic regimes, is produced and guarded by power-wielding gatekeepers who determine what constitutes a legitimate responder. International NGOs and standard-setting organizations shepherd nonconforming local responders towards the assimilation of "legitimate" knowledge through capacity building, which grants them entry into the territory. Enduring epistemic hierarchies are reaffirmed through such processes, instead of the desired redistribution of power within the system. Humanitarianism's expert-driven paradigm controls the local responders whose autonomy it paradoxically champions, resulting in cognitive and epistemic injustice. The transformative potential of the localization agenda is thus annulled. The research mobilizes a qualitative approach inspired by grounded theory, and concludes that deep reformative potential lies on the periphery of the system, rather than within its core.

Key words

Localization agenda, epistemic injustice, humanitarian responders, knowledge, humanitarian reform

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CHAPTER 1: INTRODUCTION

1.1 The humanitarian reform's failure to launch

In May 2016, with great fanfare and flourish, the United Nations, emergency response organizations and heads of state jointly launched the Grand Bargain—"A Shared Commitment to Better Serve People in Need"—thereby announcing a humanitarian reform. First presented at the World Humanitarian Summit that took place in Istanbul on May 23–24 2016, the Grand Bargain proposed a new "deal" between the world's five largest bilateral donors and six key UN agencies[1] involved in emergency response. Its goal was to address the growing humanitarian funding gap, and increase the quality of aid delivered to people in need. Now counting 64 signatories, the Grand Bargain is structured around 9 work streams and 51 commitments which address funding mechanisms, participation of affected populations and harmonization between actors. Most significantly, the new "deal" commits to providing 25% of donor funding "as directly as possible" to emergency responders in the Global South[2], and to an increase in multi-year support for the development of their capacities (Inter-Agency Standing Committee, n.d.). It heralds a "participation revolution" in which affected communities and individuals are considered key stakeholders in decision-making processes and feedback mechanisms. As expected with such institutional zeal, the Grand Bargain spawned the creation of various forums, information hubs, norms, consultancies, spin-off conferences and research reports, both within and outside of the UN. It also led to the emergence of a new term: localization.

[1] The five original bilateral donor countries are the United Kingdom, the United States, Germany, Norway and Switzerland and the six UN agencies are the UN Development Programme (UNDP), the UN High Commission for Refugees (UNHCR), the UN Children's Fund (UNICEF), the World Food Programme (WFP), the Office for the Coordination of Humanitarian Affairs (OCHA) and the International Organization for Migration (IOM).

[2] The term Global South does not refer specifically to the equatorial South, but is shorthand for countries or nations whose thought systems did not originate in the European subcontinent. Global North, meanwhile, refers loosely to countries of Europe and those which share European culture because of colonization—Canada, the United States, Australia and New Zealand for instance. Depending on the source, Japan and South Korea are often associated with the Global North on the basis of their economy, which reveals an etymological conundrum and the reductive effect of such terms. Likewise, the North-South duality, which is typical of European ontologies, obfuscates the wide variety of non-European thought systems within "Northern" territories—for instance those of the First Nations and Inuit of Canada, indigenous Australians and New Zealand's Māori population. In this study, the terms Global South and Global North have been retained for lack of more appropriate vocabulary in the English language, and largely used to distinguished organizations' origins and administrative headquarters. "Western" will be used to refer to ideologies having originated in Europe.

In the humanitarian sector, localization encompasses a variety of approaches to working and collaborating with Southern actors in the provision of aid. It is a process through which a diverse range of stakeholders including bilateral and multilateral donors, national governments, international organizations, and civil society, are attempting to ensure that local actors, as frontline responders, are situated at the centre of emergency responses. This is not the first attempt at such a restructuring in the industry: the Grand Bargain, which primarily mobilizes humanitarian actors, much resembles the 2005 Paris Declaration for Aid Effectiveness and Accra Agenda for Action (Organisation for Economic Co-operation and Development, 2005), whose main pillars include the ownership by local actors of development strategies. In fact, local actors have always been at the centre of response; they have simply not been recognized as such. The response to the 2015 Gorkha earthquake in, Nepal, for instance, was carried out by local sherpas and drivers with expert capacity to navigate the area's treacherous terrain. In Africa, local health extension workers were indispensable in efforts to curb the Ebola epidemic through community mobilization campaigns. Fiji and Vanuatu weathered two simultaneous crises, COVID-19 and a devastating cyclone, thanks to inter-island collaboration and self-help networks.

Localization, then, refers to a shift of resources and decision-making from the Global North, to responders and affected populations who are based in the country or region where the crisis is occurring, thereby enhancing their intervention capacity (De Geoffroy & Grünewald, 2017; International Council of Voluntary Associations and Humanitarian Leadership Academy, 2019; Organisation for Economic Co-operation and Development, 2017). As a polysemous concept, localization is subject to various interpretations. While some actors, such as the Kenya-based NEAR network, evoke financial independence from donors (Poole, 2018), other perspectives describe a process of recognizing and strengthening the autonomy of leadership in the Global South. In Melanesia, for instance, localized assistance draws from endogenous knowledge (Accelerating Localisation Through Partnerships, 2019) and builds on the strengths of local structures (Ayobi et al., 2017). In Indonesia, it respects the state's sovereignty (Robillard, Howe, et al., 2020). For others, it is synonymous with the right to self-determination (Barakat & Milton, 2020; Slim, 2021)—a definition which is most closely aligned with the critical perspective that will be espoused throughout this study. Localization, therefore, entails more than simply "integrating" Southern actors into the humanitarian system that has historically been dominated by the Global North (Gómez, 2021). Viewed from a critical perspective, which seeks to understand power structures and inequalities through an analysis of intersecting hierarchies, the localization agenda evokes a large-scale reconceptualization and de-systemization of humanitarianism from the bottom-up. It challenges the "integration" narrative by

questioning *why* one needs to be integrated into the system in order to be considered a legitimate humanitarian responder. It also questions *who* gets to decide.

The word "localization" was on everyone's lips in 2016, but a few years later, while all eyes were on the COVID-19 pandemic in 2021, the Grand Bargain's 5-year implementation timeframe came and went without much notice. A significantly less ambitious version, known as the Grand Bargain 2.0, has since then been elaborated (Inter-Agency Standing Committee, 2021), but the overall momentum of the World Humanitarian Summit has waned. Though donors and large international organizations report significant progress towards the achievement of some localization objectives (Metcalfe-Hough et al., 2020), studies reveal that there has been little change in systemwide operational practices (Active Learning Network for Accountability and Performance in Humanitarian Action, 2022; Fast & Bennett, 2020) or in how affected people view aid, compared to the period preceding the humanitarian summit (Ground Truth Solutions, 2019). Other studies reveal that local actors remain under-resourced and marginalized (Barbelet, 2019; Humanitarian Advisory Group and Development Services Exchange of Solomon Islands, 2019; Humanitarian Advisory Group and Vanuatu Association of NGOs, 2019). The most recent independent review for the Grand Bargain (Metcalfe-Hough et al., 2022) notes that instead of increasing, direct funding to local actors was actually *halved* from 2020 to 2021, representing a meagre 2% of all humanitarian funding. Direct funding then hit the all-time low of 1.2% (Active Learning Network for Accountability and Performance in Humanitarian Action, 2022). This is significantly off-target, considering the original objective of 25%. The summary of Metclafe-Hough et al.'s report also bluntly notes the following, in relation to one of the Grand Bargain's work stream, which called for the engagement of affected populations and local actors: "No participation revolution."

For this reason, and despite its grand objectives and the deployment of substantial institutional resources and effort, localization as a humanitarian reform appears to have failed to launch. Though donors and agencies remain committed to the transformation, the expected liftoff following the World Humanitarian Summit did not occur. My aim, in this study, is to understand why. As such, my intention is to directly address the scarcity of scientific and theoretical writing on the topic.

1.2 Challenges to localization

The vast body of documentation published by think tanks, international non-governmental organizations (INGOs), the International Committee of the Red Cross (ICRC), the International Federation of the Red Cross (IFRC)[3] and United Nations (UN) agencies suggests that the actors that are operationalizing the Grand Bargain recognize that the localization agenda has been fraught with challenges. Attempts to measure progress, identify hindering factors and capture lessons learned have resulted in countless reports and policy briefs. However, upon their review, it becomes clear that power within the humanitarian system, while broached in many documents, lacks critical theorization. There appears to be insufficient recognition of the ways in which the localization agenda itself is grounded in power imbalances, thus constraining radical change within the humanitarian system. Hence, and as this research will demonstrate, the failure to address profound and historical sources of power in the humanitarian system, which leads to internal paradoxes, is responsible for the lack of systemic change. The parameters of the would-be reform are defined by those who wield power and influence, revealing competing demands between institutional change driven by the Global North and the Global South's claims to self-determination.

Likewise, the colonial underpinnings of aid and their enduring vestiges are noticeably absent in the localization literature despite recent calls to "decolonize" aid (Boateng, 2021; Paige, 2021; Sondarjee, 2020). Many parallels can be established between colonial centre-periphery dynamics and the humanitarian system, in which international actors at the centre attempt to incorporate local actors at "the periphery" into their agenda. Yet, this political dimension of localization is obfuscated by a technocratic search for solutions. The Grand Bargain's work streams have proposed, for example, the redesign of approaches to include "as direct as possible" funding and greater use of UN-led pooled funds, standardized questionnaires to assess the capacity of local actors and even a "universal" simplified reporting template (Inter-Agency Standing Committee, 2019; International Federation of the Red Cross and Swiss Agency for Development and Cooperation, 2021; Metcalfe-Hough et al., 2020). Furthermore, most emergency responses today include a technical training component, whereby international responders engage in some form of skills-building aimed at enhancing the capacity of the local responders

[3] The ICRC and the IFRC are distinct, but interrelated, entities. The ICRC is an independent international organization founded in 1863 whose primary mission, as auxiliary to the state, is to protect and assist victims of armed conflict and other disasters. Relief activities are carried out by national societies (chapters) of the ICRC upon their own territory. The IFRC, meanwhile, is an international organization established in 1919 whose mission is to provide disaster responses and support (both financial and technical) to national chapters and populations overwhelmed in times of humanitarian crisis.

with which they work. The definition of "capacity" and the purpose it serves, however, is a highly contested domain, as will be shown in this research. It acts as a determinant of inclusion or marginalization within a humanitarian territory, whose boundaries have been established by the actors at its centre.

In asking why localization failed to take off, then, this study considers technical solutions—including those that attempt to address the failure of localization—as manifestations of processes that are in reality *counter-reformative and anti-political*. This dissertation argues that a reform—any reform that attempts a reconfiguration of power, not just localization—from within the humanitarian sector is not possible, because of self-regulating mechanisms that maintain the system in a state of homeostasis, or simply said, *status quo*. This is assured through knowledge production and compliance-inducing mechanisms, which, as will be demonstrated in subsequent chapters, negate the possibility of self-determination in its truest form for humanitarian responders in the Global South. A failure to engage with this paradox prevents the system from transcending it, sustaining instead its existing dysfunctions.

To understand why the reform didn't happen as planned, I propose to look at it from a specific angle: that of knowledge. The first task at hand then, is to denaturalize the humanitarian system's episteme, to approach it from an angle that removes its taken-for-grantedness, its "natural" and familiar character. It is then rendered unnatural and strange, an object with which we refamiliarize ourselves through deconstruction.

1.3 Episteme as territory

In this study, the humanitarian sector will be viewed, from an ecosystemic perspective, as a landscape or territory upon which actors interact to establish the boundaries of what is considered "knowledge." These actors—UN agencies, donors, INGOs, the ICRC, the IFRC and a limited number of responders in the Global South—create an epistemic territory whose bounds are clearly delineated. The term "territory" evokes extractivism, occupation and the struggles for defence which are waged by the various groups who make up its population. Viewed as open systems requiring a continuous exchange of energy to sustain themselves (Capra, 1983), populations of organizations in the humanitarian sector interact, as will be illustrated in Chapters 4 to 7, to acquire and protect the most essential currency for survival and legitimacy: knowledge.

For humanitarian actors, knowledge—which consists of technical and managerial know-how but also data (Piquard, 2022) is linked to funding, and hence to survival in a competitive environment. Knowledge is extracted, processed, accumulated, produced and safeguarded as part of a dynamic web of interactions and interdependence. To reduce threats to their relevance and hence existence, actors have assumed different roles within this ecosystem, as will be demonstrated in subsequent chapters. The most powerful players—UN agencies, the ICRC, the IFRC and donors—are gatekeepers, who have erected barriers to keep out "knowledges otherwise."[4] From the technocratic summit of the aid hierarchy, they produce technical "experts" and instruments: norms, policy, standards and increasingly sophisticated managerial approaches which maintain organizations in a perpetual state of knowledge deficit. They have delegated a supervisory role to INGO shepherds, who serve as guardians of institutionalized knowledge, and who provide epistemic orientation to those under their "care": NGOs in the Global South.

In referring to INGOs as shepherds, it is certainly not my intention to equate NGOs from the Global South to a flock of sheep. None of the actors that populate this epistemic territory are devoid of agency and most, if not all, have consciously accepted the terms of entry into the territory: they have displayed a certain form of knowledge deemed "legitimate" and "sufficient" by the gatekeepers that renders them suitable as subcontractors[5]. Instead, the term "shepherd" refers to the dual accountabilities of INGOs, who serve as intermediaries in the aid chain, forging a link between donors and organizations in the Global South, and ultimately with the populations in need of assistance. As intermediaries, INGOs have been mandated by donors to "steer" their Southern implementing partners' activity in alignment with the global agenda, and hence to conform with institutionalized knowledge. The risk of wayward behaviour is curtailed through training and control mechanisms. Meanwhile, and somewhat contradictorily, INGOs simultaneously champion the situated knowledge and skills of the Southern NGOs with which they work. They wish for their inclusion and recognition within the humanitarian system, but are complicit in donor-driven processes of technical formatting, which renders Southern NGOs admissible for entry into the

[4] The expression "knowledges otherwise" is used by Escobar (2017, 2020) to denote epistemes that are "othered" by the dominant Western tradition. Used in plural form, it also refers to the wealth and diversity of such "othered" thought systems and their knowledge production mechanisms. The term is preferred in this study to "local knowledge," which is a construction because all knowledge is situated and, it can be argued, localized. The term "local knowledge" in the aid industry, according to Mulder (2022), often denotes something that is static and internally coherent. However, this can mask the vastly different social realities within which many epistemes exist, and how they sometimes conflict at the local level.

[5] The terms "implementing organization" and "local subcontractor" will be used interchangeably to refer to local aid providers in the Global South who are contracted by foreign actors to carry out components of the aid response under contractual arrangements.

territory. These processes, and the many more that will be discussed in subsequent chapters, are among the dynamic patterns of adjustment that occur within this ecosystem.

Viewed from such a perspective, the knowledge structures that have been erected, and upon which the system gravitates, are the result of interactions and interdependence. For instance, the most ideologically, economically and politically powerful knowledge producers—UN agencies, the ICRC, the IFRC and donors—have historically drawn from the Western technoscientific tradition to delineate what constitutes "valid" knowledge. As gatekeepers of an epistemic territory whose boundaries are threatened by the encroachment of other ways of doing and thinking, they have successfully marginalized some donor countries of the Global South, for their lack of adherence to the West's definition of aid. China's international assistance, for instance, has been relegated to the category of "rogue aid," for deploying another form of development knowledge (Brautigam, 2009) because of its inclination to sidestep the commonly agreed-to processes and protocols of the OECD's Development Assistance Committee (DAC).[6] Meanwhile, the term "rogue" could arguably also be applied to some World Bank projects that have led to forced displacement, environmental degradation and human rights violations. Suffice it to say that there are ideologically, politically, and financially powerful institutions with the means to establish policy, norms and a dominant discourse, whose intended or unintended consequence is the marginalization of "otherness."

This has often been justified on the grounds that aid is best not left in the hands of amateurs and their improvised interventions—to which I agree, for if I need to travel by air for instance, I would expect that the plane be piloted by a qualified individual. Recognizing the existence of an "ecology of knowledge" (Santos, 2014)—a plurality of epistemes instead of a monoculture—need not discredit technical or theoretical knowledge. But expertise, in the aid industry, is a manifestation of a long tradition of dichotomic thinking that opposes primitive to civilized, rational to irrational and traditional to modern (Sharma, 2021). Organizations in the Global North are presented as having the technical and managerial

[6] The DAC is a policy and data hub comprised of 30 large donors, most of which are from the Global North. As a normative institution, it has defined what constitutes "official development assistance" (ODA), which includes emergency or humanitarian assistance. The DAC reports on funding flows from donors to recipient countries. The DAC has also defined membership criteria for donors, and adheres to the World Banks' definition of eligible aid recipient countries on the basis of gross national income. The data captured by the DAC therefore provides a limited view of funding flows, as its mechanisms have entirely excluded generous volumes of foreign assistance from non-DAC countries (such as China, Brazil or India), flows that it does not consider "aid" and assistance destined to "non-eligible countries."

expertise required to deliver aid, whereas emergency responders in the Global South, though they possess extensive contextual knowledge and hence insight needed to generate solutions, are presented as requiring capacity building to achieve certain performance standards. This reveals hierarchical and paternalistic undercurrents that pertain to knowledge, whereby such dichotomic thinking produces "otherness" that carries a latent connotation of subalternity.

In the aid sector, it becomes important to ask whose knowledge matters most, and why. How can the localization reform hope to place local responders in crisis-affected countries at the centre of humanitarian response, while simultaneously disqualifying their capacity? And if the self-appointed role of large, Western organizations is to "build the capacity" and shepherd Southern NGOs towards what is deemed as adequate performance, how does this equate to any kind of reform in terms of power distribution?

As will be argued in the next chapters, the dynamics of knowledge production, acquisition and safekeeping have given rise to a managerial and technical elite—gatekeepers—who, sustained by internal processes that maintain the *status quo*, are engaged in epistemic oppression. The knowledge they produce, data-driven and evidence-based (terms that appear frequently in the industry's lexicon), is favoured by the validity criteria of Western scientific thought and technocratic rationality. Therefore, ignorance of such knowledge—though it is inequitably distributed through the world—is considered disqualifying (Santos, 2014). Its presumed universality has contributed to the spread of managerial prescriptions and policymaking that are indifferent to economic, cultural and social diversity and to what Southern NGOs perceive as a neocolonial imposition that incongruently undermines their agency (Girei et al., 2022).

An aporia thereby begins to unfold upon aid's territory: While the ongoing aid reform seeks to enhance the role of Southern actors, it simultaneously stifles their self-determination through the exercise of control aimed at conformity and the negation of epistemic co-presence. And, amidst recent and increasingly vocal calls to decolonize aid, recognizing the coloniality of knowledge, as both process and product, is a first step towards defamiliarizing the "natural." It is then that we come to understand knowledge as a powerful normative construct and attendant of the cultural imperialism that sustains the West's epistemic hegemony (Amin, 2009).

1.4 The supplantation of knowledges otherwise

Inherited from the Enlightenment, Europe's claimed position at the centre and a Eurocentric vision of modernity ("Euromodernity") (Prasad, 2003a), the dominant technoscientific approach to managing and delivering aid provides ample evidence of coloniality. A judgment of "backwardness" was passed by colonizers and missionaries, and later, economists and development technocrats, leading to a generalized and paternalistic assumption that populations in need of aid suffer from a lack of knowledge. Aid's locus of control has therefore been typically viewed as external to the populations concerned, and residing in the hands of "expert designers" of interventions (De Vries & Nemec, 2013; Ziai, 2007). Yet, the history of international aid as constituted in the West—which barely spans a hundred years—is replete with examples of how foreign "expert" knowledge has caused more harm than good, revealing in some isolated cases the brutality of international assistance. From World Bank-funded dams that violently displaced millions (Roy, 1999) to the monoculture projects of the so-called Green Revolution that led to conflict and malnutrition (Shiva, 1991), and the donor-imposed structural adjustment programs that caused the exponential growth of urban slums in the Global South (Davis, 2006), foreign solutions to alleviating human suffering have often missed the mark. However, aid's faith in itself and its institutions remains unwavering. As a result, new generations of technocrats busy themselves with plans to fix the shortcomings of their predecessors' attempts, whose underlying assumptions remain unchallenged.

As we will see, the imbrication of power and knowledge, or the mutually constitutive knowledge-as-power duo (Foucault, 1966, 1975), values objectivity and rationality, and thus evacuates complexity and politics from the managerial practices that emerge. In this way, a "regime of truth" about aid is created, grounded in a specific cultural and historical context, complete with its own validation criteria. It sanctions the discourses that fall within its truth, and determines who has the authority to speak them (Foucault, 1971). True to Western binary thinking (Santos, 2014), the positivist scientific tradition ascribes an almost sacrosanct status to rational/objective/male knowledge, which serves to disqualify irrational/subjective/female knowledge (Escobar, 2017). According to ecofeminist perspectives, this accounts for the environmentally unsound "development" interventions whose bias favours economic growth through extraction and mass production, rather than a holistic understanding of complex human/non-human ecosystems and intuitive knowledge developed through millennia of coexistence (Rocheleau & Nirmal, 2015; Shiva, 1991, 2010; von Werlhof, 2011). Furthermore, by contrasting expert knowledge with "local/traditional" knowledge, the technocratic vision of aid has created scarcity (Illich,

2010), because the distinction suggests that local knowledge can never be expert knowledge. This binary sustains a need for expert, foreign knowledge. The polarization of knowledge is an enduring characteristic of the aid industry, whose most evident manifestation is an obsessive proclivity among INGOs for "capacity building" (i.e., education) of local NGOs and aid providers.

In the aid industry, the distinction between those who possess "valid" knowledge, and those who don't, mirrors underlying patterns of coloniality. Introduced in countries under European rule and assisted by the educational system, Eurocentric epistemologies have fostered processes of exclusion—but not just within the aid sector. Ki-Zerbo et al. (1997) provide for instance, an interesting analysis of how literacy programs, a long-standing staple of foreign aid, were actually campaigns against the non-literate. Rather than helping oral populations educate themselves as they had always done, the adoption of a colonial language and educational system at the national level served to exclude all the vernacular languages through which knowledge had been previously produced, fostering alienating values, particularly in youth, that disrupt personal and collective identities. Likewise, Betawamosake Simpson (2017) provides an account of how colonialist systems in Canada have dispossessed First Nations populations of the source of their knowledge and learning: land. As illustrated by this example, epistemes have a localized character, grounded in insiders' relation to a time and place. The supplantation of these knowledges otherwise, a process started during the colonial era, and pursued today through institutions and the belief that one way of knowing supersedes others, is considered *epistemicide*—the killing of knowledge repositories and the means with which to produce them.

However, the positivist scientific tradition, with its firm belief in data, technical knowledge and planning (Wilson, 2006), is blind to the epistemic oppression that it perpetuates in its claims to universality. As a result, and because it is uninterested in politics, the colonizing and universalizing nature of science and Western epistemologies, has achieved hegemonic status by labelling knowledges otherwise as static and parochial traditions irrelevant to the Euromodernity project, which thereby invalidates them (Alvares, 2010; Escobar, 2017; Guilherme & Dietz, 2017; Mir & Mir, 2014). As such, Western epistemes reflect an occidentalist discourse in their presumption of superiority and universal validity. As argued by Escobar (2020), the result of this is that the world becomes "predicated on the West's ability to arrogate to itself the rights to be 'the world' and to relegate all other worlds to its rules, to a state of subordination, or to non-existence." (p. 14).

Tied to the scientific tradition of the West, aid's modernist discourse has reduced the multiplicity of perspectives that are available to populations seeking to extract themselves from hardship and autonomously define their well-being. The suppression of options then facilitates the persuasion of subordinate groups and the fabrication of consent, which reinforces aid's belief in itself, in a self-fulfilling prophecy.

Using poverty and human suffering as a point of entry, aid interventions, like Trojan horses (Wallace, 2004) (re) produce a standardized body of knowledge and professional competencies that reflect a universalist neoliberal Western bias (Girei, 2017; Kwek, 2003; Prasad, 2003b). The result is one that is not captured in the ubiquitous project logframe, aid's emblematic management tool: the depoliticization of aid (Ferguson, 1994), the expansion of technocracy (Easterly, 2014), homogenizing policy prescriptions and an overall absence of deep alternatives. The institutional practices that accompany the deployment of aid, such as project planning, implementation and monitoring, give the impression that development policy is the result of discrete, rational actors, thereby concealing conflicting interests, exclusions and impositions (Escobar, 2010). This is unsurprising, as conventional management studies are markedly silent on issues relating to alterity and non-Western systems of understanding.

According to Boaventura de Sousa Santos (2004), who describes a "sociology of absences," such silences are actually a product of erasures created by hegemonic epistemologies. It's not that other knowledges don't exist—it's that they are disqualified, rendered invisible, unintelligible and thus relegated to the realm of non-existence through epistemic oppression, and sometimes even physical violence. For example, the assault of indigenous Bolivians marching to La Paz to contest the construction of the Isiboro-Sécure highway, intended to bring "economic growth" and electricity to their remote communities (Poupeau, 2013), is not just violence perpetrated against a population claiming territorial sovereignty. It is an attempt to silence their ontology and episteme, which ascribe rights to the Pachamama and all human and non-human beings alike. The highway is a manifestation of both territorial and epistemological occupation in response to the universalizing imperative of modernity.

Drawing on this example, the reader will understand that epistemicide, whether intended or unintentional, is a profoundly political project. Paradoxically, the same foreign aid agencies who denounce the abusive treatment of marginalized populations in Bolivia by applying a liberal human rights perspective to the conflict, and excluding a non-Western conceptualization of rights that stems from an altogether

different ontology. The solutions these agencies might propose to assist vulnerable populations via intermediary INGOs and local NGOs include capacity-building in legal literacy and advocacy, perhaps even communication to garner support for their cause. This project would be associated with funding, and the corollary reporting requirements, for which more capacity training would be needed to achieve sufficient technical mastery of the funding agencies' accounting and evaluation systems. Self-determination—which includes claims to a non-Western epistemology— would thereby paradoxically be impinged upon by well-meaning foreign organizations.

If supplanting knowledge systems is a political act, then recognizing non-Western knowledge systems and the restoration of erasures is the radical solution. Recent calls within the aid sector for greater inclusion of local actors and "traditional" knowledge are insufficiently radical to alter existing power-knowledge systems, as will be demonstrated in the next chapter, because inclusion is contingent on conformity. With its emphasis on technical know-how and international humanitarian law, universal standards such as Sphere, humanitarianism for instance has traditionally been viewed as an apolitical branch of international relations. However, I argue that the strong Western bias for technique and the control mechanisms exercised in the aid system are preventing populations and societies in the Global South from designing endogenous solutions and organizations. This trend is in direct opposition to localization as self-determination. As argued by Slim (2021), defining how aid is proffered and by whom, and when, is a right that is all too often overlooked by international agencies. As such, the system's power-knowledge architecture remains unchallenged in spite of the new actors from the Global South that are beginning to populate the territory. For this reason, as will be demonstrated, the discourse of inclusion is annulled by the repression of self-determination, thus rendering a deep reform from within the system virtually impossible.

1.5 A first challenge to power-knowledge: the reinstatement of subjectivity and alterity

The critical posture espoused thus far is not happenstance. In writing these words, my intent is to tell a story through the lens of my professional background as a former aid practitioner, combined with personal musings, research and my immersion in critical studies. My words are collective, sparked by informal conversations with friends and colleagues, interviews with individuals who were both strangers and personal acquaintances, and the vast contributions of eclectic scholars and social justice militants. The result is a heterogeneous assemblage of ideas and perspectives from which I was able to extract a pattern.

The story I tell is about a brilliant idea—localization—that needs to occur for motivations that extend beyond the search for more effective aid. It needs to occur for ethical reasons, and that is my unabashed posture. I thereby take responsibility for my bias, and recognize that pure "objectivity," often regarded as a hallmark of rigour in the social sciences, is but another manifestation of a dominant and masculine Western episteme (Botha, 2011; Dunbar, 2008).

In keeping with my interest for knowledges otherwise, I integrate the learnings from life and places that have influenced me as an author and researcher. In doing so, I'm not just adopting a reflexive research method, but also consciously practising *sentipensamiento* (Escobar, 2020) "feel-thinking," an epistemology of *nacer-crecer-conocer* (being born-growing up-learning), grounded in the things that we feel, see, hear, sense and come to understand by living and doing. Knowledge, then, resembles Vološinov's (1973) theory of language. It is not handed down from generation to generation, but endures as "a continuous process of becoming" (p. 81) because individuals engage with an existing stream, upon which their awareness is built. Accordingly, knowledge is both product and process.

As reminders of my positionality and subjectivity, short *nacer-crecer-conocer* vignettes will be interspersed throughout the next chapters. Readers are free to interpret them as they see fit – by juxtaposing them with the text or with their own experience or reflections. The objective of these vignettes is manifold. First, they enable me to reinstate myself as both an author-researcher *and* an active participant in shaping the research encounter and its outcomes. Secondly, they aim to integrate knowledges otherwise—things not learned in academia or professional practice but felt, intuited or amassed, at times through years of messy *sentipensamiento* or quiet, luminous moments of clarity. By resisting the standard format of the Eurocentric academic dissertation which calls for the erasure of the author in favour of objectivity, these vignettes are intended to be performative in making knowledge deemed "non-credible" or "non-existent" visible. They serve as reminders of different ways of knowing that do not separate reason from emotion, thinking from feeling and knowledge from caring. As a sense-making activity, the stories recounted in my vignettes serve a final purpose: They transform private experience into public meaning through narration (Arendt, 1958), and reinstate the millennial human artform of storytelling, described by Ingold (2011) as "weaving stories from the past into the texture of our present lives" (p. 154).

According to Ingold, "[t]here is no point at which the story ends and life begins. Whether in life or in the story, he adds, "it is in the movement from place to place—or from topic to topic—that knowledge is

integrated" (p. 161). As such, the vignettes challenge the monoculture of linear time (Santos, 2004) by existing simultaneously in the past and present. Finally, they represent a modest attempt at creating space for storytelling and knowledges otherwise in academic writing.

Vignette: El Traidor

I once befriended a mongrel dog, as Westerners often do when they travel to rural communities in Southern countries. He followed me everywhere, and leaned affectionately against my leg whenever I sat. I refrained from feeding him, because this would attract other dogs who might attack him for having received a chicken bone or a bit of bread; such are the dynamics of hunger and hierarchy in the canine world. You see, I'm well versed in dog psychology, for having had a German Shepherd when I was young.

But one afternoon, I was seated at a table for a meal with a dozen villagers, my companion dog at the foot of my chair as usual, when out of the blue, and with no evident stimulation, he bit my calf, drawing blood. The villagers hooted and hollered—clearly it was the funniest thing they'd seen in a long time. "Se llama El Traidor" (He is called "The Traitor"), a woman told me between fits of laughter. "EVERYONE knows that!

The emergence of my critical perspective occurred while I was an undergraduate student in anthropology, in which I hoped to gain insight on what makes us human despite our varied upbringing and ways of understanding the world in which we live. What I encountered instead was an academic discipline that served as the handmaiden of colonialism. Disillusioned, I turned to international solidarity for more authentic contact with individuals and populations from diverse backgrounds. I relocated my family to Vanuatu, a small insular state in the South Pacific, where I volunteered for two years with a local organization, supporting skills training for youth on outlier islands. However, the feeling of being superfluous and unjustified as a foreign "technical advisor," funded by Canada's overseas development assistance, never abated while I was there. It took 18 months for me to consider myself a "fully acclimatized outsider," productive and well versed enough in local customs and knowledge to overcome my worry of projecting an image of the "white saviour." My time there was rich in learning, and pivotal in nurturing a burgeoning interest in locally led development and emergency response strategies. And, as with anthropology, the vestiges of yet another great colonial enterprise were beginning to emerge with increasing clarity, this time within the aid industry. Returning to Canada after those few years away, I held a variety of positions with different INGOs whose projects and approaches provided additional fodder for my growing critique.

Today, in addition to insight gained from living in a remote area of the Pacific and, partaking in the system as an expatriate volunteer, I also bring to my research thirteen years of professional experience in

management of international aid projects, and 10 years of graduate-level studies in management and aid. My research is tainted by this indelible storyline which defines me as a professional-militant-academic. It is important to highlight, however, that amidst the critique, I do not reproach international assistance nor do I reject the notion of "expertise"—which instead I aim to broaden. I am employed within academia, and also occupy a senior leadership position in an INGO (not featured in this research), and thereby regularly engage with personal and organizational paradoxes The next chapters are therefore by no means intended as a rebuttal of international aid. In fact, it would be unfathomable for me to contemplate violence in Ukraine, Yemen, Myanmar or Afghanistan—or even at home in Canada, without wishing for the deployment of assistance to populations in need. I understand that humanitarianism is a tangible expression of our greatest faculty—our humanity, our empathy and compassion. But history warns against excesses committed in the name of "benevolence," and thus, unless we learn from our errors, other solidarities are fated to non-existence. As such, I believe in solutions—but those which allow for autonomous design and self-determination, and the support and recognition of these solutions by states, by organizations and by individuals who contribute to the emergence of a new wave of critical international solidarity.

1.6 Overview of the next chapters

Having set the stage for my research question on why localization didn't happen, and presented the key actors of the would-be humanitarian reform—the emergency responders that occupy an epistemic territory—I proceed in Chapter 2 to recount a history of Western aid and reinstating some of its erasures. I argue that while humanitarianism and development assistance have historically been viewed as distinct fields of activity, the two have become increasingly intertwined in their ultimate objective. They also converge in the manner in which they are managed, thus giving rise to a technocratic paradigm and megastructure dominated by donors and a few hegemonic players in the Global North. Thus revealed, the foundations of the international aid sector appear as monuments to Western knowledge and modernity, which, though they may "stand like a ruin in the intellectual landscape" for critical scholars such as Sachs (2010, p. xv), suggest an enduring construct of both the Global South, and the "civilizing" role of aid experts.

In Chapter 3, I expose how I came to my understanding of this phenomenon, namely, through an approach inspired by the grounded theory tradition (Glaser & Strauss, 2006) and participant interviews with

individuals equally distributed in the Global South and Global North. Using a well-established INGO as an entry point for the study, I then moved outwards and further away to establish parallels between the challenges and paradoxes faced by this organization and the industry as a whole. I describe how I worked with my sources of information—mostly interview transcripts, but also documents, situational maps, literature, and preexisting sensitivities—until a pattern emerged.

In Chapter 4, I present the localization reform as the latest trend to descend upon the epistemic territory of aid. I extract some recurring themes pertaining to knowledge and local NGO capacity from recent literature on localization, most of which is produced by Western agencies. This reveals empirical, practical and discursive blind spots—namely surrounding the political dimension of knowledge production and capacity gaps.

The next four chapters then expose my analysis of the mechanisms at play within the epistemic territory of aid, as they pertain to knowledge production, supported by passages from interview transcriptions. Chapter 5 focuses on the role of technocratic gatekeepers. I argue that the aid sector is a guarded ecosystem whose knowledge parameters are defined by powerful actors, who exert control over their territory by deploying mechanisms aimed at preserving the primacy of their episteme, and thereby protect their position. Through tactics such as co-option of dissenting knowledge, marginalization of knowledges otherwise, constructing knowledge deficiencies and rewarding compliance, these actors perpetuate their own technocratic mindset and a unidimensional form of expertise. Aid "experts" then deploy a series of increasingly sophisticated managerialist approaches, in the search for effectiveness and efficiency, without interrogating the validity of their claim to expertise. As such, their privileged position as gatekeepers maintains local organizations in a perpetual knowledge deficit compared to that of its "experts." Power asymmetries within the sector are thus maintained through the construction of knowledge-based barriers.

Chapter 6 is interested in the role of INGOs in the aid industry, and how, as intermediaries, they simultaneously promote gatekeepers' epistemes through capacity building of local NGOs, while championing their recognition as legitimate actors in the aid system. What results is an ambivalent stance, in which INGOs serve the managerialist interests of donors and contribute to the expansion of homogeneous ways of organizing, creating a recognizable "Other" whose admittance in the aid system rests on their demonstration of managerial and technical prowess. This protects Southern local NGOs against marginalization, as capacity building ensures that they can gain access to financial resources and

symbolic capital. As such, INGO shepherds are concurrently acting in the interests of local organizations. This stance generates competing demands and internal contradictions which simultaneously sustain and challenge existing hierarchies in the system.

In Chapter 7, I illustrate, how the gatekeeping and shepherding processes manifest at the organizational level, within Amani[7], an INGO which served as my entry point for this research. I apply the conceptual elements discussed in Chapters 5 and 6 to a case study. A restructuring effort undertaken by Amani mirrors the aid industry's contradictory impulses, analyzed in the previous chapters. The organization's head office, based in the Global North, views itself as a "centre of expertise" which it deploys to support the capacity of its Southern satellite offices and Southern implementing organizations, revealing enduring epistemic hierarchies. The decentralization of its structure, as an internal reform resembling that which is attempted by localization, is achieved through centralizing instruments such as policies and standard operating procedures, aimed at protecting Amani's status, brand name and resources. While it strives for the autonomy of its satellite offices, their recognition as capable actors within the Amani network is contingent on alignment with centrally defined managerialist and technical parameters. The chapter reveals that the tensions and competing demands within the industry manifest at the micro-level, within INGOs, as a reflection of patterns occurring within the aid industry.

Finally, in Chapter 8, I conclude my analysis by demonstrating that such tensions, occurring within both Amani and the aid industry, are suggestive of persistent paradoxes. The failure to engage with paradox generates dysfunctions, such as polarization and ideological impasses. These stymie the capacity for innovation and transcendence of competing demands. While a tug-of-war between seemingly contradictory yet interdependent elements is being waged, the system is caught in a stalemate of its own making, which allows hierarchies to endure. The status quo is thereby maintained: Gatekeepers and shepherds pursue their business, and the restructuration of power envisioned by the localization agenda remains elusive. Instead of a dialectical engagement with competing demands and opposing perspectives necessary for innovation, the industry's processes foster homogenization, which ultimately results in an impoverishment of transformative capacity. This is why the localization reform has not worked.

Finally, in Chapter 9, I offer reflections on how to overcome this paradox-induced impasse. These include the reconceptualization of the aid as a polycentric ecosystem rather than a centralized architecture.

[7] Amani is a pseudonym.

Drawing on pluriversal politics, epistemologies of the South and principles of emergence with complex systems, I advocate for the reinstatement of epistemic diversity and the salience of knowledges otherwise to redress the ills brought about by a "monoculture" of aid. I propose a re-envisioned role for INGOs as boundary spanners and advocates of cognitive and epistemic justice rather than shepherds. I suggest that given the theoretical and practical challenges with which the aid industry is currently challenged, the elements necessary for a deep reform lie outside of its periphery.

1.7 Conclusion: reintegrating alterity within humanitarianism

The manner in which aid is conceived, managed and proffered to populations in situations of duress by foreign agencies is a homogenizing Western construct, complete with its industry standards and their claims to universality that reinforce its hegemonic status. Compassion, meanwhile—the aspiration to keep people alive and expand their opportunities—is not a Western construct; all the major religions and cultures of the world have traditions of kindness, empathy and ethics. However, recognizing our shared humanity requires a genuine appreciation of difference, not an attempt to diminish it through standardized programs that insist on treating the varied contexts that make up our world as a blank slate. And for that to occur, reforming the humanitarian sector need not rely on further technical solutions and increased funding to local responders, but rather on the reinstatement of a political, critical and ethical practice of alterity, and a decidedly utopian attempt at nonhierarchy. The persistence of foreign "expert" knowledge in the system remains a major roadblock.

As a former practitioner, I have had the privilege and pleasure of collaborating with hundreds of individuals from diverse backgrounds who are resolutely devoted to social justice, peace, equality and human dignity, and whose unwavering professional and personal work ethic is nothing short of exemplary. These individuals, and the ones who contributed to this study, aspire to the aforementioned reform; they are, for the most part, genuinely convinced that local aid providers are essential to any humanitarian response. Yet, the system, as a depersonalized entity, behaves with a depersonalized logic, as though it were not comprised of these individuals but rather animated with its own life force, resolved to sustain itself. While power dynamics are contested by people, the entire sector is subjected to normative pressure and coercive isomorphism. Consequently, individuals often fall into step as institutional mechanisms supersede their resistance, which leads to ambivalence, competing demands, a disengagement with paradox and an overall inability to transcend debates.

In the next chapter, I propose a passage through aid's genealogy. This historical detour is an approach favoured by adepts of critical theory who are interested in understanding how a field constructs its truth and discourse. This will establish the backdrop against which the aid industry orchestrates its processes and activities, and upon which the localization agenda is enacted.

CHAPTER 2: EVOLVING PARADIGMS IN INTERNATIONAL EMERGENCY ASSISTANCE AND THE RISE OF TECHNOCRATIC THINKING

2.1 In the beginning, there was pillage and there was war

As aptly written by the Congolese philosopher V.Y. Mudimbe (1988), "history is both a discourse of knowledge and a discourse of power" (p. 200). "Start the story with the arrows of the Native Americans, and not with the arrival of the British, and you have and entirely different story," adds the Nigerian novelist Chimamanda Adichie[8]. Her compatriot Chinua Achebe writes: "Until the lions have their own historians, the history of the hunt will always glorify the hunter" (Achebe, 1994). History's omissions are acts of power—power to silence and relegate to a status of non-existence. When you begin with colonialism and the dispossession of nations, aid's storyline becomes vastly different from that which is usually recounted in aid textbooks. It is no longer linked to a benevolent if not politically strategic invocation to share the benefits of Western modernity to alleviate the world's suffering. Rather, it recounts the impoverishment, fractioning and refashioning of nations through colonialism, and today through neoliberalism, for the benefit of Western modernity. When you cast aside humanitarianism's saviour narrative and start with the wars that fuelled human tragedy, history is instead replete with acts of violence which mock the notion of progress. Entwined in complex dynamics of myths and power plays, paradoxes begin to emerge beneath the veneer of aid's discourse. The knowledge landscape is not just littered with political and ideological debris, but also with gaping holes that represent its absences.

In the genealogical chapter, I do not propose to recount the history of Western aid, as many have done so before me. Instead, I aim to unfreeze certain narratives and foster a defamiliarization with elements which have come to be viewed as truths. In keeping with Boateng's (2021) remark that humanitarianism lacks alternative (and particularly non-Western) historicization, this chapter simply intends to set the backdrop for the localization reform in a different manner. By highlighting some of its omissions and silences, aid's sites of power deployment and concealment are rendered more visible, which then helps us locate

[8] The quote comes from Chimamanda Adichie's famous Ted Talk, "The Danger of a Single Story", https://www.ted.com/search?q=The+danger+of+a+single+story. A French version of Adichie's address is available in print format: Adichie, C., (2015), Nous sommes tous des féministes. Éditions Gallimard. The French translation reads as follows: "Commencez par les flèches des Américains autochtones plutôt que par l'arrivée de Britanniques, et vous aurez une histoire entièrement différente."

hierarchies. In recounting this story, I aim to illustrate aid's technocratic underpinning, revealing how it has come to rest on the expert knowledge of foreigners rather than affected populations. I decompartmentalize an enduring distinction between humanitarianism and development assistance to demonstrate that they are constructed variants of a shared Western, colonial, modernist and liberal tradition. As will be illustrated in subsequent sections of this chapter, both streams are increasingly converging toward a hybrid form of aid which renders the perceived difference largely irrelevant (especially as local aid providers generally do not distinguish between humanitarianism and development). This also serves the purpose of unfreezing a story, entertained more widely in the Francophone literature compared to Anglo-Saxon readings, that insists on the distinction between the two streams. I contend that the analysis provided in the next chapters applies to international aid in general. The localization reform, as attempted by humanitarian actors, can be studied to understand underlying phenomena and dynamics that concern the wider international aid sector.

When recounting the birth of Western humanitarian action, a common omission is that of women social reformers such as Florence Nightingale, Eglantyne Jebb and Dorothy Buxton. History tends to attribute aid's patriarchy to Henri Dunant, a Swiss banker inspired to create civilian committees to care for wounded soldiers during the battle of Solferino between the Franco-Sardinian Alliance and Austria in 1859. Dunant's advocacy led to the establishment of the International Committee of the Red Cross, in 1863, and later institutionalized by the First Geneva Convention, a wartime humanitarian agreement, in 1864 (Eberwein & Reinalda, 2015). Florence Nightingale, meanwhile, was a British statistician and nurse whose social reforms included establishing miliary hospitals during the Crimean war of 1853–1856 (preceding Solferino and the First Geneva Convention) and treating malnutrition in Bengal, during the famine that was triggered by the British occupation and wartime inflation. She also contributed to the professionalization of healthcare, which in turn radically expanded women's role and visibility in the workforce (Vallée, 2006).

At the time, humanitarian assistance was indissociable from national interests and geopolitics of the European empires, firmly rooted in Western history, war and colonial preoccupations. But while Dunant proposed to reduce the barbarism of European wars, he was altogether uninterested in the outrages committed in the colonies (Barnett, 2011). Interest in the plight of populations beyond national borders was manifest in the amelioration and abolitionist movements of the early 19th century, fuelled by values of the Enlightenment and Christianity. Thus, and without understating the importance of Dunant's contribution, the compassionate charity of foreigners and their appeals to moral uplift were gaining

momentum well before Solferino (Lester & Dussart, 2014). Western international humanitarianism existed at the time of the abolitionist movement, as early as 1830. Even before then, however, the medieval tradition of almsgiving, through which the wealthy could achieve salvation, had shaped moral duty—less toward paupers, who were assured entry into the Kingdom of Heaven by virtue of their condition, but rather toward God. Moral duty also extended overseas through Christian missionaries, to whom the monarchy now conferred the right to provide "help" beyond the cloister door. This was achieved by redeeming the "lost" souls of indigenous populations through conversion and "improvement," leading to a first iteration of Western-led development that implies the self-professed spiritual and cultural superiority of the foreigner (Gronemeyer, 2010).

However, it wasn't until after World War II that humanitarian aid took on the form that is familiar to us today—an institutionalized version, complete with designated UN agencies and INGOs (INGOs), enshrined in the revised and expanded Geneva Conventions of 1949. The wars meant that the ICRC was busier than ever on European soil—but it soon found itself expanding into new areas such as helping prisoners of war and protecting civilians, no longer just providing medical relief (Eberwein & Reinalda, 2015). The scale of needs, including war-induced poverty, provided additional impetus to aid organizations such as Save the Children, established in 1919—whose founders, sisters Eglantyne Jebb and Dorothy Buxton, are often also omitted from historical accounts.

Jebb and Buxton, British philanthropists and social reformers who rallied several dozen women to create what is now the oldest relief NGO, took on a controversial and courageous stand by insisting that relief should be provided to all children affected by wartime famine, including German ones. Jebb drafted the document that subsequently became the Declaration of the Rights of the Child (Mahood, 2009), a cornerstone in international child welfare policies and programs, decades later. Oxfam was later founded in 1942 in the U.K., followed by the Cooperative for American Remittances to Europe (CARE)—whose very name is indicative of the early scope of humanitarian relief at the time. It would take about another ten years, spurred by the postwar modernity discourse, the backdrop of a newly decolonizing world and a growing fear of communism, for foreign aid to be distributed to allied countries of the Global South. It was then that the Global North discovered a whole hemisphere of civilians waiting to be "helped" and organizations like CARE and Oxfam, originally created to support European relief and reconstruction in postwar Europe, expanded into new geographic territory.

Though Nightingale, Jebb and Buxton are erasures which can be restored as key figures in the masculinist history of humanitarianism courtesy of a feminist reading, there are enduring erasures in aid that are more difficult to address. On this topic, the writings of Spivak (2009) and Mohanty (1988), who challenge the Western gaze, provide insight. Though we may easily reinstate women as actants in the story of aid, women of the Third World, they argue, have been omitted as *subjects* from the discourse as they are continuously rewritten as the object of imperialism and patriarchy, in need of "saving." Instead, they are presented as homogeneous objects (or recipients) of Western benevolence—i.e., beneficiaries—and thus deprived of agency. What results is paternalistic and arbitrary construction of a false "monolithic" figure of the non-Western woman as subaltern, unemancipated, unresourceful and unknowledgeable. This figure is a product of the Western gaze and ideological aspirations, remaining in an ambivalent state of victimization and objectification. As remarked by Hilhorst (2018), such categorization of people, which is used in aid interventions to make decisions about eligibility or non-eligibility of services, is an act of power that defines the identity of the labelling subject (the donor agency, the aid provider) as much as the identity of the object of labelling. Furthermore, Western liberal feminism—the kind of feminism that presumes universality and calls for gender equality within the framework of the state and law (Calás & Smircich, 2014; Thomas & Davies, 2005), has produced the industry's conventions, standards and aid policies which are blind to their own oppressive and homogenizing character. Linking back to episteme, by being portrayed as hapless citizens in need of assistance, the knowledge of non-Western populations, and specifically the knowledge of women from which resourcefulness and resilience are derived, is "erased" by the Global North's humanist discourse. As argued in chapter 1, erasure then fosters scarcity—a scarcity of knowledge—which sustains through circularity international aid agencies' position of purveyors of help and expertise.

Recognizing coloniality in the aid industry also reveals another site of concealment. The roots of many contemporary civil conflicts are often obscured, if not omitted altogether, from modern humanitarian literature, suggesting its depolitization. Scores of countries were created through decolonization, most of which had never existed as nations before. Their territorial boundaries were often arbitrarily drawn by belligerent European empires and their claims to ownership. Testifying to such a heritage, the civil conflict in Cameroon, where violent tensions between former French and English territories persist, has led to a humanitarian crisis benefitting today from assistance from both former colonial empires. Meanwhile, the Rwandan genocide, which was spurred by the ethnoracial division imposed by Belgian colonists—who favoured the Tutsi minority for their likeness to Europeans—provides ample evidence of this legacy. This

can be summarized as such: War begets war, which begets humanitarian needs and poverty, which in turn begets aid organizations.

The humanitarian landscape is not the only territory marked with such silences, however. Those produced by the development narrative, and its increasing managerialism, are even more abyssal. The largest of all silences pertains to the West's socioeconomic growth, which for long was touted as the universal standard that all should aspire to. However, as we're reminded by Nandy (1989), Western modernity was achieved because of colonial extraction, exploitation and expropriation, and "built on the suffering and brutalization of millions" (p. 269). Colonialism, which routinized plunder, enslavement and extraction through imposed foreign rule, inducted indigenous populations around the world into the West's economic and political system, but also into its Eurocentric ideology (Clegg et al., 2006). Cultural imperialism, or "the second colonization"(Nandy, 1983) subsequently took on the guise of aid and an attempt at creating a brave new world in the colonies. No longer led by the marauders and bandit-kings of the empires who had conquered foreign territories, this second wave of occupation was carried out by those who sought to be helpful, the "well-meaning, hard-working, middle-class missionaries, liberals, modernists, and believers in science, equality and progress" (Nandy, 1983, p. x-xii).

Vignette: To West Papua's Morning Star

Papua Island, New Guinea to the British, or Irian Jaya to Indonesians, is a contested territory upon which the Dutch, German and English colonial empires, indigenous Melanesians, the contemporary Indonesian state, international agencies and multilateral banks have staged a maldevelopment project turned violent. Papua's original inhabitants are Austronesians who settled the territory an estimated 42,000 to 48,000 years ago, representing today the most linguistically diverse populations of the world. Today, the island is severed in halves: the Eastern side is the country of Papua New Guinea, which has previously been claimed as a British then German colony, and later an Australian-administered UN trust territory until its independence in 1975. The Western side belongs to Indonesia.

Though Indonesia secured its independence from the Dutch in 1949, Western Papua remained a Dutch colony until 1963. The territory was eventually ceded to Indonesia, who referred to it as Irian Jaya. But West Papua's indigenous inhabitants share very little history and cultural affinity with Indonesia's Javanese majority. Before colonization, there was no East or West—there were only indigenous Melanesian communities practising communal land use on the island they called Papua. Today, West Papuans are the victims of geopolitical transactions between European countries that signed away their territorial sovereignty to Indonesia, thereby sanctioning a new form of colonization through expropriation. West Papua's claims to autonomy have fuelled five decades of riots and violent repression by the Indonesian state. Displaying the Morning Star, West Papua's independence flag, is a punishable offence in Indonesian Irian Jaya—the most extreme penalty having been the sentencing of one man for 15 years in prison. If this weren't bad enough, the World Bank and other bilateral donors decided to add further insult to injury.

The reason I write about West Papua in this vignette is because it troubles me today, and because it exemplifies my disillusionment with development

agencies and large humanitarian actors. My knowledge of what occurred there—and what continues to be carried out by the Indonesian state, with the support of donors who turn a blind eye—is derived from conversations with human rights militants from Papua New Guinea, the Solomons and Vanuatu. Elsewhere, no one seems to even know of West Papua's existence, Vice magazine being an unlikely exception, for having produced some provocative articles on the topic. Unsurprisingly, the lack of international interest also means that no one has noticed how Western donors have been complicit in human rights violations. The World Bank, for instance, funded a large-scale transmigration program in the 1980s that moved 6 million Javanese agriculturalists to the less densely populated region of West Papua. USAID, the Netherlands, France and Germany provided funding and technical expertise in this massive resettlement program that led to extensive ecological degradation and violence. Canada supplied weapons to Indonesia. Rainforests have been hacked clear to produce palm oil, and bulldozers are sent, still to this day, to destroy the homes of the indigenous Melanesian inhabitants who continue to resist the military occupation and encroachment of their ancestral land. An estimated 500,000 West Papuans have been killed since the 1960s because of this conflict, while others have been forced to flee, often eastward to Papua New Guinea, which in turn fosters other social and economic challenges in Melanesia. The IFRC has provided emergency support to hostages detained by the West Papuan independence movement—but not to displaced or injured West Papuans whose homes have been destroyed by the Indonesian miliary forces.

Seen on a wall at the University of the South Pacific in Port Vila, Vanuatu (April 2023)

For me, the struggles being waged in West Papua are a representation of profound injustice—which borders on genocide—that results from the interplay of colonialism and development and so-called foreign expertise. Where is the help for those who need it? What actually constitutes help? It also reveals all the errors of the blank slate approach, in which a donor-funded agrarian reform was used as a means to subjugate a minority ethnic group in Indonesia. Absolutely nothing good has come out of "development" in West Papua. But all the more troubling is that Indonesia, who upon its independence had begun to forge alliances with the Sino-Soviet bloc, then became a major recipient of U.S. foreign aid, including that which funded the land grab in West Papua. Ultimately, the Javanese and West Papuans, in spite of their vast differences, are bound by one similarity: that of having been used, for centuries, as pawns in the geopolitical power theatre of the West.

The West's international aid, therefore, is intertwined with colonialism and European ideology, motivated by a complex mixture of goodwill, Christian values, paternalism, economics and underlying political considerations. Humanitarianism and developmentalism have both evolved from colonial discourse, which was their direct predecessor in establishing a conceptualization of the South from a European perspective. For this reason, the distinction between both forms of aid is somewhat muddled given the interweaving of their ideological, economic and political roots. And, as I will continue to argue, aid was rendered all the more political in the post-WWII period, at which time it took on the form that we recognize today—state-

led and state-funded. This increasing institutionalization has further blurred the humanitarian-development divide, as I will proceed to illustrate, paving the way for hybrid forms of expert-driven international assistance in response to the evolving global context. Therefore, while some scholars and humanitarian practitioners ardently insist that humanitarian action differs from development because of the former's focus on "saving lives" and the latter's interest in long-term well-being, I argue that they are contemporary manifestations of the same ideology, connected today by a technocratic discourse and common managerial delivery model.

Though a specific body of work is interested in international humanitarian law and security interventions in war zones (see Slim, 2015; 2022, for instance), it must be added that extreme life-and death situations are not the norm for humanitarian interventions. In reality, the great majority of humanitarian operations typically last many years and support displaced and highly vulnerable populations, repeatedly servicing the same communities—for instance in Somalia, Haiti, South Sudan or Syria, with a model akin to pro-poor development in a context of chronic poverty and failed states. *Médecins sans frontières'* presence in the Occupied Palestinian Territories since 1989 (Médecins sans frontières, 2021) is indicative of this long-term orientation, even for an organization known for its disavowal of "developmentalist" humanitarian assistance. This is why, moving forward, the term "international aid" will be used to refer to both humanitarian and development actors, and to those who propose hybrid interventions. When a distinction is necessary for clarity's sake, *humanitarian* will refer to the actors that self-identify as such, and who adhere tightly to the *saving lives in emergencies* paradigm. Likewise, and only when the distinction is necessary, *development* will refer to the vast array of social transformation and poverty reduction projects and programs proposed by varied actors.

2.2 (De)colonization and development

At the turn of the 20th century, impoverished by colonization—whose effects were both physical and psychic (see Fanon, 1952, 1961; Memmi, 1957; wa Thiong'O, 1981 and Nandy, 1983, to name but a few)—colonies and a few nascent nations were invited to place themselves under the political, economic and moral tutelage of Northern countries. As the world emerged from WWI, the same sentiment that had spurred the creation of the League of Nations and its goal of collective security and well-being, inspired U.S. President Woodrow Wilson to propose that: "for the first time in history, the counsels of mankind […] be drawn together for the purpose of improving the conditions of working people—men, women and

children—all over the world" (Wilson, 1919). More precisely, poor nations—many of which had been rendered as such at the hands of colonization or war—were to be put under the guardianship of the League of Nations during the period of their "development." With this affirmation, a first blueprint for technocratic aid had just been sketched, featuring a benevolent leader assuming insight to improve the well-being of colonial subjects. Thus, with the creation of the League of Nations, the North defined its relationship with the Global South on the basis of knowledge. It would take a second world war and economic theory, however, for aid to be developed and institutionalized as a discipline, from which a discourse and techniques are produced, standardized, implemented and sustained.

Against a political and economic backdrop that included the breakdown of the colonial system, vast gains in productive capacity in the U.S., a new war, and, consequentially, the decimation of European economies, heads of state got together again in 1949 to review and expand the Geneva Conventions. The League of Nations, which had ceased its operations in 1946, gave way to a new intergovernmental organization: the United Nations and its specialized agencies. From this landscape emerged the Bretton Woods institutions such as the World Bank, then associated with post-WWII economic reconstruction, and other relief-centred agencies such as the United Nations High Commission for Refugees (UNHCR). The postwar global order was further shaped by U.S. President Harry Truman's inaugural address (Truman, 1949), whose 4-point agenda announced a vainglorious "bold new program" of sharing the benefits of the West's scientific advances and industrial progress with populations "handicapped" by poverty and "primitive and stagnant" economies. In history textbooks, this moment is generally cited as both the birth of institutionalized development and the emergence of underdevelopment (Escobar, 1988, 1995; Esteva, 2010; Rist et al., 1986).

Truman's inaugural statement, which is emblematic of the West's optimistic ethnocentrism at the time, enacts several erasures. On the one hand, his pronouncement marginalizes millennial economies such as commoning, gifting and reciprocity, that do not correspond to the dominant liberal economic system (Gibson-Graham, 2007). "Non-Western" is likened to primitive compared to the scientifically and industrially advanced countries of the Global North and thus disqualified as a valid mode of exchange. Peters (1994), whose account of colonial land policies in Botswana, illustrates how they contributed to economicide—or the destruction of an economy—through processes of resource allocation and wealth destruction/creation, at the cost of ancestral knowledge and communal definitions of property and rights.

In Truman's statement, means of living that are un-industrial or unschooled in scientific thinking (i.e., Western epistemology) are designated as inferior, and in need of the West's gift of expertise. Ancestral pedagogies and knowledges otherwise are invalidated by such a statement. For example, Shiva's (1991) "Violence of the Green Revolution" recounts through extensive research how the scientific expertise of the West brought about the destruction of genetic diversity in Punjab, first by replacing rotational cropping with monoculture, then replacing native varieties suited to the soil, water and climatic conditions with engineered seeds prone to pests. Having disabled nature's self-regulating mechanism for pest control (i.e., biological diversity), the so-called Green Revolution caused social unrest and led to the emergence of new pests and diseases. In the end, what would have been a strategy for abundance engendered by Western technical prowess, yielded the opposite. There are hundreds more such examples of well-intentioned but flawed aid initiatives, which I hope to gather one day in a "Dictionary of Maldevelopment."

Finally, as previously noted at the start of this section, the most splendid erasure from the collective imaginary that has been generated by Truman's statement, is the omission of how the West's progress was contingent on slavery and extraction in the colonies. Perhaps this led to a flaw in the postwar era's economic theory of development, also known as modernity theory. Elaborated by the American economist Walt Rostow through the metaphor of "take-off," societies progress through five different stages of economic maturity, starting from ground zero (i.e., "primitive and stagnant" type), pre-take off conditions that include private wealth and infrastructure, followed by take-off (or growth) and then, maturity, which is expected to occur some sixty years after the necessary reforms. Finally, the epitome of development, achieved in the U.S. and some European countries, is mass consumption society, of which Ford is the emblem (Rist et al., 1986). The assumption that each country is a blank slate whose economic progress can be systematized and planned decontextualizes growth and poverty, negating the obvious fact that former colonies cannot follow in the West's footsteps. This is simply because, unlike the empires of Europe, they do not possess colonies of their own from which to extract the resources and labour that facilitated the West's economic growth (Mir et al., 2003; Prasad, 2003a).

This blind spot upon which conventional aid doctrine was established in the 1940s and '50s, along with its institutionalization through UN agencies, led to the rise of technocracy. A technocratic vision of progress and how to operationalize it, was formulated in the offices of engineers, economists and businesses who had been schooled in the scientific management of Taylor ([1914] 1967), whose indirect influence on the contemporary aid paradigm must not be understated (Clegg et al., 2006). Inspired by take-off theory and

institutional reformist thinking, such as that of technopatriarch Gunnar Myrdal (1971), the social well-being of populations of the Global South became a problem to be solved by the experts of the Global North. According to Myrdal and his compatriots of the time who were champions of Keynesian economics, state-led development—the kind that entails forced displacement, for instance, to accommodate hydroelectric dams and agrarian reforms—was justified in its sacrifice of individual rights in the name of the nation (Easterly, 2014). Aid through massive infrastructure investments, championed by the World Bank, is the modern-day manifestation of this paradigm. It remains to this day contested in both the Global North and Global South.

Known as the Bretton Woods Institutions in reference to the location of the meeting that saw their creation, the World Bank and the International Monetary Fund are multilateral institutions that were established in 1944 to reinvigorate the postwar economy among allied countries through international economic cooperation (Murphy, 2008). A few years later, bolstered by the success of the Marshall Plan in Europe and Truman's call to share the benefits of Western growth to populations of the South, the World Bank extended its funding to newly independent "peace-loving" (i.e., "not communist") nations in Africa, Latin America and Asia in the form of loans to support infrastructure and industry development. Thus began a development age, whose universalizing intent was ambitious, if not utopic: high levels of industrialization, urbanization, technically sophisticated agriculture (monoculture), and ever-increasing material production and consumption, accompanied by Western education and cultural values (Escobar, 1995). Nascent countries of the Global South were instructed on how to undertake their nation building by foreign economists and technocrats who championed the welfare state (Brinkerhoff, 2008; Gore, 2013). It was believed that the American dream of freedom and abundance was desired by all, and could be attainable by all, through state reform, capital, science and technology (Rist et al., 1986). The role of the Western state in developing the Global South was further institutionalized in subsequent decades by the creation of bilateral government agencies such as USAID, AusAID, CIDA (now Global Affairs Canada) devoted exclusively to the implementation of publicly funded aid interventions.

Underlying this process was a new understanding of post-colonial world affairs. In the 1950s, the Cold War and fear of communism saw new conflict patterns emerging around the globe and the emergence of three worlds: The industrialized nations of the First World, braced against the threat of the communist industrialized bloc of the Second World, and the rest. The non-aligned and non-industrialized countries became known as the Third World, whose "primitive and stagnant economies" justified their qualification

as “underdeveloped.” This fictitious construct is articulated around the discourse of American hegemony (Escobar, 1988, 1995), whose technical assistance was proffered to allies of the West. Aid was viewed as scientifically neutral and desirable by all, because, as remarked by Barnett, “[t] he meaning of progress is generally in the eye of the beholder, and those with power usually define its meaning” (p. 12).

The superpowers of the West thus politicized aid under the guise of technical neutrality to solidify their alliances with heads of state in the Global South as a security strategy, fighting their communist foes through proxy wars (Duffield, 2001). As noted by Secretary of State Henry Kissinger in 1976, “Disaster relief is becoming increasingly a major instrument of […] foreign policy” (quoted in Barnett, 2011, p. 104). The underlying nature of aid is thus revealed as a means of fulfilling security objectives. Assistance also served (and continues to serve) former colonial empires in retaining a certain hold over their ex-colonies, a new imperialism that was enacted through remittances and state reforms. France’s official development assistance, remains heavily geared toward its former territories. The Francophonie (OIF), for example, enables France to maintain its cultural and political hegemony among a sub-group of countries, the majority of which are located on the African continent (Sondarjee, 2020).

Still in the Cold War context and testifying to the political power plays at work, the Bandung Conference of 1955, which convened non-aligned nations of Asia and Africa, sparked discussions about the Third World’s economic dependence on the Global North, and laid the foundation of South-South technical assistance and development. Point 8 of its final communiqué states that “encouragement should be given to the establishment of national and regional banks and insurance companies” (Republic of Indonesia Ministry of Foreign Affairs, 1955) to counter the West’s hegemonic foothold on international aid flows. However, the Conference was not able to propose any deep alternatives to the West’s development paradigm, so thorough was its permeation. Much like their counterparts in the First World from which they sought financial independence, the Bandung participants equated development to an economic metric, achieved through production and accumulation, private investment and foreign aid, technology and infrastructure (Rist et al., 1986).

Thus aided by international donors, poor countries undertook the push for development. In many cases, the expected kickstart to economic growth, improved service delivery and increased standard of living for populations, did not materialize as expected. Perhaps no one had considered that state-led technocratic development would serve the leaders of new nations in their aspirations to unchecked power. Instead of

improving the lives of citizens, swollen administrations and state-owned enterprises became a fertile ground for rent-seeking politicians and patronage (Barnett, 2011), while despotic leaders sought to maintain their position through oppression and authoritarianism. Cold War geopolitics, which had originally motivated international aid relationships, led Western donors to disregard these shortcomings, in favour of strategic alliances. Fuelled by the perceived threat of communism, loans toward ill-conceived projects continued to flow rather indiscriminately until the late 1970s, largely unconnected with countries' level of poverty (Duffield, 2001), until the failings of development funding for Third-World nation-building simply became too egregious to overlook. With a few decades' hindsight, the side effects of the so-called Green Revolution for instance had begun to reveal themselves: soil erosion and flash flooding, overconsumption of water resources, loss of biodiversity, pollution, the disappearance of ancestral livelihoods and knowledge, reduced food sovereignty, shifts in gender dynamics that disfavour women, civil conflict over access to resources, debt and agrarian suicides, to name a few. The idea of development, which had been ostensibly formulated as a benign and well-intentioned project, started garnering criticism from theorists and popular movements in the Global South and Global North alike. However, it simultaneously sparked the interest of a type of actor who perceived an opportunity to extend beyond its original scope: the international NGO.

2.3 The era of NGOs and neoliberalism

The existence of NGOs is often linked to failures of the market and the state to respond to unmet social needs (DiMaggio & Anheier, 1990; Hansmann, 1987; Nyssens, 2017). This holds true for the few organizations previously cited as examples—namely Save the Children, Oxfam and CARE, who were created to respond to residual basic health and well-being needs of European populations in a context of war (Roth, 2015). The post-WWII extension of aid to allied countries of the Global South enabled these organizations to make their entry into the global humanitarian ecosystem of the 1960s, funded by newly established state aid agencies that had begun to spring up. The shift in focus is exemplified by CARE's name change: Having originally been an organization devoted to assistance to Europe, it extended its geographic scope by becoming in 1953 the Cooperative for American Relief Everywhere (CARE, 2022). Until then, the ICRC had a more or less uncontested monopoly of humanitarian aid in interstate conflict in a relatively unpopulated relief ecosystem (Eberwein & Reinalda, 2015), but now, NGOs began to heed Truman's call of "sharing the West's boundless knowledge" with the rest of the world. The deployment of volunteers to occupy positions in healthcare and the education sector in poor but relatively politically stable countries,

where the West perceived a shortage of human resources and capacity, quickly gained momentum in the 1960s, aided by a plethora of new INGOs anchored in the Anglo-Saxon tradition of the Third Sector (Roth, 2015; Smillie, 1995), such as the Canadian University Service Overseas (CUSO) and Britain's Voluntary Service Overseas (VSO). The era also saw the creation of state-funded programs such as the U.S. government's Peace Corps, who has sent more than 200,000 volunteers abroad since 1961 (Tiessen & Heron, 2012). The decades that followed are marked by a veritable upsurge in Northern mobility to countries of the Global South.

The Biafra war of 1967–1970 and starvation of millions of Nigerians, unfolding before Western eyes thanks to photojournalism, further spurred international volunteering and eventually led to the emergence of the *sans-frontièriste* movement in France (Eberwein & Reinalda, 2015; Shusterman, 2021). Epitomized by Médecins sans frontières (MSF), a new model of humanitarianism was emerging as an alternative to the ICRC's tradition of diplomacy (Bettati, 1996; Hammond, 2015; Neuman & Weissman, 2016), motivated by the belief that disembarking in a foreign country to save lives is a moral imperative, which can even supersede national sovereignty. This triggered a conceptual broadening and deregulation of humanitarian action, which had previously been embodied solely by the ICRC. It fostered a reshuffling of actors, definitions and increased space for expansion (Shusterman, 2021). A more militant discourse of aid was beginning to emerge through MSF's testimony approach, which took on a political tone by speaking out against extreme injustice (Fassin, 2010). This self-appointed role allowed MSF and other like-minded organizations to make determinations about the actions of those who take part in conflict, and thus informally act as arbiters of justice—thereby derogating from the ICRC's humanitarian principles of impartiality and neutrality (Hammond, 2015). As pillars of classic humanitarianism, impartiality demands that assistance be based on need rather than other determinants such as nationality, religious belief, gender, whereas neutrality involves refraining from engaging in any action that can either benefit or disadvantage a party in conflict.

During the decade that followed, aid, which was becoming increasingly difficult to insulate from media, sensationalized a flow of images from crises such as the famine in Ethiopia. The hallmark pop hit, "We Are the World," performed by U.S.A. for Africa, a collective of high-profile musicians appealing to American generosity to "make the world a better place" marked the start of a new trend: the commodification of humanitarianism (Daley, 2013). Amidst human tragedy and suffering, a heroic figure was beginning to emerge in the collective imaginary, keenly celebrated by media and the general public. Once a missionary,

the omnipotent bearer of assistance from the West now took on the guise of a humanitarian worker, animated by goodwill and altruism, but also by the Third-Worldist moralism of the white saviour complex (Rodesiler & Garland, 2019; Ticktin, 2011). This new narrative, inscribed in an amalgam of socioeconomic hierarchies and morality, created a binary between victims and those with the financial and political power to save them.

Meanwhile, another trend was stimulating interest in INGOs and their volunteer responders as providers of international assistance: Neoliberalism (Bornstein et al., 2007). In the Global North, the economic and political reforms initiated by the Thatcher and Regan administrations replaced the statist and redistributive systems of previous decades with public sector downsizing, trade liberalization and the privatization of social services (Wallace, 1997). Coined as the Washington Consensus by economist John Wil Sharson in 1990, Western donor agencies and Bretton Woods institutions advanced that policy reforms were needed to redress the failing economies of the Third World (Gore, 2000). The World Bank began to impose such restructurings of the state and economic policies, known as structural adjustment programs (SAPs) upon the countries to which it loaned funds. International assistance thence became conditional on recipient nations' adherence to the neoliberal logics that were believed to stimulate growth in the West. However, the resulting reduction of the state apparatus and the privatization of social services—another example of blank state technocratic aid—proved disastrous (Dollar & Svensson, 2000; Easterly, 2005). SAPs are linked today to the exponential growth of low-income informal settlements (i.e. "slums") in the Global South during the eighties and nineties (Davis, 2006). As social safety nets disappeared, populations migrated to the city in the search for greater economic opportunity, only to find further destitution and overcrowding. Women were particularly marginalized by their increased participation in the informal sector and the vagaries of a labour market intent on their super-exploitation (Escobar, 2017).

Reducing public funding naturally created a vacuum for the public services which had previously been a state prerogative, and the space was quickly filled by non-state actors. Because of the public sector reforms and downsizing, there were more residual needs to be catered to by NGOs, both on a local and international level. On the other hand, tendering for aid delivery became the norm, in accordance with neoliberal principles of competitive bidding and market dynamics. INGOs were favoured by the state for their cost effectiveness and their access to civil society networks and remote locations (Suárez & Gugerty, 2016). They began bidding for projects in response to donors' calls for proposals, in much the same way as any private-sector contractor. Entrusted with public funds and the implementation of donors'

development and relief policies, INGOs began to assume an intermediary position in what is now a multi-actor aid chain that links multilateral and bilateral funding agencies to recipient communities in need of assistance (Bornstein et al., 2007; Edwards & Hulme, 1996b; Smillie, 1995). Acting as subcontracted auxiliaries of the state, a scrum of humanitarian organizations began drifting from one emergency to the next, and setting up satellite offices in the countries where they operated. Reflecting its new globalized orientation, CARE changed its name once again in 1993, from the Cooperative for American Relief Everywhere, to the Cooperative for Assistance and Relief Everywhere (CARE, 2022).

However, the sensationalized effervescence of the eighties would be followed by a period of decline. The legitimacy of the aid sector had already begun to wane, as the SAPs and planned development strategies failed to produce favourable results in poor countries. Foreign funds nourished the appetite for self-advancement of some power-hungry, and sometimes kleptocratic heads of state, at the expense of the population, leading economists and scholars such as Easterly (2006; 2014) and Moyo (2010) to wonder where the money was going. Watching atrocities unfolding before their eyes in Somalia and Bosnia, the public also began to ask for a demonstration of impact. Then, amidst this growing critique, the sector was faced with a rather large blow in the mid-1990s: Though there were some 200 INGOs and UN agencies present in Rwanda in 1994, the global aid community failed to prevent a genocide and protect 800,000 civilians who perished at the hands of Hutu militias.

2.4 A dawning legitimacy crisis

From the nineties onwards, unprecedented access to information led to a growing awareness of humanitarian crises was matched by increasing skepticism over the effectiveness of international aid, and skepticism in state-led assistance (Lewis, 2008; Macrae, 1998). The euphoria around INGOs, the capacity of the UN, and blank-slate solutions to social welfare in the Global South was beginning to dissipate. Aid providers' performance and accountability were called into question (Edwards & Hulme, 1996a) and given their reliance on public funds, the independence and impartiality of INGOs began to be challenged (Barnett, 2011). Aid agencies, donor governments and INGOs responded to a burgeoning legitimacy crisis and increasing pressure to demonstrate impact, by professionalizing and adopting rigorous performance management systems intended to solidify their interventions' soundness through logic, control and objective evidence (Bornstein, 2003). The search for better aid gave rise to several international forums and commitments that produced roadmaps, quality standards and self-regulatory mechanisms such as

Sphere in 1997 (Sphere Association, 2018) and the Paris Declaration on Aid Effectiveness in 2005 (Organisation for Economic Co-operation and Development, 2005). It also led to the creation of a new UN entity in 1998, the Office for the Coordination of Humanitarian Affairs (OCHA), as well as the reinforcement of a previously ad hoc consultation mechanism, the Inter-Agency Standing Committee (IASC) into a high-level policy and coordination forum (Barnett & Walker, 2015). Donors' newfound focus on performance management initiated a trend toward the adoption, among INGOs, of more businesslike characteristics (Claeyé, 2014) and professionalization, a process which Escobar (1988) describes as the establishment of disciplinary practices through which knowledge is generated, organized, validated, shared and controlled. Borrowing from the increasingly popular service model developed by the business sector during the 1980s and 1990s, donor agencies adopted a new managerial approach known as the New Public Management (NPM) (Aijazi, 2022; Hood, 1991; Kerr, 2008; Piciotto, 2020). NPM is a neoliberal-inspired public sector management reform which, in its search for greater efficiency, proposes a separation between policy and execution, which manifests as the decoupling of funding agencies and contracting agencies. Its precepts—neoliberal economics, public choice, transaction cost analysis and principal-agent theory, were then imposed upon subcontracting INGOs, who served as conduits for this paradigm shift (Elbers & Arts, 2011; Wallace, 2004), and eventually reach recipient organizations in the Global South.

Rooted in the economic policy of the era, the NPM agenda was exported wholesale via INGOs, from the industrialized countries of the West to nascent nations of the Global South via public funds. Meanwhile, multilateral lending banks' reforms imposed decentralization and external procurement to enhance the role of the private sector in market-led development (Brinkerhoff, 2008; De Vries & Nemec, 2013). This move, which is motivated by public-choice theory (Aucoin, 1990) proposes performance inducements that are quantitatively measurable, intended to enhance the overall effectiveness and efficiency of the public sector (Andrews & Van de Walle, 2013; Hood, 1991; Leicht et al., 2009; Manning, 2001; Savoie, 1995). Confronted with aid whose results remained modest at best and un-demonstratable at worst, donors looked to technocrats, who turned to their managerial toolkit to increase project control and evaluation, because as noted by Illich (1973), "[t]he cure for bad management is more management" (p. 22). This reveals an underlying bureaucratic rationale of turning political problems into administrative issues. It ascribes the failure of aid initiatives not to their design, but to the poor design of the managerial tools with which they are implemented.

Unsurprisingly, the cure for the legitimacy crisis which ailed INGOs and donors alike from the nineties onwards, led to a heightened focus on performance, a "good governance" agenda and a tempering of the more extreme neoliberal paradigm of the eighties, to bring back synergies between the state, the market and civil society (Lewis, 2008). This neo-institutional shift was enshrined by the Paris Declaration on Aid Effectiveness in 2005. Its five pillars are intended to address what was perceived as not working with aid: a lack of ownership of strategies by aid beneficiaries, insufficient alignment with recipient countries' pre-existing systems, no coordination between donors and INGOs, accountability problems across the board and inadequate management (Organisation for Economic Co-operation and Development, 2005). Managing for results, or results-based management (RBM) as it is called in the sector—complete with its ubiquitous logical framework, targets, performance indicators and prescriptive measurement systems—became the new norm for the aid industry. Development management became hierarchically aligned with universalizing targets such as the Millennium Development Goals (later replaced by the Sustainable Development Goals, or SDGs), while humanitarian actors established their own performance indicators such those found in Sphere and the Core Humanitarian Standard (CHS). However, as argued by Barnett (2011), such standards, combined with NPM rationality, imagine beneficiaries as consumers of aid products (clinics, wells, crops, medicine, food, microfinance, etc.). This reveals a highly truncated concept of ownership: Instead of including local perspectives, priorities or knowledge in project design, it asks communities to choose from a shopping list of predefined solutions and thus contributes to the formatting of beneficiaries themselves. The resulting normativity, then, prevails over autonomous and emergent solution design.

The spread of knowledge on performance measurement and management systems, and the simultaneous professionalization of aid brought on by increasing agency competition, is emblematic of the technocratic belief that there exists a causal link between "better" management and the alleviation of human suffering. Even the participatory approaches aimed at integrating local populations in the design of interventions, which was intended to counteract top-down expert-driven aid (for instance Participatory Rural Appraisal, see Chambers, 1984), were coopted through professionalization and incorporation into mainstream, orthodox aid practice (Cooke & Kothari, 2001). The transformative ambition of these nonconformist approaches was thereby negated by their assimilation into dominant actors' reformist toolkits—the World Bank now has manuals dedicated to participatory approaches—which is a telling example of how dissent can be controlled and eventually dissipated (Kothari, 2005).

For many actors, the most logical and desirable pathway to more effective aid remains today the application of a managerial reform (Gulrajani, 2010, 2011). The localization agenda is one such reform, as will be discussed to Chapter 4, whose operationalization is essentially managerial and technical. Nonetheless, critics argue that reformist solutions such as localization amount to no less than the universal technical bureaucratization of social transformation (Escobar, 2017). As previously mentioned, technocracy's weakness is its lack of self-reflexivity: The myopia required to capture granular numeric indicators in logframes and performance measurement matrices, or "indicator fetishism" (Piciotto, 2020), is blind to wider contextual dynamics, including the inequitable relations between donors and aid recipient communities, or the Global North and the Global South (Bornstein, 2006; Gasper, 2000). This myopia inevitably transforms populations of the Third World and their interests into data within Western developmentalist and capitalist economic ideology. Santos (2004) argues that this ideological power is further evidenced in aid by the "monoculture" of capitalist productivity and efficiency. Foreign assistance, by privileging capital accumulation at the individual and state level, does not even consider data on non-capitalist economic activity, which it deems "non-productive" from a market perspective. What counts as data reflects an ideological bias.

In fact, technocratic aid reformers are generally not interested in the politics of power, because they firmly believe in the neutrality and objectivity of their policy instruments and toolkits. They attribute ineffective aid to the poor operationalization of policy. If anything, the multiplication of advisor and technical experts and the frenzy of data collection and stockpiles of plans, impact assessments and reports produced to satisfy donors and skeptic taxpayers is an attempt to further rationalize inefficiency (Giovalucchi & de Sardan, 2009; Wallace, 2004), and thus solve a technocratic crisis with … technocracy. The obsession with demonstrating results has paradoxically led to an obsession with the means, rather than the ends.

2.5 Humanitarianism's mission drift

INGOs, who since the neoliberal turn have become privileged and powerful players in aid delivery, had no choice but to follow suit and adhere to increasing levels of managerialism and professionalization because of their dependence on public funding. Financial coercion, which occurs when powerful actors such as donors impose policies, orientations or managerial approaches, sanctions by exclusion those who do not adhere. Claeyé and Jackson (2012), for instance, provide a compelling demonstration of institutional isomorphism (DiMaggio & Powell, 1983) in the aid industry, revealing how donors' competitive bidding

processes have led to increasing homogeneity among INGOs and a limited palette of aid responses. Homogenization is also manifesting through another process, similarly brought on by the aforementioned legitimacy crisis: the amalgamation of humanitarian and development aid into a new, hybrid form of assistance.

When everyone began asking for proof of impact during the nineties, INGOs needed to translate their goals into measurable indicators, gather data in highly volatile contexts, establish baselines to generate a "before and after" snapshot as proof of impact—which is something they had previously been unaccustomed to doing. Humanitarianism could no longer rest on its moral laurels of "saving lives" as an act exempt of justification (Duffield, 2001). The shortcomings of aid became tragically visible in the wake of the Rwandan genocide, resulting in calls for greater accountability. There were more actors present than ever before in the aid ecosystem, but many whose responses were amateurish and even conflict-inducing. Mary Anderson's (1999) now famous revival of the Hippocratic Oath, "do no harm," was a direct challenge to INGOs' disavowal of their unwitting role in conflict.

In the meantime, and true to the good governance agenda of the 1990s, there was a growing recognition that civil conflict and underdevelopment are often linked through the common denominator of weak state institutions. Aid's wavering legitimacy meant that humanitarian organizations could no longer be satisfied with "keeping alive the 'well-fed dead'" (Barnett, 2011, p. 3)—saving children from the brink of starvation and dysentery one day, only to return a few months later to find them in the very same condition. Efforts to relieve suffering needed to be sustained locally to be defensible. For this reason, many humanitarian organizations began to propose projects that include peace building and stabilization, strengthening of local or national capacity to respond, as well as post-conflict or post-catastrophe reconstruction (Audet, 2014). There was a growing consensus among aid actors that conflict hinders state building and destroys development assets and social capital, thus deepening underdevelopment and heightening the risk of further conflict. Humanitarian NGOs were not only drifting into the realm of "development," but they were also treading on new landscape that is decidedly more political (Barnett, 2009; Duffield, 2001). Politics are reflected in humanitarianisms' new interest in state-building and societal reconstruction, whereas previously this had been the prerogative of development organizations. They are also evidenced in the association of underdevelopment to the danger of political instability and hence to national security, a moral rearming of sorts of the Global North. Humanitarian aid in Afghanistan for instance, alongside military intervention and the War on Terror, was used as an essential instrument of American foreign

policy. As with Rwanda, it externalized the sources of conflict and thus legitimated foreign involvement. Therefore, while once focused on keeping soldiers alive in emergency situations, humanitarianism espoused a newfound political inclination. It began to reflect on how to rehabilitate societies toward peace, stability and security, leading to the emergence of what Barnett (2009, 2011) calls "alchemical" organizations, in reference to their socially transformative ambition.

Until then, the emergency branch of humanitarianism had reigned supreme, along with its industry standard of humanitarianism associated with the ICRC (Shusterman, 2021) and MSF. Evolving in a parallel dimension, development organizations, with their reliance on technical assistance and volunteer deployment, tended to shy away from highly volatile environments, preferring instead to implement projects in more stable contexts. However, both branches began tunnelling toward each other—while development organizations started to engage in their emergency responses through their network of local implementing organizations in the Global South, many relief agencies turned to reconstruction and what is now known as the "nexus" model. Nexus is an approach that attempts to bridge the gap between short— and long-term aid. According to this perspective, relief activities should be part of a comprehensive strategy that encourages the resumption of development initiatives at the earliest opportunity (Buchanan-Smith & Maxwell, 1994). Also coined by Hilhorst (2018) as the "resilience paradigm," it highlights the importance of building on local response capabilities in a context of prolonged duress, as opposed to classic dunantist humanitarianism, which is framed around a distinction between crisis and normality.

Duffield (2001) proposes a similar distinction between "minimalist" and "maximalist" aid, in which the former concentrates on efforts to relieve suffering, while the latter holds that action must be coupled with efforts to address the root causes of the crisis. As such, he argues, that foreign assistance can no longer solely be justified on the basis of saving lives, an enduring tension that will be further explored in Chapter 8. Likewise, several other authors including Sezgin and Dijkzeul (2015) advance that "new humanitarianism," whose paradigm is reminiscent of Barnett's "alchemical" approach, require a departure from state-centric models toward a more inclusive, participatory and rights-based approach which emphasizes the involvement of local actors, social justice and the integration of long-term development goals. Embarking upon this paradigmatic shift, several INGOs such as CARE mutated toward a political rights-based approach to aid in the 1990s (Barnett, 2009, 2011). Though still aiming to alleviate suffering, rights-based aid integrates an analysis of marginalization and hence greater attention to processes by

which subgroups may be excluded from participation and accessing resources (Cornwall & Nyamu-Musembi, 2004; Herman, 2014; Nelson & Dorsey, 2003).

The mission drift of alchemical organizations and "new humanitarians" can be interpreted as a self-reflexive adjustment to the increasing complexity of crises and the multifaceted dimensions of fragility (Burkle et al., 2014; Organisation for Economic Co-operation and Development, 2022; Rose et al., 2013). Climate change is rendering the distinction between naturally occurring disasters and manmade crises—virtually irrelevant: Desertification caused by global warming will induce famine and extreme poverty, which will in turn induce displacement, violence and conflict, then the massive international migrations which bring the humanitarian crisis to the very doorstep of donor countries. Mining of natural resources, most often by foreign multinationals—which according to neoliberal economic theory should propel a country's development—is costing the world half of its UN peacekeeping forces, because the extractive industry not only causes, but also funds civil conflict in many regions. Then, in post-conflict contexts that lack adequate public infrastructure, once the attention of foreign emergency responders wanes, the risk of returning to war within a decade is over 50% (Burkle et al., 2014). The shortcomings of orthodox humanitarianism are thus revealed by the wicked nature of humanitarian crises—their complex and interconnected character, for which solutions are hindered by a lack of clarity and evolving constraints. Without a shift toward the unfamiliar but crucial terrain of prevention, preparedness, stabilization and reconstruction activities—the nexus approach—, many humanitarian INGOs have recognized that the need for emergency assistance is fated to increase exponentially, well beyond the aid industry's capacity to respond.

On a more pragmatic level, the mission drift observed among many INGOs is also a survival tactic within the increasingly populated aid ecosystem. Indeed, this shift enables them to capture both development and humanitarian funding, which for most bilateral and multilateral donors today, remains compartmentalized. Quite simply, the expanded scope of activity of alchemical organizations (or new humanitarian and resilience paradigm actors) provides them with a competitive advantage. This, however, requires them to shift away from their principles of neutrality and independence by becoming subcontractors to the state (Lister & Nyamugasira, 2003), whose generosity, as has been argued, tends to be aligned with foreign policy interests rather than humanitarian need (Eberwein, 2005). Unsurprisingly, this dilemma has provoked an identity crisis for some organizations who, like MSF, have responded with an outright disavowal of state funding, the nexus approach and the localization agenda, to maintain their

relative independence while specializing on medical emergency "gaps" (De Castellarnau & Stoianova, 2018).

In 2004, INGOs were faced with yet another legitimacy crisis that elicited heavy criticism: An unprecedented outpouring of public support received for the Indian ocean tsunami response, which actually exceeded the needs, but most importantly revealed an utter lack of coordination among the 300 organizations and 2000 foreigners that descended upon the affected region in Indonesia (Conway et al., 2015). This actually led the Indonesian state to implement a new policy that heavily limited international actors' entry into the country and the subsequent scope of their activity (Robillard, Howe, et al., 2020). However, despite attempts to address the coordination problem through the UN cluster system and other information-sharing mechanisms, a similarly disorderly and ineffective response occurred in Haiti following the 2010 earthquake (Peck, 2013; Van de Walle & Dugdale, 2012).

Realizing that they can no longer rely on the moral righteousness of their interventions as a justification for their presence, the centralization and professionalization efforts that started after Rwanda were heightened throughout the first decades of the new millennium. Global coordination efforts were mirrored in the UN system and the launch of the Millennium Development Goals in 2000 and the Sustainable Development Goals in 2015, and finally among donor agencies and INGOs with the Grand Bargain in 2016. To further their ambitions, large organizations began distinguishing themselves from the more amateurish ones by emphasizing the performance norms to which they adhere, such as Sphere and the Core Humanitarian Standard. This accelerated their bureaucratization and technocratization through the adoption of standardized toolkits, detailed needs assessments, and rigorous control and evaluation mechanisms borrowed from the development sector. The ever-increasing focus on quality—with its underlying assumption of technical expertise, can also be interpreted as an attempt to stabilize a shifting humanitarian space whose boundaries were becoming more porous (Duffield, 2001). Humanitarianism's epistemic territory was becoming increasingly ill-defined.

Meanwhile, donors' need to rationalize public spending from an efficiency standpoint was thus addressed, while INGOs reaffirmed their expertise through increasingly sophisticated technical standards, and an attempt to generate measurable results that justified their *raison d'être.* This is the legacy of the modernization discourse: Organizations, whatever their position along the emergency-development

continuum (classic/minimalist, or resilience, maximalist, alchemical/new humanitarianism), now use both their technical and managerial knowledge to justify their interventions and presence in the Global South.

For this reason, as was argued earlier in this chapter, there no longer exists a divisive line between humanitarian action and development assistance. The technocratic and managerialist discourse blurs the division, as it applies to all forms of international assistance. Today, emergency assistance and development both attempt to promote direct social change. Both are steeped in a colonial past. Their segmentation, however, is maintained by state agencies who continue to compartmentalize their budgets according to increasingly ill-adapted definitions (development versus emergency assistance) that no longer hold much relevance in today's complex crises. The division is also insisted upon by a few remaining organizations of the old guard—the ones that save lives without thinking about what comes next—which Barnett likened to "aged people in an isolated village who cling desperately to the hearth language" (2011, p. 212). Holding on to the ancient narrative of imperial humanitarianism may no longer be a viable strategy in an evolving global landscape and amidst calls to decolonize aid. But as the next chapters will demonstrate, there are structural elements and practices, including gatekeeping, technocratic shepherding and a lack of engagement with paradoxical tensions, which ensure that some actors retain their hegemonic position in spite of threats to their legitimacy. Such legitimization provides a justification and rationale for the ever-growing assemblage of INGOs in the Global South whose practice has been shaped by dominant Northern ideologies. Thus, they represent the frontline of modern imperialism. Its direct consequence is the homogenization of aid, which is contradictory to the localization reform that the same actors are championing.

2.6 Conclusion: the road was paved with good intentions

Aid and its underlying motives have long oscillated between an impassioned voluntary response to a moral call toward our immediate and global neighbours, and a profession, framed by rationality, technical norms and an effectiveness imperative. For the technocratic planners, of which Gunnar Myrdal (1971) is a paradigmatic example, aid is a collective and state-driven effort to alleviate suffering, raise standards of living and promote a version of progress. The aid apparatus and its body of knowledge, whose focus remains technical and managerial, are to be understood as tools at the disposal of the technocrat. Planning, it was believed, would not only enhance progress; it would also give it direction and measurable significance.

For other aid workers, international assistance is impulsive and urgent, born of the politics of care and morality, altruism and humanity. However, the tipping point between caring and harming is not always discernable; “Do no harm” is an ill-defined ideal after all, when applied outside of the medical profession. What is included in the definition of harm? Does it include unwitting participation in the slow death of epistemes, or the supplantation of alternative pathways to well-being? The original Hippocratic Oath which inspired Anderson’s (1999) celebrated work may provide insight into how knowledge is safeguarded within a profession: Oath-takers are bound by loyalty to those who taught them their art. “By the set rules, lectures and every other mode of instruction, I will impart a knowledge of the art to my own sons, and those of my teachers, and to students bound by this contract and having sown this Oath (…), but to no others”(Miles, 2004, p. ii). An epistemic territory is thus created.

The threshold between altruism and self-interested motives remains just as vague for many aid workers. Consider the example of a professional field manager, trained in project management and specialized in camp operations that are Sphere compliant. Her knowledge is not of a place and its people, but of a technique whose deployment occurs at the expense of that which is possessed by those who live there every day. She is passing through, homebound in a few months or a few years, depending on organizational policy or her capacity to suffer the vagaries of civil conflict in the foreign country to which she has been assigned. Her temporary presence speaks of her privilege, but there is not a hint of ill intent in her thinking. She may be there for altruistic reasons, but also to advance her career.

Multiplied thousandfold, this field manager is part of a legion of aid experts, each tasked with investigating, measuring, theorizing and planning the social well-being of populations in the Global South. The policies and programs that surround their work originate from a vast field of knowledge that inevitably carries with it a strong normalizing component. Behind them is an apparatus that allows experts to classify problems and formulate policies, to pass judgment on entire social groups and forecast their future—to produce, in other words, a regime of truth about the Global South (Escobar, 1984). Aid, therefore, does more than just save lives; it shapes them. Humanitarianism is not just “a creature of the world it hopes to civilize” (Barnett, 2011, p. 9), born out of the ashes of war, colonialism and Western societies thoroughly pervaded by expert knowledge and discourses; it also formats the world it hopes to inhabit.

To do so, it deploys strategies that rest on the belief that suffering is a technical problem amenable to such solutions as oral hydration salts, sanitation, immunization or climate-smart agriculture. The construction

of the benevolent expert, whose power is harnessed through the problematization of social well-being and the predicament of postcolonial subjects, performs an act of "othering" by reinforcing an opposing image: the portrayal of entire populations in the Global South as hapless, passive and unknowledgeable (De Vries, 2008). The coloniality of this relation implies structural domination and a suppression of heterogeneity—of subjects of aid, knowledges, the possibility of ontonomy (the harmonious co-existence of non-uniform entities) and non-modern/non-Western pathways to well-being (Escobar, 2017; Mohanty, 1988). Alternatives are thus precluded, silenced and rendered non-existent by expert-driven processes (Crush, 1995; Santos, 2004). Meanwhile, the use of disembodied managerial technologies sunders managers from the communities they hope to assist.

Expert knowledge does more than shape human relations and provide a basis for intervening, however: It also provides a mechanism for keeping power concentrated at the top of the architecture. While it continues to produce erasures—a masculinist story, for instance, in which coloniality and aid's role in conflict are obfuscated—it also protects the epistemic capital of an elite group of Western actors. This is why, as I will discuss in the next chapters, a humanitarian reform which simultaneously calls for the restoration of local responders' role as key players in emergency assistance *and* the increasing technicity of practice, is paradoxical. In much the same way that development has attempted to define the terms of Southern societies' transformation in order to make them "fit" into the global world order, the aid system has elaborated the conditions of entry into its territory—rather than allow its territory to be redefined by the multiple knowledges, practices and experiences of outsiders. Perhaps it perceives a threat in the vitality of challenges to its aging apparatus and to the monolith of Western knowledge. Perhaps it recognizes that the road it has paved over the last century, albeit with good intentions, has not led to the promised destination. What is certain, however, is that in spite of its discourse in favour of decentralized and pluralistic assistance, the industry continues to exert its control over an increasingly unruly humanitarian landscape. Chapters 5 to 7 will discuss the strategy deployed within the territory to regulate disparate aid actors. First, however, academic tradition prescribes a mandatory exposition of my research methodology and methods to demonstrate the soundness of my analysis and conclusions. The next chapter will therefore be devoted to this end, followed by a chapter on the existing literature pertaining to localization.

CHAPTER 3: METHODOLOGY AND METHODS

3.1 On producing knowledge about knowledge

Before delving further into the dynamics of technocracy in the aid industry and my analysis of the factors hindering systemic change, I must provide the reader with the requisite tour of my research methodology. This chapter aims to satisfy this requirement, but also to demonstrate the soundness, coherence and originality of my approach. I will justify the use of grounded theory (Glaser & Strauss, 2006) and a complimentary process termed situational analysis (Clarke, 2005), as the most appropriate approach to study inter-actor power dynamics in the latest attempt at a humanitarian reform, the localization agenda. I will expose my empirical context, starting with an "alchemical" INGO based in Canada, with 8 overseas offices, and proceeding outward both geographically and organizationally to speaking with other actors working in the aid industry. I will then present my empirical material and the way in which information was collected and analyzed in a manner inspired by the grounded theory tradition. In closing, I discuss the challenges and limitations associated with my methods and the empirical context.

3.2 Epistemological stance: dissensus research, decolonization and performativity

Recognizing the coloniality of knowledge production in North-South dynamics, I selected a research method that would allow me to harmonize existing knowledge, both theoretical and professional, as a former aid practitioner, with the act of performing research in a postcolonial setting. My stance is simultaneously postmodern and critical, as already revealed in the preceding chapters, but now I will explain what this means in terms of research. As a counterbalance to Western epistemes, I am also personally inspired by the pluriversal agenda championed by South and Central American intellectual-activists such as the oft-cited Arturo Escobar (2017, 2020) in this dissertation, as well as Epistemologies of the South by Boaventura de Sousa Santos (2014) and the sociology of absences by the same author (2004). These streams, which may appear somewhat disparate, converge to influence my posture as a researcher in what I consider to be dissensus research.

To begin, critical theory offers a broad reflective space in which metanarratives, such as that of international "aid," "development" and "modernity" can be challenged by diverse forms of knowledge and

counter narratives, as I have already begun to do in the preceding chapters. Alvesson and Willmott (1992) argue that critical theory encourages utopian thinking, by offering concepts and ideas that challenge current practices and arouse self-reflection and the "unfreezing" (p. 16) or defamiliarizing of phenomena that is necessary for emancipation. Mirroring this preoccupation, some of the individuals that I spoke with as part of study have highlighted that a process of "unformatting" is required for the aid industry to achieve significant progress toward localization (Participant 3, August 3, 2021, and Participant 6, August 10, 2021). Critical perspectives therefore help us shed light on the eminently political function of aid in perpetuating global asymmetries that are historically rooted.

Next, the postmodern component of my research is interested in the sites of power deployment and concealment in the aid discourse. According to Kincheloe and McLaren (1994), postmodernism as an academic tradition aims to deconstruct grand narratives of knowledge and truth. It views language as a constitutive power that discursively produces singular, monolithic objects—for example "underdeveloped country," "illiterate peasant" or "Third-world woman" (Escobar, 1995; Mohanty, 1988). Since aid is political, as discussed in Chapter 2, its instruments and vocabulary cannot be considered neutral. The creation of categories through discourse inevitably masks or silences important alternative distinctions (Santos, 2014), thus depriving categorized individuals of self-identification and agency (Spivak, 2009). By placing emphasis on the multiplicity of voices and local politics, postmodernism challenges the foundations and power of grand narratives. My interest in diverse, local perspectives that are representative of varied epistemes and expertise is reflected in my sampling, which is mindfully inclusive of those voices that figure less prominently in the discourse on aid and localization. More than half of the 47 individuals I conversed with are from the Central or South America, Africa, Asia and the Pacific, or its diaspora.

Given my stance, my experience with power architectures in the aid industry and my desire to unsettle its epistemological foundations, critical and postmodern research appears as a most coherent, if not most obvious, posture. However, a nuance is required. In "Doing Critical Management Research," Alvesson and Deetz (1996) distinguish between critical theory and postmodernism, but concede that the two traditions overlap to some degree in their disavowal of the modernist project—hence my affirmation that I draw from both stances. Critical theory in its purest form is associated with the Frankfurt School and intellectuals such as Horkheimer, Adorno, Marcuse, Löwenthal and Pollock, while the postmodernists typically refer to French intellectuals such as Derrida, Foucault, Deleuze, Habermas, Lyotard and Baudrillard (Clarke, 2019). However, these traditions are paradoxical in their repudiation of "truth" and "modernity" in that they

essentially constitute the echo chambers of Western male intellectuals. Organizational theorists Mir et al. (2008) further warn that these schools of thought, because they are Western and self-referential feedback loops, neglect the dissenting dialogue that occurs between Western and non-Western concepts such as modernity, the economy and ways of knowing. Therefore, I prefer to claim critical theory and postmodernism as *influences* in my design and analysis rather than as explicit postures, to which I add a third dimension of *pluriversalism*. The end result is an open-ended, polyphonic and subversive epistemology, whose aim is to fulfill a decolonizing vision.

Pluriversalism, which is a Zapatista[9] concept that essentially stands for "a world in which other worlds fit" (*un mundo donde quepan muchos mundos)* asserts the equality and validity of infinite ontologies. In Western tradition, constructionism and interpretivism are similar in their repudiation of a single, true reality because individuals construct and interpret their world through their situated perspective (Clarke, 2019). However, the pluriversal agenda is more explicit and militant in its rejection of a hegemonic worldview (Reiter, 2018). It hopes to reverse epistemological violence and orchestrated silencing, by creating a critical space in which subaltern realities may be articulated through "proposals for 'worlding' life on new premises" (Escobar, 2020, p. 4). It is actively engaged in the attainment of cognitive justice by creating "interepistemic spaces in which the primacy of academic understandings is subverted in favour of a determined stance for the 'knowledges otherwise' of subaltern groups" (ibid., p. 10). Cognitive justice refers to the recognition of diverse ways of knowing and the promotion and of equitable participation in knowledge production and dissemination. It emphasizes the importance of recognizing that populations have different ways of understanding and engaging with the world, and respecting the various epistemes that ensue. It aims to create more inclusive and democratize knowledge systems that reflect the diversity of human experience. Epistemic justice, meanwhile, is interested in issues of power and inequality in the production and dissemination of knowledge. It recognizes that certain forms of knowledge are privileged at the expense of others due to historical and structural inequality. The goal of epistemic injustice is to challenge and redress these dynamics to promote a more just distribution and recognition.

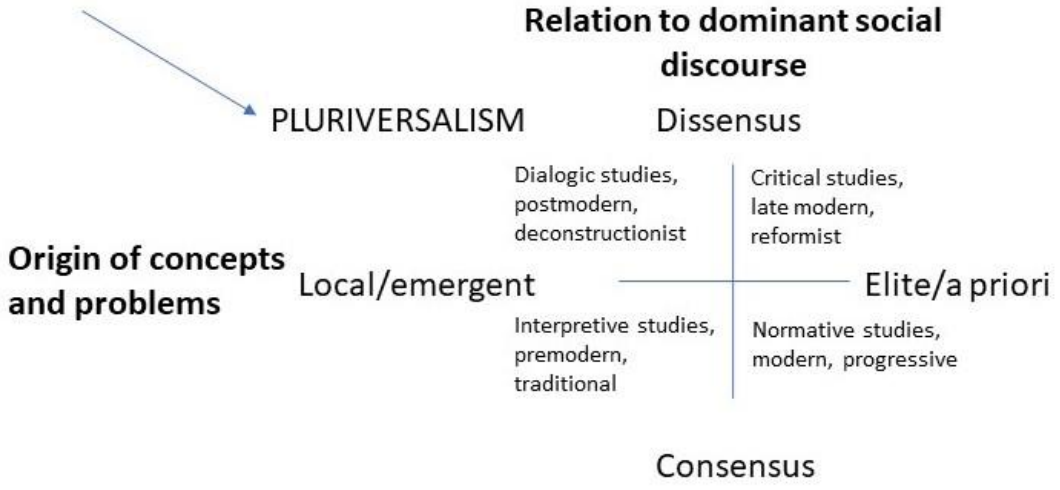
As a research perspective, pluriversalism requires a departure from grand narratives and dominant methodologies, and an acceptance of *pensamiento otro* (another way of thinking) or knowledges

[9] The Zapatistas are a indigenous Mayans from the Chiapas region of Mexico who advocate for the rights and autonomy of indigenous peoples, land redistribution, social justice, self-governance and participatory decision-making.

otherwise needed for epistemic opening. Thus, pluriversalism is inherently political and, like many other forms of critical thought, it contributes to the utopian objective of emancipation by "unfreezing" theory and phenomena. It then becomes a conscious act of epistemic justice, taking the concept of cognitive justice a step further by addressing power disparities.

To connect my various epistemological influences, I have found the diagram proposed by Alvesson and Deetz (1996) featured in Figure 3.1 to be useful in situating my approach without attributing it to a specific perspective. Their model classifies representational practices by contrasting the extent to which researchers work *within* or *against* dominant structures of knowledge, social relations and identities. These two poles are referred to as **consensus** or **dissensus** discourses. The authors also distinguish between research which is interested in **local and emergent** conceptions, versus that which mobilizes **elite and a priori** conceptions. The local and emergent dimension is less theory-driven and more pragmatic than its opposite in the quadrant. It seeks to produce practical knowledge that is contextually relevant and useful to the populations or actors concerned, rather than grand narratives.

Figure 3.1 Contrasting dimensions from the metatheory of representational practice (Alvesson & Deetz, 1996, p. 24)



The top left quadrant, to which I've added the term "pluriversalism" describes research that, like mine, is interested in local narratives rather than generalization and "truth" (Reiter, 2018). Much like the topic of this dissertation, it challenges some of the fundamental notions of Western empiricism: what constitutes

knowledge, what constitutes science, and what constitutes quality in research. Similar dynamics are at work in the aid industry, as introduced in the previous chapter, and to be further developed in chapters 4 to 7. Hierarchies of knowledge in international aid mimic those of Western empiricism. Therefore, by mindfully distancing myself from the pre-existing social theories of Western individuals to "unfreeze" and analyze the localization agenda, my hope is to generate a research territory and approach that is inclusive of suppressed and/or emergent theorization. This will support a decolonizing agenda by making space for the contributions of practitioners, intellectuals, and activists from the Global South.

In academia, decolonization refers to the active and deliberate deconstruction of (neo) colonizing practices which perpetuate the disenfranchisement of certain populations (Denzin & Lincoln, 2008). This requires an examination of much more than the content residing within the edifice of academia and being produced by it, as per Paolo Freire's "Pedagogy of the Oppressed"(2000), first published in 1968. It also calls for an analysis of the practices that continue to construct certain groups as sedimented or inarticulate objects of Western research, disqualify them for lack of conformity or familiarity with Western academia, or bar them from accessing and generating knowledge. Within management, where there is a notable dearth of literature integrating a postcolonial or decolonial lens—Prasad (2003b), Frenkel (2008), Claeyé (2014), Yousfi (2014) and Cooke (2004) being a few exceptions—it requires recognition that the organizational knowledge of non-Westerns has been largely excluded, and thus erased from the canon of management studies.[10] To ensure coherence with the subject of this dissertation, the research itself must include a reflection on the means to counter colonialism, such as reintegrating epistemologies of the South. This requires that we step away from mainstream methodologies.

Because it recognizes the possibility of multiple truths, decolonization, like post-development and pluriversalism, is interested in what occurs at the local level, rather than in macro-theory (as per the local/emergent quadrant in Figure 1). Research, it is argued, must be localized, grounded in the specific meanings and traditions of Southern actors, situated within their unique experience with resistance, struggle, dignity and emancipation (Denzin & Lincoln, 2008; Kincheloe & Steinberg, 2008; Kovach, 2018). A decolonizing agenda thus calls for research whose quality is determined by pragmatism and relevance to the concerned actors, rather than by narrow rigour criteria of replicability, predictability and generalizability. Because it is resolutely anti-positivist, it fosters space in social studies for reflexivity,

[10] Contributions from Japanese management methods being another rare exception, starting with lean approaches known as Toyotism, kaizen, kanban, just-in-time (JIT), total quality management (TQM) and many more.

multiplicity of voices, epistemological pluralism and practical (as opposed only to theoretical) knowledge. It resists a dualist ontology that separates subject from object, reason and emotion, and many other dualisms that are present in Western ontologies. Finally, it is constructivist in its conviction that knowledge is produced through human experience rather than discovered as self-evident information.

Vignette: The gnomes at my window

When I lived in Port Vila, in a small, twelve-unit compound on the outskirts of town, there was a woman named Sera who tended the property's gardens and assumed other maintenance tasks. One day, she informed me that she'd be leaving to return to her home village with her teenage daughter, Florina. The owners of the apartment compound, an Australian couple, had decided to rent out the small unit she'd occupied rent-free for some time, and the price was now too high for her to afford on her modest salary. She had no choice but return to her father's house.

I'd grown very fond of Sera and Florina, so the news saddened me, though we've remained in touch over the years. But at the time, Sera was preoccupied that by leaving the property, she would no longer be close-by to look out for my daughter and I. Speaking in Bislama, she explained that if I ever woke up at night to the sound of someone trying to open my window from outside, I should not worry. "This is because I've asked … (a word I didn't know) … to check that your windows are properly locked, so you'll be safe."

Unsure that I'd understood everything, I looked to her daughter Florina, quizzically, who shrugged and silently mouthed "des lutins" in French. Gnomes? Sera had asked little invisible hobgoblins to check that my windows were locked during the night? The sound of someone tampering with my window would signal a benevolent gnome, rather than an intruder? Florina smiled as if to say "nevermind my mother."

Sera was born on Ambrym, the island renowned in the archipelago for the power of its kastom *(customary) magic, which is derived from volcanic activity. No one disputes it in Vanuatu, not even the Church—Ambrym magic is in fact quite venerated, if not feared. So, I thanked her for her thoughtfulness, which I accepted as a gift. Because you see, the knowledge that she imparted about my tiny invisible guardians was actually very important, as it made me realize that I'd never locked my windows at night. Sera knew that my daughter and I were unsafe while we slept, and thanks to that knowledge about gnomes, I learned about vigilance.*

Where conventional social inquiry expects researchers, as "neutral observers," to be removed from data analysis, decolonizing methods rest on a collaboration between the researcher and a community. In this case, my participating community is one comprised of an INGO who accepted me as a researcher, and a diverse group of aid practitioners and members of civil society scattered around the globe. There are no claims on my part to neutral objectivity, as I introduce myself as a former/current member of this same community in which everyone is a subjective knowledge creator. By engaging in dialogue with research participants—who are in fact, collaborators—I am inscribing myself in their story and landscape. I recognize my influence on the rapport that we may (or may not) develop during the course of our conversations, as I recognize their contribution to my ongoing reflections. Because traditional inquiry into the Global South is said to replicate "extractive" patterns of colonial exploitation by generating benefits in

the Global North (Drawson et al., 2018), I remain mindful of sharing my findings with those who contributed to them, through means that are culturally and contextually relevant.

Finally, by concurrently interrogating the dominant epistemic territory of the aid industry and the mechanisms that maintain its hegemonic position—as well as the same-said processes that exist within academia—this research is intended to be performative, as summarized in **Table 3.1.**

Table 3.1 Summary and demonstration of performativity

Key elements of critical theory, postmodernism and pluriversalism	Influence on objective of study	Influence on methods
Identifying and challenging assumptions behind ordinary ways of perceiving, conceiving and acting	Interrogating "development and humanitarianism discourse," and the neutrality of management practices and technical expertise. Rendering conflict visible within discourses and practise (humanitarian and development discourse as a false consensus).	Inclusion of indigenous (non-Western) knowledge production approaches and validity criteria. Inclusion of non-Western perspectives. Reclaiming conflict and paradox in terms of epistemological stances rather than consensus (see Chapter 8) Anti-positivist stance
Recognizing the influence of history, culture and social positioning on beliefs and actions	Genealogy of aid discourse (Chapter 2), colonial and postcolonial perspective, situating the lead INGO within a broad geopolitical context. Hegemonic aid discourse as the product of historical and contemporary orchestration. Identifying sites of power production and concealment (see Chapters 2, 5 and 6) Identifying processes of marginalization/oppression within the aid territory. (see Chapters 2, 5, 6 and 7)	Critical reflexivity about my role and position as woman intellectual-activist and Westerner-outsider to some participants. Integrating my former role as an aid practitioner). Writing in the first person and naming my posture. Providing *sentipensar* vignettes to integrate "knowledge otherwise" as a complement to traditional research/academic writing. Researcher as facilitator rather than intellectual elite. Researcher as historically, culturally and politically situated agent (see Chapters 1 to 9)
Imagining and exploring extraordinary alternatives, one that may disrupt routines and established orders	Ultimately transforming the idea of humanitarianism and development by recovering marginalized and suppressed ideas, identities and trajectories. Identifying alternatives to aid rather than aid alternatives (Chapter 9) "Pluriverse," a world in which other worlds fit.	Writing the thesis "differently" as a transgressive act to disrupt routines. Research as a deliberate anti-positivist process with a political activism objective to reveal and address cognitive injustice.
Being skeptical about any knowledge or solution claiming to be the only truth, and thus disengaging from the modernist tradition.	Looking at alternatives to humanitarianism and development, and local strategies that emerge from resistance to dominant discourse, looking at what is occurring on the outskirts of mainstream humanitarian and development activities. (Chapter 9) Drawing attention to the instrumentalization of people and nature through the use of scientific-technical knowledge modelled after positivism and other rational ways of developing safe, robust knowledge to accomplish predictable results, measured by problem-solving, leading to "good" economic and social life primarily determined by the accumulation of wealth and consumption (Chapters 4 to 7).	Exploring new forms of producing, evaluating knowledge and quality criteria. Remaining mindful of the tendency of research to instrumentalize people in the production of knowledge. Commiting to sharing the results in contextually relevant formats to avoid "extractive" practices.
Discourse	Denaturalizing humanitarian and development discourse and the discursive "closures" that occur in defining what constitutes knowledge, expertise, aid, humanitarianism, development,	Denaturalizing what constitutes humanitarian and development research data (typologies, statistics) and methods (outsider perspective).

Key elements of critical theory, postmodernism and pluriversalism	Influence on objective of study	Influence on methods
	aid management, partnership, well-being, poverty, poverty-reduction strategy, etc. (Chapters 1 through 9))	Focus on the constructed nature of people and reality, and therefore on pluriversality.

3.3 Methods: grounded theory, more or less…

While there exists an array of qualitative data collection and interpretation approaches (for instance ethnography, observation, phenomenology or discourse analysis), grounded theory is considered to be a method of inquiry best suited to topics which have been relatively ignored in the literature (Goulding, 2011). Though research on the aid industry is abundant, little has been published to understand the tensions and contradictions inherent to the localization agenda. As briefly discussed in Chapter 1**,** the industry has struggled, if not failed altogether, to achieve the desired outcomes of the localization agenda on various levels, suggesting that new theoretical insight may be more helpful than extant theory in overcoming current challenges.

Glaser and Strauss's foundational book, *The Discovery of Grounded Theory*, first published in 1967, describes a process by which social scientists can produce new theory from qualitative data, as an alternative to the classic empirical practice of analyzing data through the lens of pre-existing theoretical frameworks. Hence, rather than being driven by theory, their approach is an abductive process that consists of moving to-and-fro between various forms of qualitative data to identify increasingly robust linkages and patterns that lead to conceptualization, and finally, to theorization. Data collection and interpretation are performed simultaneously, and often in an iterative fashion. Interview transcripts, which typically form the bulk of the empirical material, can be coded and interpreted multiple times as concepts begin to emerge from the data. For Glaser and Strauss, this activity is complemented by the production of "memos" or short notes that aid the researcher in defining concepts and relating them to one another. This allows for a progressively refined theoretical model to emerge from qualitative empirical material.

To produce new theory grounded in data, Glaser and Strauss highlight the importance of setting aside preconceived theoretical models with which to interpret the phenomenon being studied. However, they recognize that most scholars already possess "theoretical sensitivities" or a disciplinary background, which can't be entirely severed from the process. They concur that this amassed knowledge, while it may hinder the capacity to generate novel theory, may actually be helpful in distinguishing between what is already

known in a certain discipline, and what can be learned through new theorization. I concur, and further argue that because knowledge is a constant flow with which we interact and upon which our consciousness rests, it is *always* active in shaping our research process. Recognizing my sensitivities supposes that grounded theory is one of them. Paradoxically, while Glaser and Strauss contend that we must move away from pre-existing theoretical frameworks to generate new theory, they don't seem to disagree with the use of grounded theory as a prefabricated method of data production and analysis. As such, and to allow for emergence in the research project, I have decided to claim Glaser and Strauss's original model as the *basis* of my method, without insisting on some of its more granular and formulaic elements.

In fact, during the last five decades, grounded theory has undergone several adjustments, expanding from sociology to different disciplines including management (Goulding, 2011). After *The Discovery of Grounded Theory*, both scholars went on to publish single-authored work that established distinct strands of their original method. Glaser further developed the concept of theoretical sensitivity while remaining committed to the original approach, creating a more procedural and hence rigid form of grounded theory that is interested in the conditions giving rise to incidents in the data. Strauss meanwhile expanded into interpretivism and symbolic interactionism, setting the foundation for a form of research particularly adapted to critical studies (Clarke, 2019). Followers of this tradition are especially attentive to the way actors interact through language, symbols and action to produce meaning and explain phenomena (Locke, 2011).

Because interactions inevitably involve elements originating in actors' wider environments not necessarily accounted for in traditional grounded theory, Clarke (2005) proposed an adaptation which she calls "situational analysis" to capture elements which she felt were "missing in action." This recent variant or addition to grounded theory enables the researcher to gain a more comprehensive picture of the situation of inquiry, by identifying various contextual elements such as power dynamics, discourse, history and stakeholders. Elements are typically charted on three different maps—situational, social arenas and positional—which provide further insight into the phenomenon being studied and the links between data. Situational maps, for example, include human and multiple non-human elements such as technologies, policies, discourse, resources, trends, traditions and even tools that shape and influence phenomena within the industry. They also include spatial issues such as geographic distribution. Social arena maps identify actors—individuals such as the researcher, groups, organizations, state and global governance structures—that together comprise the social ecosystem of the inquiry. Finally, positional maps list

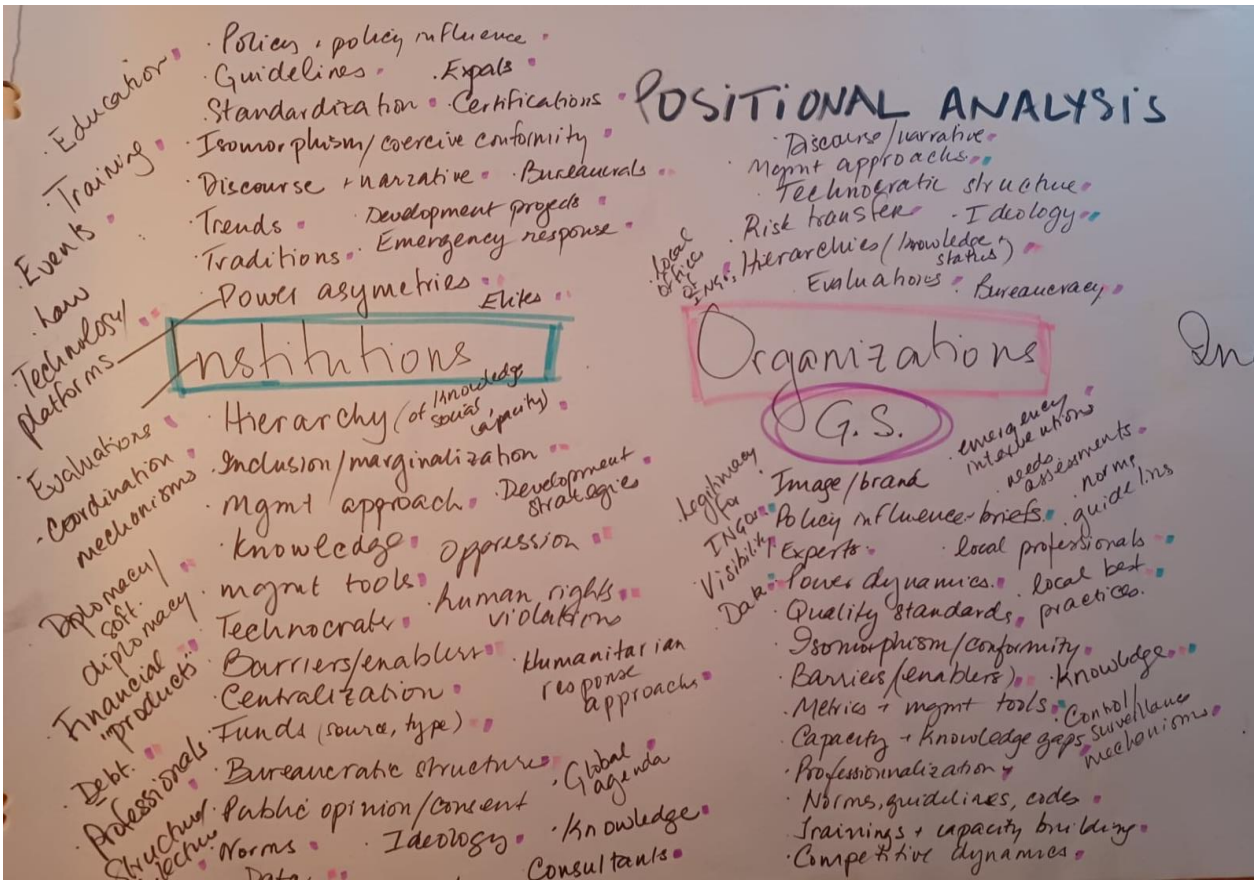
contested or debated issues and conflicting narratives or discourse, providing a more comprehensive picture of their proponents and the power dynamics at play. These maps feature both the positions taken, and those *not* taken (Clarke, 2005; Clarke, 2019; Clarke et al., 2015).

Figure 3.2 Situational analysis and output mapping

Approximately midway through my data collection—which spanned from July 2021 to April 2022, I undertook the task of creating situational maps as per Clarke's approach. I found the social arena map—in which I visually charted the ecosystem's multiple actors according to a loose typology of "institutions, organizations and people"—to be relatively un-insightful, other than serving as the basis for the next layer of mapping. Its usefulness may have been limited by my existing awareness of exclusion mechanisms in the aid industry, which had already stimulated a reflection about invisible aid providers and emergency aid responders (such as informal organizations or networks in affected communities, or individuals facing crisis). I felt that these various actors' output was most relevant to capture on a map (see Figure 3.2, in which the actors are juxtaposed with what they produce), as this is essentially what's contested in the ecosystem: whose contributions matter, which contributions are visible or invisible, which outputs occupy more space, which ones are transformed to produce other outputs, which ones are guarded or discarded, and by which actors. The items listed on this map were derived from my prior knowledge of the aid

industry, but also from concomitant conversations with research participants. Interestingly, the exercise revealed itself to be coherent with an ecosystemic approach and its constitutive elements of complexity, relationality, self-organization and emergence.

Figure 3.3 Positional analysis and output mapping



For a final map which focused on positional elements, I extracted the outputs identified above, around which I perceived tension or dissent, and I established the sites of contention by asking, "who might oppose or challenge this or that element?" The results revealed that outputs generated by institutional actors—UN agencies, states, bilateral and multilateral donors and even academia—are more widely contested by organizations, particularly those of the Global South. The reverse, however, appears to be untrue; very few outputs produced by organizations are subject to contestation by institutions. Some of them, such as non-Western managerial approaches, instead of being contested, are simply dismissed as being not "up-to-standard" or deficient (to be further elaborated in Chapters 4 and 7). A Foucauldian analysis would interpret this situation as the consequence of asymmetrical power relations, because the

enactment of resistance, however covert or overt, signals oppression by a power-wielding actor—in this case, institutions (Foucault, 1980, 2000).

These maps are intended to serve as complementary reflective processes to capture tensions and discreet, intangible elements that the interpretation of my empirical material may not capture. They do not constitute data in this study; rather, they aid in linking various concepts and categories.

3.4 My research context

In their original work, Glaser and Strauss (2006) differentiate between two forms of theory—substantive and formal. Substantive theory, which should be the immediate outcome of the inquiry, applies to the specific area in which it is grounded. That is to say, my research must produce knowledge that is relevant to the participant, their organization and their community. Its relevance need not extend beyond that level—at which point it would be considered formal theory, more conceptual than its substantive variant. While they do note that substantive theory may "become a springboard or stepping stone" (p. 79) toward formal theory, the premise of grounded theory is to study a phenomenon occurring within a bounded, or delineated context. Case studies are therefore perfectly adapted to grounded theory.

For this reason, I chose to start my research with a Canadian INGO of the "alchemical" type, which leans more toward the development paradigm but has evolved over the last two decades to include humanitarian assistance. The organization will be given the fictitious name of Amani—which means Peace in Swahili—to preserve its anonymity and that of its employees with whom I had the opportunity to converse. I was already acquainted with Amani through previous work, so this presented a convenient entry into a systemwide mutation that is affecting the discourse and practices of aid actors. Amani is undergoing a long-winded and complex structural transformation, which it refers to somewhat interchangeably as "internationalization" and "nationalization." The intended outcome of this ambitious organizational change resembles the localization agenda, whereby their 8 overseas satellites would eventually become "national" entities registered within their host country, complete with their own local governance structure as opposed to being outposts of a Canadian INGO, as they have been for several decades now.

Amani is a registered charity that was founded by a Jesuit priest in the 1950s, around the time that many countries including Canada established bilateral aid agencies, which also corresponds to the emergence of several technical assistance INGOs throughout the country. At the time of its founding, Amani's purpose was to initiate missionaries and laypeople, such as public servants, to the socio-economic and cultural realities which awaited them in their countries of assignment in the Global South—it did not carry out the interventions overseas itself. A decade later, the organization secularized, and its mainstay programmatic approach turned to technical cooperation through the deployment of Canadian volunteers overseas. Its first international outpost offices were opened in Burkina Faso, Senegal, Guinea, Mali and Nepal in the 1980s. Having established itself as a development organization, Amani chose to diversify its projects and funding sources by responding to humanitarian crises in the countries where it operated, such as Hurricane Mitch in Central America in 1998 and the Haïti earthquake in 2010. In the years that followed, Amani became increasingly engaged in emergency response. In 2009, the organization's approach to humanitarian action, which entails a long-term sustainable development vision rather than simply emergency aid, was formalized in an organization-wide operations manual. Today, Amani conducts a wide array of activities in 17 countries, the nature of which has changed frequently since its establishment, ranging from bilateral projects without technical cooperation, its flagship North-South volunteer cooperation program and short- and long-term emergency responses and recovery initiatives. These activities are carried out through a network of offices in Africa, Central America, South America, the Caribbean and Asia and some 300 local implementing organizations (which it refers to as partners), and an annual operating budget ranging between 35 and $40 million (CAD). [11]

Amani's current structure allowed me to access a wide array of individuals in and from the Global South, who are associated with the organization and its activities, including staff, subcontracted implementing NGOs (Southern civil society organizations) and local advisors whose perspective is essential to understanding challenges to localization. All told, in addition to speaking with many individuals based out of Amani's Canadian headquarters, I spoke with staff associated with five of its overseas offices, and collaborators in six countries where projects are carried out. In accordance with the practice of grounded theory, I allowed this entry point to guide me outward and back inwards in an iterative process, toward

[11] The information was sourced on Amani's website and in its corporate documentation—which cannot be referenced according to the customary format, as this would reveal its identity.

research participants unrelated to Amani, then back to Amani to discuss emerging interpretations, and back out again.

My research, therefore, without being exclusively dedicated to observing processes within Amani, has enabled me to utilize it as a mini case study that is reflective of tendencies within its macroenvironment. Amani's relevance in my study resides in its implementation of a significant structural change, started in 2013 and reaffirmed in its strategic framework for 2020–2025, of transforming itself into an international, interdependent and inclusive network. An entire chapter (Chapter 7) is dedicated describing and analyzing Amani's internal processes, and to linking them with tensions observed at the industry level. This essentially means that its country offices are at various stages of becoming officially registered as national entities in their host countries, which would confer them with the status of "Southern NGO," complete with local employees and governance structures. By hiring local staff as opposed to deploying expatriate workers, and by redistributing operational roles and power to their offices in the Global South, INGOs such as Amani, it can be argued, are practising a form of localization. The Canadian headquarters would, according to its strategic vision for 2020–2025, become the secretariat of an international network of financially and programmatically autonomous but interrelated Amani offices in the Global South. Currently, the overseas offices are heavily dependent, if not exclusively dependent on funding secured by the Canadian headquarters. The desired outcome of the transformation is for each office, as a nationally registered NGO, to generate its own revenue streams and thereby ensure a gain in financial autonomy. However, the lapsed time since the launch of the restructuring process and the modest headway achieved to date suggests that there are internal and/or external challenges which warrant investigation. The organization, therefore, provides a rich context within which to study the process of localization and the elements undermining progress.

Secondly, Amani is not unique in attempting this organizational reform—several other INGOs have undertaken similar restructurings, which are indicative of a trend occurring in the industry (Patel & Van Brabant, 2017). Oxfam International, for example, currently operates as a confederation of 21 independently registered affiliate "member organizations" or national Oxfam offices in the Global North and the Global South (Oxfam International, 2021). This trend is generating much debate among Southern civil society, whose members contend that it masks INGOs' self-serving interpretations of localization, as opposed to participating in a more fundamental redistribution of power with endogenous actors. As a case study, Amani consequently has the potential to contribute to substantive theory within the aid community.

It would be considered an "instrumental case" according to the typology developed by Stake (1995). Compared with intrinsic cases, in which the researcher focuses on unique attributes, instrumental cases can provide insight into a phenomenon occurring within the system comprised of INGOs in the aid industry. And, as noted by Lewis (2008), NGOs have been shaped by the state and its technocratic rationality, but at the same time, in thinking more broadly about approaches to aid, they have also been sites of resistance that reveal tensions between conformity and emancipation. As such, he writes that "the story of development NGOs in the past two decades can usefully be seen as representing a microcosm of wider debates and struggles around managerialism" (p. 53).

Finally, pragmatism is a central concern of grounded theory and decolonial methodologies. A measure of quality of the knowledge produced, is its relevance to the research participants. It is important to highlight that Amani has explicitly stated that it wishes to gain a better understanding of its institutional transformation toward a more localized structure. Though the research question—namely understanding which processes are hindering transformative reforms such as localization in the aid industry—extends beyond the case study and Amani's own interests in this research, the organization's active engagement in self-reflection and learning provides additional impetus for its use a mini case study.

3.5 Collection of empirical material

Consistent with the grounded theory tradition, my primary source of information was open or conversational interviews, in other words, dialogue with research participants that did not rely on a fixed script. Conversational interviews are favoured because of their capacity to generate richer accounts of individuals' perspectives and experience (Goulding, 2011). They are also more flexible than directed or semi-directed interviews, allowing for the discussion to explore emergent topics as the process evolves. Hence, I often drafted a list of potential questions in advance of my interviews, geared to the individuals I would be speaking to and their role within the aid ecosystem, and their perspective or experience with the localization agenda. However, during the interviews, I spontaneously proposed other questions and abandoned those which I felt were less relevant. The conversations were adjusted intuitively as they unfolded. As such, interviews were felt and performed as an individual-to-individual relation grounded in our shared interest in civil society's vital role in enabling localized definitions of well-being, development trajectories and relevant emergency responses. As my understanding increased, I felt I could share some of my perspectives with participants—as they shared theirs with me. This should not be construed as a

design flaw tainting their responses, but as a desire to understand and to engage in dialogue with knowledgeable individuals from around the world. There are many other factors that have an incidence on what participants share and how they present themselves within the researcher-participant dynamic; there is no way to curtail this in qualitative methods; hence one must accept subjectivity and positionality as constitutive of the empirical material (Alderson, 2020). Adopting a reflexive stance to explore such power relations and the multiple influences on the co-construction of meanings in the relational space inhabited by the researcher (or former aid professional in my case) and research participants is, therefore, an essential part of my methodology. This further justifies the use of *sentipensamiento* vignettes throughout.

Because the research occurred during the COVID-19 pandemic, all of my interviews took place over web-based platforms (Zoom, Teams, Imo and WhatsApp) in French, English and Spanish. An interpreter was present to assist with calls in Spanish, but for the most part, he remained silent and only intervened when clarification was required. For many of the individuals I conversed with, none of these languages constitute a mother tongue, and this is an important dimension to reflect upon—for as Rigoberta Menchu explained in her testimony (Burgos, 1983), many individuals have had to learn the colonial language in order to be heard by the colonizer. I noted that not being to speak in one's mother tongue had an impact on the fluidity and depth with which some participants expressed themselves, often leading to shorter answers that those provided by someone who displayed a good level of ease in French, English or Spanish. Given the resource constraints, I did my best to accommodate this linguistic challenge in my research, communicating with participants in the language of their choice between the three options. As such, my consent forms were available in all three languages, and I commit to communicating a summary of my research results to the participants in all three languages.

With the exception of a few calls during which the connection was poor, video cameras were activated during the interviews, which facilitated both verbal and non-verbal communication. As illustrated in Table 3.2, participants represented a wide array of geographic locations, some binational Canadians were also part of diaspora communities, while other participants identified as indigenous or ethnic minorities within their native country. Various gender identities were represented, including non-binary (self-identified), though this information is not captured in the table, as participants were not asked to provide it. This measure further safeguards their identity. Rather, the table presents the profile of the different individuals who contributed to this research by accepting to speak with me, as well as the type of

organization with which they are currently associated. I have voluntarily used the term "program staff" for anyone involved in management of projects, programs or operations so as to protect the identity of the individuals and avoid distinguishing between those who are senior, intermediate and junior staff—as there is no automatic link between their status within the organization and their expertise. Some directors, for example, were new hires within their organization, or had limited previous exposure to localization.

Table 3.2 Research participants

No.	Role	Location	Affiliation	Date	Duration (minutes)
1	Program staff	Canada	Amani Canada	30- Jul-21	88
2	Program staff	Canada	Amani Canada	30- Jul-21	77
3	Program staff	Canada	Amani Canada	03-Aug-21	80
4	Program staff	Canada	Amani Canada	04-Aug-21	74
5	Program staff	Canada	Amani Canada	09-Aug-21	56
6	Program staff	Canada	Amani Canada	10- Aug-21	64
7	Program staff	Canada	Amani Canada	12- Aug-21	55
8	Program staff	Canada	Amani Canada	16- Aug-21	62
9	Program staff	Burkina Faso	Amani Burkina Faso	18- Aug-21	38
10	Program staff	Canada	Amani Canada	02- Sep-21	36
11	Program staff	Nepal	Amani Nepal	07- Sep-21	41
12	Advisor	Burkina Faso	Civil society Burkina Faso	10- Sep-21	41
13	Consultant	France and Canada	Consultant Canada	16- Sep-21	45
14	Program staff	Haïti	Amani Haïti	21- Sep-21	31
15	Program staff	Guatemala and Canada	Amani Guatemala	06- Oct-21	44
16	Program staff	Germany	Consultant	07- Feb-22	28
17	Program staff	Guatemala	Amani implementing organization	11- Feb-22	36
18	Consultant	Canada and Macao	United Nations Agency	14- Feb-22	48
19	Program staff	Guatemala	Amani Guatemala	17- Feb-22	61
20	Program staff	Burundi	Amani implementing organization	04- Mar-22	36
21	Program staff	Guatemala	Multilateral funding bank	08- Mar-22	77
22	Consultant	Vanuatu	Civil society Vanuatu	08- Mar-22	26
23	Program staff	Spain and Occupied Palestinian Territory	INGO in Palestine	09- Mar-22	92
24	Program staff	Canada	Red Cross[12]	11- Mar-22	28

[12] Exceptionally, the affiliation is provided for two participants associated with the International Committee of the Red Cross and/or the International Federation of the Red Cross and Red Crescent Societies (IFRC), as it is one of only two worldwide actors to be known as an "international organization" (i.e., not an INGO). In subsequent chapters, the role of the ICRC and IFRC is specifically addressed and therefore, for clarity and legibility purposes, neither organization could be anonymized. In order to safeguard the identity of the two concerned individuals, I have opted to simply use the generic affiliation "Red Cross," which encompasses both the ICRC, the IFRC and

No.	Role	Location	Affiliation	Date	Duration (minutes)
25	Advisor	Burkina Faso	Civil society Burkina Faso	15- Mar-22	28
26	Program staff	Guatemala	Amani implementing organization	15- Mar-22	45
27	Program staff	Guatemala	Amani implementing organization	17- Mar-22	40
28	Program staff	Switzerland	Red Cross	21- Mar-22	38
29	Program staff	Canada and Iraq	INGO in Iraq	21- Mar-22	33
30	Consultant	Canada	Government of Canada	23- Mar-22	60
31	Program staff	Philippines	Amani implementing organization	23- Mar-22	34
32	Independent	Colombia	Civil society Colombia and Guatemala	25- Mar-22	34
33	Public servant	Ghana	Government of Ghana	28- Mar-22	49
34	Program staff	Canada	INGO in Canada	28- Mar-22	49
35	Program staff	Burkina Faso	Amani implementing partner	29- Mar-22	40
36	Program staff	Burkina Faso	Amani implementing partner	29- Mar-22	*
37	Program staff	Guatemala	Amani implementing partner	31- Mar-22	32
38	Program staff	Canada	INGO	31- Mar-22	33
39	Program staff	Germany	INGO	01- Apr-22	35
40	Independent	Guatemala	Civil society Guatemala	01- Apr-22	45
41	Independent	Nepal	Civil society Nepal	04- Apr-22	88
42	Program staff	Canada	INGO	05- Apr-22	28
43	Program staff	Senegal	INGO satellite office in Senegal	07- Apr-22	23
44	Consultant	Canada	Consultant	08- Apr-22	26
45	Program staff	Canada	INGO	08- Apr-22	43
46	Program staff	Kenya	INGO network	12- Apr-22	30
47	Program staff	Switzerland and Cameroun	Standard-producing organization	13- Apr-22	30

* Interviews 36 and 37 occurred jointly and lasted 40 minutes. The time is only counted once, but the participants are considered distinctly. The interview produced a single polyvocal transcript.

In total, 2127 minutes (35.5 hours) of conversations were recorded and transcribed, totalling approximately 400 pages of single-spaced text.

3.6 Sampling and interpretation

Whereas the goal of traditional sampling is generally to represent a phenomenon, in grounded theory, sampling is part of the process of data collection, whereby the researcher simultaneously codes, analyzes and decides where to look next for relevant information, as new insights or leads emerge. Sampling is flexible and used for developing concepts and constructing theory (Morse & Clark, 2019). Thus, my

national societies. The Red Cross movement boasts millions of volunteers and staff, and by virtue of its size, there is no chance that these individuals will be identified.

sampling approach, which is referred to as "theoretical," intentionally sought out participants to be interviewed who have experience or knowledge about the topic of aid and localization, as the research progressed. In line with my interrogation of what constitutes knowledge, I also reached out to non-visible or non-traditional actors in the aid industry, which included for instance self-help cooperative organizers, faith-based organizations or staff/members of a variety of small and informal civil society groups in the Global South.

In theoretical sampling, interview topics are expected to evolve over time along with the profile of participants. My sampling was therefore purposeful, to the extent that at the beginning of my research, Amani and I decided to start with a specific group of participants who possess historical and thematic knowledge on the topic of study within the organization. When core ideas were found to recur in the interviews, my sampling become more selective and focused on the emerging theory.

Beyond staff working out of Amani's Canadian office, I specifically sought out the perspective of individuals working in their overseas offices and other civil society organizations in Africa, South and Central America, the Caribbean and Asia. Amani's implementing organizations are generally small or mid-sized NGOs who are bound to headquarters or overseas country offices via a memorandum of understanding or a contract, to carry out a specific mandate within a larger project. They simultaneously receive technical support (also referred to as capacity building, achieved through training by staff from headquarters or the deployment of volunteers from Canada) (see Chapter 6) and modest financial support earmarked to the project. Some of Amani's relationships with local organizations have been in effect for more than a decade, while others are relatively new.

The importance of including individuals representing non-Western organizations in this study is twofold: firstly, from a performative perspective, it can help simultaneously decolonize the discourse on aid and localization, by drawing attention to suppressed conflicts and false consensus. Sampling outside of large Western NGOs, though more challenging from a recruitment perspective, can help decolonize knowledge production by acknowledging, and working with, the aid industry's own epistemological conflict: local knowledge versus foreign knowledge.

Secondly, in keeping with Glaser and Strauss (2006), diversity and demographic variation are essential to obtaining quality data and conducting effective analysis through comparison. They suggest, as part of the sampling approach that researchers identify comparison groups whose perspective will enhance the

generative potential of collected data. Therefore, the inclusion of Southern actors, who are in many ways the "subject" of the localization program, as distinct comparison groups, is not only justified for decolonial purposes but also for its theoretical relevance. Finally, because I sought to include non-Western organizations in this study, I also wanted to interview representatives from INGOs and other Global North aid actors, to maximize the benefits of comparative analysis, and thus strengthen my theory.

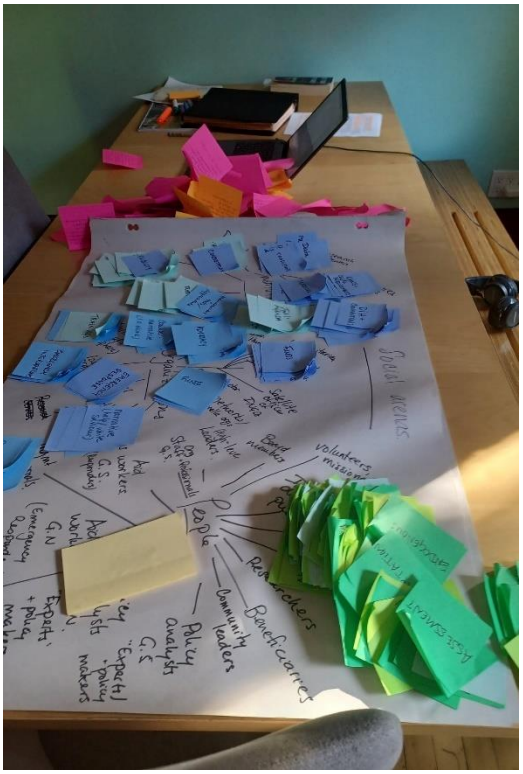
3.7 Interpretation

As per my selected method, I reviewed my transcripts within a few days of completing my interviews, and began to code them using Altas.ti. Coding and analysis therefore occurred concurrently with data collection. While Glaser and Strauss's (2006) original approach proposes a 4-step sequence featuring increasingly conceptual building blocks, which result in the elaboration of theory, I opted for a more organic and free-flowing formula. I found this to be less constraining and, echoing Goulding's (2011) critique, counterproductive to the spirit of creativity that is an integral part of grounded theory. I chose instead to use simple open coding, highlighting evocative passages that I could associate with a "tag"—and often up to a dozen tags—using participants' own vocabulary at first. As I progressed, highlighting a total of 1340 passages, many of which are featured in Chapters 5 through 8, certain patterns emerged, I came up with new codes. These were not supplied directly by participants, but rather surfaced as nodes connecting several terms. They became higher-level concepts, which led to ever-increasing abstraction.

"Technocracy," for instance, emerged as a higher-level concept associated with technical expertise, managerialism, and management tools around the twelfth interview. "Shepherding" and "gatekeeping," meanwhile, are codes which I generated toward the end of my data collection. Whenever several new codes appeared seeming to reveal a higher-level pattern, I reviewed all my earlier transcripts in light of emerging insight, recoding a second, third and finally fourth time as I advanced through the process. This resulted 232 codes, which were eventually reduced to 208 by combining similar terms—for instance "knowledge" and "expertise," which at first were distinct—and deleting those whose occurrence was negligible. A complete list of codes is available in Appendix A, but during the coding process, these evolved considerably, renaming, splitting apart into sub-codes, converging into higher-level categories, then separating again, as I shifted between interpretive and conceptual levels.

While coding can effectively achieve the high level of abstraction that leads to theory production, I was preoccupied that it would fail to integrate those intangible elements—power dynamics, tensions and erasures, for example—which Clarke (2005) feels are inadequately integrated in classic grounded theory. The situational maps generated and presented in Figures 3.2 and 3.3 were helpful in moving to a higher level of conceptualization, away from open coding and analysis of the empirical material and into interpretation of the context of disputed elements. Throughout most of the interpretation process, I moved back and forth through different but interconnected layers of analysis—at times engaged in reflexive practice, or musing over some theoretical sensitivity or other, then deep into the transcriptions for coding, then back up to the surface for air, which is where a grounded theory started to emerge. I sometimes physically manipulated my codes over the situational analysis maps I produced, to create links and categories between them, as illustrated in Figure 3.4. I daresay there was no "drugless trip" as described by Glaser and Strauss, nor was I graced with a eureka moment. I was only able to perceive patterns, which at first seemed faintly outlined on the horizon. With time, they assumed a more definite shape and character as they reappeared, time after time, and layer upon layer, in my data. These recurrences seemed almost to provide them with a discernible outline.

Figure 3.4 Juxtaposing codes and maps



Finally, one last element was central to my interpretive process: Memo writing, an activity by which I captured and structured my emergent reflections. While I attempted to produce distinct memos whenever a spark occurred, I found that jotting my messy reflections in a notebook and keeping a single, rambling, 20-page memo in Atlas.ti—which had no structure whatsoever—ultimately provided all the necessary fodder to produce the analysis chapters of this dissertation.

3.8 Limitations

I recognize that skillfully capturing participants' true subjective experience via a 30 to 45-minute conversation over a web-based platform may be naïve and optimistic. Interviews provide interesting, but often uncertain clues. For a number of reasons, including power asymmetries, my own positionality, some participants' fear of reprisal (despite an assurance of confidentiality) or even language barriers, I cannot claim authoritative knowledge of their subjective experience and context on the basis of interviews. Furthermore, while participants selectively chose what to share during an interview, as researchers, we are also selective in our use of interview passages and observations to construct and support our research. Readers then apply their own subjective interpretation to the story we attempt to tell. For this reason, as argued by Alvesson and Deetz (1996), objectivity is impossible to sustain. This may be viewed as a limit to my study by those whose epistemological stance is positivist, and who maintain that objectivity is the highest virtue of research. This is fine, as my interest is not to discredit their posture in favour of mine, but rather to draw attention to the dynamics that sustain objectivity as the ultimate measure of good research at the expense of other methodologies.

Finally, my methodology aims to shed light on a complex phenomenon that involves restructuring relations between organizations and individuals who have long occupied asymmetrical positions in the aid industry. My study attempts to understand how this is played out at the epistemic level for an international organization and its stakeholders, but also within a knowledge territory in which this same organization is contributing to systemwide dynamics. At this stage, my research is by no means intended to be generalizable or replicable outside of this realm. Rather, it confines itself to a bounded context or scope, the limits of which are determined by my theoretical sample. As such and in keeping with my

epistemological stance and methods, it remains an ever-developing endeavour to produce substantive theory—or quite simply, knowledge—that is relevant to the concerned actors.

3.9 Conclusion: The intellectual has no special knowledge

In this chapter, I presented my epistemological stance and argued in favour of methods inspired by grounded theory, but also influenced by a decolonizing critique. I would, however, like to end, before transitioning to chapters that address the localization agenda and the interpretation of my data, with a quote by Alvesson and Deetz (1996, pp. 16-17):

> The intellectual has no privileged position or special knowledge, but can act only in situational, local ways like all others, that is he or she cannot offer external or even broadly valid truth […]. The researcher's role today is more appropriately one of enabling more open discourse among the various members of organizations, and between them and external social groups and the larger societies in which they operate.

While I concur, I do recognize my privilege in being granted access to a diversity of knowledges, meanings and perspectives that constitute the phenomenon that I've become engaged with—localization. This does not imply a disavowal of my identity as an academic researcher and aid practitioner, but rather, as suggested by Fine (1994) and Cunliffe and Karunanayake (2013), a continual examination of self and other, "working the hyphen," connecting epistemes on an equal plane, mine and those of fellow humans. In such a way, I hope that I may put that identity to very modest use in drawing attention to the need for fewer abyssal lines and more interstices between "expert" knowledge and "knowledges otherwise" in the aid sector.

Having presented my epistemological posture, methodology and methods, we may now turn our attention back to my research question: Why did the localization reform fail in its attempt to restructure power relations in the aid industry? The next four chapters will be devoted to this topic and the analysis of my empirical material.

CHAPTER 4: THE LOCALIZATION AGENDA - WHAT WE KNOW, WHAT WE DON'T KNOW

4.1 Localization is an old idea

Before presenting my analysis of the dynamics that impinge upon the localization agenda in chapters 5 through 8, I felt it would be necessary to define and explore the latest attempt at a humanitarian reform. When consulting the literature on localization—most of which is produced by power-wielding actors—patterns emerge, revealing significant blind spots, interrogations, contention and even erasures within aid's territory. We begin to hear the inner rumble of the system. Clues as to what's plaguing it begin to manifest, which can then be juxtaposed with interview content to shed new insight on why systemic change is difficult to achieve, and what might prove fruitful in lieu of an internal reform.

While the term "localization" only became commonplace in the humanitarian lexicon following the 2016 World Humanitarian Summit, approaches that champion the involvement of local actors and affected populations in situations of crisis were already well established within the development community. Localization is far from a new concept, but rather the outcome of a long tradition of critique which questions the effectiveness of international aid, as already revealed in Chapter 2. For example, the importance of working "through local non-governmental humanitarian agencies and partners in planning and implementation" has been highlighted for over 25 years in the Code of Conduct for the Red Cross and Red Crescent Movement and NGOs in Disaster Relief Operations (International Committee of the Red Cross, 1994).

Several other standards and guidelines have since been developed. The Good Humanitarian Donorship (GHD) guidelines (Good Humanitarian Donorship, 2016), launched in 2003 by a group of 17 bilateral donors based in the Global North, aims to improve the consistency and performance of humanitarian funding, as well as accountability to affected populations. It promotes capacity building in recipient countries and communities, to simultaneously prevent crises and enhance response delivery in the event of an emergency. The GHD guidelines highlight the need for flexible financing, and the diversification of response approaches and operational partners (GHD, 2016). Similarly, the Core Humanitarian Standard (CHS), a joint initiative of the CHS Alliance, Groupe URD and Sphere whose first iteration was produced in 2006, includes several performance indicators aimed at improving the integration of local actors and aid

recipients in disaster response (CHS Alliance, 2014). The short-lived Global Humanitarian Platform, an initiative led by UN agencies, INGOs and the Red Cross and Red Crescent Movement, stimulated dialogue from 2006 to 2010 on reducing power asymmetries between actors, including local actors whose limited access to funding is highlighted (International Council of Voluntary Associations, n.d.).

More recently, the United Nations Office for Disaster Risk Reduction (UNDRR) has defined priority actions to reduce losses linked to natural and climatic disasters, which are summarized in the 2015 Sendai Framework for Disaster Risk Reduction. Although the framework is primarily intended for use by state agencies and does not specifically address emergency relief, it too values the role of local actors. It emphasizes that early recovery, rehabilitation and post-disaster reconstruction present critical opportunities to reduce the vulnerabilities of populations subject to crises through capacity building (UN Office for Disaster Risk Reduction, 2019). This long-term and more holistic approach to the emergency response cycle is indicative of a shifting paradigm that integrates preparedness, in addition to disaster management and recovery—the nexus perspective presented in Chapter 2. This suggests that humanitarian agencies and INGOs might need to abandon a near-sighted "saving lives," or minimalist, *modus operandi* in favour of a more developmentalist model. Also in 2015, the Charter for Change (C4C) was launched by several INGOs to address power imbalances in the humanitarian system. The charter's 38 signatories agreed upon a target of 20% of humanitarian funding to be provided directly to local organizations. They also proposed several complementary actions to enhance their role as first-line responders. Administered by an India-based NGO, the Charter for Change has also garnered endorsements from hundreds of civil society organizations in the Global South (Charter4Change, n.d.).

While the C4C's intended target audience is INGOs, that of the Grand Bargain, which followed a year later in 2016, is donors. Its original intent was to negotiate a "deal" between the world's 5 largest donor countries and 6 key UN agencies involved in emergency response to address the growing humanitarian funding gap and the trust deficit that has structured disbursements to actors in the Global South (Featherstone & Mowjee, 2020; International Council of Voluntary Associations, 2017). Now counting 64 signatories, comprised of donors and INGOs, the Grand Bargain is structured around 9 work streams and 51 commitments which address funding mechanisms, participation of affected populations, harmonization and a reduction of local responders' administrative burden[13]. The Grand Bargain also

[13] More specifically, the 9 work streams are the following: 1) Transparency (which aims to increase the transparency of humanitarian funding by improving the quality and availability of data on humanitarian funding

commits to providing 25% of donor funding to local and national actors "as directly as possible" by 2020, and to increase multi-year support for the development of their capacity (Inter-Agency Standing Committee, n.d.). Efforts to strengthen the institutional capacity of responders in the Global South cover the areas of preparedness, response and coordination, especially where populations are vulnerable to conflict, disaster, outbreaks and climate change (International Federation of the Red Cross, 2018).

Thus emerges the concept of localization, from the meanders of the multiple standards, roadmaps, blueprints, agreements and codes of conduct presented in this brief historical prelude, and their intrinsic ties to wider contextual elements as discussed in Chapter 2. Powerful global actors in the West and their wavering legitimacy as effective and/or relevant first-line responders, neoliberal market dynamics and the search for ever-increasing efficiency. More recently, resounding demands from the Global South for the decolonization of aid and greater reflection on its historical ties to colonialism (Boateng, 2021) have also influenced the discourse within the humanitarian sector.

The recurring themes in the literature on localization reveal theoretical gaps and opportunities for problematization. Firstly, it must be noted there is but a handful of published peer-reviewed articles on the subject of localization. The relative newness of the term within the humanitarian sector and journals' lengthy publishing timelines may account for this absence. Notably, among the 114 publications (all types confounded) included in a literature review on localization conducted by Wall and Hedlund (2017), there isn't a single title containing the term "localization" in their bibliography. It is also important to acknowledge that with the exception of a few notable pieces by the Network for Empowered Aid Response (NEAR) and organizations based in the Global South, the majority of documents currently available are published by, or on behalf of UN agencies, donors, INGOs, European think tanks such as the Overseas

and spending); 2) Participation (which aims to increase the participation of affected populations in decision-making processes); 3) Cash (which aims to increase the use of cash-based approaches in humanitarian assistance as opposed to the distribution of rations); 4) Localization (which aims to increase the capacity and leadership of local responders in humanitarian response); 5) Joint needs assessments (which aims to improve the efficiency and effectiveness of assessments via greater collaboration between aid providers); 6) Harmonization (which aims to reduce the administrative burden of reporting and enhance coordination between donors); 7) Simplification (which aims to reduce bureaucratic processes and streamline aid procedures); 8) Multi-year funding (which aims to improve the predictability and flexibility of humanitarian funding to reduce aid responders' financial vulnerability and provide longer-term support); and 9) Quality funding (which aims to increase the ratio of flexible and predictable funding versus strictly earmarked, short-term project funding).

Development Institute (ODI) and its Humanitarian Policy Group (HPG), as well as research centres (for example, Active Learning Network for Accountability and Performance in Humanitarian Action ([ALNAP]). Some of these resources are based on rigorous research methods while others are briefs intended for INGOs, policy-makers and other Western-based actors (Barbelet, Davies, et al., 2021). Diverse views, representing for instance the perspectives of Southern actors, non-OECD donors, donors of Arab states or even the private sector, are therefore inadequately represented in the available literature.

4.2 Who are the knowledge producers in localization?

Published documents on localization can be loosely grouped into the following categories, produced by a limited variety of actors:

INGO or international actor research reports and policy briefs: In the few years following the WHS, the humanitarian community produced a vast number of briefing documents defining localization, and the Grand Bargain, and issuing recommendations for its implementation (Els, 2017; Els, 2018; International Federation of the Red Cross, 2018). These documents are intended for use by donors, policy-makers or INGO actors, and include a variety of subtopics such as complementarity between actors (Barbelet, 2019), risk management (Stoddard et al., 2019) or pooled funds (Featherstone & Mowjee, 2020). For example, a mildly self-critical document produced by Oxfam (Cohen et al., 2016), titled "Righting the wrong" calls on the international humanitarian community to increase its funding to local and national organizations to 10% (which is short of the Grand Bargain's target of 25%). Meanwhile, the Start Network, a joint initiative of several dozen INGOs hosted by Save the Children U.K., has produced its own set of localization markers, arguing in favour of a more multi-dimensional approach which extends beyond funding to local actors (Patel & Van Brabant, 2017).

Other examples include a review of localization practices in the Pacific undertaken by the Australian Red Cross with funding from the Australian government, and case studies commissioned by a consortium of Action Aid, C4C signatories, CAFOD, Oxfam, Christian Aid, Tearfund, and CARE. These documents review the response of international actors through a localization lens and according to the performance standards established by the OECD DAC (Featherstone & Antequisa, 2014; Featherstone & Bogati, 2016; Ramalingam et al., 2013). More recently, reports by these same actors have looked at the impact of the COVID-19 pandemic on localized aid (Asia Society Policy Institute, 2020; Bamforth et al., 2020; Barbelet, Davies, et al., 2021; Fast & Bennett, 2020).

"Pathways to Localisation" is a similar resource produced by six large INGOs featuring case studies from South Sudan, Nepal, Myanmar and Nigeria. The report proposes a global localization framework outlining actions to be taken by actors and indicators to measure progress (Accelerating Localisation Through Partnerships, 2019). It also offers recommendations for further reading on the topic. All suggested resources are produced by the same six organizations, thereby revealing an echo chamber comprised of these large INGOs.

A notable exception to the wide array of documents produced by INGOs from the Global North are the studies and guides produced by NEAR, a collective based in Kenya and largely comprised of NGOs from the Global South (NEAR, n.d.; Poole, 2018). The network's aim is to foster a more equitable, diversified and dignified aid system through innovative financing and partnerships. The International Council of Voluntary Associations (ICVA) also features a diverse NGO membership base of civil society actors in both the Global South and Global North, whose varied perspectives foster a more critically reflexive perspective on localization (International Council of Voluntary Associations, 2017, 2018; International Council of Voluntary Associations and Humanitarian Leadership Academy, 2019).

Think tank and research centre reports: As one of the largest think tanks and research centres on aid, the Active Learning Network for Accountability and Performance in Humanitarian Action (ALNAP) produces an extensive annual review of humanitarian crises and aid titled "State of the Humanitarian System" (SOHS). The research assesses funding flows and interventions against DAC performance criteria (Active Learning Network for Accountability and Performance in Humanitarian Action, 2018), revealing the group's close alignment with the OECD. Though the research methods are rigorous and include stakeholders from the Global South, non-DAC funding and response mechanisms are generally excluded from their study. Furthermore, the inception report for the 5th edition of the SOHS showed limited interest in localization, with only 4 of the 68 research questions concerning local actors and locally led response (Active Learning Network for Accountability and Performance in Humanitarian Action, 2020). This was, however, redressed in a comprehensive section that features in the completed report, published in 2022.

Other independent reports produced by the HPG and the ODI, which aim to measure progress against the Grand Bargain indicators (Metcalfe-Hough & Fenton, 2019; Metcalfe-Hough et al., 2022; Metcalfe-Hough et al., 2020; Metcalfe-Hough et al., 2018), reveal a similar bias in favour of dominant actors. Data collection is achieved through the analysis of self-reported—and incomplete—information provided by donors and

interviews with the 54 signatories and 17 co-conveners of the Grand Bargain's work streams, all of whom are based in the Global North. Though Barbelet, Davies, et al. (2021) do argue that current research on localization remains largely perception-based rather than evidence-based, the lack of triangulation with perspectives on progress from actors in the Global South in Metcalfe-Hough's evaluations appears as an important design flaw.

The work of several other research centres and think tanks demonstrates an opposite trend, however. Research and policy papers produced by Featherstone and Mowjee (2020) and by Tufts University's Feinstein International Centre (Howe et al., 2019; Robillard, Howe, et al., 2020) are specifically interested in the perceptions of affected communities and emergency responders in the Global South. The Australia-based Humanitarian Advisory Group (HAG) has collaborated with several national and regional networks of local NGOs in Asia and the Pacific to produce comparative studies that reflect significant divergences between donor and INGO perspectives, and those of local communities and responders (Humanitarian Advisory Group and Civil Society Forum of Tonga, 2019; Humanitarian Advisory Group and Development Services Exchange of Solomon Islands, 2019; Humanitarian Advisory Group and Pujiono Centre, 2019; Humanitarian Advisory Group and Vanuatu Association of NGOs, 2019, 2020; Network for Information Response and Preparedness Activities on Disaster and Humanitarian Advisory Group, 2020). Reflecting a concern for decolonizing research methods, data collection is undertaken by local teams, and findings are disseminated in accessible formats which feature quotations and vocabulary from local languages. Finally, the work of Humanitarian Outcomes, an independent consulting group, is notable in its critical assessment of the risk transfer practices of INGOs and donors. Localization and the decentralization of aid have resulted in local actors bearing an inequitable share of the risk burden, both financially and in terms of human security (Stoddard et al., 2019). Barbelet's (2019) report on coordination and complementarity between actors also espouses a critical perspective.

Scientific literature: While there is a limited number of articles now available in non-peer-reviewed professional or scientific journals on localization (Savard et al., 2020; Vielajus & Bonis-Charancle, 2020) peer-reviewed publications are even fewer and far between. These rare publications provide the most critical analytical frameworks (Beaulieu et al., 2022; Boateng, 2021; Piquard, 2022; Slim, 2021). Many articles address the contested terms of "local" and "national" actor. Authors argue that this vocabulary is representative of mainstream Western humanitarian thinking and that it fails to account for power dynamics within the "local" or "state" realms (Jayawickrama, 2018; Kuipers et al., 2019; Melis & Apthorpe,

2020; Roepstorff, 2020). These categories are further obfuscated in the context of refugee settlements (Pincock et al., 2021), in which homegrown refugee organizations may not have the support of local or state entities. This is especially true in the Middle East, where grassroots initiatives are typically marginalized due to a Western-centric blind spot, according to Fiddian-Qasmiyeh (2019). Along those same lines, Harris and Tuladhar (2019) also highlight the centrist nature of the localization discourse. Agency rests in the hands of INGOs and donors who are expected to embark upon a humanitarian reform—actors in the Global South being the object of that reform. Finally, Gómez (2021) interrogates the liberal foundations of humanitarianism and like Fiddian-Quasmiyeh (2019), argues for a plurality of humanitarianisms which eschew the hegemonic pull of the mainstream system. These authors reject the idea that local actors must be "integrated" into the dominant system. According to Gómez, localization also translates into a state's right to reject external support.

Case studies: A vast array of reports and scientific articles utilize case studies to extract learnings, policy recommendations, and conceptual models. For instance, Howe and Stites's (2019) peer-reviewed article of the Syrian context, characterized by "bunkerization," remote management and high levels of mistrust, which they argue, has fractured the habitual humanitarian architecture in that country. Ali et al.'s (2018) report on South Sudan, Commissioned by the Humanitarian Policy Group, suggests very limited progress toward authentic localization, arguing instead that local actors are only instrumentalized as "stand-ins" because of international actors' low risk threshold. Also in South Sudan, Wilkinson et al. (2022) find that faith-based groups are marginalized by the aid architecture and challenges international actors' definition of what constitutes a legitimate aid provider. The IFRC has created in-depth case studies on financing mechanisms available to local actors in Colombia, Ethiopia and Ukraine. In addition to the HAG series presented in the "think tank" section, which have a geographic focus, Action Aid (2019) and Robillard, Howe, et al. (2020) analyze the response to the Sulawesi earthquake. Other studies focus on the Nepal earthquake, flooding in Bangladesh and Typhoon Haiyan in the Philippines (Featherstone & Antequisa, 2014; Featherstone & Bogati, 2016; Network for Information Response and Preparedness Activities on Disaster and Humanitarian Advisory Group, 2020; Ramalingam et al., 2013) and tropical cyclone Harold in Vanuatu (Bamforth et al., 2020; Cook & Chen, 2022; Humanitarian Advisory Group and Vanuatu Association of NGOs, 2020; Rosier & Savard, 2022; Savard et al., 2020).

The state of research on localization is notable in its dearth of scientific literature compared to the overwhelming volume of institutional documentation, produced by the same actors attempting to

implement localization. These documents are somewhat analytical in their attempt to understand the shortcomings of the Grand Bargain and localization and the factors hindering implementation. However, they are replete with contested definitions and understandings, and are indicative of power asymmetries and dysfunctionalities that may account for limited progress. It must be noted that this literature does not capture diverse forms of knowledge (for instance, customary knowledge that is transmitted orally and in languages other than English). The authors and agencies who write and publish these resources, some of which receive considerable funding to do so, bring a bias to the knowledge they produce, which is then further legitimized by visibility and the diffusion practices of think tanks, scientific journals and INGOs.

4.3 What the literature tells us

At this point, it would be worthwhile to address an important typological issue. The term "local," in referring to actors based in the Global South, is polysemous and subject to much problematization in academic literature (Jayawickrama, 2018; Kuipers et al., 2019; Melis & Apthorpe, 2020; Roepstorff, 2020). The aid industry tends to distinguish between local, national and international organizations, but a more critical analysis reveals that the "local" is of itself a contested site and that semantic debates are unproductive. For instance, there are many nuances between endogenous organizations originating as a result of local community mobilization, NGOs established by naturalized foreigners, hybrid actors with a business model catering to INGOs, and nationalized branches of INGOs such as Amani (Robillard, Howe, et al., 2020). The term may also exclude groups that do not identify as aid responders, but nonetheless play an essential role in response. The private sector and faith-based community organizations also receive inadequate consideration as endogenous humanitarian responders, as they are typically excluded from the dominant aid architecture comprised of the UN, the Red Cross and Red Crescent Movement, and INGOs (International Council of Voluntary Associations and Humanitarian Leadership Academy, 2019; Wilkinson et al., 2022). For instance, Boateng (2021) draws attention to the ambiguous status of Africanized religious bodies who have created local aid programs based on the inherited welfare schemes of former foreign missionaries. Robillard, Jean, et al. (2020) also remark that "pocket organizations" feature among local aid providers. These are opportunistic entities, who don't have any significant engagement with the populations they represent, have a business model that aims quite simply to capture project funding. They exist on paper but are only active when they receive contracts.

Moreover, the capture of locally driven processes by organizational, business or state elites in countries facing crisis further complexifies what constitutes the "local" (Barakat & Milton, 2020; Pincock et al., 2021).

Such is the case in Nepal and Guatemala, where, as revealed in my research, participants perceive their government as posing equal, if not greater challenges, to localized aid (Participant 11, September 7, 2022; Participant 26, February 11, 2022; Participant 37, March 31, 2022; Participant 40, April 1, 2022; Participant 41, April 4, 2022).

To clarify, my use of the term "local" will henceforth correspond to origin. It is synonymous with "endogenous." A local actor is a homegrown entity, whether state, civil society, private sector or faith-based. I also include structured or unstructured groups of refugees who many not be recognized as "local" by virtue of their displacement, but who are just as "homegrown" in the territory they've come to occupy, just as any other local organization (Fiddian-Qasmiyeh, 2019; Pincock et al., 2021). Furthermore, I do not distinguish between "local" and "national," as many INGOs do, for whom national is equivalent to the state or to organizations with a nationwide reach. When referring specifically to governmental agencies in affected countries, I will call them "state actors." However, when citing other authors or referencing their work, I may use the term "national" to preserve the integrity of the citation. According to my definition of local, which is based on endogeny, INGOs' satellite offices in the Global South, are consequently not considered local but foreign, though they may be legally registered as charities in the host country. This definition aligns with the perspective of local actors consulted during my research, who consider nationalized INGOs, such as Amani, to be "outsiders" because of their foreign origin and affiliations, though they may be well integrated in their host country.

Unsurprisingly, in the documents consulted, nationalized INGOs are the source of much debate; national affiliates or "franchises" are either a viable business model in a globalized market, or an encroachment on "local" space (Barbelet, 2019; Patel & Van Brabant, 2017; Robillard, Jean, et al., 2020; Van Brabant & Patel, 2018). Their presence is contested by some, as they can potentially "game" the system by presenting as locally registered organizations (Els, 2017), whereby they are simultaneously dressing themselves in the legitimacy of local *and* international organizations. Localized aid, it is argued, does not occur simply by virtue of recruiting local staff (Poole, 2018). For some, therefore, nationalization avoids key issues at the heart of the localization agenda, namely shifting power away from large INGOs, donors and UN agencies who overshadow and easily outcompete local actors (International Council of Voluntary Associations and Humanitarian Leadership Academy, 2019).

Local actors are consequently often disadvantaged in a competitive funding environment in which larger international actors poach their skilled staff, apply increasingly strict control measures and expect adhesion to sophisticated humanitarian standards, a paradoxical phenomenon which will be explored at greater length in chapters 7 and 8. Thus, viewing the "local" as a pure, untainted category is problematic. By defining local actors according to the West's model, the humanitarian community generates and perpetuates a reductive aid architecture that excludes the contributions of countless hybrid, non-organized, diaspora, atypical or emergent actors (Harris & Tuladhar, 2019; Willitts-King et al., 2019).

Other recurring themes in the literature include funding, performance measurement, efficiency, risk, trust, "partnership" and subcontracting, power dynamics and the nexus (or maximalist/resilience/new humanitarian) approach. Each of these topics will be briefly presented.

Funding: For many, direct funding—or the transfer of funds from actors in the Global North to the Global South "as directly as possible," or without passing through an intermediary, is one of the most important markers of localization, so much so that the first independent evaluation of the Grand Bargain (Metcalfe-Hough et al., 2018) neglects other dimensions. This is rectified in the later versions of the evaluation, as there is growing recognition that tracking funding flows provides an inadequate portrait of progress on other, less tangible dimensions (Els, 2018; International Council of Voluntary Associations, 2018). The 25% target of "funding provided as directly as possible" set forward in the Grand Bargain is in fact problematic, though a handful of donors reported having met the objective in 2020 (Metcalfe-Hough et al., 2020).

Following the World Humanitarian Summit in 2016, the Inter-Agency Standing Committee (IASC) of the UN was tasked with producing a marker to measure progress against this target and was quickly confronted with the challenge of defining what constitutes a "local" and "national" responder—and how to integrate pooled funds, such as the UN's Central Emergency Response Fund (CERF) into the process. The terminology in the Grand Bargain was subsequently changed from "directly" (*sans* intermediary organization but including pooled funds) to "as directly as possible" (with the fewest number possible of intermediary organizations) (Els, 2018; Singh & Smruti, 2019). Actors such as the NEAR Network, however, object to this adjustment of the original definition (Poole, 2018), and argue that it does not change the status quo: it merely serves the interests of dominant actors whose administrative and risk burden is reduced when funds flow through intermediaries. Interestingly, an article published almost three decades ago highlighted the need to provide more funding directly to local actors in order to support a thriving civil

society in recipient countries—while foreshadowing the risk that such a process might paradoxically hinder a healthy civil society sector by co-opting it into foreign donors' agenda (Bebbington & Riddell, 1995). The push for more funding to local actors is far from new—see also Lewis and Sobhan (1999)—thereby revealing a systemic incapacity or unwillingness to change.

For many donors, the go-to solution that has emerged to increase direct funding is pooled funds (including the CERF, UN country-based pooled funds or "CBPFs," the Start Network and the ICRC's Disaster Relief Emergency Fund), because they provide a hassle-free channel to achieve the 25% objective. This in fact accounts for "progress" toward direct funding as reported by Grand Bargain signatories (Metcalfe-Hough et al., 2022). However, these funds do not necessarily translate into support to local actors, a fact echoed by a research participant in the Philippines (Participant 31, March 23, 2022). In 2019, only 26% of funds transiting through the UN CBPFs were actually allocated to local NGOs (Metcalfe-Hough et al., 2020), meaning that if a donor claims to give 25% of its funds "directly" via pooled funds, only a quarter of that 25% actually reaches local actors' coffers, if not less. The Start Network also requires that all of its funds pass through a member INGO intermediary before reaching a local partner (Featherstone & Mowjee, 2020). Furthermore, multi-year research conducted by ALNAP and Development Initiatives reveal that in 2017, INGOs and international organizations such as the IFRC received approximately 97% of all humanitarian assistance (Active Learning Network for Accountability and Performance in Humanitarian Action, 2018; Development Initiatives, 2020). This is also echoed by Ali et al. (2018) whose research concludes that even in South Sudan, where foreign actors are largely absent as first-line responders, funding to local and national organizations remains minimal. Since 2013, the UN World Food Program (WFP) has reaped the lion's share of humanitarian dollars, receiving an average of 43% of the total funding to the South Sudan crisis, while local NGOs have just received 0.2% of the total international humanitarian aid. Meanwhile, an entirely different source of funding is flowing on the periphery of official tracking mechanisms of the OCDE and the UN: research by Willitts-King et al. (2019) suggests that official assistance accounts for as little of 1% of resource flows to countries facing a humanitarian crisis, while the rest can be attributed to remittances from diaspora communities, local government, the private sector and faith-based associations. This suggests that populations in need have a wider array of assistance channels than recognized by the humanitarian sector and especially INGOs, who typically claim the privilege of disbursing aid, and then draw upon it to justify their presence.

At the global level, truly direct funding to responders in the South equated to 3% of funding in 2017, though much of this was assistance provided to national governments or national societies of the ICRC. In 2020, four years following the Grand Bargain commitments, this figure has increased marginally to 3.1% after dropping to 2.1% in 2019 (Development Initiatives, 2021), only to fall to an all-time low of 1.2% in 2021 (Active Learning Network for Accountability and Performance in Humanitarian Action, 2022). It is safe to say, therefore, that in spite of the narrative which champions the role of local actors, change is not reflected in increased funding. According to Featherstone and Antequisa (2014) "the failure of humanitarian financing to be adequately inclusive of NNGOs [national NGOS] in the relief phase is both inexplicable and inexcusable" (p. 23). I contend, on the contrary, in chapters 5 through 8, that it is quite *explicable*.

Risk: Challenges associated with increased funding, and hence autonomy of action for local and national responders, are often linked to concerns over risk management and accountability and to the enduring false narrative that local actors lack adequate capacity (Featherstone & Mowjee, 2020, p. 5) or are more susceptible to corruption (Poole, 2018). Although the risk of diversion and corruption exists, donors' increasingly stringent requirements and low appetite for risk have created a generalized climate of extreme compliance (Stoddard et al., 2019) which is counterproductive to localization. Donors' aversion to fiduciary and reputational risks means that funds are channelled predominantly through large INGOs. Risk is therefore transferred over to intermediary international actors, who then pass on the risks to local and national responders (Ali et al., 2018; Barbelet, 2019; International Council of Voluntary Associations, 2018). This results, for local and national partners, in the inheritance of an ever-increasing compliance and administrative burden (Bioforce, 2020), which is often assumed without sufficient overhead funding. Donors' risk averseness and their expectations of predetermined, measurable outcomes within very short timeframes are incompatible with innovation, which requires flexibility, acceptance of error and learning. Furthermore, the practice de-incentivizes transparent communication and sector-wide learning, as local actors may downplay risk, or refrain from reporting certain activities or incidents for fear of reprisals or losing contracts (Stoddard et al., 2019).

As argued by Barakat and Milton (2020), it is essential that donors accept an increased risk burden. Their commitment to providing more funding to actors in the Global South must also reflect a proportionately greater engagement in risk-sharing (International Federation of the Red Cross, 2019; International Federation of the Red Cross and Swiss Agency for Development and Cooperation, 2021). Compliance

pressure also influences INGOs and their subcontracted NGOs: It complicates the tasks of INGOs, who also face punitive repercussions in the event of their Southern partners' non-compliance, therefore paradoxically dis-incentivizing collaboration with local responders. Many INGOs may simply prefer to engage in direct delivery than assume the reputational or fiduciary risk of transferring this task to a local or national responder, thereby working against localization (Humanitarian Advisory Group and Pujiono Centre, 2019; Stoddard et al., 2019). This observation leads Ali et al. (2018) to pessimistically argue that it is unlikely that responders in the Global South will benefit from increased funding and a capacity to grow under the current conditions of caution established by donors and international actors.

Performance measurement: True to the technocratic tradition of large donors and organizations, there have been attempts to quantitatively measure progress toward change in the humanitarian sector. Tools and platforms have been developed to evaluate the reform. The self-reporting framework for the Grand Bargain is the largest and most ambitious of these, but it is perceived by many signatories as being excessively burdensome and time consuming. As a result, some donors submit incomplete information, or have simply opted out of reporting (Metcalfe-Hough & Fenton, 2019; Metcalfe-Hough et al., 2020; Metcalfe-Hough et al., 2018). Local and national actors are not solicited for their input on progress as part of the Grand Bargain's reporting platform, leading to a lack of triangulation. NEAR (2017) has, meanwhile, developed its own set of simplified markers which are more inclusive of local and national NGOs, and intended for use by all stakeholders involved in aid delivery. Other organizations such as the Pacific Islands Association of NGOs (PIANGO) have identified geographically and culturally relevant indicators with which to measure progress, including equitable partnerships, nationally led actions, respect for commonly agreed upon local approaches, community-led responses and the financial independence of local actors (Humanitarian Advisory Group and Pacific Islands Association of NGOs, 2019). PIANGO's measurement framework invites local actors to "map out [their] own success statement" (p. 6), suggesting resistance to the imposition of a foreign standard. In fact, for Pacific stakeholders, direct funding is not as important as the perception of being respected by donors, which is achieved through transparency, and a transfer of decision-making power to local actors (Ayobi et al., 2017).

Though it is not directly explored in the literature, this suggests that localization is a dynamic process rather than an end in itself, whose conceptualization varies according to actors and their position within (or without) the humanitarian sector, their ideological or cultural heritage and the political context. Measurement tools will therefore reflect actors' conceptualization of localized aid—and a technocratic

bias that may only impinge upon local NGOs' autonomy. The kind of profound political shift that is necessary to redress power imbalances in the aid industry extends beyond what can be captured as indicators in a performance measurement framework.

Efficiency: As discussed in Chapter 2, efficiency has become a measure of quality for aid interventions since the advent of NPM, the legitimacy crisis of the '90s, and the subsequent Paris Declaration of 2005. It remains so today, due to growing public scrutiny spurred by negative press and ineffective endeavours. In spite of this, a quantitative study undertaken by Nunnenkamp et al. (2013) and research by Barry and Boidin (2012) reveal that aid fragmentation, in which donor funding is disbursed through thousands of small contracts to just as many implementing organizations, persists in spite of the Paris Declaration, while coordination among donors has even weakened.

The obvious lack of donor coordination and ill-adapted interventions following the Indian Ocean tsunami in 2004 in Indonesia and the Haiti earthquake in 2010 (Ali, 2016), and more recently, the sexual abuse scandals involving Oxfam and other international organizations, are among the few causes of the humanitarian sector's wavering legitimacy. The search for greater efficiency, to deliver better and more fit-for-purpose aid in emergency situations, has therefore led to the consideration of local actors as a more cost-effective alternative. Hence, there is a perception that localization will deliver cost-saving benefits. Evidence, however, suggests that this may be true from a human resources perspective, but not necessarily so when it comes to procuring humanitarian supplies. Cost reductions may also be offset by the heavy administrative burden placed on local actors, and their need to hire additional staff to meet donors' compliance requirements (Ali et al., 2018; Ayobi et al., 2017; Featherstone & Bogati, 2016; Robillard, Howe, et al., 2020). Meanwhile, the common practice of deploying foreign technical advisors and evaluators for short-term missions to "build the capacity" of local actors is not presented in the reviewed documents as an inefficiency, reflecting an enduring bias that favours Western knowledge and the taken-for-grantedness of its management paradigm

Trust: Donor's lack of direct engagement with local actors through direct funding, for the reasons cited above, also inhibits trust building in the humanitarian sector. Without any direct channels of communications with donors, local and national actors cannot increase their visibility and credibility, and remain marginalized in the aid architecture, while donors' relationship with INGOs or other intermediaries such as UN-managed country-based pooled funds are further enhanced (Ali et al., 2018) and solidified. As

intermediaries in the funding chain, INGOs can broker trust over time between donors and local responders in the Global South through the use of donor-oriented reporting, audits and training (Dijkzeul, 2021; Savard et al., in press); however, there are few financial incentives for INGOs to champion direct relations between donors and their implementing organizations, as it would result in their presence being less relevant: Decreased funding of INGOs would then ensue, and consequently threaten their long-term viability. Furthermore, paternalistic attitudes toward local NGOs persist, as illustrated by the following report by Oxfam: "But it's clear that if we, the international humanitarian community, want to help local communities, we need to start trusting them more with their own future" (Cohen et al., 2016, p. 15). Localization here is presented as the act of "trusting" local actors; however, the burden of truth remains grounded in local actors' capacity to demonstrate their trustworthiness.

There are but a few studies interested in trust building from local responders' perspective (Ayobi et al., 2017; Barakat & Milton, 2020; Humanitarian Advisory Group and Vanuatu Association of NGOs, 2019). These documents highlight that donors' and INGOs' lack of transparency with regards to funding flows to local organizations inhibits trust and mutual respect, which in the Pacific, is an indicator of localization. In Syria, local NGOs expressed that donors' increasing use of control mechanisms is driven by mistrust rather than a desire to achieve quality humanitarian outcomes. Many have turned to private individuals and donors in the Arab states of the Persian Gulf to obtain quick and flexible funding. Though these donors tend to have political agendas, they do not exercise the same level of managerial control over funds, nor do they require monitoring and evaluation (Howe & Stites, 2019). How this practice intersects with the localization agenda is unclear, as non-DAC donors typically do not divulge their funding flows on platforms such as the OECD's Financial Tracking System, nor do they partake in "global" collaborative platforms on aid, for example, OCHA's cluster system or even the Grand Bargain, for that matter.

"Partnership" and subcontracting: Aid is delivered through a variety of mechanisms, including direct implementation (in which an INGO carries out the entire emergency intervention), partnerships, and subcontracting, which Syrian local actors refer to as "truck-and-chuck" (Howe & Stites, 2019). The expression describes local NGOs' limited role of supply delivery in areas inaccessible to international actors, often because of their risk aversion. A study undertaken by the IFRC and the Swiss Agency for Development and Cooperation (2021), in which questionnaires were distributed to 4000 aid organizations, revealed that local actors' top priority entailed being treated as equal partners, rather than subcontractors presented with a predesigned project and budget. Ali et al. (2018) describe some relationships as being

truly collaborative or consortium-based, with mentoring mechanisms. However, the use of the term "partner" to refer to implementing actors in the field was found to be confusing and misleading by the same-said actors, who consider themselves to be subcontractors. Other authors have highlighted the misuse of the term "partner" in instances of unambiguous subcontracting dynamics (Contu & Girei, 2014; Howe & Stites, 2019; Lister, 2000).

In this dissertation, the term "partner" is only retained in cited passages to retain the integrity of the transcriptions, because it is illustrative of how INGOs conceive their relationship with local NGOs. Elsewhere, the term "local implementing organization" is used to designate aid providers which receive funding to carry out activities that are bound by contractual agreements with an INGO or its satellite office, or any other international organization or donor.

In contexts where security risks are high, "last resort localization" (i.e., emergency responses that are remotely managed by INGOs in "safe" neighbouring countries and carried out by local actors who assume the risk burden) is a common practice which NEAR condemns (Poole, 2018). They consider this type of engagement with civil society in the Global South within the humanitarian system as being instrumental, devoid of intentions to assist with community development, strengthen governance, foster democracy rights and support human rights. Thus, they do not consider this to be localization in practice. Likewise, when the COVID-19 pandemic prevented external responders from accessing Vanuatu in the aftermath of a devastating cyclone in 2020, space for a locally led response was effectively generated. However, this represents another example of "last resort" localization, rather than a planned effort by INGOs to decrease their role and presence in the country (Rosier & Savard, 2022; Savard et al., 2020). A study by Barbelet, Bryant, et al. (2021) and Metcalfe-Haugh et al's most recent independent review of the Grand Bargain (2022) similarly found that while ruminations provoked by Black Lives Matter and decolonization had led to some modest headway in terms of critical reflection, the pandemic has not yielded lasting shifts in inter-organization dynamics, despite the opportunity for greater localization presented by the worldwide mobility restrictions.

Whether they are considered partnerships or contracts, arrangements between INGOs and local actors are generally project-based and do not provide adequate overhead costs, particularly when interventions are carried out in situations of high security risk. In South Sudan for instance, local NGOs report that their real costs exceed those provided for by project budgets due to high operational cost. This is further

exacerbated by contracting agreements' lack of flexibility (Ali et al., 2018). Because donors and INGOs are reluctant to fund overhead costs, national actors operate in a perpetual state of vulnerability, with a tendency to "mission twist" in response to funding opportunities that can provide a certain level of financial security (Poole, 2018).

Hence, relationships between actors are affected by a number of elements, which include coordination and managerial practices, national and international state policy, access to affected communities and donor attitudes to fiduciary and security risks. Low levels of trust are typically associated with large power asymmetries which result in subcontracting (Wall & Hedlund, 2017) rather than complimentary partnerships in which actors stand on more even ground (Barbelet, 2019). The literature provides countless examples of INGOs attempting to engage in veritable partnerships; however, local appreciation of such attempts remains mitigated, revealing significant divergences between foreigners' and local NGOs' perceptions (Humanitarian Advisory Group and Development Services Exchange of Solomon Islands, 2019; Humanitarian Advisory Group and Vanuatu Association of NGOs, 2019; Ramalingam et al., 2013). For instance, Humanitarian Advisory Group and Pujiono Centre (2019) found that INGOs with a long history of activity in Indonesia were more successful in partnering with local actors than those who arrived in the aftermath of the Sulawesi earthquake without pre-existing networks. They report that some local actors opted out of working with INGOs who appeared to be opportunistic, and whose financial and administrative requirements outweighed the benefits of partnership (Featherstone & Antequisa, 2014). Partnership assessment tools developed by international actors are often unwieldy, Western-centric and rarely reciprocal, leading for example, in the Philippines, to local actors' disillusionment in INGOs' sincere willingness to "partner" (Featherstone & Antequisa, 2014).

Power dynamics: The literature on localization suggests that power dynamics and de-incentivizing structures are an underlying barrier to more local humanitarian action, with academic journal articles being the most overtly critical (Fiddian-Qasmiyeh, 2019; Gómez, 2021; Harris & Tuladhar, 2019; Roepstorff, 2020). The localization agenda is driven by international actors (Poole, 2018) paradoxically reluctant to "let go" of space and resources (Bennett, 2016; Bennett et al., 2016), which translates into a chronic lack of dedicated funding for local organizations. The increasing focus on compliance to humanitarian principles and norms, such as the Core Humanitarian Standard and Sphere, is used to legitimize international actors (who produce the standards) while delegitimizing local actors as "lacking capacity" (Barbelet, 2019). Where local actors equate their legitimacy to their embeddedness in the local

context, their cultural affinity with populations and their operational adaptiveness, they also perceive this as a disadvantage when compared to the power of INGOs' branding, and their business model of ever-expanding affiliations and confederations. In a competitive environment, this is a threat to small, independent actors (Fast & Bennett, 2020).

From the perspective of Pacific humanitarian stakeholders, localization can only start once power dynamics are analyzed and understood, and a desire to see them change is clearly articulated by foreign actors (Ayobi et al., 2017). The authors note for example that power imbalances in local and international participation were clearly visible at a Pacific Humanitarian Team meeting held in 2016, in which 74% of participants were foreigners. Likewise, Poole (2018) and Featherstone and Bogati (2016) highlight that local actors are often absent or timid in global platforms such as OCHA's clusters. The burden of showing evidence of capacity and leadership is placed on local actors who are simultaneously excluded from opportunities to do so (Barbelet, 2019), revealing the deep entrenchment of the self-preservation logics and power dynamics in the humanitarian system (Audet, 2016). However, power can also be captured by local elite NGO or state actors, leading, in more extreme cases, to the suppression of social movements and civil society (Martinez & Cooper, 2017; Melis & Apthorpe, 2020). Furthermore, authors have observed that the localization agenda is being co-opted in conflict- or crisis-affected countries such as the Philippines or Sri Lanka to serve nationalist agendas and bar foreign actors from providing aid, thus contributing to the shrinking space of civil society in humanitarian, development and peace efforts (Barakat & Milton, 2020; International Council of Voluntary Associations, 2018; Melis & Apthorpe, 2020).

The nexus approach: Efforts to bridge the gap between the aforementioned humanitarian, development and peace (or stabilization) interventions, referred to as the "triple nexus," are mainstreamed in the Grand Bargain's different workstreams. Some view this gap as an ill-fitted "prehistoric relic" that reflects poor harmonization due to donors' separate delegation of budget responsibilities and siloed administrative structures (Shusterman, 2021). Contrary to donors and Western INGOs, local actors are less likely to distinguish between emergency, resilience and short/long-term recovery support, as they are active in communities before, during and after a crisis (Atienza & Quilala, 2021; International Federation of the Red Cross and Swiss Agency for Development and Cooperation, 2021). A term frequently evoked by local aid organizations in Palestine, *sumud,* exemplifies such a temporal and programmatic blurring of assistance: it means steadfastness, perseverance, attachment to a place (Badarin, 2021). Working with local actors, therefore, presents an untapped opportunity to provide more holistic and lasting responses that enhance

the connectedness of disaster risk reduction, emergency response, recovery and development (Barbelet, Davies, et al., 2021; International Federation of the Red Cross, 2018).

Recent research on linking peace, humanitarian and development funding in protracted refugee settings has also highlighted the need to reconsider host communities and refugee organizations as local actors and key stakeholders in influencing the design and implementation of humanitarian response, though they may not be by definition "local" (Pincock et al., 2021). However, while different approaches are being piloted in support of the nexus agenda, funding instruments, policies and program design have not yet had time to adapt to this new way of working. How the nexus will translate into clear policy and practice remains thoroughly unclear at the global level (International Council of Voluntary Associations and Humanitarian Leadership Academy, 2019).

4.4 The most prominent theme in the literature: capacity

While this is by no means a new topic in humanitarian intervention (see Smillie, 2001 and Audet, 2011 for example), capacity is the singlemost prominent theme in the localization literature. The idea of capacity building, which is a tradition inherited from the development industry, appeared alongside the 1950s and 1960s' model of aid. At the time, it was believed that "progress" among Third World allied countries would be achieved by financing economically productive projects and deploying "experts" to ensure that aid recipients were equipped with a basic inventory of technical and managerial knowledge to improve the performance of their industrial and public sectors. Capacity manifested as a wide array of organizational development and training intended to strengthen institutional subsectors (health, emergency assistance, agriculture, electricity, transportation, etc.). It was only later applied to civil society actors when INGOs became involved in providing aid.

Today, capacity occupies an overwhelming amount of space in the localization narrative and research, occurring in every document consulted. Arguments are typically founded on two enduring assumptions, the first being that international actors possess capacity and expertise which is superior to that of local actors. Hence, local actors require "capacity building" to achieve a desired standard—which is routinely defined by foreign actors. The second assumption is that local actors possess skills which are marginalized by a universalizing faith in a "common" standard reflective of power holders' view.

Pertaining to the first assumption, capacity is omnipresent in the discourse of INGOs and will generally determine which local actors are eligible for funding and hence "worthy" as implementing organizations. Capacity assessments, or "diagnoses," will then be utilized by international actors to identify weaknesses in Southern actors' competencies. The reverse never occurs, as it is assumed that expertise lies with international actors, as opposed to the communities themselves. Based on these assessments, which usually mirror the managerial and technical proficiency standards of INGOs, capacity strengthening initiatives will be incorporated into multi-year partnership agreements with local NGOs. This is perceived as a positive and necessary step toward localization and to local and national actors' ability to scale up responses. For example, Islamic Relief USA launched a pilot project in 2018 whose objective was to increase the effectiveness and efficiency of their responses through the establishment of standard operating procedures, policies and systems in a dozen Asian countries where they work. The initiative's objective was for "all local organizations in these countries to adopt an effective action plan for organizational development and to increase the knowledge and skills of key staff on emergency preparedness and response" (Wake & Barbelet, 2019, p. 3). Likewise, training features as one of the Grand Bargain's commitments toward building a more capable and autonomous, "as local as possible" response in the Global South. However, this practice continues to reflect the pervasive paternalistic and neocolonialist stance of the West and the deep, structural subordination of local organizations and populations. This results in generic statements about a lack of knowledge among Southern aid providers and a propensity to overlook existing skills and assets, when in fact, as argued by Barbelet (2019), neither the aid community as whole, nor INGOs individually, have any clear understanding of where capacities lie, because of their limited understanding of capacity systems. This does not imply that the expertise that some external actors possess is unhelpful or unimportant; it suggests, rather, that the aid system privileges some forms of knowledge over others, which is the topic that will be explored in depth in Chapter 5.

Capacity, then, is an elusive concept whose definition tends to align with the standards of the largest actors in the humanitarian system (Barbelet, 2019; Howe & Stites, 2019) For instance, the IFRC (2018) describes it in terms of adherence to financial and project management norms and standards, accountability, domestic resource mobilization, community engagement and good governance. Meanwhile, capacity is also synonymous with adherence to international norms and standards such as Sphere. According to the International Council of Voluntary Associations and Humanitarian Leadership Academy (2019), local NGOs, particularly in disaster settings, are less familiar with approaches to protection than foreign responders. Likewise, Featherstone and Antequisa (2014) noted in their study of the Typhoon Haiyan response, that

partners tend to tick fewer technical quality boxes. Their knowledge of accountability frameworks, such as complaint mechanisms for beneficiaries, was weaker than that of international actors who are better informed and capable of resourcing such practices. These mechanisms, however, reflect dominant actors' technocratic paradigm and are not necessarily adapted to the local complex, as demonstrated by Aijazi (2022). The author finds that donors' and INGOs' accountability instruments not only fail to capture the full extent of the impact of aid interventions, but also undermine the agency and participation of local communities in decision-making, which reinforces power imbalances. The distortions in accountability that may result question the very relevance of "ticking the boxes."

Apart from being rooted in paternalism, or even cultural imperialism (Escobar, 2020) capacity building may stem from a fear among international actors that the humanitarian standards of impartiality and neutrality—but also quality—will suffer from erosion if left in the hands of local or state actors (Ayobi et al., 2017; Barbelet, 2018; Schenkenberg van Mierop, 2016). Along those lines, Barbelet (2019) found that in the Democratic Republic of Congo, where humanitarian action remains "as international as possible," humanitarian principles were used negatively as a tool for maintaining foreign control of interventions, citing not only the lack of capacity of local actors, but also challenging their neutrality, impartiality and independence. Robillard et al.'s (2020) study of the Sulawesi earthquake found no evidence, however, that local responders provide a lower-quality response. Some international actors, therefore, may also lack capacity—namely in terms of trusting, of "letting go" and recognizing other standards which are not their own. As such, it appears both methodologically and ethically imprudent to generalize a "lack of capacity" as an overarching condition in emergency affected countries.

This leads to the second assumption, namely that local actors possess knowledge, skills and capacity which are underutilized, under-resourced or unrecognized. Boateng (2021), echoing the findings of Juma and Surhka (2002), argues that local capacity and endogenous regional response networks have in fact been eroded by the presence of UN agencies and INGOs. Though it would be naïve to dismiss capacity gaps in certain contexts (Barakat & Milton, 2020), the established metrics for assessing performance are not designed to explore the meaning of "existing capacity" at the local level, and how to support its further development (Cohen et al., 2016; Fast & Bennett, 2020; Gómez, 2021; Piquard, 2022). In Indonesia, a sense of caring, local knowledge, local relationships and the ability to engage meaningfully with communities were listed by affected populations as the most important skills—not financial management or adherence to the Core Humanitarian Standard or Sphere (Robillard, Howe, et al., 2020). Similarly, HAG and VANGO

(2019) revealed a tendency for international actors and their technical advisors in Vanuatu to deliver training geared toward the attainment of international standards, without appreciation for relevant local approaches or definitions of capacity. Reduced external support following tropical cyclone Harold resulted in the mobilization of traditional resilience mechanisms and local structures that had been sidelined by international actors in previous responses (Bamforth et al., 2020; Humanitarian Advisory Group and Vanuatu Association of NGOs, 2020; Rosier & Savard, 2022).

Furthermore, the inability of some local NGOs to provide detailed information in response to donors' needs for accountability should not automatically be misconstrued as a lack of capacity or negligence (Gómez, 2021)—as it can stem from different loyalties (notably to beneficiaries as opposed to donors or INGOs) and simply from being under-resourced. A stronger, more capable local response also rests on the financial stability of local and state responders, which is undermined by international actors' project-based funding approach, fragmented technical training and the tendency of UN agencies, INGOs and their satellites to poach skilled staff from local organizations (Ayobi et al., 2017; Barbelet, 2019). Overheads are rarely included in project budgets, or are kept at minimum for local actors, particularly in terms of safety and security, for fear of losing contracts to more inexpensive competitors (Barbelet, Davies, et al., 2021). Along those lines, local actors in Somalia expressed that the rhetoric of capacity building is superficial, reduced to a transactional instrumentalization of local NGOs who are "trained" in risk management while being subcontracted to implement projects in conditions of excessive risk without the accompanying security budget (Ali et al., 2018). Local actors also voiced frustration at receiving training but being marginalized by dominant international actors during disaster response. They are thereby prevented from putting their capacities into practice and gaining precious experience (Ayobi et al., 2017; Barakat & Milton, 2020; Robillard, Howe, et al., 2020).

There is a gap, clearly, between what local actors need and are requesting in terms of capacity support, and what they are receiving from international organizations (Accelerating Localisation Through Partnerships, 2019). Several authors have highlighted that capacity strengthening efforts are designed in such a way as to reflect the perceived strengths of those who hold the purse strings. Efforts are often compliance-based, and primarily benefit donors or INGOs whose low risk thresholds lead to an overemphasis on fiduciary and managerial capacities to mitigate risk (Barbelet, 2019; Howe & Stites, 2019; Poole, 2018). As such, mainstream approaches to assess local capacity are inadequate in their ability to truly inform humanitarian action that is "as local as possible," because they reveal important gaps, biases

and divergences in how capacity is understood. It appears, as argued by Smillie (2001) twenty years ago already, that "the track record of humanitarian organizations […] is better in delivering life-saving assistance than in strengthening local capacity," (p. vii), because each new crisis eclipses the importance of partnerships with local organizations.

Vignette: The sky is pedagogy

There are constellations that overlap between the Southern and Northern hemisphere. But there are some, like the tiny Southern Cross, that will never be visible in the Northern latitudes because of celestial blind spots. Having grown up with a father who was an amateur astronomer, I remember the first time I saw the Southern Cross in the South Pacific. I wasn't looking for it, I'd even forgotten that it existed, but when I recognized it in the sky, I physically felt a shift occur inside of my head.

Around the world, our foremothers and forefathers generated knowledge of the world by observing the stars, and I realized then that there is knowledge that can only be gained from being in a place. Places are pedagogy, and knowledge may be hidden from view depending on where you stand.

In his book, The Wayfinders (2009), Wade Davis recounts how Polynesians sailed the vast span of the Pacific on outrigger canoes, discovering new land by sensing changes in the pattern of waves and observing the behaviour of birds to signal distance. No compasses were needed, as children were taught to memorize the minute shift of constellations in the night sky that resulted from movement in a direction and the passage of time. Today, the tradition of voyaging is preserved and shared among Pacific islanders through Hokule'a, "Star of Gladness," a large traditional outrigger whose modern-day navigators have traversed the far reaches of Polynesia since 1976. Astoundingly, they can travel to Rapa Nui (Easter Island), one of the most isolated islands on Earth, without the use of any maps or modern-day navigation devices.

I was fortunate to witness the arrival of Hokule'a in Port Vila, a team of women at its helm. In stark contrast to the Australian-owned yachts and cabin cruisers typically docked in the harbour, Hokule'a drew a crowd of curious islanders who greeted the visitors with South Pacific reverence reserved for the greatest of experts—not just voyagers, but wayfinders—those who carve the path ahead.

4.5 Conclusion: knowledge as a common denominator

Knowledge—and the perceived lack thereof—is the invisible thread that connects all of the recurring themes in the literature on localization, from the risk adverse behaviour of donors to their lack of trust, which translate into inequitable managerialist arrangements doubtfully called "partnerships" and chronically underfunded emergency responders in the Global South. As humanitarianism can no longer simply rest on its moral authority, it has to produce the knowledge that enables it to maintain its legitimacy. Like moral authority, however, expert authority denies its own political nature by presenting itself as objective and neutral. A critical lens reveals that the capacity-building narrative is profoundly

political, transforming the epistemologies of elite gatekeepers into a self-serving barrier, erected to protect the humanitarian territory and the sacrosanct status of its dominant actors from encroachment.

This chapter also reveals that international actors—donors, INGOs, UN agencies—have difficulty engaging with local actors beyond the transactional relations that have defined their rapport for decades. Paradoxically, the localization agenda's desire to place these actors at the centre of emergency responses is matched with a desire to produce a recognizable and trustworthy "Other" through capacity building. Local actors, then, are first subjected to an assessment that involves separating out "experts" (foreign aid workers) from "non-experts" (the local actors who then become beneficiaries of the West's "expertise" alongside populations who receive emergency assistance). "Knowers" are distinguished from "non-knowers," though non-knowers are generally experts at resilience and overcoming crisis and duress (Kwek, 2003). Constructing the "Other" actor as incapacitated—as needing help—then goes hand in hand with the attendant construction of the foreign actor as superior, in a position to dispense that help. International actors' obsession with capacity strengthening reveals a direct continuity with the civilizing mission of the past, expats bringing the gift of knowledge intended to reproduce Western epistemes the world over. By being subjected to reshaping, potentially radical or alternative solutions emerging from the epistemologies of the South are driven out of existence.

This is perhaps why, as Barbelet (2018) writes, "past efforts at capacity strengthening have not necessarily resulted in more locally led humanitarian action, in part because they have tended to focus on making local organizations a better fit for partnership, rather than better or more effective humanitarian actors in their own right" (p. 1). Here, we catch a clear glimpse of shepherding in the aid ecosystem, a concept to be further explored in Chapter 6. Another pattern emerges from the literature: Conversations about localization have been largely led by, and focused on, the experiences of international humanitarian actors. How this bodes for the intended humanitarian reform will be discussed in the next chapters, in which I will begin to mobilize my research data to illustrate how dominant actors justify their presence within the aid architecture and foster conditions that are counterproductive to a reform.

CHAPTER 5: THE GATEKEEPERS

5.1 The consecration of Western knowledge in aid

In the previous chapters, I argued that the aid industry is a historical construct that views human suffering as a condition to be addressed through technical and managerial solutions. The application of Western expertise and technology, twinned with neoliberal economic policy, has influenced the design of humanitarian interventions in such a way that they have become a continuation of modernist development planning. The conditions having given rise to systemic inequalities—dispossession of resources and knowledge, political, territorial and economic oppression, and the concentration of capital and power in the hands of a tight-knit minority described as the "Humanitarian Club" (Barnett & Walker, 2015)—are obfuscated by the aid industry's technocratic prescriptions.

While standardization and professionalization are understandable responses to the shadow cast upon the industry during the 1990s (Le Naëlou, 2004), they also served to consecrated Westocentric forms of knowledge as "natural" and "neutral" solutions to crises around the world. Thus bolstered as universal and irrefutable, technocratic aid and its managerial instruments have, however, contributed to cognitive injustice and the reproduction of historical asymmetries between the Global North and the Global South (Cooke, 2004; Girei, 2016; Girei, 2017; Kerr, 2008; Murphy, 2008). Indeed, as an immense design project (Escobar, 1995, 2017), aid structures knowledge between that which is admitted as "valid," and that which is viewed as deficient. This then predetermines, but also justifies, assistance interventions on the basis of perceived expertise and a presumed lack thereof. Underwritten by political and ideological power, the technical and managerial knowledge apparatus of aid does not just reduce human suffering; it also contributes to the economic, social and cultural transformation of the non-West.

In this chapter, I further explore the kinship between power and knowledge in the aid industry, and how it has led to the production of an epistemic territory, whose perimeters are guarded by elite "experts." I draw on interview data and a diversity of expertise and voices to illustrate the processes through which dominant aid actors have delineated "legitimate" knowledge, operationalized conformity and shaped the role and behaviour of the various aid providers who populate the territory.

5.2 Those who "know"

A key question that first needs asking is *who* has the power to determine what constitutes knowledge. Looking at the past century, the ICRC has occupied a preeminent role in defining humanitarian values and principles. The Red Cross was granted its structure through the first Geneva Convention and the resolution requiring signatory countries to establish national societies—a network of volunteers aiding sick and wounded soldiers in times of war—to provide assistance upon their own territory. The establishment of the IFRC in 1919, as a complementary entity focused on disaster response and supporting the work of national societies through technical and financial assistance, conferred another layer of legitimacy upon the Red Cross (ICRC and IFRC combined) as a leader in the production of knowledge and discourse. It maintains this position today within the industry.

Beyond the Geneva Conventions and the precepts of international humanitarian law, which it upholds, the *normative* influence of the Red Cross is evidenced by the generalized adoption of its Code of Conduct (International Committee of the Red Cross, 1994). At first intended for use by its employees and volunteers, the Code of Conduct is now integrated into the Sphere standard, and adhered to by scores of relief NGOs with no affiliation to the Red Cross. This implicitly positions the Red Cross as a sentry: the Code's aim is to "*guard* (italics added for emphasis) […] standards of behaviour" (p. 1) in order to maintain, "the highest standards of independence, effectiveness and impact."

The generalized adoption of the Code of conduct by aid organizations suggests a presupposed universal agreement as to the standards in question. It defines the boundary of what constitutes proper aid, and thereby marginalizes actors who either have no knowledge of the Code or the Geneva Conventions, or who operate outside of their parameters. While attempting to establish and protect a standard—and though there is nothing inherently wrong with aspiring to quality—the Red Cross assumes authority over an epistemic territory, dividing those who possess the knowledge, and hence the capacity to be admitted within its perimeter, from those who do not. According to Stockton (1998), the Code offers a powerful normative framework with which to evaluate the performance of the humanitarian system against its own standards. However, in doing so, the ICRC and IFRC have erected an entry barrier, and consequently, serve as gatekeepers.

The IFRC applies its quality standard internally, as a Red Cross[14] employee explained, to assess the capacity and fitness of its own national societies, through an audit process called the Organisational Capacity Assessment and Certification (OCAC), "something that was rolled out, as a process for national societies to baseline their capacity, prioritize areas for improvement and develop their own plans for improvement" (Participant 28, March 21, 2022). The results of the evaluation then serve to justify corrective interventions or the deployment of expatriate staff to "take over" when the crisis exceeds perceived capacity. "To some extent," he adds, "that then becomes the basis for prioritization of resource allocation from the secretariat to national society capacity building." Hence, and despite a desire to support national societies and engage with the localization agenda, the Red Cross's structure remains heavily Westocentric in its definition of "capacity" and the deployment of human resources from the Global North to lead responses in the Global South. The following excerpts from a second employee further support this affirmation:

> There's still this posture in major crises that when the national society can't respond to needs, the Federation[15] shows up, pushes aside the national society, and if there are needs like water and sanitation, even if they're not in the national society's portfolio, we'll deploy them for a surge phase […] In big crises, like in Mozambique, you know the big red crises, the Head of Operations are always Whites from the North. The leadership is still very, very Northern, white.[16] (Participant 24, March 11, 2022)

The knowledge hierarchies that structure the relationship between the secretariat of the IFRC and national societies are further evidenced by another excerpt from Participant 28 (March 21, 2022):

> A principled humanitarian approach is so critical, so there's often this sort of skepticism—sometimes justified and sometimes not—that the Red Cross societies are not able to, don't yet have the capacity to act at the same principled humanitarian way. Similarly, there's this sort of… I guess it's an acknowledgement that in order to meet donor requirements, when it comes to accountability, financial accountability, and performance accountability, you know, reporting requirements, national societies don't yet have that capacity, and so the added value of the international

[14] The use of the term Red Cross is intentional, for anonymity purposes. It encompasses the ICRC and the IFRC, including national societies, and thereby reduces the possibility of participants being identified.

[15] "Federation" refers here to the International Federation of the Red Cross.

[16] The original passage is in French: "Ben, il y a la posture un peu plus dans les grosses crises, quand la société nationale est pas capable de répondre aux besoins, la fédération arrive, tasse la société nationale, et s'il y a des besoins en *water and sanitation,* même si c'est pas dans le portfolio de la société nationale, on va en mettre en place pour la phase de *surge* […] Pour les grosses crises, il y en avait en Mozambique, tu sais les grosses crises rouges, les *Head of Operations* c'est tout le temps des blancs du Nord. Le leadership est encore très très du Nord, blanc."

> secretariat or other national societies—you know, you have Western, Northern national societies, they feel that this is their added value.

These last passages reveal that the knowledge that national societies are expected to demonstrate is twofold: Firstly, it relates to how an intervention should take shape, and secondly, to how it ought to be managed and accounted for. The standardization of humanitarian practice, which is framed by the ICRC's normative Code of conduct, is therefore also constrained into a regime of accountability characterized by sophisticated tools aimed at gathering, categorizing and analyzing data for the purpose of rationalizing public spending.

The IFRC's role in the definition of humanitarian conduct is therefore complemented by that of institutional donors, whose outline of what constitutes sound managerial practice further delineates the parameters of aid interventions. Because they hold the ultimate financial power in the aid chain, donors' approach to managing aid takes precedence over that of every other actor in the industry. Influenced by the technopatriarchs of the mid-20th century and a contemporary neoliberal efficiency imperative, donors define knowledge through policy and the use of managerial instruments. These are then used to delimit the territory they oversee, through coercive compliance and exclusionary mechanisms, as illustrated by a participant who has worked for several INGOs and local organizations in Africa:

> Sadly, the funding comes from there [the donor], and when it comes from there, it comes with power, and it establishes the narrative. It establishes the narrative. Because the funder and us, we are in this environment, and in terms of localization, it poses a problem, because the discourse isn't aligned yet. The benchmarks, the localization standards, the expected performance, are determined and structured according to the environment of the donor […] Failure to conform exposes an organization to serious consequences. Not just with funding, but it affects your credibility.[17] (Participant 3, August 3, 2021)

Donors set conditions for what they fund through policy and accountability mechanisms, thereby determining the characteristics of those who may be granted access to the territory. Yet, the technical and management knowledge that they expect funding recipients to adhere to, is often detached from the

[17] The original passage is in French: "Malheureusement, l'offre d'argent vient de là, et quand ça vient de là, donc ça vient avec le pouvoir, et ça détermine le narratif. Ça détermine le narratif. Parce que le bailleur et nous, on est dans cet environnement, et nous amenons le narratif de cette manière, et nous évaluons la compétence et les standards par rapport à ce narratif. Et ça, ça pose problème pour la localisation de l'aide, pour moi. Parce que le discours n'est pas encore aligné. Les *benchmarks*, l'analyse des standards de localité de… niveau de performance attendue, sont déterminés et structurés par rapport à l'environnement du bailleur. […] Ne pas s'y conformer expose une organisation à des conséquences sérieuses. C'est pas le financement seulement, c'est notre crédibilité."

material and cultural contexts in which aid interventions are deployed (Girei, 2022). For example, a participant recounts how Global Affairs Canada insisted on the recruitment of an LGBTQ organization in Iraq as part of a 12-month emergency response, in compliance with its Feminist International Assistance Policy (FIAP) and Canada's gender diversity and inclusion discourse. "It's unfeasible!" she remarked, recounting a conversation with a program officer at Global Affairs Canada. "Are you crazy or what? In a territory formerly occupied by Daesh, you think an LGBTQ organization has an office and I can go knock on their door? And develop the kind of trust that's needed to set up a partnership?"[18] (Participant 29, March 11, 2022). In this example, Canada's attempt to dictate what constitutes an aid response in accordance with its presupposed universal values is clearly demonstrated. It also highlights Canada's requirement that emergency responders display knowledge of its feminist policy and the context-specific construct that is gender diversity and inclusion. Sometimes there is a clash of cultures, however. "We come waging a fight," remarked one individual from West Africa, "and sometimes, we even resist certain values which are not our own[19]" (Participant 12, September 10, 2021). Beyond differences in values, displaying such knowledge as required by Global Affairs Canada, might even place individuals and organizations at risk, as is the case with Iraq, the "do no harm" dictum of the humanitarian sector seemingly dismissed.

Donors' gatekeeping function also exacerbates the divide between various forms of expertise, by homogenizing that which is considered valid. In doing so, they consolidate a power-knowledge assemblage into a monolithic block that stands against the diversity that exists in its periphery. This process is not only occurring within North-South dynamics, however, but also within specific countries, whereby some states such as Iraq and Guatemala replicate the gatekeeping dynamics occurring at the international level. Internal disqualification mechanisms, such as revoking the status of NGOs whose posture might be perceived as too radical or a threat to state power, enact a first level of marginalization, forcing these organizations into non-existence. Funders, including multilateral agencies, are then expected to seek the authorization of the Guatemalan state before financing any activity with an "authorized" local NGO. However, in a context such as that one, the organizations which manage to overcome the first level of marginalization, are then faced with a second threat of exclusion.

[18] The original passage is in French: "C'est infaisable ! Vous êtes malades ou quoi ? Dans un ancien territoire occupé par Daesh, tu penses qu'une organisation LGBTQ a pignon sur rue et que je peux aller cogner à leur porte ? Puis développer la confiance qu'il nous faudrait pour établir un *partnership* ?"

[19] The original passage is in French: "On y vient en bataillant, et parfois on fait même de la résistance pour certaines valeurs qui ne sont pas les nôtres."

That which is deemed worthy is usually underpinned by assumptions of Western superiority and mirrors state paradigms that sustain a powerful ideology of disenfranchisement, at times generating acts of cognitive injustice and epistemic violence in the name of progress and well-being in the eyes of "those who know." However, testifying to the logics of institutional survival, the urgent need of local and international NGOs to access scarce resources, means that most will have an interest in adhering to the dominant body of knowledge, rather than challenge its foundation.

5.3 The power-knowledge complex

As Barnett reminds us, "any act of intervention, no matter how well intended, is also an act of control" (2011, p. 12). Though humanitarian gatekeepers' heart might be in the right place, aid manifests as a complex combination of care and control. Consequently, their role in global governance cannot be detached from the exercise of power. This calls for a brief theoretical detour on power and its intersection with knowledge, before further analyzing the processes occurring within the aid industry.

According to the deconstructionist work of neo-Marxist critics such as Escobar (1995), international aid exists as a power-knowledge complex whose most significant material representation and instrument is the bilateral donor agency. Legitimated by a discourse that speaks to the "modern" values of a nation (i.e., Canada's Feminist International Aid Policy), the aid apparatus' claims to bureaucratic rationality produce "objective" expert knowledge on the management of social transformation. For instance, Mohanty (2003) highlights that for many international organizations working towards women's advancement, the discourse of financial equality between men and women—and projects addressing women's economic empowerment, correspond to a Western form of feminism that is liberal and pro capitalist. Its individualistic character may be at odds with other forms of organizing that are communal and non-market oriented. As such, by featuring prominently in aid interventions, Western feminism and the body of knowledge it conveys are altering more than gender relations. It serves discretely as an agenda of governability that subordinates people and populations to the ideas of Western modernity, and supports the enforcement of Western privilege, which according to Shiva (1991), is the ultimate manifestation of power.

Escobar and Shiva are not alone in equating knowledge with power; Foucault (1975, 1980, 2000) is in fact most widely cited on the subject. Like Shiva, Foucault argues that power produces the subjectivity of individuals in such a way as to render them governable. Power is exercised upon people and populations

through a vast array of control instruments, in a manner that disciplines and orients them according to certain objectives. Power, therefore, is a productive force that creates reality through discourse and rituals of truth. Discourse, which is driven by a search for truth, then acts as a "prodigious mechanism of exclusion"[20] (Foucault, 1971, p. 22). As a structure that is to a large extent unacknowledged, discourse bestows individuals and groups with charged identities—such as "head of humanitarian operations" or "illiterate refugees." The following passage from a conversation with a binational Ghanaian-Canadian public servant now working in Ghana is illustrative of the power-knowledge complex that accompanies the label "expert":

> Not every minister is a technocrat or a technical person, so I come in as a technical expert. I get to use the word "expert," because that's the way they describe me. My head is pretty big, but it's getting bigger right now! (Laugther) But the idea is to be able to support the minister, to be able to say "OK," especially in a ministry like mine, not like the Ministry of Energy, that's very technical—but we do need a level of technical expertise. So as an expert you're able to support the ministers in the direction that they want to go, in best practices, for example. So a lot of times, you have political appointees, especially with the Ministry of Gender, that come in with a different point of view, a very philanthropic point of view or a very charitable point of view, and they don't understand best development practices. (Participant 33, March 28, 2022)

This passage speaks of different categories of knowledge holders and it supposes that "best development practice" comes from outside, as the binational individual was hired for her previous experience with Canadian INGOs. Though Foucault's analysis of knowledge never specifically addressed international relations or colonialism, several authors including Escobar (1984, 1988, 1995), drew inspiration from his work to analyze the discourse of international aid and the creation of monolithic categories which came to be known as "truth." Rossi (2004) and James (2022) for example, argue that discourse determines what constitutes a legitimate way of thinking and speaking about aid, through the construction of fables, which then dictates how to practise it. James argues that discourse—for instance, the humanitarian principles of humanity, impartiality, independence and neutrality—works to sustain a "truth" about aid, in much the same way that development is equated to technical expertise and economic growth, and growth to progress.

As remarked earlier in Chapter 3, Foucault presents a male, Eurocentric view of power that is oriented towards the analysis of external constraints imposed by institutional powers. It is not interested in the subtler forms of oppression documented by postcolonial theorists such as Said (1978), Bhabha (1994);

[20] Author's translation. The original reads: "prodigieuse machinerie destinée à exclure."

Spivak (2009) and Mohanty (2003), or even his French contemporary, Bourdieu (1998) who wrote, among other things, about masculine domination and symbolic power. For this reason, I do not claim Foucault as a significant influence in my analysis. It must be noted, however, that my theoretical sensitivities may have been tainted by previous exposure to Foucauldian thought, as I firmly believed that I had come up with an original concept in this study—namely that of "shepherding" (Chapter 6)—only to be informed that Foucault had thought of it before me, and called it "pastoral power."[21] Invisibility is the paradigmatic manifestation of absolute power; therefore, one might argue that Foucault has, to a certain degree, shaped my subjectivity to such an extent that I failed to notice his influence on my own thought process. Nevertheless, a distinction begs to be made between Foucault's idea of pastoral power (Foucault et al., 2004)—in which a shepherd is mandated with ensuring both the survival of a group and its individuals—and technocratic shepherding—in which I consider shepherds to be conformity inducing instruments deployed by gatekeepers, to ensure order, uniformity and continuity within the humanitarian ecosystem. This will be discussed at greater length in Chapter 6.

The many other authors who have theorized power reveal another significant blind spot in Foucault's work, namely a reflection on how oppressed actors consciously or unconsciously resist domination, by engaging for instance in the manipulation of knowledge. Thus, local and international NGOs in the humanitarian industry who have been exposed to gatekeepers' normative and coercive power are not merely passive objects of an isomorphic process. They assume (whether voluntarily or unwittingly) the characteristics necessary to gain entry into the territory. As such, they display agency, deploying a variety of resistance tactics known by Scott (1985, 1990) as infrapolitics, in which subaltern groups' "hidden transcripts" (what lies beneath and happens offstage) nourish a growing consciousness of oppression. As will be seen in chapter 6, NGOs, both local and international, are in fact masters of infrapolitics. Consequently, they are not idle and submissive subjects of conformity-inducing mechanisms but willing participants in what many interviewees, particularly from the Global South, have described as "the business of aid." One participant from Burkina Faso commented specifically on this type of agency, which involves the manipulation of knowledge and information to ceremonially comply with gatekeepers' requirements:

> Before, we would ask people to submit a proposal, and at that moment, they would look at their action plan, and their priorities, and those that will submit align with what they're currently doing […] But now, calls for proposals are … we see, for instance, in gender, that we have new players in

[21] I am grateful to one of my jury members for pointing this out!

> the area of gender, that know nothing about gender, but that are service providers experienced in securing good funding. They're not the right actors to be addressing gender issues, but compared to women's NGOs, NGOs with a social purpose, they're more competitive to obtain funding. And then it turns into a war of consultants. We find ourselves in this country with funded projects and we don't even know what they're about.[22] (Participant 12, September 10, 2021)

This is further echoed by another participant from an INGO working in Iraq, who describes the practice of a local responder whose organizational survival strategy amidst a highly competitive funding environment rests on the acquisition of the necessary knowledge to excel in donors' thematic priority areas, as opposed to developing their own thematic expertise:

> Their mission wasn't determined internally. It responded only to one thing—funding. So they did a bit of everything. They did it well, they were well established in the community, they were respected, but they did GBV [gender-based violence interventions], WASH [water, sanitation and health], they had cash, and we were like "OK, what do you do." In the sense that, their vision, their strategy, was not very clear, it was like "Well, we don't really have one, we just get the funding and go." (Laughter) This organization had been around for about 10 years and they had at least 300 employees. Their identity was not well defined, it was defined according to the priorities of the funders.[23] (Participant 29, 2022)

This passage suggests that gatekeepers' power is not unacknowledged by local organizations. They retain their own subjectivities, and act upon them to reduce organizational vulnerability with a percipient demonstration of agency. The work of other authors, namely Bourdieu and his theory of symbolic capital as a repository of social power, might be more relevant here to understand the strategic manipulation of knowledge and other resources by cognizant actors within asymmetrical dynamics. According to Bourdieu

[22] The original passage is in French: "Avant, on demandait aux gens de déposer une proposition, et à ce moment, ils regardent leur plan d'action, ils regardent leurs priorités, et puis ceux qui vont déposer s'alignent sur ce qu'ils sont en train de faire […] Bon, mais les appels à projets en ce moment-là, nous nous observons en genre par exemple, qu'on a de nouveaux acteurs dans le domaine du genre, qui ne connaissent rien du genre, mais qui sont des prestataires aguerris pour capter de bons financements. C'est pas les bons acteurs sur les questions de genre, mais comparé aux ONG féminines, les ONG et à vocation sociale, elles sont compétitives pour aller chercher des appels à projets. Et là ça devient aussi la guerre des consultants. Voilà. On se retrouve dans ce pays avec des projets où on ne sait même pas de quoi il s'agit."

[23] The original passage is in a mix of French and English: "Leur mission n'était pas déterminée à l'interne, mais répondait seulement à une chose — le financement. Ça fait qu'ils faisaient un peu n'importe quoi. Ils le faisaient bien, ils étaient bien implantés dans la communauté, on les respectait, mais il faisaient *GBV, WASH*, ils ont du *cash*, on était comme "*OK, what do you do?".* Dans le sens que… leur vision, leur stratégie, c'était pas très clair, c'était comme *"Well, we don't really have one, we just get the funding and go."* (Rires). Ça fait que, jusqu'à où ça peut avoir un impact sur leur enracinement, *I don't know.* Cette organisation-là existait depuis au moins une dizaine d'années puis employait au moins 300 personnes. Leur identité, disons… était pas très bien définie, était définie en fonction des priorités des bailleurs."

(1977, 2001), economic and cultural capital are directly linked to the production of symbols which are generative of credibility and legitimacy—thereby enabling those who possess symbolic capital to gain entry into social spheres. As illustrated in the last quotation, symbolic capital for the local NGO in question stems from the recognition as a legitimate aid responder—which in turn is founded on its alignment with donors' priorities (the association with culturally powerful institutions) and economic capital (the projects that derive from this alignment). Therefore, as remarked by Rossi (2004), one has to conceive of the possibility that conformity to gatekeepers' expectations may not actually reflect convergence, but strategic manipulation. This, then, would amount to somewhat of a reversal of Said's (1978) postcolonial theory that knowledge of "subject races," or Orientals, is what makes their management easy and profitable. An understanding of the "game" and its rules by the Orientals, to use Said's term—in this case, organizations of the global South—facilitates their access to symbolic power and the management of profitable relationships within the aid industry. This is illustrated by the following passage from a conversation with a Senegalese aid worker employed at an INGO's satellite office in Dakar:

> It's a chain—the funder who releases funds has defined the rules and the frameworks with which we work, and everything. To exist, NGOs need those funds, so if we don't respect the framework defined by the funder, we won't be able to access those funds—it's the same for [anonymized INGO]. To be respected, for [anonymized INGO] and for other NGOs as well, we have to ensure that the rules are respected. It's more or less the same thing that we impose upon local organizations. And they also want to access those funds, so in that perspective of being able to exist, and to carry out their activities among communities. So there, too, they accept to enter into the framework.[24] (Participant 43, April 7, 2022)

Another form of agency can be observed within this dynamic: Bhabha's concept of mimicry, which designates an ambivalent mixture of deference and disobedience. Bhabha (1994) argues that the effects of colonialism are characterized by ambivalence and contradictions. Colonizers' narcissistic desire for recognizable "Other" produces an ambivalent version of otherness through mimicry, "almost the same but not quite … almost the same but not white" (p. 122). However, mimicry, which can take the shape of

[24] The original passage is in French: "Je pense que c'est une chaîne, le bailleur qui libère les fonds, qui tout de moins a défini les règles, donc les cadres de fonctionnement et tout et tout. Les ONG pour exister ont besoin de ces fonds, ce qui fait que si on ne respecte pas le cadre défini par le bailleur, on ne pourra pas également avoir accès à ces fonds, et pareil pour [ONGI anonymisée]. Pour se faire respecter, pour [ONGI anonymisée] et pour d'autres ONG également, il faut s'assurer que ces règles soient respectées, c'est plus ou moins la même chose qu'on impose aux organisations locales. Donc elles également, elles veulent avoir accès à ces fonds, dans cette optique de toujours pouvoir exister, également de pouvoir mener des activités auprès des communautés. Donc là, également, elles acceptent de rentrer dans ce cadre."

camouflage, mockery, parody and irony, creates an imperfect replica of colonizers' image and culture. As such, it actually reverses domination, in a fashion similar to the infrapolitics described by Scott (1985, 1990) and ceremonial compliance (Meyer & Rowan, 1977), in which actors decouple their internal operations from external impression management. Hybridity, meanwhile, is a process of cultural translation enacted by colonized groups (again, to use Bhabah's terminology) which produces distortions. Though it entails the partial appropriation of dominant ideologies, it remains generative as a process. By resisting complete assimilation, hybridity simultaneously turns the West into a manageable vector for the colonized, as illustrated in the previous quotation, while thwarting its desire to produce a recognizable "Other" (Mir & Mir, 2014).

This suggests that within the humanitarian sector, interactions between actors in a postcolonial North/South order are inevitably hybridized as a result of their dialectic relationship. The site of these encounters, known among postcolonial theorists as "liminality" or "third space," is the location in which negotiation and resistance are enacted. The products of third space are in effect the essence of postcolonialism: contradiction, repetition, ambiguity and at times, an implicit or explicit disavowal of Western authority. Hence, it is important to remember that for the actors that populate the terrain of international aid, discursive conformity, or "wearing the same uniform" (Rossi, 2004, p. 23)—must not automatically be viewed as mark of submission, but also as the product of strategic agency.

Vignette: On being a disempowered bystander

Many years ago, I was invited to participate in the production of a shadow report, alongside various women leaders and women's organizations in Vanuatu, to mark an event in which the state was invited to the UN in New York, to present the measures it had taken to implement the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) following its ratification. The shadow report is produced by civil society actors, and is intended to triangulate, and sometimes contradict, the official version drafted by the state. As a masculinist nation in which there are no women who serve as members of parliament, Vanuatu holds the dubious claim of 140th position among 195 countries, according to the Gender Inequality Index. Unsurprisingly, in our shadow report, we highlighted several omissions and errors in the document produced by the government, which were then documented in our own report. I felt this was an excellent initiative led by the UN, to purposefully include the voices of those who might traditionally be marginalized through such a state- and male-centred UN reporting process.

I was among approximately twenty women gathered to work on this report. I had no specific contextual expertise, but my writing skills were put to use in drafting sections of the document and editing the final report. As is often the case, being the foreigner in the group meant that I was assigned the role of knowledge mediator—the women could orally recount in Bislama how discrimination manifests in Vanuatu, and I would then transpose this information into English according to the UN's technical reporting format. During our meetings, in which we mostly sat around woven mats eating fruit, they talked. I listened and took notes, and that is where I heard a story that troubles me to this day.

The woman describing the incident worked for Vanuatu police force, and because of her gender, she had been sent to one of the outer islands of the archipelago to observe the resolution of a "conflict" — in this case the sexual assault a teenage girl— according to customary, or kastom *law. In Vanuatu,* kastom *encompasses a variety of practices that are revered and heavily entwined with identity politics, distinguishing that which is endogenous and that which is foreign or a product of colonialism. But* kastom *also serves the interests of certain individuals who claim from it their authority and legitimacy, as is the case in this story.* Kastom *law co-exists with Civil Law and Common Law, which are legacies of colonization by France and England, and for "community matters," the state allows for conflicts to be resolved through customary channels, as a form of delegation of power to village chiefs. As an advocate of pluriversal politics and non-Western knowledge systems, I naïvely thought this was a fabulous manifestation of self-affirmation and self-determination on the part of Vanuatu—until I heard this story that challenges many of my personal postures.*

The police officer who was speaking recounted how she was dispatched by the Vanuatu police force to ensure that justice was adequately carried out according to local kastom *in the matter of the sexual assault. She was not called in to intervene and apply the "colonial" law, which would have found an aggressor guilty of a crime; her authority was superseded by the application of local norms, which were intended to restore order between two clans. The situation was described as follows: A boy from village A raped a girl from village B, thereby causing harm on her entire community. To rectify the matter, village A would provide a girl to be raped by the chief of village B, and justice would be done as simply as that. The police officer—a disempowered bystander—tearfully described how she could do nothing but witness the assault of the second girl, who had to be pulled out of her mother's arms.*

I too am a disempowered bystander in this situation, a modest contributor in a shadow report. What can one foreigner possibility do, when confronted with such an utter failure by a state to protect its most vulnerable citizens? And worse still, the co-optation of its police force to serve the interests of men who claim to lead communities under the guise of kastom*? Here, traditional knowledge is violent: It is used to guard the interests of a select few against colonialism and the epistemic encroachment of the West, but the power of chiefs is also sanctified by a state apparatus inherited from the empires, whose power-hungry members remain unchallenged in a mutually reinforcing feedback loop. State knowledge then is equally violent: It condones the ancient practice of an eye for an eye (or in this case, a girl for a girl), which it then shrouds in silence by omitting it from its CEDAW report. When power is misused by both camps, there is no good against evil, no right against wrong.*

Alongside the ICRC and donor agencies, another gatekeeper merits discussion for its convening power and role in sustaining a global managerial elite and erecting both normative and technical-managerial performance standards in the humanitarian sector: the UN system. According to Murphy (2008), convening actors such as UN agencies display strong normative influence and the capacity to summon others within their perimeter, to form and transform transnational networks whose members derive legitimacy from the association with a power-wielding institution. One of the characteristics of this gatekeeping class is that its clout does not just rest upon legal status. Like the ICRC and IFRC, it exercises its regulating effect through social power and control. This power is then nurtured via a system of tight-knit globalizing institutions that collaborate to extend their ideology. Exemplifying this convening capacity, UN OCHA's "cluster" system, which grants specialized UN agencies and one INGO, Save the Children, the

authority and funding to assume a leadership role in coordinating emergency responses in a crisis-affected country, according to the thematic area in which they possess expertise.

UNICEF, for instance, leads the education cluster and coordinates the work of local and international actors who intervene along this area during a crisis. The World Health Organization is responsible for overseeing the activities of responders who address water and sanitation and other health-related elements. Following the post-earthquake condemnation of the humanitarian system's failure to coordinate in Haiti, OCHA's clusters are a welcome attempt to structure the aid industry and its communication channels. However, here again, foreign technical knowledge trumps the contextual insight that endogenous actors possess. In fact, a common grievance among local aid responders is that they are not invited to attend cluster meetings, which are perceived to be reserved for international agencies. As remarked by a Nepalese respondent who worked with a dozen local and international organizations, "I saw cluster meetings all the time, yeah… I feel that it was mostly on paper, you know?" He adds, "because there were meetings in 5-star hotels, but the real benefits was not done. And another big problem, in every local organization more or less, someone doesn't speak English" (Participant 41, April 22, 2022).

The use of the term "5-star" by this individual is evocative; it conveys a sense of elitism and exclusivity, of an internationally mobile social class of aid managers imbued with the social power of their affiliation with an INGO, the IFRC or a UN agency within a global network to which local organizations lack access. In this citation, the epistemic barrier assumes a physical and spatial dimension, the 5-star hotel. The passage also reveals that aid's territory has a lingua franca: English.

The marginalization of local responders by UN agencies is further described by a participant from the Philippines who speaks of the continued disregard of local actors by the United Nations Development Program (UNDP) in spite of their demonstration of technical and managerial capacity:

> When we apply for a UNDP project, you have to go through a series of meetings, and you have to submit a series of requirements, for them to assess you in terms of your level of capacity, both implementation and in terms of logistical means, also by requiring you to submit a 5-year report of projects, the financial statements, those are the things that they require. But somehow even in the implementation, when you have submitted all these requirements, as required, but somehow in the distribution of resources, who are available based on their funding, you're still not included. (Participant 31, March 23, 2022)

UN agencies, therefore, behave similarly to donors, because they disburse multilateral funds in accordance with the same managerialist paradigm as bilateral agencies from which their budgets are sourced."UNICEF has a 70-page compliance annex," remarks one participant, who felt that the administrative requirements to access grants were prohibitive for small local organizations, which, in the context of internal displacement where she worked, tend to follow refuge-seeking populations. "They don't even have time to obtain the compliance certificate, collecting all the supporting documents is too expensive, and these local organizations that are made up of affected populations, who also provide aid, are never supported, never even given the means"[25] (Participant 29, March 21, 2022).

Finally, the sense of privileged "expert" position is conveyed by a respondent who worked for the World Bank and other UN agencies, who anecdotally describes the posture of her technocrat colleagues in New York:

> They think, you know, "do I still have anything to learn from the field, if I've succeeded in joining the international elite?" And I remember, there was one time when Obama had come to speak at the General Assembly and the streets had been blocked off, but people wanted to go back to their office, so they were harassing the police, waving their little blue UN passes like "I work for the UN, I'm super important, let me pass!" (Participant 18, February 14, 2022)

Thus, the convening capacity of the UN, linking donors' funds and technocratic mindset to the normative influence of the ICRC and IFRC, have consolidated the authority and legitimacy the "expert" in a global network of liberal governance whose reach extends beyond the provision of aid. Together, they form the humanitarian club (Barnett & Walker, 2015). Its influence extends to policy and the shaping of public perception—or the manufacture of consent—reminiscent of Herman and Chomsky's (1988) analysis of media coverage of the war on communism, which can also be applied today to the war on terror. Consequently, these global actors are more than aid responders—they are also manufacturers of knowledge and information upon which their power and legitimacy reside. They are bound by their common principles of neutrality, impartiality and their conviction that standards must regulate the delivery of assistance. Their interest in safeguarding the perimeter of the territory they occupy stems from a desire to preserve their status in the world order, which, when secured, and as observed decades ago by Ferguson (1994) in the Anti-Politics Machine, facilitates the expansion of control. Viewed from this angle,

[25] The original citation is in French: "L'Unicef a un *compliance annex* de 70 pages. Il y a des organisations petites, des fois, elles se déplacent avec les populations. Elles ont même pas le temps d'obtenir le *compliance certificate*, de ramasser tous les documents, ça a un coût trop élevé, et ces organisations-là qui sont à la fois des gens affectés, et qui offrent de l'aide, ne sont jamais soutenues, on leur donne même pas les moyens."

the decentralization of the humanitarian sector through the localization agenda, and the consequent renunciation of control by the global managers, appears thoroughly improbable, if not paradoxical.

5.4 Technocracy, a child of power and knowledge

What, then, is the uniform ("one form") that the aid population appears to be adopting? What is the symbolic capital that actors are clamouring for? Since aid is a cultural and historical construct intertwined with the idea of statehood, it is relevant to look at the knowledge generated by the industrial nations and from which aid's dominant narrative is produced.

Among Western donor countries, science is perceived as the highest expression of civilization, democracy and rationality (Shanin, 1997). As is typical of the Western ontology of binary separation, these pinnacles of Euromodernity are diametrically opposed to magic, myth, religion which are perceived as primitive and nonsensical (Mudimbe, 1988). Rapid industrialization in the United Kingdom, continental Europe and North America provided a direct conduit for the expansion of scientific methods to optimize productivity, and to technoscientific rationality which distinguishes between elite intellectual-experts (knowing managers) and a class of doers (non-knowing labourers). This is why, according to Alvares (2010), the rapport between science and development is congenital, tracing back to Europe's industrial revolution, during which a relationship was first established between science and industrial growth. During the post-WWI era, technology became a marker of societal progress, coveted by those who produce and mobilize it, and whose interests it serves. Technology was further consecrated by Truman's inaugural address in which he refers to increased production as "the key to prosperity and peace," for which "a wider and more vigorous application of modern scientific and technical knowledge" is required (Truman, 1949). Though his 4-point agenda called for a distribution of knowledge, such a discourse implicitly fetishized science and legitimized the subordination of diverse forms of progress and wealth creation to a small group of nations and people.

When considering technical expertise and its intersection with the state apparatus, Weber's (1968) classic, Economy and Society, comes to mind, in which modernization is equated with rationalization. In Weber's archetype of bureaucracy, the principles of science and order which are applied to industry by the likes of Taylor, are transposed to governance, in which rationalization is associated with explicit rules, discipline, objective procedures and technical expertise. Rationalization has several dimensions: It includes the use of methodologies for calculating results (the logframe being an example) and rules to guide standardized

responses (exemplified by the Sphere handbook). It also includes procedures aimed at improving efficiency, quantitative indicators, bureaucratization, increased specialization, and an overall focus on means to ends. All of these elements converge in the search for efficiency and predictability which is then taken for granted as a "truth" or fact of nature, rather than a cultural construction.

Meanwhile, the term technocracy, which is derived from the Greek words *téchne* (how-to knowledge) and *kratos* (power to rule) has come to represent the application of scientific rationality by the state—to solving problems that are of a social nature (Steffek, 2021). It amounts to the "rule of experts," namely bureaucrats with technical expertise. The cognitive problem-solution mindset displayed by engineers is mobilized to solve societal issues with applied technology and the instruments of technoscientific management. A field of knowledge is thus produced by technocrats, which includes both a technical and managerial dimension. This means, according to Fischer (1990), that states and their institutions are run according to an intellectual ethos, which in turn is further applied to shape government, policy and instruments, as opposed to shaping outcomes. It also explains why, as a reform, the localization agenda is confronted with a massive technical and managerial roadblock of its own making: Donors' impossibility, for instance, to transfer funds directly to local NGOs because of self-imposed rules, which is then justified by the affirmation that local actors lack technical and managerial knowledge (also based on donors' rules). Within this logic, the technocratic model is self-affirming; the focus remains on the means, rather than the political ends of localization. "Trying to elevate some of these things to the political level can be hard, because they're steeped in administrative and bureaucratic processes like procurement, or grant administration …," remarked a staff member from a network of Southern NGOs dedicated redistributing power with the humanitarian system. "So in the donor space, it's getting bogged down at the technical level" (Participant 46, April 12, 2022).

Another example of the means versus ends unbalance is exemplified by the following passage, in which an INGO employee describes the increasingly technocratic demands imposed upon a local responder in West Africa by USAID, which then shifts the focus away from the intended purpose of the project:

> One of the new requirements now for example—we work in food security—so before the only thing they needed for auditing purposes was some germination tests on the seeds to make sure that the project is distributing seeds to farmers that are of good enough quality for people to actually produce at the end of the season. So that was enough, and it was something that we would attach to our documentation and for auditing purposes. Now, this year, not only do we need to do the germination tests and submit them to Washington—so not even locally, but to Washington—so I

> need to do the translation of the document and send it, but they also want to have the certification from the seed vendor to attest the quality of the seeds. So they want to see that the Malian government has given a certification to the suppliers that our local partner is buying from, to make sure that the seeds are actually government-certified seeds of good quality. So, the producer that we have is a local trader, their seeds are good, but it's a small trader because we want to support the small merchants. We cannot certify him. But you know, this is an added requirement that wasn't there last year. We're talking about making things easier in localization, but at the same time, it's the contrary. There are more and more requirements popping up. (Participant 5, August 9, 2021)

This passage illustrates the privileged capacity of an elite group, in this case the donor, to identify thanks to its "expertise" the supposed most efficient needs to undisputable ends, which establishes a style of knowledge-based rule that for Habermas (1990), is marked by its unresponsive and unquestioning character—or simply, depolitization. In a technocratic regime, such as the one described above, science becomes reified, and extends into what Habermas calls "sociocultural lifeworlds" or the subconscious, where it exercises control over individual subjectivities. This leads to a state of totalizing technocratic consciousness, which then justifies and sustains an expert class's interests, while repressing another class' need for emancipation. The pernicious effect of this power-knowledge complex and its technocratic offspring, then, is that it defines its own questions (for example how to deliver aid more efficiently and effectively). It thereby brushes aside as illegitimate other questions (are we attuned to local and diverse manifestations of self-affirmation, resources, capacity and expertise?) and evidence that does not fit its assumptions (local actors do not want aid, local actors are knowledgeable subjects, local actors have capacity).

This is exemplified by the number of respondents from Western organizations who spontaneously identified the term "metric" in our conversations, testifying to technical reflexes when describing a need to quantify progress towards localization and identify its markers. For instance, as explained by an INGO worker based in Canada: "Now at [Anonymized INGO], localization is really interesting, it's part of what we're doing, what we want to do, we produce policies on the topic, we ask ourselves many questions, as a matter of fact, we're developing KPIs [key performance indicators]." He adds, speaking about another organization for which he previously worked: "Whenever I had the opportunity to speak with my colleagues [about localization], I kept asking them, 'what are we actually doing?' 'What are our indicators of success?'"[26] (Participant 34, March 28, 2022).

[26] The original passages are in French: "La localisation de nos jours, puis par exemple avec [ONGI anonymisée], c'est super intéressant, ça fait partie de ce qu'on fait, de ce qu'on veut faire, on produit des politiques là-dessus, on se

Likewise, a consultant for Global Affairs Canada also spoke of the need to quantify localization. During our conversation, she asked for my advice on using a measurement tool developed by Global Mentoring Initiative (Van Brabant & Patel, 2018), a consultancy group based in Switzerland: "What do you think of the framework that mirrors the 7 dimensions of localization? I'm looking for a framework that I could put all the data into, in order to measure and evaluate it" (Participant 30, March 23, 2022). Another consultant complained of donors' increasing measurement of means rather than ends, suggesting that the data collected confounds management processes with results: "Evaluating impacts, no one wants to do that, it's too expensive. The few performance indicators that we have measure progress, not impact. In the end, projects are evaluated on their capacity to cash-out, not on their impact." (Participant 13, September 16, 2021).[27] Finally, this comment by an expatriate humanitarian manager in the Occupied Palestinian Territories simultaneous expresses her own propensity for measurement and frustration at local employees' disinclination for metrics: "And I tell them, 'No, it's not enough! You're doing a good job, but on paper, it means nothing. If you can't write a report at the end of the week, it's like you haven't worked at all!'"[28] (Participant 23, March 9, 2022).

As we transition into the next section of this chapter, which addresses managerialism as an operational offshoot of technocracy, the preceding quotation serves as a reminder that often, work practices developed outside of the West are delegitimized and excluded from the corpus of canonical and transferable management knowledge. The insistence that report-writing know-how trumps the professional activities and insight of Palestinian aid workers perpetuates the humanitarian system's self-image as a Western technical and managerial discipline, which, as suggested by Frenkel (2008), denies the ability of the "Other" to be knowledgeable. A taken-for-granted hierarchy, resulting from the West's ever-expanding technocratic consciousness, is thus reimposed upon aid's epistemic territory.

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pose des questions, on a justement des KPI qu'on développe." and "J'avais l'opportunité d'en parler avec mes collègues, puis je disais, 'Mais qu'est-ce qu'on fait comme tel ?' 'C'est quoi nos indicateurs de succès ?'"

[27] The original passage is in French: "Je veux dire, évaluer les impacts, personne veut le faire, ça coûte trop cher. Même les quelques indicateurs de rendement. Ils mesurent l'avancement, c'est pas des indicateurs d'impact. Donc finalement, les projets sont évalués sur leur niveau de décaissement, pas sur l'impact qu'ils vont réellement créer."

[28] The original passage is in French: "Puis moi je leur dis, 'Non, c'est pas assez ! Vous faites une très bonne job, là, mais ça sur papier, ça veut rien dire. Si t'es pas capable de produire un rapport à la fin de la semaine, c'est comme si t'avais pas travaillé !'"

5.5 Managerialism and its power tools

Technocracy, once operationalized, manifests as managerialism, or "a generalized ideology of management" (Parker, 2002, p. 10) associated with features of expertise and efficiency. As a modernist and occidentalist project, it derives its power from its supposed scientific objectivity and hence universal applicability (Gulrajani, 2011, 2017), an unconfirmed assumption that "better" management is an effective solution to a wide array of social ills (Illich, 1973). Applied to a Western ideal of social progress, managerialists are convinced that human well-being is dependent on control of both the natural world, and the human beings that inhabit it (Parker, 2002). This control requires a form of organization that is efficient and ordered in its orientation of people and things towards the achievement of a collective objective, of which the SDGs are a prime example. Reflecting this managerialist approach to designing a global social transformation, donors and bilateral agencies have attempted to standardize aid around what constitutes "sustainable development," "effectiveness" according to the Paris Declaration or "localization" as per the Grand Bargain, for instance, through a variety of policies, toolkits and performance indicators. The technocratic underpinnings of these ambitious projects are evidenced by their decision-making structures, which remain in the hands of an elite group of global conveners or gatekeepers.

The silence of conventional management studies on issues of power and alterity, however, conceals underlying assumptions about the superiority and universality of the Western standard. Within public bureaucracies, management is thought to be "neutral" because it privileges impartiality as a dominant value, *à la* Weber. However, the policy instruments and implementation toolkits of the state are always imbued in politics that reflect political leaders' normative judgments. A representation of the world is thereby inculcated through discrete steering mechanisms, whose objective is generalized adhesion.

At a global level, the continued deployment of Western epistemologies and perspectives in the aid industry, complete with its managerialist paradigm, imposes categories that sustain the image of the Global South as a "strange" or "deficient" Other, in terms of its managerial knowledge (Kwek, 2003). Thus, managerialism, like the technological "know-how" of the West to be shared with "the Rest," takes on the character of a civilizing mission used to pursue the alignment of the world according to dominant interests, a neo-colonial undertaking that embodies the cult of Western modernity and expertise. This is why, as revealed by a significant body of research, aid recipient countries and their local organizations are increasingly adopting—through coercive, mimetic or normative processes—management models that are

largely derived from the West (Bornstein et al., 2007; Claeyé & Jackson, 2012; Frenkel, 2008; Kerr, 2008; Yousfi, 2014).

The managerialist discourse stemming from the aid architecture, which bears both the imprint of the colonial encounter between the West and the non-West and its continuity (Cooke, 2003a, 2003b; Neu, 2003), is therefore complicit in sustaining the empowerment of some actors. Meanwhile, it disempowers others who do not master its techniques, or who have failed to assimilate them. This is exemplified by the following passage from an expatriate Canadian manager working for a humanitarian INGO, in which she is referring to one of her local employees of Middle Eastern origin:

> You know, I'm nothing without her, but she's just not capable, she's a woman in her fifties, so it may be linked to her generation, or to the education that she's had access to—but she's just not able to fill out a strategic document. She doesn't understand the logframe. So, obviously, when you have people from HQ who are asking things about the project, like a health promo strategy—and she's not able to do that! What she does, or what she thinks she's doing—it's just not it! We can't seem to give her the tools. Even if … you know the number of trainings she's had, she's even been sent to Ethiopia for a detachment, to carry out a mission as an expat, and yada yada yada, but I know that she doesn't have that brain, of what we're requiring from a manager. She doesn't have it.[29] (Participant 23, March 9, 2022)

In this quotation, strategic management and the local humanitarian worker's "incapacity" legitimizes and privileges the relative expertise of the INGO's expatriate manager, which is closely aligned to that of the organizations' foreign headquarters. This reinforces the production of categories and power asymmetries: while certain actors are created as strategists and expert managers, others are reduced to troops whose role is to subordinate themselves to the implementation of strategies. Additionally, from a postcolonial perspective, "what we're requiring from a manager" reveals its Eurocentric bias and constructed nature (Prasad, 2003a). Like "altruistic humanitarian," the terms "professional," expert" and "manager" are thence politically and symbolically charged categories, configured through neoliberal aid imaginaries that determine who can speak, from what authority and according to which determinant of expertise.

[29] The original passage is in French and English: "Mais elle, elle est pas capable, c'est une femme dans la cinquantaine, donc c'est peut-être de sa génération, ou l'éducation à laquelle elle a eu accès — elle est pas capable de remplir un document stratégique. Elle comprend pas c'est quoi un *logframe.* Ça fait que c'est sûr que t'as du monde de *HQ* qui demandent des choses du projet, comme une stratégie promo-santé, puis elle est pas capable ! Ce qu'elle fait, ou ce qu'elle pense qu'elle fait, c'est pas ça ! Parce qu'on est pas capable de lui donner des outils. Mais même si… tu sais le nombre de *trainings* qu'elle a eus, elle a même été envoyée en Éthiopie, comme détachement, pour faire une mission comme une expat, puis bla bla bli, mais je sais qu'elle a pas ce cerveau-là de *what we're requiring from a manager. She doesn't have it.*"

Attempting to identify hierarchies at work within this INGO, I asked its expatriate manager—who does not speak the local language—what her added value was. "You spoke of your colleagues who have a hard time producing reports, who can't seem to master the logframe," I asked, "is that your added value"? "Yes," she answered, "that's it."[30]

Authority is also displayed via the use of English managerial vocabulary derived from the corporate sector, the mastery of tools and "techspeak" representing a symbolic currency from which certain actors derive their legitimacy. The following lengthy passage from an individual employed at the Red Cross, in response to the question, "what are you working on right now?" is illustrative of this sense of authority that is generated by managerial capital.

> Right now, I'm working on a number of different initiatives, one of which is very much focused on a meta analysis of learning from the COVID-19 operations globally, and another that is looking to consolidate best practices around management decisions at different levels of leadership—strategic, operational and tactical at both the secretariat level and the membership level—and developing a digital playbook which would guide decision-making. And then, doing a piece of work also that's focused on developing an assessment tool and process for assessing Red Cross capacity for communication—particularly communication in emergencies—so it's essentially a maturity model framework that enables a baseline assessment and monitoring of … well, the identification of planning priorities and the monitoring of progress against those priorities and also the aggregation across national societies or regional or global level of prioritized resource allocations […] And I've worked on developing a different assessment tool and process that's more focused on the service side—so it's the Preparedness for Effective Response, PER—so it looks essentially at all the management components: processes, systems and capacities as they relate to effective response—and the response can look like anything—but it's, you know, using that as your service, and working backwards: what are the core capacities that need to be in place. And that's had a lot of uptake—now we're at something like 90 national societies. It's also become a framework that we're using to do an analysis of reports and evaluations that come from the field, so that we can see, where are the global trends, and where are the regional trends in terms of where are our weakness in terms of those areas. (Participant 28, March 21, 2022)

This excerpt also describes the gatekeeping function of the organization's international headquarters, who produce standards and tools with which to assess the performance of Red Cross national societies. In fact, the plethora of new instruments and requirements developed by the aid industry's gatekeepers in the search for greater effectiveness and accountability—from the format of funding proposals, policy implementation guidelines, gender and diversity inclusion markers, environmental impact assessments,

[30] The original passage is in French: "Donc, c'est quoi ta valeur ajoutée ? Tu as parlé de tes collègues qui ont de la difficulté avec les rapports, d'autres qui ne maîtrisent pas le cadre logique. Est-ce que c'est ça ta valeur ajoutée à toi ?" Participant 30 : "Oui, c'est ça !"

performance measurement frameworks and financial management platforms—are all aspects of the managerialist zeal that has permeated the sector since the 1990s (Barnett, 2005). However, the increasingly sophisticated requirements and standards of donors and other dominant actors such as the Red Cross, which reinforce existing relations of power, have not only defined what constitutes expertise, but they've also concentrated it in the hands a select few global technocrats and managers. And, the tools wielded by these experts, which are steeped in contemporary politics and a colonial heritage, become instruments or "actants" (Alvesson & Sköldbert, 2018) of control, conformity and disqualification. Management tools, simply said, are enablers of domination, because they profoundly shape inter-individual relations, between individuals and their work, but also with oneself. Reminding us that labour struggles are not only waged upon an economic terrain but also at a cultural and symbolic level, Chiapello and Gilbert (2013) further argue that tools serve the primary function of generating knowledge for those who possess them.

The logframe, or logical framework, which was developed by the US military industry and later espoused in the 1960s by USAID (Gasper, 2000), is one such tool whose aim is to capture data for its developer. The tool schematizes an aid intervention in a hierarchical chain of inputs, activities, outputs and outcomes, linked by linear causality and presented in a grid, along with objectively identifiable indicators and means of verification. The logframe is emblematic of results-based management's underpinning technocratic rationale, namely that results will be achieved if inputs and activities are appropriately robust in terms of their technicity and planning. This suggests a positivist belief in the infallibility of cause-and-effect relationships. Then, monitoring and evaluation systems, which are interconnected with the logframe, enable donors to appraise the project progress throughout the implementation phase, and account for overall results against the planned targets upon completion.

Yet, in spite of the plethora of institutional resources, university courses and capacity-strengthening initiatives aimed at achieving universal mastery of the logframe, an extensive literature review paints a rather mitigated picture about the tool's usefulness. Though it has the advantage of visually capturing projects in synthetic cause-and-effect format, I have only been able to find two manuals (Brière et al., 2016; Rosavallon, 2011) and two scientific articles, written by engineers, that tout its merits in terms of enhanced performance (Golini et al., 2017; Golini et al., 2015). Recent research, in fact, suggests that agile management may be better suited to the context of aid while fulfilling the ambition of reducing power asymmetries between collaborating actors (Pellowska, 2023). The overwhelming consensus within

academia, which is at odds with the logframe's sacrosanct status among aid practitioners, is that there exists no positive correlation between use of the tool and improved aid delivery. Martinez and Cooper (2019) found, in fact, that local NGOs must devise "patches" to adapt the tool to their operational realities while satisfying donors' requirements.

Though its champions argue that it motivates desired actions, promotes learning and enhances everything from efficiency, to transparency, communication and accountability, critics suggest that the logframe tends to oversimplify highly intricate social dynamics into biased numeric indicators that fail to capture emergence and complexity. It also neglects of range of non-quantifiable but equally essential activities and outcomes such as being present, witnessing or restoring dignity. Furthermore, the logframe enforces power dynamics between its developers—the donors—and the receiving NGOs who are obliged to adhere to its managerial paradigm, as illustrated by the following passage from a consultant having worked with local NGOs, multilateral agencies and INGOs.

> In a lot of local organizations that I've visited, they want to respond to the needs of the population. They want to capture projects, execute activities. They're doing very concrete things, so management … often they complain about the administrative burden that prevents them from actually concentrating on their activities. And that stems from the burden of processes here in Canada, of responding to accountability requirements, project management, you know … sometimes they have to produce reports every three months! That means that there are people [in local NGOs] who almost on a full-time basis are gathering data and writing reports instead of executing projects […] We have a donor that is very meticulous, that's extremely controlling. I see budgets … where to change anything, I mean, it's months to obtain an approval, tons of questions sometimes just to transfer $2000.[31] (Participant 13, September 16, 2021)

The same frustration is echoed by one of Amani's implementing organizations in Guatemala: "When you get funds from these kinds of projects, you constantly have 40% to 60% of our daily efforts has to be to

[31] The original passage is in French: "Dans beaucoup d'organisations que je visite, oui, quelque part, ils veulent répondre aux besoins de la population. Ils veulent capter des projets, exécuter des activités. Ils sont dans le concret, la gestion c'est un petit peu… même des fois beaucoup se plaignent de la lourder de la gestion qui les empêche de se concentrer sur les activités. Donc c'est sûr que la lourdeur de faire des processus à au Canada, surtout de reddition de comptes, de gestion de projets, tu sais des fois c'est des rapports aux trois mois ! Ça veut dire qu'il y a des gens quasiment à temps plein qui collectent des données et écrivent des rapports au lieu d'exécuter un projet. On a un bailleur qui est très méticuleux, qui est extrêmement contrôlant-là, moi je vois des budgets, là pour changer quoi que ce soit, je veux dire, c'est des mois pour avoir une réponse, des tonnes de questions des fois pour faire un transfert de 2000 $."

focus on administrative activities. It's ridiculous, the amount of paperwork you have to work on, in order to get $2000" (Participant 26, March 15, 2022).

The scientific literature reverberates with similar conclusions that the logframe and its associated accountability mechanisms—the "paperwork" mentioned above—are instruments of control that serve to regulate heterogeneous civil society organizations (Martinez & Cooper, 2017). They do not serve aid recipients, but donors' need to rationalize and account for public spending via the quantification of activities, beneficiaries and results, all in neatly packaged project table (Bornstein, 2006; Brinkerhoff & Ingle, 1989; Dale, 2003; Eyben, 2010; Giovalucchi & de Sardan, 2009; Girei, 2016; Girei, 2022; Hulme, 1995; Kerr, 2008; Mosse, 2001; Simpson & Gill, 2007; Wallace, 2004). Bornstein et al. (2007), in fact, found that in Uganda, where they conducted their research, frontline staff generally ignored the logframe because it was not a relevant tool.[32]

Exemplifying the way in which epistemic territories generate a myopia that insidiously controls what questions *may* be asked within its borders, donors disqualify organizations who lack knowledge of aid's dominant management paradigm and tools. From a systemic perspective, the supremacy of managerial knowledge establishes what is unthinkable: that alternative approaches to the management of aid that do not adhere to the Western paradigm might be both adequate and efficient. The assumption that "not using the logframe equals deficiency" is never interrogated. Donors do not ask *why* many local responders manage otherwise—likely because they already possess capacity, knowledge and skills, or have no need for alien standards, whose added-value remains unconfirmed beyond securing funding. Instead, donors continue to enact their gatekeeping role by imposing a demonstration of compliance with their knowledge systems as a condition for access. Thus, it is through their managerialist discourse that they establish the boundaries within which aid actors can operate. This results in the emergence and maintenance of a specific type of compliant aid entity, while relegating others to the status of non-relevance, and hence, non-existence. By undermining knowing subjects' capacity to interpret their condition, generate knowledge, and engage as equal contributors of managerial and technical insight in emergency responses, donors are partaking in cognitive and epistemic injustice.

[32] This is echoed by both my experience with local NGOs in the Pacific and previous unpublished research among local aid providers in Central and South America, the Pacific and Southeast Asia. When asked to name or describe a managerial tool deemed essential to project success, none of the organizations interviewed suggested the logframe.

5.6 The construction of knowledge deficiencies

The powerplays unfolding within the international aid sector's knowledge terrain extends beyond the construction of boundaries. As aptly argued by Wilson (2006), technocracy is not just about the power associated with the possession of knowledge that is deemed superior, but also "the power of being able to engage in a process of learning, and hence self-reinforcing circle of increasing superior knowledge through assimilating other knowledges" (p. 508). As such, knowledge produced by fringe actors, if deemed useful to gatekeepers, will surreptitiously make its way into dominant discourse, thus depriving its producers' right to claim it as their own. For instance, the gender equality expertise of civil society organizations, which has historically been more sophisticated than that of multilaterals and donor agencies, has been integrated through consultation and acquisition processes into instruments such as Canada's Feminist International Assistance Policy. As an employee of Amani remarked,

> Organizations like the African Development Bank, or even the World Bank, the Asian Development Bank, they're very behind on that question, you know. It has not been part of their preoccupations. But now they are starting to integrate it a lot more. So, we've actually been asked recently to do a training at the World Bank on gender equality. You know, you would think it's the opposite![33] (Participant 7, August 12, 2021)

While integrating outside expertise to enhance performance is decidedly laudable, the way in which this is achieved may at times resemble co-option. If, for instance, external knowledge is perceived as a significant threat to dominant aid orthodoxy, it may be manipulated and monopolized through professionalization and mainstreaming, thereby neutralizing its dissenting potential. For instance, Cooke and Kothari (2001) have documented how the World Bank's integration of participatory methods (see Chambers, 1994; 1998), which were originally conceived in the South to challenge top-down aid and the institutionally produced ignorance of aid professionals, have led to a dilution of their transformative potential. Instead of representing an end which is decidedly politicized, participation has been reduced to a technical means. The scores of resources, courses, toolkits and certifications on participatory rural appraisal (PRA) now offered by the World Bank reveal that participatory planning, which was intended as

[33] The original passage is in French: "Les organisations comme la Banque africaine de développement, même la Banque mondiale, la Banque asiatique de développement, sur les questions EFH, sont encore loin, tu sais. Ça a pas été des préoccupations. Maintenant ils commencent à l'intégrer beaucoup plus. On a fait des formations à la BM en égalité femmes-hommes récemment. Tu sais, on aurait pu penser l'inverse."

an emancipatory process for crisis-affected communities, has been manipulated and incorporated into the gatekeepers' repository of planning knowledge. Its counterhegemonic potential has been neutralized.

A comment by a participant who was mandated to design evaluation tools for the World Bank further reflects this dilution: "It's extremely challenging, because they're just not responsive," she remarked. I then asked for clarification: "So you're proposing participatory approaches, but you're meeting some resistance?" She answered, "Well, I don't think it's resistance, so much as apathy." (Participant 44, April 8, 2022). Thus, a symbolic involvement of local people lends credibility to decisions that have already been made without destabilizing the decision-making power of dominant actors. This decoupling of discourse and action was also remarked upon by another consultant: "You know, it really annoys me to know that we've applied all the norms and priorities of Global Affairs Canada in a call for proposals in which they've already defined the intermediate results, all within a limited number of pages, and then we honestly believe, 'Ah, yes, this intervention is really aligned with the needs of the population.' We don't even have time to consult the population!" (Participant 13, September 16, 2021).[34] This suggests that "participation," as conceived and deployed by technocrats, is in reality a well-honed ritualistic instrument for engineering consent and conformity, led by outsider experts in which top-down planning is imposed from the bottom-up. Likewise, the Poverty Reduction Strategy Papers (PRSP) produced by receiving states, a conditionality imposed by the World Bank in response to the Paris Declaration's insistence that aid strategies should be devised nationally, are typically produced by foreign technocrats. As a result, they are homogenous documents in spite of receiving countries' different histories and contexts. Instead of being the product of participatory processes leading to profound ownership, PRSPs are part of the neoliberal reform package of the World Bank (Wilson, 2006).

The co-optation and assimilation of alternative approaches by gatekeepers reinstate the importance of the "expert" as an exclusive agent with a self-reaffirming global privilege: consolidating and producing a rapidly changing and increasingly sophisticated body of knowledge and discourse. The knowledge "deficiency" of local actors is therefore the result of a process in which symbolic capital, as a form of currency that circulates among dominant actors, lies just beyond the reach of fringe actors. They produce

[34] The original passage is in French: "Ça m'énerve de savoir qu'on a bien appliqué toutes les normes et toutes les priorités d'Affaires mondiales Canada dans un appel à propositions pour lequel ils ont déjà défini les résultats intermédiaires, dans un nombre de pages limité. Puis ensuite qu'on se dise honnêtement 'Ah oui, cette intervention, elle colle vraiment à ce dont ont besoin les population'. On a même pas le temps de les consulter les populations !"

and possess knowledge, but not of the right kind. The most evident manifestation of this epistemic hierarchy is the industry's obsession with organizational assessments, which are intended to diagnose local organizations' shortcomings or ills, and define remedial "capacity-building" interventions proposed by donors and INGOs.

A participant from a bilateral bank working in Guatemala explains how they select local NGOs to carry out projects, on the basis of their capacity, which is demonstrated in their project proposal. In the case we were discussing, the project had been designed by a local organization working to address chronic malnutrition in remote areas through the revival of ancestral agriculture, but the proposal was written by an American volunteer who spoke English and was able to package the community's project according to the donor's application form. Selected funding recipients are then subjected to a second capacity assessment:

> Before, to use the first cent, we do a training, we explain our procedures, we do an on-site visit to understand how they manage their projects, their funds, we do like an assessment about how they are organized and provide recommendations. And they have, it's a commitment from them, they need to comply with our recommendations so they can receive the funds. Exactly. If they need to hire someone, we recommend that. "You need to hire an accountant," let's say. (Respondent 21, March 8, 2022)

The idea of capacity building, as we saw in Chapter 2, emerged in the aftermath of WWII under the guise of technical assistance, whose delivery was later extended from states to civil society organizations in the Global South, as a form of organizational development aimed at enhancing the technical and managerial capacity of local actors (Smillie, 2001). It is overwhelmingly perceived as something that actors in the Global North unidirectionally "provide" to actors in the Global South, rather than a reciprocal process. The underlying rationale, then, is somewhat reminiscent of colonialism's civilizing mission, in which the knowledge of the West, firmly rooted in its ethnocentric assumptions, is imparted to actors who are thought to be suffering from a shortage (Said, 1978). Prasad (2003a) echoes this observation: "If a non-Western organization does not deploy practices and/or policies considered 'normal' in the West, it is considered deficient, lacking and in need of training, modernization or innovation" (p. 32).

As previously remarked in Chapter 4, capacity building as a topic generates much debate and activity within the aid sector. On the one hand, it embodies the technocratic and managerialist paradigms of gatekeepers, which give rise to training agendas, consultancies and certifications that sustain experts'

claims to authority and hierarchies of knowledge. On the other hand, it enables certain actors to deploy their agency to acquire the symbolic capital which is needed to be considered as a trusted or legitimate aid provider, according to the criteria of donors. And even upon demonstration of compliance, exclusionary dynamics remain. An employee from a local NGO in the Philippines explains that even though her organization is nationally recognized as a leader in emergency response, UN agencies and foreign NGOs tend to capture the bulk of emergency funding that is available in the country:

> They [the funders] don't feel that local NGOs have capacity, so we have to show that we're compliant to this requirement, that we should meet all data, that we are taking all the reportorial requirements. This instead of seeing this project as a joint activity and learning process that they provide, that we can share. It's important that we can share how things are done, because we have encountered really many problems, in responses done by international organizations. (Participant 31, March 23, 2022)

Epistemic hierarchies are clearly demonstrated in this last passage: Some knowledge, i.e., that which is generated locally, is deemed unessential to project success. The Philippine organization is not viewed as a producer of knowledge, providing yet another example of cognitive and epistemic injustice.

Capacity building serves another insidious purpose. Generally, capacity building interventions are designed as the result of a capacity assessment, which is intended to situate, formally or informally, the receiving organization against the performance standards of its Western funder. Capacity assessments, however, are not neutral processes, because they reflect the paradigms and prejudice of their developers. Those who carry them out, often expatriate staff or consultants, are granted the authority to pass judgment on the organizational health of local NGOs. In passing judgment, they create deficiencies that legitimate their own expertise. Here, an analogy can be drawn with Illich's (1976) concept of "diagnostic imperialism" and the authority with which a physician, as an acting member of a profession, "discovers" disorders rather than diagnosing health. This reveals an important bias, namely that assessments focus on lacunae. This in turn creates new pathologies, which then multiplies patients. Similarly, the capacity assessments imposed upon local NGOs as a condition for their admission within the aid territory certifies their inferiority. Local NGOs are then drafted into training programs to "earn" certificates in compliance, which measure their progress towards emulating the training providers' expertise.

Drawing from the postcolonial theory of Bhabha (1994), Claeyé (2014) qualifies emulation—or mimicry—as a strategy through which local NGOs obtain their legitimacy. While mimicry entails a form of agency,

Rahnema (1997) evokes a stealthier project: colonization from within, which contrary to the master-slave relationship, sets out to modify populations' subjectivities. Foreign knowledge acts like an "intimate enemy" by making its target population "freely" participate in a transformation, of which the end goal is complete internalization of one's deficiency, and of foreign knowledge's saving grace. A "truth" is thereby constructed and sustained by gatekeepers.

5.7 Conclusion: what is a machine without cogs?

In this chapter, I have argued that aid's epistemic territory is constructed by the knowledge producing—and deficit producing—machinery of gatekeepers. It functions in a form of perpetual motion, unperturbed by external disturbances which are either denied access, assimilated, co-opted to neutralize their potential for dissent, formatted into conformity through coercive, normative or mimetic processes. Aid is thereby depoliticized, while attention is turned towards the implementation of technical and managerial fixes in an effort to reform what isn't working. However, the application of technocratic measures to overwhelm ineffective technocratic aid, is an ultimate attempt to solve a crisis by escalation. As a result, power and politics are sanitized, if not entirely obfuscated, from the localization reform. The potential questions that may bear more reformative potential on the industry are not addressed. Instead, localization is attempting to coordinate a redistribution of power within the confines of a highly structured power complex.

The localization agenda, with its centrally controlled attempt to embrace the periphery within centrally defined parameters, is a bit like Ghana's Ministry of Decentralization and Local Government: at odds with its stated purpose, oddly paradoxical. A Ghanaian public servant I spoke with could not help but break into fits of laughter every time she mentioned it: "The Ministry of Decentralization! (Laughter) Local government and decentralization, OK? (Laughter) They make sure that things go *doooown* [vocal emphasis] to the local level. (Long bout of laughter)" (Participant 33, March 28, 2022). The ministry, whose first objective is to "initiate and formulate policies on Local Governance, Decentralisation, Rural and Urban Development," receives funding from several multilateral and bilateral donors, including Germany's Federal Ministry for Economic Cooperation and Development (BMZ), whose 15-year grant towards decentralization reforms in Ghana has achieved the following results:

> Since 2016, […] a local governance platform has been set up to ensure a coordinated exchange between experts and decision makers in the decentralisation process. A web-based monitoring and evaluation platform for collecting data from local authorities has been developed and piloted to

> feed into the government's SDG reporting system. (Gesellschaft für Internationale Zusammenarbeit, n.d.)

Experts, decision makers, coordinated, data, monitoring and evaluation, web-based technology, reporting and the Sustainable Development Goals: on a most basic level, a rapid discursive analysis of these two sentences speaks of centralized control, not the opposite. The same can be said about the Grand Bargain's website—the self-affirmed roadmap to localization hosted by the UN's Inter-agency Standing Committee (IASC), whose introductory sentence announces the following:

> This is the official website of the Grand Bargain, a unique agreement between some of the largest donors and humanitarian organizations who have committed to get more means into the hands of people in need and to improve the effectiveness and efficiency of the humanitarian action (Inter-Agency Standing Committee, n.d.).

We know that aid is not a simple manifestation of human altruism but the machination of powerful global governors and gatekeepers. Getting "more means into the hands of people in need," therefore, is not synonymous with almsgiving. Conditions apply. The machine, whose technocratic operators and overseers are hundreds of kilometres removed, if not continents apart, from the populations it hopes to assist, requires cogs.

In a neoliberal world order, who else is better positioned to occupy this role than donors' favoured subcontractor, the INGO? Institutional theories on the emergence of the third sector suggests that NGOs respond to residual needs which the state apparatus is unable to address (Laville & Nyssens, 2017) but in democratic societies, they also assume an advocacy role, ensuring that governments are held accountable to their policies and the populations they serve. In such a context, INGOs are privileged allies of both state and populations. As intermediaries, they are contractually bound by grant agreements to observe the interests of their funder (which includes foreign policy), but also to provide, by virtue of their mission, essential service delivery to groups in need. And, as argued in this chapter, the overwhelming perception sustained by the aid industry is that populations and the local organizations that cater to them require *expertise*, not just *means*. In fact, for local organizations, access to these means hinges upon the demonstration of technical and managerial knowledge which mirrors that of donors. As subcontracted actants of overseas assistance, INGOs are thereby instrumentalized as shepherds of the state, to keep watch over the epistemic territory of aid, and ensure that all those who have been admitted—namely compliant local NGOs who cater to the needs of populations—do not wander too far. Should alterity be detected among newcomers, and perhaps perceived as disregard or deficiency (which, as I have argued,

is a construction), it is the role of shepherds to assess the dysfunction and provide remedial action through a process they've called "capacity building." In such a way, epistemic order is retained within the territory, and the gatekeepers' machine, whose once disparate actors now fall into rank, pursues its work, unperturbed.

In the next chapter, the role of shepherds will be further discussed, illustrating an ambivalent posture. On the one hand, they tend to the interests and standards of their funders and gatekeepers, whose knowledge they transfer to local subcontracted organizations through capacity building. On the other hand, as champions of localized aid, they also tend to local organizations by orienting them towards the adoption of donors' sought-after skills, which will facilitate their entry into the humanitarian ecosystem.

CHAPTER 6: THE SHEPHERDS

6.1 Advocates of the weak and the poor

In the previous chapter, I argued that the humanitarian sector is a guarded arena whose knowledge parameters are defined by powerful gatekeepers—donor agencies, the ICRC and IFRC and the United Nations—who exert control over their territory by deploying mechanisms aimed at preserving the primacy of their episteme. Through tactics such as co-optation of dissenting knowledge, marginalization of knowledges otherwise, constructing knowledge deficiencies and rewarding compliance, these actors perpetuate their technocratic mindset and a somewhat unidimensional form of expertise. Aid "experts" then deploy a series of increasingly sophisticated managerialist approaches in the search for greater effectiveness and efficiency, without interrogating the validity of their claims to expertise. As such, as in a self-fulfilling prophecy, their privileged position as gatekeeper maintains local organizations in a perpetual lack of knowledge compared to that of "experts." Power asymmetries within the sector are thus maintained by a knowledge-based barrier.

Aid, however, is no longer solely the prerogative of these gatekeepers. As we saw in chapter 2, the neoliberal state reforms of the '80s gave rise to the commodification of social welfare services, including development and humanitarian assistance. Many INGOs were enlisted as low-cost contractors whose networks in the Global South provided access to remote populations, and whose knowledge of context-specific dynamics was deemed complementary to that of technocrats employed in the Global North (Smillie, 1995). INGOs, however, also serve a more discreet purpose, which is that of fostering public support for donor countries' foreign policy. For instance, Canada's enduring model of deploying several thousands of volunteers abroad annually via Canadian INGOs was described by a participant from Amani as a public awareness strategy whose objective is that "more Canadians have a better understanding of social issues, and a more important base of Canadians that understand aid budgets, that understand those actions undertaken by Canada."[35] (Participant 10, September 2, 2021).

[35] The original passage is in French: "[…] une façon d'atteindre l'objectif que plus de Canadiens comprennent plus les enjeux sociaux, et une base de Canadiens plus importante qui comprennent ces budgets-là d'aide, qui comprennent ces actions du Canada."

This suggests that INGOs are instrumentalized not just as service providers, but also as generators of public consent. However, they serve a third and most crucial function for the state, which is that of orienting local aid organizations towards a format that is recognized as "legitimate" by donors. Likened to Trojan horses through which donors flex their political power (Temple, 1987; Wallace, 2004), INGOs facilitate the expansion of Western epistemes under the guise of aid. Beneath the veneer of assistance, well-intentioned emergency responses and altruistic volunteers, lies a Western faith in the supremacy of its technocratic, managerialist and economic mode. However, Demaria and Acosta (2017) and Yousfi (2010) consider this to be a false consensus. The progressive managerialization and professionalization of INGOs, which has occurred as a result of competitive market dynamics, incentivized alignment with donor priorities and demands for accountability (Agyemang et al., 2017), has transformed them into ideal vectors of Western hegemonic expansion (Girei, 2016). While they champion the rights of the worlds' most vulnerable populations, they also inadvertently and paradoxically advocate for the most powerful, through the uncritical diffusion of Western managerialism.

As this chapter will proceed to illustrate, INGOs occupy a privileged, but ambivalent nodal position in the aid chain as intermediaries. They link gatekeepers and local NGOs in an increasingly dense transnational network of actors. They are not simple custodians recruited by the state to tend to the knowledge of the aid industry—but shepherds, mandated to steer diverse actors towards the adoption of gatekeepers' standards. Their tacit role is to detect threats which might compromise the hegemonic status of elite actors, via organizational assessments and low-risk pilot projects. To reduce the risk of encroachment by knowledges otherwise from the fringes of the territory, INGOs are tasked with "capacity building," which orients local NGOs towards the format desired by donors. This, they believe, is in the best interest of local NGOs whose lack of means is thought to result from their lack of fundamental technical and managerial knowledge. Armed with a chartered accountant, the latest industry lingo, a gender policy, project logframes, standard operating procedures, a Sphere training certificate and myriad other symbols that mirror gatekeepers' knowledge, those local actors approaching the gate may then expect to be greeted with a nod, and "I bid you welcome." In English, of course.

6.2 The chosen ones

Since the early 1990s, the paradigmatic shifts observed among INGOs and local actors reflect an adaptation to the effectiveness imperative of the Paris Declaration, calls for greater professionalization inspired by

private sector practices, and attempts at improved coordination amidst accusations of humanitarian interference and chaotic inefficiency. No longer able to rely exclusively on the moral authority of "saving lives," INGOs had to demonstrate their competence through specialized knowledge and managerial prowess. More recently, demands that the sector interrogate its role in sustaining colonial dynamics and address sexual misconduct within its ranks, also reflect changes in INGOs operating environment that threaten their legitimacy.[36] This provokes organizational adjustments such as revised hiring practices, whistleblowing mechanisms, and human resources policies aimed at achieving greater equity. Some INGOs drifted into nexus programming and began to include peacebuilding and post-conflict reconstruction into their project delivery models, others, such as *Médecins sans frontières*, resolutely put on the brakes, citing confusion and contradiction (Barnett, 2011) and the risk that aid, if left in the hands of local actors, risks cooptation into the political agendas of those who wish to prevent foreign witnessing (Schenkenberg van Mierop, 2016). Thus, they insist on responding to medical gaps only—even if this approach typically perpetuates such gaps—as will be argued in Chapter 8.

The dual responsibility orientation of INGOs, by which they are simultaneously held accountable to donors and beneficiaries for the quality of their interventions (Ebrahim, 2003), is further complexified by the addition of a third dimension. "Identity" accountability (Unerman & O'Dwyer, 2007) requires INGOs to abide by the same high moral standards that they proffer by virtue of their mission, and the conditions imposed by donors can engender a variety of negative consequences such as the invalidation of participatory approaches and an erosion of their fundamental values. A form of decoupling ensues, in which INGOs create a "paper reality" that adheres to externally imposed standards without substantially altering their core, to appease the requirements of their multiple stakeholders (Elbers & Arts, 2011; Girei, 2022).

However, none of these elements have threatened the *raison d'être* of INGOs quite as effectively as Southern NGOs' increasingly insistent claim to greater participation, decision-making power, autonomy of action, access to funding and visibility *vis-à-vis* their foreign collaborators. Unsurprisingly, this has provoked an identity crisis among INGOs who sought to rebrand, if not reinvent themselves according to

[36] See Dodds' (2023) investigative report on the sexual abuse of Congolese women by aid workers during the Ebola crisis in North Kivu. The much mediatized case of sexual abuse perpetrated by Oxfam GB staff in Haiti is another recent example, detailed in an independent investigation available on the organization's website, https://d1tn3vj7xz9fdh.cloudfront.net/s3fs-public/haiti_investigation_report_2011.pdf.

the shifting tides, while attempting to maintain their autonomy within the financial, symbolic and informational bind of donors.

This then begs the following question: If, as supporters of the localization agenda and champions of locally provided aid, INGOs can no longer strategically or morally retain their role as first responders, what is their purpose? The answer is not a simple one.

Trapped in projectified modes of funding and ever-shifting global agendas and foreign policy, aid INGOs' organizational culture and identity are inherently linked to how aid is designed at the state level. This forces them into making choices, whether knowingly or unconsciously, that reflect the interests of gatekeepers. INGOs are entrenched in the power-knowledge complex of their donors, and their legitimacy is conferred upon them by public funds, which as a seal of approval, grant them a privileged access to aid's epistemic territory. Thus, compared to those fringe actors who have not been admitted into the system, and as revealed in Chapter 4, INGOs often believe that their value-added is "knowledge." As the most important symbolic currency in this landscape, knowledge is then doled out to local NGO implementing organizations, alongside funds or emergency supplies. The distribution of expertise, called "capacity building" is associated with ideas and practices intended to optimize local actors' performance, which responds to all three forms of INGO accountability—to donors, to beneficiaries, and to their identity as champions of local NGOs. This can result in an oddly condescending and ambivalent narrative of wanting to "help" local actors, including their own satellite offices who employ local staff, reach "maturity." The following statements from Amani's employees illustrate this ambivalence, while hinting at vestiges of modernist thinking and the managerialist logic of capacity-building and performance prescriptions:

> I think that one of our contributions is that we bring change, and often we'll help people discover things that they didn't know in their country, so it's hard to talk about, sometimes, for local participants, to imagine something that they don't know and express it as a need, it can be a technology, or something else.[37] (Participant 1, June 23, 2021)

Another criticizes his colleagues' inability to trust local organizations while simultaneously using a paternalistic analogy to explain the need to "let go":

[37] The original passage is in French: "Je pense qu'une de nos contributions c'est d'amener du changement, et souvent on va, on va aider à faire découvrir des choses que les gens connaissent pas dans le pays, donc c'est difficile des fois de, pour les participants locaux, d'imaginer quelque chose qu'ils ne connaissent pas et de l'exprimer comme un besoin, peut être une technologie, ça peut être autre chose."

> You teach a child … you know, I don't like the image, but you understand? It's the easiest image. If you help a child to walk, eventually you'll have to let him go, eventually he'll fall, he's going to get hurt or will hurt you. But it's OK. The objective is that when he becomes an adult, your process will be achieved. I mean… I'm proud of my child who's an adult today, who's autonomous or whatever, but if every time you say, "Ah, but I can't, we can't trust them," or "Ah, you know, they don't have the financial capacity or the collateral, they don't have this or that."[38] (Participant 7, August 12, 2022)

Referring to one of their satellite offices in the Global South, another participant from Amani adds that local staff are hired without necessarily possessing the required skill sets, which then justifies his role in Canada:

> You know, it's not in two days that you'll hire someone and that person will be able to respond to a call for proposals and produce a strategy for this or that, produce an adequate proposal, you know? So, for what's missing, those individuals have to be matched to people like me. To be coached, to be accompanied.[39] (Participant 4, August 4, 2021)

Recollecting the emergence of a few cases of Ebola in Congo-Brazzaville during the COVID-19 pandemic, another participant from the Red Cross explains that in response to the international mobility restrictions brought about by the pandemic, he suggested that they simply dispatch a local operations manager from the national society:

> I said, "Just give him my phone number or Skype, and I'm on standby, 24-7." If he's got a problem, whatever the case, he calls me and we go through his different options. We do a risk management planning, resources planning. I'm the coach, and that's it. He goes off and does his thing. So, we did a lot of online coaching and mentoring over the last few years, and you know what, it turned out pretty well.[40] (Participant 24, March 11, 2022)

[38] The original passage is in French: "C'est comme tu apprends à un enfant… j'aime pas l'image, mais tu comprends-tu ? Tu comprends, c'est la plus facile. Si tu aides un enfant à marcher, un moment donné il faut que tu le lâches, un moment donné il va tomber, il va se faire mal ou il va te faire mal. Mais c'est pas grave. L'objectif c'est que, une fois qu'il va être adulte, ton processus va être atteint. Je veux dire… je suis fier de mon enfant qui est un adulte aujourd'hui, qui est autonome et peu importe, mais si à chaque fois tu dis 'Ah oui, mais je peux pas, on peut pas leur faire confiance', 'Ah tu sais, ils ont pas la surface financière, ah, il y a ci, ils ont pas le collatéral, ils ont pas ci, ils ont pas ça'"

[39] The original passage is in French: "Tu sais, je veux dire, c'est pas en deux jours que tu vas embaucher quelqu'un puis il est capable de répondre à un appel d'offres pour faire une stratégie de ci, pour faire une proposition apte, comprends-tu ? Ça fait que là, ce qui manque, il faut que ces gens-là, soient jumelés à des gens comme moi. Soient coachés, soient accompagnés."

[40] The original passage is in French: "J'ai dit, 'fais juste lui donner mon numéro de téléphone ou skype, puis moi je suis en stand-by, 24 sur 24, 7 jours sur 7'. S'il fait face à un problème, quoi que ce soit, il m'appelle puis on passe au travers des différentes options. Au début on se fait un planning risk management, resource management. Je suis le

These four passages exemplify the shepherding function of INGOs. Paradoxically, these same individuals and several other participants from different organizations also argued that skills and expertise *do* exist in aid recipient countries; however, they remain hierarchized *vis-à-vis* those of expatriates who serve as coaches or mentors. Highlighting the moral and ethical implication of dispatching foreign aid workers, a reflection brought about by the localization and decolonization agenda, one participant nevertheless equates hiring local staff or transferring control to local NGOs to a compromise:

> There's no way we will send a bunch of gringos to work there [in Haiti]. No way. If competencies exist in the country, we hire those competencies. So, we're ready to pay the price of "maybe a little slower, less this, less that," but that's not always necessarily the case, this being said."[41] (Participant 42, April 5, 2022)

Citing accountability to local populations as a justification for expatriate expertise, the previously quoted Red Cross employee adds:

> When I was with [anonymized INGO], there were debates on the topic of localization, but absolutely no compromise on quality of services. It was like, if the Ministry of Health, or that local organization, is not capable of applying the same standards as [anonymized INGO], then we go in. Do we want to compromise the quality of services towards beneficiaries in the name of localization?"[42] (Participant 24, March 11, 2022)

These cited passages are wrought with tensions—at times subservience to dominant managerialist narrative, then ambivalence or outright contestation and antagonism. However, they all point to knowledge as a keystone in the dialectic relation between INGOs and local aid providers. Though it may champion "local expertise," the practice and politics of knowledge production, preservation and distribution within the aid sector constrain INGOs and local actors in a relation of power that sustains inequality. As shepherds, INGOs' proclaimed role of technical experts in the delivery of specific services, leads to an unequal playing field between them and the communities or movements they support (Banks et al., 2015; Fowler, 2000). However, acting in the interest of populations whose needs and rights they

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coach, puis *that's it*. Il part puis il fait ses affaires. Ça fait qu'on a fait beaucoup de coaching et de *mentoring online* dans les deux dernières années, et ça a quand même bien été."

[41]The original passage is in French: "Il n'y a pas question qu'on envoie un gang de gringos faire les travaux, travailler là-bas. Il en est pas question. Si les compétences existent au pays, on engage les compétences. Donc, on est prêt à payer le prix de peut-être moins vite, moins ci, moins ça, mais ce qui n'est pas nécessairement le cas."

[42] The original passage is in French: "Quand j'étais avec [ONGI anonymisée], il y avait beaucoup de débats là-dessus, mais aucun compromis sur *Quality of services*. C'était comme, si le ministère de la Santé ou telle organisation locale est pas capable d'avoir les mêmes standards que [ONGI anonymisée], ben on y va. Est-ce qu'on veut compromettre la qualité des services pour les bénéficiaires au nom de la localisation ?"

represent, INGOs are involuntarily complicit in epistemic subordination and oppression. Despite the wishes of many, their relationship to local organizations is always unequal. In their wake, INGOs leave a trail of homogenous standards and prescriptions—gender policies, logframes, double-entry bookkeeping, strategic plans—that are harbingers of a new globalized modernity: management.

INGOs' seeming blindness to their own power is further reflected in their axiological use of the term "partner" to describe their relationship with local actors (Contu & Girei, 2014). Their aversion to the term "subcontractor" recasts local organizations as equals, thereby obfuscating tension and inequality, and leading to inter-actor dysfunctions such as lack of trust, fear of reprisal and even falsification of data (Bornstein, 2006). The subtly coercive, yet benevolent, practice of shepherding one's "partners" therefore negates antagonism, which then deprives both shepherds and local NGOs of mutual learning opportunities.

Meanwhile, research undertaken by Wallace (1997), which is also corroborated by my own experience, suggests that local organizations are more lucid in their recognition of asymmetry. They rarely distinguish between INGOs and funders (both are often synonymously referred to as donors), as both are associated with foreign funding and narratives, and similar technocratic accountability requirements. They are also quite perspicuous in their analysis of INGO's propensity to establish satellite offices in the Global South. This practice allows the local branches of large, well-known international organizations to continue "building the capacity" of local actors, while claiming the lion's share of international funding earmarked for "local" NGOs. Because of their brand-name recognition and symbolic capital (which includes knowledge desired by donors), they simply outcompete homegrown actors, as illustrated by the passage that describes the situation in the Philippines:

> On a national level, one of the commitments [of the Grand Bargain] is 25% of humanitarian funding goes to the national and local NGOs but in practice, it is still … it's a long road to freedom (laughter) because, like, international aid organizations are also establishing their local offices here. So, they're local actors, so that is one problem. Like Save the Children, Plan International, Care, Oxfam … they're all established at the national level, and operating at a national scale, because they're registered locally, so they are considered a national responder too […] So there's a problem that's trickling down to the local NGOs, it's hard, because we get less contract work. So I think it's a problem, even after the Grand Bargain commitments. (Participant 31, March 23, 2022)

Speaking of this same trend within the sector, using Oxfam's federated model to illustrate his point, another participant from the Global North (not employed at Oxfam) adds:

> So, listen, somewhere we've created another actor, so yes … it's interesting inasmuch as the Oxfam brand provides a certain kind of legitimacy, of confidence for donors, which will facilitate access to funding. Because, ultimately, there is a real transfer of knowledge, of procedures, of tools, because "we are part of the same family with the same management norms." Beyond that though, they're another actor. I really don't think that the countries of the South are lacking NGOs. At the end of the day, they're competing with each other. It's become a business like any other […] But it's not just about their status, because you can open an Oxfam in Burkina, and half of their staff are expats from the North. You're not really solving any problems there. So you need to work on creating professional opportunities and competencies among the people of that country. Competencies, which, when people eventually leave that organization, are reinvested in civil society, other organizations, or the ministries. (Participant 13, September 16, 2021)[43]

In addition to reaffirming the primacy of expertise in INGOs' definition of their purpose, this last passage reveals that their conduct, which could be considered unfair and even harmful to homegrown aid providers, is paradoxically justified by the ability to produce "competent" locals who will then lead the country's social transformation. How this will be achieved by organizations weakened by INGOs' "business conduct" remains to be seen.

6.3 Capacity building or steering?

As evidenced by these last passages and also argued by Alcadipani et al. (2012) and Frenkel (2008), the importation of Western management knowledge is often considered to be the only channel through which local actors can improve their productivity and effectiveness. This unidirectional flow of knowledge is also supported by business schools in the Global South (Dan Rani Guero & Gueye, 2022) whose adoption of Western managerialism, as documented by Yousfi (2014), has benefited a westernized managerial elite to the detriment of holders of indigenous management knowledge. The capacity training dispensed by INGOs achieves a similar result: While they may produce individuals, and hence local organizations, capable of securing funding because they understand donors' systems, they also inhibit the possibility of alternatives.

[43] The original passage is in French: "Écoute bon, quelque part, on vient créer un acteur supplémentaire donc oui, c'est intéressant dans la mesure où le brand Oxfam donne une certaine forme de légitimité, de confiance à des bailleurs, qui va permettre de capter des fonds plus facilement. Parce que finalement il y a un vrai transfert de connaissances, de procédures, d'outils, 'parce qu'on fait tous partie de la même famille avec les mêmes règles managériales'. Après, après ça va être un acteur supplémentaire. Et puis je pense que les pays du Sud maintenant ne sont plus en manque d'ONG. Finalement, elles sont elles-mêmes en compétition les unes avec les autres. C'est devenu une business comme une autre […] Mais il n'y a pas qu'un enjeu de statut là, parce que finalement tu peux ouvrir un Oxfam au Burkina, et la moitié du *staff* c'est des *expats* du Nord. Tu règles pas beaucoup de problèmes là. Alors il faut travailler aussi sur le fait de créer des opportunités professionnelles, créer des compétences chez les gens du pays. Des compétences, quand les gens éventuellement quittent cette organisation, là sont réinvesties dans la société civile, d'autres organisations, ou vers les ministères."

While capacity building should foster increasing room for maneuver among local NGOs; instead it appears to be orienting diverse local actors towards the adoption of a single, common model that shifts according to the weathervane of donors' priorities. Furthermore, the sector's managerial approach, rendered ubiquitous via INGOs' increasing rapprochement with donor agencies who impose upon them their efficiency and effectiveness imperative. This rationality is then transmitted down the aid chain towards affected populations.

Capacity building can therefore be equated to *steering*, which bears a certain resemblance to Foucault's concept of pastoral power (Foucault et al., 2004). According to him, the herd and its individual members are the object of the shepherd's concern. Under the exercise of pastoral power, humans are deprived of agency and governed in much the same way as docile animals, as the control of subjectivity inhibits the development of counteractions on the part of members of the herd. The exercise of this power is neither repressive nor authoritarian. Rather, it is a power of care, fundamentally benevolent and reminiscent of biblical imagery, in which the shepherd (i.e., Jesus) does not govern for himself, but entirely for the benefit of others. Contrary to gatekeepers, the shepherd does not reign upon a territory but rather upon a multiplicity in movement. He tends to the well-being of his herd and drives it towards new pastures, ensuring that no harm comes to any of its members; no one is to be left behind, harmed or weakened.

The shepherding discourse is recurrent in the aid narrative and specifically in the agency-produced documentation on localization, which points to INGOs' appointed capacity strengthening role. For instance, the *Guidance note on arrangements between donors and intermediaries,* published by the Inter-agency Standing Committee (2020) on behalf of the Grand Bargain's Localization Workstream explains that "arrangements should be structured so that the international intermediary's role is mutually understood to be one of supporting, nurturing and overseeing local partners, so the latter can deliver the most effective results" (p. 2). The following excerpt of a conversation with a participant also illustrates this benevolent steering at work, which is undertaken to protect local NGOs in Africa (here called "partners" in typical power-diffusion form) from reprisal due to lack of conformity with foreign managerial knowledge. The Southern NGO is displaying divergent behaviour, and must be brought back to order by its INGO shepherd, lest its lifeline—which is its access to the aid territory, and hence funding—be threatened.

> Participant 6: There are lots of new protocols, you know, that relate to fraud, and now we have all these things in place where info can quickly make its way up to GAC [Global Affairs Canada, the

donor]. So, we're really careful about the way things are presented (laughter), you know, at the financial level, everything that might be misinterpreted. But in our case, we haven't yet come to that, but our regional finance controller did an audit, which revealed that there were many, many issues—potentially risks, so…

Author: Risks … related to the antifraud protocols?

Participant 6: Yes, namely because our *partners* [italics added for emphasis] don't respect our project management manual at all, you know, like the need to obtain three vendor quotations before making a purchase, and to seek approval for purchases above a certain threshold.

Author: And what did you provide them in terms of information on procedures to follow? Were there training sessions?

Participant 6: Yes, yes, there were three training sessions. They've also had a least eight meetings with the controller, who held a three-day session with them. (July 21, 2021) [44]

Another participant from a multilateral bank in Latin America acting as an intermediary project manager for Japan's bilateral aid agency, describes a similar process whose purpose is to steer a wayward actor towards the dominant managerial paradigm:

In the case, for example of (anonymized local NGO), at the beginning, we need to be close with them, but as they were learning our procedures, they were able to do, after six months they were able to do by themselves, and we saw that they were more like accurate, and following our procedures like that. And sometimes there are some organization that can have very good systems, that we say "OK, your systems are good," they are let's say compatible with what we need, or what we use. In other cases, they don't have that, so we say, "you need to follow our procedures in a more strict way, in a more by the book." (Participant 21, March 8, 2022).

[44] The original passage is in French: Participante 6 : « Il y a plein de nouveaux protocoles, tu sais au niveau de l'antifraude, ou maintenant on a des trucs en place où ça peut vite remonter jusqu'à AMC — donc on fait attention à comment les choses sont présentées (rires), tu sais, au niveau financier, tout ce qui peut être mal interprété, mais bon dans notre cas, on n'est pas arrivés à ça. On a eu une vérification interne de notre contrôleuse régionale qui a quand même montré qu'il y avait beaucoup, beaucoup d'enjeux — potentiellement des risques, donc…
Auteure : Par rapport à la… aux protocoles antifraude ?
Participante 6 : Oui, entre autres, parce que nos partenaires ne respectent pas du tout le manuel de gestion du projet en fait, donc tu sais, toute la question de chercher trois *pro forma* avant de faire un achat, de faire approuver les achats au-delà d'un seuil de dépenses.
Auteure : Puis, qu'est-ce que vous leur avez transmis comme information sur les procédures à suivre ? Est-ce qu'il y a eu des formations ?
Participante : Oui oui, il y a eu trois formations, il y a eu au moins huit rencontres avec la contrôleuse, qui a fait une formation sur trois jours.

Steering, therefore, appears to be performed to reduce threats to upward accountability that might bar local actors from entry into the aid landscape as legitimate actors. Training in financial management, project implementation and monitoring and evaluation is intended to satisfy intermediary INGOS' and donors' need to account for the use of public funds. Therefore, the conformity-inducing solutions that are deployed to address this threat are coercive (tougher regulations, frequent audits or even continuous surveillance, tighter protocols and contracts, multi-level approvals, etc.) and punitive (cancellation of contract, loss of funding). These solutions are deployed through technocratic shepherding by INGOs, which, *in fine*, amounts to benevolent transfer of expertise from the North to the South to mitigate the threat of sanctions—and ultimately, non-legitimacy as a local aid provider.

The hazard associated with technocratic shepherding is that while it intends to strengthen the managerial capacity of local NGOs, it is simultaneously orienting them towards a normative service delivery model that is fundamentally opposed to a restructuring of power within the aid industry. As a managerial practice whose unstated objective is the manufacture of consent and homogeneity, it surreptitiously aligns the goals of local NGOs with those of donors and INGOs. It regulates the knowledge of heterogenous grassroots organizations into a uniform mass, whose potential to generate alternatives stemming from knowledges otherwise, is effectively disarticulated and silenced. In the process, as shown by Navarro-Flores (2011) and Michael (2004), in undermines local NGOs' power by drawing them away from the thematic expertise upon which their local legitimacy rests. To illustrate this point, a participant from Haiti distinguishes between organizations that display firmly rooted thematic expertise, such as agricultural unions, and generalist NGOs whose model rests on executing projects for foreign INGOs and donors. "There are organizations that are just NGOs," he explains. "When you contact them for a project, they say that they're working in this or that area, but you actually know them, and you can say, 'yeah, but that organization has never actually worked on education, or WASH.' Well, that organization is there to execute a project. It has no expertise.'"[45] (Participant 14, September 21, 2021)

[45] The original passage is in French: "Il y a des organisations qui sont juste des ONG. Quand tu les contactes pour un projet, elles te disent qu'elles travaillent dans tel domaine ou tel domaine, mais tu les connais, tu dis 'cette organisation-là a quand même jamais travaillé sur l'éducation, ou sur le WASH'. Mais cette organisation, ben elle est là pour exécuter des projets. Elles n'ont pas l'expertise."

Suggesting some recognition among INGOs that shepherding is yielding undesirable effects, another participant expresses concern over local organizations' increasing adoption of a service delivery model, which is unfavourable to profound engagement with local communities:

> It's like we're making local NGOs work towards an objective that they may not really own, or who don't share the vision that's pursued by a foreign organization. We have this tendency to ask local organizations to provide support in communities in which we don't have any roots, in locations that we don't know. And so sometimes they become service providers… It has some advantages, because they may be closer to the issue, but sometimes they act like service providers instead of actors who are really engaged. And at the end of the intervention, there's no follow-up. It's like they've offered a service. When it's the coffee break, the service provider takes a break and leaves.[46] (Participant 7, August 12, 2021)

In all these instances, Western project implementation and management knowledge appears to supersede all other skills and capacities in terms of desirability for donors, which serves to reaffirm the need for capacity-building interventions on the part of shepherds and hence preserves their status. "Do you think that managerial performance is overvalued to the detriment of local expertise?", I asked a participant from Burkina Faso, to which he answered:

> Yes, that's obvious. Because usually, INGOs succeed in imposing their so-called experts in this or that area, while effectively, we've worked extensively on the topic, in the promotion of women's rights [his organization's area of expertise], we have resources within our organization. But effectively, external expertise is favoured, those external consultants, to come a train us. And sometimes we notice that they are people who … (laughter) … don't really have the necessary baggage to train us … but anyways, that's what's favoured … and we have to endure that, right? So yes!"[47] (Participant 36, March 29, 2022)

[46] The original passage is in French: "C'est comme si on faisait travailler les ONG locales pour un objectif qu'elles ne portent peut-être pas, ou qui n'ont pas la vision qu'une organisation étrangère poursuit. On va voir une tendance à demander aux organisations locales de réaliser des appuis sur des localités où tu n'as peut-être pas d'ancrage, dont tu ne connais pas le milieu. Et parfois, ça devient comme des prestataires. Ça a son avantage… parce qu'ils sont peut-être un peu plus près de la problématique, mais parfois ils agissent comme des prestataires et pas des agents engagés. Et à la fin de l'appui, il n'y a pas de suivi. C'est comme on a fait une prestation. Quand il y a la pause-café, le prestataire fait sa pause, il s'en va."

[47] The original passage is in French : "Oui, ça c'est clair ! Parce que d'habitude, même les projets quelques fois, ils arrivent à nous imposer des soi-disant experts dans tel domaine, alors que, effectivement, nous on y a beaucoup travaillé, dans le domaine de la promotion des droits de la femme, il y a quand même des ressources en notre sein. Mais effectivement, on privilégie ces expertes externes, là, ces consultants externes, pour venir nous former. Et quelquefois, on se rend compte que ce sont des gens qui… (rires)… n'ont pas aussi de bagage pour nous former, nous. Mais bon, comme c'est… on privilégie ça, on est obligés de subir, quoi ! (Rires). Ben oui !"

Further exemplifying the disciplinary hierarchy between different types of expertise, another participant from the Global North describes a deficit that he perceived in African countries decades ago, when he first began working in the aid industry:

> So people who had [work] experience didn't have varied experience, and their management and governance models were really narrow. And then we were showing up with a rather North American approach amidst all that. So, it wasn't easy. People didn't have any experience in management, we had to help people a lot, you know, "how does one manage?" "Maybe you have a PhD from the Sorbonne in Paris, but it doesn't make you a manager," you know … so … it was challenging."[48] (Participant 1, July 30, 2021)

In the end, it appears that because of the preponderance of management knowledge, local organizations are contrived by shepherding processes into entities that are increasingly capable of managing aid within the confines of the existing system, as defined by gatekeepers, but progressively less diverse from an epistemic perspective.

6.4 Certificates of competence, certificates of resemblance

As we have seen, donors' accountability regimes require both international and local aid providers to adhere to legitimacy-inducing managerial standards. This subsequently alters their focus from local communities' aspirations and challenges towards those of donors, whose priorities and intervention approaches are frequently redefined according to foreign policy agendas. "At a certain point in time, local actors also need to learn…to follow trends a bit," explains a participant from Haiti. "A while ago, everyone was doing local development. Now, no one's talking about that. Does that mean that we can't do it anymore? That we shouldn't be working on local governance? No, not at all! But that's kind of the donors' trap"[49] (Participant 14, September 21, 2021). Furthermore, by rewarding compliance and excluding divergent knowledge, management and its instruments of control stifle counter-hegemonic possibilities

[48]The original passage is in French: "Puis les gens qui ont des expériences n'avaient pas des expériences variées, et des modèles de gestion et de gouvernance assez étroits. Puis nous autres on arrivait avec une approche assez nord-américaine dans tout ça, aussi. Ça fait que c'était pas évident. Les gens n'avaient pas de bagage en gestion, il a fallu beaucoup aider les gens, tu sais, 'comment on gère ?' 'T'as beau avoir un doctorat de la Sorbonne à Paris, ça fait pas de toi un gestionnaire, là', ça fait que… tu sais, c'était pas évident."

[49] The original passage is in French : "Mais à un certain moment, les acteurs locaux ont aussi besoin d'apprendre...à suivre les tendances un peu. Il y a un certain temps, tout le monde faisait du développement local. Maintenant, il n'y a plus personne qui parle de ça. Est-ce que ça veut dire qu'on ne peut plus en faire? Est-ce que ça veut dire qu'on peut plus en faire? Qu'on ne devrait plus travailler sur la gouvernance locale? Non, pas du tout! Mais c'est ça le piège du donateur."

that are necessary conditions for a significant reform. “So we can say,” I proposed during a conversation with a participant from Burkina Faso “that funders trust NGOs that resemble them?,” to which the individual answered, “That’s exactly it! (Laughter) In any case, they are accompanied that way [by INGOs], I tell you … you’ll see, you’ll find them almost everywhere. Be it in Mali or Niger, when there are calls for proposals, I see names, I know them.”[50] (Participant 12, September 12, 2021).

Shepherding, therefore, is a mechanism which enables herded organizations to obtain a certificate of conformity. “I know almost all the NGOs that have influence,” explains the same individual, who is a well-established civil society practitioner in Burkina Faso:

> Because they were accompanied for at least five months in capacity building, to standardize, normalize. So they have an organizational assessment and a strategic plan, a procedures manual, an accounting plan, audits. And there you have it! Today these are the organizations that succeed in obtaining funding. [51] (Participant 12, September 12, 2021)

As previously argued, technocratic aid and its managerial tools such as the logframe are fundamentally at odds with the principles of relationality, self-organization and emergence that characterize complexity (Gulrajani, 2017). Emergence, in fact, is perceived as a risk irrespective of its impact— which may be positive or negative—simply because it eschews technocratic design and thus threatens the integrity of the “plan.” Similarly, knowledges otherwise, like emergence, threaten the control of gatekeepers, as illustrated by the following quotation from an INGO employee in Canada, which again highlights the prioritization of certain epistemes:

> [Working with local partners] is risky in this way: it’s not that they’re not competent, it’s that they’re not competent in what we’re asking of them—and what we’re asking of them is financial, on the one hand, and on the other hand, it’s technocratic, it’s technical, for reasons that are linked to the very nature of organizations. Such as…we want equality between men and women for example.[52] (Participant 34, March 28, 2022).

[50] The original passage is in French: “Donc on peut dire, on peut dire que les bailleurs de fonds font confiance aux ONG qui leur ressemblent ?” “C’est ça, exactement ! (Rires) En tout cas, on les accompagne ainsi, je vous dit, vous verrez bien que vous les trouverez presque partout. Que ce soit au Mali ou au Niger, quand on lance les appels, je vois les noms, je les connais. “

[51] The original passage is in French: “Je connais presque toutes les ONG qui sont influents parce qu’on les a accompagnés pendant au moins 5 ans, en renforcement des capacités, pour les standardiser, comme normaliser, qu’ils aient un diagnostic et un plan stratégique, et un manuel de procédures, un plan comptable, des audits. Ben voilà ! Aujourd’hui c’est ces ONG-là qui arrivent à avoir des financements si vous voulez.”

[52] The original passage is in French: “Donc, c’est risqué. C’est pas qu’ils sont pas compétents, c’est qu’ils sont pas compétents dans ce qu’on leur demande, puis ce qu’on leur demande c’est d’un côté financier, puis de l’autre côté

As such, one of the most effective risk detection mechanisms, which is deployed in early stages of project implementation, is the ubiquitous organizational assessment process that is carried out by INGO shepherds, often at the explicit request of donors. In speaking of Canada's bilateral donor, one participant remarked that capacity assessments are in effect a risk mitigation method, as is the transfer of risk management to INGO shepherds:

> You know, there's a lot of due diligence with respect to risks, it's clearly written that we are the ones who must manage them. And then there are things where they say, 'We don't want to know, manage it yourself. If there's a problem, let us know, but it's up to you to manage it, which includes the relationship with the local partners'… And they do a quick verification of the local partners on our projects, to ensure that they don't have a bad reputation, and things like that, but this verification is done at the beginning of the project.[53] (Participant 45, April 8, 2022)

In doing so, donors are exercising coercive control upon INGOs, whose privileged status as shepherds hinges on their ability to effectively steer local NGOs towards the adoption of Western managerial knowledge. Should they fail in their mandated endeavour, they will suffer financial sanctions such as the necessity to reimburse funds which are inadequately accounted for by their "partner" organizations, attacks upon their legitimacy as effective INGOs, and ultimately, the inability to bid successfully in calls for proposals. In a competitive environment, INGOs' survival is therefore dependent on their capacity to effectively shepherd local NGOs into compliance—and hence resemblance. In doing so, however, INGOs are rendering themselves complicit in cognitive and epistemic injustice by locating knowledge "deficiencies," deploying highly normative remedial capacity training programs, and ultimately, issuing certificates of conformity.

6.5 If you have your hand in another man's pocket, you must move when he moves

"This is the dance you learn," remarks a Columbian participant. "Funders have specific methodologies, you know, […] that often don't apply to the local realities or to the local needs, so there's a kind of dancing that needs to happen, to kind of make it fit into what the foreign organizations want." (Participant 32,

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c'est technocratique, c'est technique, pour des raisons qui font partie de la nature même des organisations. C'est-à-dire que…on veut par exemple l'égalité des hommes des femmes."

[53] The original passage is in French: "Tu sais, il y a beaucoup de *due diligence*, de risques que c'est assez clairement écrit que c'est nous qui devons les gérer, puis même AMC, il y a des affaires qu'ils disent 'Je veux pas le savoir, gérez-le.' 'S'il y a un problème, avisez-nous, c'est à vous de le gérer, dont la relation avec les partenaires locaux'… Puis ils font une petite vérification sur les partenaires locaux sur des projets, pour voir s'il y a pas de mauvaise réputation, et des choses comme ça, mais la vérification est faite au début du projet."

March 25, 2022). The dance he refers to is the one that corresponds to the oft-cited proverb in aid literature—it is the choreography of someone whose hand is in the donor's pocket. "And this kind of vision that's coming from foreign organizations," he adds, "is often skewed towards a particular imperative that conflicts specifically with indigenous organizations that I've worked with."

However, most dancers would argue that they engage in this activity of their own volition; as such, we must again consider the agency of local organizations, for whom partaking in donors' dance represents a rational choice, consciously enacted in response to a survival imperative. "One critical question that each organization should ask itself," remarks a participant from a multilateral funding agency, "is to what extent they want to maintain their autonomy. The organization might need support, but it will be asked to comply with certain norms … and they need to be aware of the implications." (Participant 21, March 8, 2022). This research suggests that local NGOs are acutely aware of such implications as they fall into step, which one participant likens to "playing the game" (Participant 40, April 1, 2022). Therefore, it must not be automatically be interpreted as submission, to the extent that compliance entails gains in symbolic capital and financial viability.

Vignette: I'm too Cartesian in Burkina Faso

I was once sent by my organization to a small town in Burkina Faso, just on the edge of the Sahel desert, to meet with a local NGO with whom I'd established a new collaboration. As is common in the industry, this first project, which spanned a modest 3–4 months, would enable us to get acquainted and test our synergies before deciding to embark upon more ambitious joint undertakings. During my whirlwind 5-day assignment, I had planned to meet the organization's team, review our project protocol and other management tools, budgets, RACI matrices, security procedures for hosting staff and Canadian volunteers, and much more. I planned to arrive on a Saturday morning, to rest and acclimate for 36 hours before embarking upon a productive week of project management, then fly home to my children after a quick drop-in at the Canadian embassy in Ouagadougou exactly 7 days later. My schedule and the anticipated outcomes of my brief trip—as per the precepts of results-based management—had been diligently submitted for approval by my hierarchical supervisor. I had things to achieve and projects to manage.

However, I hadn't anticipated that my departing flight would be delayed, leading me to spend the weekend in the nowhere town of Le Mesnil Amelot, France, instead of Ouahigouya, Burkina Faso. Conveniently located a shuttle bus ride away from Charles-de-Gaulle, Le Mesnil is home to 900 souls, most of them elderly, a dilapidated cemetery which I visited, and a hotel where airlines ship off their passengers who are delayed overnight. I had to wait 24 hours for the next available flight to Burkina Faso—which I realized as I eventually boarded, also included a transfer in the dusty ochre haze of Niamey.

In the end, I reached my destination on Monday night instead of Saturday. All the lights were out from Yako to Ouahigouya because of a power outage, and the chauffeur who'd been sent to pick me up at the airport dropped me off in front of an outrageously large empty house that was to be my lodging for the week. A security guard came to greet me, showed me around with his flashlight and bid me good night. I used the glow from my phone, sparingly, to unpack a few things and eventually fell asleep to the strange sound of hyperactive nocturnal birds. I'd already mentally

adjusted my schedule to account for the "lost" day—and would present my revision to my local collaborator early next morning. Except that he had other plans for me. "Marie, you're too Cartesian," he complained, slightly exasperated.

Instead of meeting with key staff, the next day, I was taken to meet with other local organizations in Ouahigouya. One of them comes to mind: It dispensed support and literacy training to HIV-positive women who'd been ostracized by their families for contracting the disease (usually from a vagabonding spouse) and were left with limited options to earn a decent living, especially if widowed. Many of their facilitators were women who'd at one point, been at the receiving end of this organization's support and who could now mentor their peers through their long-term care and livelihoods options.

I spent the Wednesday with my Burkinabé collaborator's immediate family, visiting the orphanage that his wife oversees. Then he took me out to a three-hour lunch of the most extraordinary brazed chicken and plantain. I decided then, over a deliciously warm beer, to abandon any plan of actually "working" that week when he announced that the next day, I would meet his grandfather who happens to be a king. Walking through the royal family's extended living quarters, which span an entire block, I heard repeated jokes about being the 15th or 16th wife. I laughed, and knew this to simply mean that he took care to introduce all foreigners such as myself to the regional monarch. It was an honour.

Reflecting on my very short passage through Ouahigouya, I realize that my understanding of "productivity" was entirely determined by my "cartesian" bias. I accomplished nothing as per my plan, which proved of no value. Something else was achieved, however, which was essential and should have been the objective of my visit: mutual trust. Not captured in any logframe. Certainly not measurable in a performance framework. The only indicator of success is that my collaborator and I are still friends more than a decade later, despite our vast age difference. Today he is the most likely heir to the regional throne. The last time I saw him, he laughed when I enquired about his grandfather. "The old man just refuses to die," he shrugged. I shrugged too, and we laughed together.

It can be argued, then, that beneath the façade of compliance, several discrete emancipatory processes—or acts of subversive compliance—are at work. According to the postcolonial theory of Bhabha (1994), when different knowledges come together in a place of discontinuity—such as the site of encounter between expatriate knowledge and local expertise—a process of resistance is engendered by the mere presence of power. In response, the colonized individual or group (to use Bhabha's term) engages in a process of hybridization. As a productive process, hybridization results from the engagement with foreign ideas and practices, which are then translated and reinterpreted through a local epistemic lens. Claeyé's (2014) extensive research on management practices in Sub-Saharan Africa, for instance, demonstrates that local organizations are far from passive recipients of foreign management knowledge. Instead, he reveals that they juxtapose the endogenous collectivist philosophy of *ubuntu* with the individualistic and competitive principles of Western neoliberal management doxa. A bargaining process ensues within the organization, which then produces unique adaptations that are contextually grounded.

Agency and the search for a golden mean, located somewhere along the continuum of oppressive conformity to absolute autonomy, are evidenced in the following remark by a Burundian program manager

who highlights conscious choice rather than obligation: "Yes, of course, it's important to know the norms and be able to adapt. It's part of an organization's maturity process. And then, on the basis of all our acquired experience, we'll adopt procedures that have really demonstrated their effectiveness" (Participant 20, March 4, 2022).

Agency is explicitly manifest when a local relief organization, such as the one founded by Participant 40, choses programmatic autonomy and financial precarity over the imposed constraints of donor funding. When asked to perform a social impact assessment in order to qualify for an award from a North American foundation, he refused, citing the irrelevance of such a process from an indigenous perspective. It is also evidenced by the depiction of resistance in Participant 23's organization, whose local employees insist on their own definition of performance: quality of social relations, instead of quantity of beneficiaries. Agency also manifests in the attempt to secure a viable balance between foreign and local knowledge, in this highly evocative passage from a Tchadian participant, who works for a standard-setting organization based in Switzerland:

> I don't want to be treated as inferior because I don't use your tool! […] We have to be able to find a good balance, between what I have to use to facilitate good communication between us, good monitoring, and what's good for me, for my identity, my capacity also to work with the local population. If we standardize too much, everyone does it the same way—and that's just not possible! We're not the same! […] There are things that we do in a similar way, but there are things that we do differently, and that's humanity's greatest wealth![54] (Participant 47, April 13, 2022).

To have your hand in another man's pocket, and to move when he moves, conjures all the tensions and contradictions that are imprinted upon the relationship between gatekeepers, shepherds and local organizations. A first interpretation of the analogy may speak of limited autonomy induced by dependency. A second interpretation may, however, highlight agency and strategy, because one has to *reach* for the pocket in the first place. Both of these interpretations suggest an access to riches, not a loss thereof. However, there are innumerable measures of wealth, and it can be argued that the practices described in chapters 5 and 6 have equally contributed to impoverishment. As argued by Juma and Surhka (2002) and Boateng (2021), the progressive orientation of local NGOs in Africa towards service delivery

[54] The original passage is in French: "Je ne veux pas être traité d'inférieur parce que je n'utilise pas ton outil, mais il faut qu'on soit capable de trouver un bon équilibre, entre ce que je dois utiliser pour permettre une bonne communication entre nous, et un bon suivi, et ce qui est bon pour moi, mon identité, ma capacité aussi à travailler auprès des populations. Si on commence à faire trop de standardisation, que tout le monde fait de la même façon, ce n'est pas possible ! On n'est pas pareils ! Il y a des choses qu'on fait de façon similaire, il y en a d'autres qu'on fait de façon différente, c'est ça qui est la richesse de l'humanité !"

models has eroded local norms and knowledge necessary for coping with disaster upon which their capacity, as local aid providers, also resides. This was likewise echoed by Participant 22, who argued that customary knowledge to safeguard crops and food supplies in anticipation of the annual cyclonic season in Vanuatu has all but died out, substituted by a dependency on emergency rice rations imported from Asia and purchased by donors.

The progressive steering of civil society actors into the role of subcontractor to donors and their INGO intermediaries has also weakened their capacity for engagement with long-term social transformation agendas (Banks et al., 2015; Lewis, 2008), by gutting their independence and reorienting their mission in accordance with donors' ever-shifting priorities and accountability regimes (Ebrahim, 2009). It has drawn them away from the populations they wish to serve and diluted their transformative impact on the ground, as noted by a Burkinabé NGO worker: "We are much more aligned with training programs, international agendas, which seem to be 'the answer'. And sometimes, we don't have the desired impact, because we're not listening enough to the communities, to the beneficiaries"[55] (Participant 25, March 15, 2022). Similarly, in Guatemala, Martinez and Cooper (2017) found that INGOs have contributed to the disarticulation of civil society, by "NGO-izing" grassroots organizations into entities whose political aspirations are reconstructed to serve those of foreign aid providers. The co-optation and technocratization of participatory approaches has further reduced their counterhegemonic potential and the adoption of standardized management models appears detrimental to meaningful, emergent design that is grounded in local epistemes. Thus, waltzing with the donor has contributed to an overall impoverishment of alternatives.

6.6 Conclusion: "Universal" management expertise as the new modernity

As previously argued, NGOs the world over emerged in response to residual welfare needs in society, unmet by the state. As sites of resistance and advocacy, they provide alternative mechanisms by which individuals and groups can associate and think more broadly about service, forms of organization and social transformation. However, as illustrated by Lister and Nyamugasira (2003), the commodification of their agendas by the neoliberal state can force NGOs into service delivery roles, which then decreases their

[55] The original passage is in French: "On est beaucoup plus alignés sur des programmes de formation, des agendas internationaux, qui semblent être 'la réponse'. Et quelques fois, on n'a pas l'impact, parce qu'on écoute pas assez les communautés, on n'écoute pas assez les bénéficiaires."

capacity for advocacy, or to hold states accountable. This is as worrisome as the actions of a repressive government wishing to exercise its control over civil society. In the former case, a dependency on institutional funding coerces NGO recipients into alignment with state policy while in the latter, only those entities in alignment with state policy are permitted to thrive. In the aid sector, the increasing instrumentalization of INGOs at the service of national and foreign policy through prioritized intervention areas and mechanisms fulfills a homogenizing purpose, rather than the opposite. Explicitly evidenced in the second sentence of Canada's Feminist International Assistance Policy, which states that "Canadians are safer and more prosperous when more of the world shares our values" (Canada, 2017), the intention of aid is not just to alleviate suffering but to promote morals and ideals consistent with a Western democracy and economy for the benefit of the West.

Throughout this research, most of the individuals I've had the opportunity to speak with are cognizant of these dynamics, often attributing the failure of the localization agenda to the rigidity of bilateral agencies' technocratic regime. However, the INGOs they work for are often blind to the manner in which they flex their ideological power at the beck and call of states by shepherding "partner" NGOs towards a model that mimics their own Western values and ways of organizing. In doing so, are they not complicit in the re-enactment of colonial dynamics that they paradoxically contest through such reforms as the localization agenda? Does their role as "capacity builders" not suggest that they have become the convenient handmaidens of a new modernity defined by management expertise? The following passage from a Colombian participant impeccably captures all these elements:

> I think of the Red Cross and I think of all those big NGOs and they come and replicate the same model of organizing here, but that model of organizing here, doesn't even know or understand, and isn't even integrated with the local histories, the local context, the local dynamics … and in a sense, what that does, it replicates … it's this kind of generic model of aid, that doesn't take into consideration who people are, where they come from. There's all types of hierarchies that are reinforced here through those models, even if it's humanitarian work, and a lot of those hierarchies often reflect the kind of larger systems of oppression that are affecting local populations. Right, so … yes, I think there is a kind of imperative around progress, around results, around you know, quantifying the work that exists within a particular worldview but that isn't universal. It's forced as universal, right? (Participant 32, March 25, 2022).

Indeed, and as also noted by Girei (2016), donors' reliance on standardized systems and managerial approaches can hinder INGOs' meaningful engagement with populations - many of which have a history of oppression - and with the singularity of their context. Instead, capacity building, which is intended to achieve a certain functional standard among local aid providers, furthers the cognitive distance between

funders and aid recipients, thus reinforcing the separation between "foreign expert" and "local" knowledge. The ranking of local NGOs' knowledge as inadequate through such processes as capacity assessments (or certificates of deficiency) ensures that gatekeepers maintain their monopoly over aid's epistemic territory. Though forms of resistance are effectively enacted at the local level, which manifest through such processes as hybridity, the homogenizing "remedial" capacity training interventions of INGOs contribute to the suppression of other forms of organizing and knowledge.

In closing, and before we move to the next chapter which will provide a concrete example of these processes at work within Amani, a Canadian-based INGO attempting to decentralize its operating structure, I would like to reflect on one of the most common "deficiencies" among local NGOs, which is failure to master the logframe. Decades ago, Illich (1973, p. 34) wrote the following astute paragraph:

> Tools are intrinsic to social relationships. An individual relates himself in action to his society through the use of tools that he actively masters, or by which he is passively acted upon. To the degree that he masters his tools, he can invest the world with his meaning: to the degree that he is mastered by his tools, the shape of the tool determines his own self-image. Convivial tools are those which give each person who uses them the greatest opportunity to enrich the environment with the fruits of his or her vision. Industrial tools deny this possibility to those who use them and they allow their designers to determine the meaning and expectations of others. Most tools today cannot be used in a convivial fashion.

By that definition, the logframe, which is imposed upon local organizations by donors and INGOs, is the perfect example of a tool that lacks conviviality. Its mechanical reasoning fails to integrate, let alone consider the varied epistemes, lived experiences, challenges and aspirations of the populations it aims to serve. According to Illich, convivial tools can be easily used, by anyone, "as often or as seldom desired" (p. 35), without obligation. They require no previous certification or training.

In tracing the history of management, tools have had an undeniable role in shaping society by producing new occupational pathologies, from noise-induced diseases and physical safety hazards brought about by mechanization and the incessant search for greater speed, to industrial fatigue from performing repetitious tasks and an array of chronic psychological syndromes resulting from exposure to chronic stressors or lack of stimulation. Management tools also support the maintenance of social inequalities within industrialized countries but also between the Global North and the Global South, through the replication of postcolonial extractive or exploitative dynamics. Thus, the technocratic toolkit of aid—like all other managerial instruments, has created a pathology of deficiency that continues to shape the

industry and its operators. The continued emphasis on capacity assessments, and particularly training on the use of the logframe and its performance measurement framework, sustains a perception that local NGOs require "education." In the neoliberal global order, training and learning in Western management principles are thus commodified, and like any commodity that is marketed through the devaluation of other knowledges and alternatives, they become scarce. This leads to their accumulation, as any form of capital, by a power-wielding minority. Donors' confidence in their "better knowledge" becomes a self-fulfilling prophecy in the aid chain, hindering both INGOs' and local NGOs' trust in their own judgement and agency, thereby producing a universal "truth" and faith in management that undermines the very possibility of anything otherwise. This, as I will continue to demonstrate in the next few chapters, is one of the reasons why a significant reform of the humanitarian sector, is unlikely to occur.

CHAPTER 7: THE CASE OF AMANI

7.1 Ambivalence among the shepherds

In the previous chapters, we saw how INGOs have come to occupy a multiplex role in the aid industry, defending the rights of the world's most vulnerable and marginalized populations while simultaneously serving as auxiliary to the foreign policy and agendas of bilateral donors and global governance agencies. INGOs' organizational culture, structure and identity have become increasingly tied to the paradigms of these powerful actors and their funding patterns (Lewis, 2008). As a result, they have gradually been reconstituted as technocratic and managerialist interveners, steering local aid providers towards a uniform standard of performance that they expect will gain them greater recognition and legitimacy, and hence increased access to funding. The transfer of responsibility from state to non-state actors has led to the establishment of new systems of control that shape INGOs' engagement with implementing organizations in the Global South, in which they increasingly define themselves as providers of capacity. As illustrated by Amani's implicit mission and organizational statement of "capacity building of CSOs" (Participant 2, July 30, 2021), training on the industry's ubiquitous planning, monitoring, reporting and accounting tools and other technical standards has *de facto* come to describe INGOs' rapport with local actors.

However, not everyone is convinced that this is a worthwhile strategy: "I want to throw up whenever I write 'capacity building,'" remarks a participant from an INGO. "We're on autopilot, we've been capacity building for 10 years, and every proposal starts with that, we've found all kinds of things to measure, but I just **CAN'T** [vocal emphasis] anymore! I just don't know what the long-term impact is, or the impact that it can have in society"[56] (Participant 29, March 21, 2022). We are reminded by such a statement that INGOs and their staff also constitute a vital source of resistance to dominant or mainstream agendas and policy. Many have adopted an explicitly critical stance with regards to the neoliberal doctrine of multilateral banks and to economic systems that perpetuate the disenfranchisement of populations. Like the above-cited individual, the majority of participants working for INGOs interviewed as part of this study expressed grievances with regards to the technical and managerial requirements of bilateral and multilateral

[56] The original quotation is in French: "Tu sais, je tape *capacity-building* puis j'ai un haut-le-cœur ! On est en autopilote, ça fait 10 ans qu'on fait du *capacity-building*, puis chaque *proposal* commence avec ça, puis on a trouvé toutes sortes de choses à mesurer, mais je suis PLUS capable ! Je sais juste pas c'est quoi l'impact à long terme, ou l'impact que ça a dans la société. "

agencies, noting their trickle-down effect upon local NGOs whose reality differs significantly from that of donors. “I even remember in Malawi,” remarks a former INGO worker now employed with Global Affairs Canada (GAC), “the paper that local NGOs printed things on … the ink didn’t stay, so there were all these receipts that were inadmissible in their financial report and the organization had to give the money back to GAC, because the ink was faded” (Participant 30, March 23, 2022). While one might be tempted to attribute this problem to Malawi’s local paper manufacturers, this also suggests that program officers at GAC lack the granular knowledge of context-specific variables that many INGO workers possess.

Indeed, the identity of many INGOs rests on their claims to proximity to communities in the Global South, on whose behalf they speak, and for whose rights they advocate. While INGO legitimacy derives from their capacity to generate results (reduced suffering, improved well-being), it also rests on their affiliation with local organizations and the communities in which they work, as well as the participatory or democratic approaches they champion (Thrandardottir, 2015). They distinguish themselves by their ability to propose people-centred alternatives to top-down, state-led technocratic practices (Girei, 2016); however, they are simultaneously bound by donors’ policies and managerial instruments. For instance, their appreciation of local actors’ knowledge and expertise, is contradicted by their fixation with capacity building, and the manner in which they shepherd local organizations towards the adoption of practices that resemble their own. Thus, because of their multiple accountabilities—to donors, to the general public, to local NGOs, to communities—INGOs occupy an ambivalent position that results in internal contradictions, as this chapter will proceed to demonstrate.

As an INGO attempting to compose with the localization agenda and calls to decolonize aid, Amani—my case study organization here presented under a pseudonym—provides a cogent example of such ambivalence, revealing important incongruities between narrative and action, between a desire to empower their local affiliates towards greater capacity to secure funds, and efforts to enforce centralized performance standards and managerial knowledge. The organization is in the process of implementing a lengthy structural transformation, which it refers to somewhat interchangeably as “internationalization” and “nationalization.” The intended outcome of this ambitious organizational transformation represents a general shift towards aid that is more local by definition. However, as will be demonstrated, it is unclear whether the establishment of eight “nationalized” overseas offices is supportive of the localization agenda. The dynamics at work within the epistemic territory are also observed within Amani’s own structure.

Drawing on interviews with twenty-four individuals associated with Amani (including Canadian and satellite office staff, implementing organization employees and members of local advisory committees), this chapter will illustrate the gatekeeping and shepherding processes described in Chapters 4 and 5. As a microcosm in which the wider debates, tensions and mutations affecting aid are reflected, Amani's case exemplifies the interplay of counterproductive processes that, applied on a broader scale, explain why the localization reform has not delivered on its promise.

7.2 Inside Amani

As previously explained in Chapter 3, Amani is a Canadian INGO of the "alchemical" type (Barnett, 2011), whose original developmentalist approach has gradually shifted towards a hybrid model that includes emergency response, early recovery and post-disaster reconstruction in addition to long-term social transformation initiatives. Its hallmark volunteer-sending program, which has been in operation since the 1960s, is one of three channels through which the organization operationalizes its capacity-building mission. Canadian professionals and students possessing thematic knowledge that aligns with local organizations' needs are recruited and deployed overseas, for mandates ranging from a few months to years during which they are expected to transfer their expertise in areas such as gender equality, strategic planning, economic empowerment or financial management. Though volunteers increasingly come from diaspora communities or are binational individuals already residing in the host country, the underlying North-South model remains centred on the overseas deployment of Canadian citizens and permanent residents. The condition is imposed by Global Affairs Canada, for whom this program, while presented as development-focused, also serves the purpose of raising public awareness about Canada's foreign aid policy. In Canada, the reverse option (South-North deployments, or South-South mandates between two African countries, for instance) is a rare occurrence, and often financed by the organizations themselves rather than via public funds.

Vignette: The sound of my legitimacy crisis

*Four or five months after my arrival in Vanuatu, my director decided it was time for me to travel to another island, to get acquainted with the work done by our rural training centres there. I was to accompany a colleague, Shem, a construction engineer who was often tasked with improving the buildings' infrastructures, latrines and access to water, and together, we would be visiting five or six centres dispersed all over the island of Tanna. Shem was a "*man-ples*", a local, having grown up on Tanna, and he seemed to know everyone wherever we went.*

In some places, the road to the village was nothing more than the tracks that had been left by the last

truck passing through six months earlier. Shem and I were greeted with gifts of flower wreaths, live chickens, prayers and songs. This excessively ceremonial welcome made me uncomfortable, given that I was not a dignitary but just the odd white girl. And I didn't know what to do with the chickens.

On Tanna, I learned that there was no extreme poverty. Nature is abundant and the islanders fish, raise pigs and chickens and hunt wild boar, they harvest manioc and beans, and the fruit trees are outrageously generous. They have thatch and bamboo to build comfortable homes, and children are healthy. There's no malaria, most communities have rainwater tanks or access to freshwater. The country boasts that it has no homeless citizens. Poverty, as I came to understand while I was on Tanna, is of a more discreet and pernicious nature than an empty stomach and lack of shelter. It manifests itself in the early teenage years among youth who've been exposed, through media, tourism, family visiting from the capital, foreign volunteers, to "more," nourishing a sense of what they don't have and the opportunities they're lacking. Poverty also manifests itself in the eyes of women, who can't escape rampant domestic abuse because of patriarchal customs and a lack of police on the outer islands, and of the elderly who have no access to medical care. Lack of transportation, lack of schooling, lack of options. And as was later shown in the wake of Cyclone Pam, which destroyed 90% of the island's homes, a general lack of any form of state-provided social security.

Thus, as a deeper form of understanding of the issues with which populations were struggling started to settle in, the puzzle pieces that had been plaguing me started to fall into place, and I understood my organization's role in the equation. This took me many months to achieve, but on the same night that I'd felt a sense of clarity settling in, I was simultaneously confronted with my outsider status.

Shem had dropped me off at a guesthouse in a village while he went off to stay with his family. I'd been told by my host that dinner was served for the guests under a thatch roof down a footpath. In Vanuatu, night falls at 5:30 p.m. so it was pitch-dark when I arrived to eat at 7:00. I realized I was the only guest, and no lights had been turned on to spare fuel, since electricity is provided by generators. I sat down at a table, itemizing what snacks I had left in my room to make up for a dinner that didn't seem to be happening, when suddenly, I heard the generator come on. A bare bulb lit up over my head, revealing how utterly alone I was. I had moths and geckos for company. Perhaps sensing my loneliness, my host put on some music while I waited for my food and ate. So, I spent my last evening in Black Sands Village in Tanna, listening to Willie Nelson and dining by myself under a wavering halo of electric light. I was entirely alienated from everything familiar to me, and the sense of clarity that I'd momentarily grasped was replaced by disillusion. Why was I there? How could my presence serve any useful purpose? Why would anyone think it could?

Now, close your eyes and imagine the soundtrack to my legitimacy crisis (and try not to smile). This is it: Willie Nelson's mournful "You were always on my mind," a sputtering generator and … crickets.

At Amani, knowledge transfer—or the practice of technocratic shepherding—is also integrated into project design. The organization is engaged in a range of initiatives that include humanitarian response and long-term development, and several hybrid interventions situated along the emergency-development continuum, such as post-disaster recovery and reconstruction. As subcontractors of Amani, local implementing NGOs are provided with planned technical training in areas directly linked to the performance of their activities: Specialized education for displaced populations in the Great Lakes region of Africa, for example, or integration of the Sphere standards for emergency response in the Philippines.

A third and final form of knowledge transfer occurs when Amani deploys its headquarters' staff to provide managerial training to its satellite offices, for example in the application of the organization's security protocol or its gender policy. Alternatively, staff from satellite offices may also provide training to local NGOs, particularly in financial management, proposal writing and project evaluation. As we have seen, managerial expertise facilitates entry into the ecosystem as a legitimate actor. This, therefore, is intended to assist local organizations in accessing new financial resources, which in turn generates symbolic capital through association with foreign actors, greater project implementation experience and heightened visibility. It also serves Amani's self-interested need to mitigate the fiduciary risk associated with the delegation of some tasks to foreign satellite offices or subcontracted organizations. Capacity building is therefore a safeguarding mechanism that protects Amani's reputation among donors as a trustworthy subcontractor.

The last few decades have, however, witnessed the emergence of a new threat to Amani's legitimacy, and on a wider scale, that of the aid industry. According to Suchman (1995), legitimacy constitutes "a generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs and definitions" (p. 574). Indeed, accusations regarding the aid industry's Westocentricism and growing calls to "decolonize" aid have cast doubt on the moral legitimacy of INGOs such as Amani. Internally, this has prompted reflection on the relevance of its model and structure. Over the last ten to fifteen years, Amani has gradually shifted away from enlisting expatriates to staff their satellite offices and oversee programming. Today, these offices employ almost exclusively national personnel. This process, which some staff perceive as being aligned with the localization agenda, is reflective of ambivalence within the organization. On the one hand, it effectively signals a departure from the aid industry's tradition of deploying foreign nationals to the Global South to manage and implement activities, but on the other, it generates an ambiguous stance: "You know, I follow the debates with my colleagues from other NGOs, and I challenge them a bit," says an Amani staff member. "They ask us, 'so you guys, you say that you are working on localization, on decentralization, but your country offices, what is that?'"[57] (Participant 3, August 3, 2021). Testifying to this ambivalence, the

[57] The original passage is in French: "Moi je suis beaucoup les débats avec les collègues des ONG, que je *challenge* un peu, et qui nous disent, 'Mais vous là, vous dites que vous êtes sur la localisation, la décentralisation, mais vos bureaux-pays, c'est quoi ça ?'"

individual did not provide an answer to the question, but instead reiterated that their satellite staff were nationals.

Amani's hiring policy aligns with the organization's current strategic objective of internationalizing its governance structure, whereby leadership is no longer geographically concentrated in Canada but globally dispersed, and hence more diverse and representative of the international network of interlinked "Amanis" that the organization hopes to become. Though internal reflection on the relative autonomy and composition of satellite offices has been ongoing for decades, these structural questions have become strategically pressing, as Amani vies for space in an increasingly populated and competitive funding environment. Strategic planning documentation[58] reveals a preoccupation among Amani's leadership that funding streams will imminently favour Southern NGOs (though this study suggests the opposite). The strategic repositioning of Amani as a network of autonomous and locally staffed national chapters in the Global South, a process the organization refers to as "nationalization," can then be interpreted as an institutional survival tactic. By claiming national ownership through such mechanisms as local advisory committees comprised of civil society leaders in their country of operation, it responds to the de-Westernization agenda and to a need to capture new funding streams. By being registered as entities operating nationally in their host country, it is expected that Amani's satellites will be positioned to secure funding designated for Southern NGOs, all the while benefiting from the organization's structure, managerial expertise and the legitimacy of an international brand name.

7.3 "But your country offices, what is that?"

This practice of establishing nationalized country chapters with a greater degree of programmatic and financial autonomy features prominently in Amani's current strategic orientations and long-term vision. However, as a strategy, it generates much problematization, both within and outside of the organization, as alluded to the question posed earlier, "but your country offices, what is that?" The interviews reveal contradictory positions within Amani's headquarters, its country offices and among its implementing organizations.

[58] The documents cannot be referenced as this would reveal the identity of the organization. As such, the many resources mobilized to construct this case study (website, organizational documents, annual reports, strategic plans, proposals for funding, etc.) are not included in the bibliography.

Some argued that Amani's nationalization process, which is reflected in its hiring policy, is synonymous with localization. "We are trying to localize our effort by engaging the local staffing, minimizing the bureaucracy, involving the local partner organizations in a very much equal footing" explains an individual from Amani's Nepal office (Participant 11, September 7, 2021). A Canadian employee adds that localization is reflected in Amani's attempt, at the global level, to further integrate the needs and priorities of country offices. "It raises a lot of questions," he explains, such as "how do we ensure that our country representatives have the same right to decision-making processes at the global Amani level"[59] (Participant 3, August 3, 2021). The use of the term "representative," however, suggests an unresolved tension between the power to appoint someone to speak on Amani's behalf, and a desire for horizontality within the organization.

While these passages conjure attempts at greater inclusivity and democracy within the organization's international structure, another individual evokes a system that is hierarchical, citing the unlikely example of McDonald's restaurants. Amani's country offices, he explains, are local entities, from an administrative perspective, who as part of a network, are granted the right to conduct business under the brand name and standards of their franchiser. "So, your McDonald's over there in Beijing … it's a member of the McDonald's network. As a member of the McDonald's network, it has to respect a certain number of things […] Because if you want to call yourself McDonald's in China, you have to … accept the standards."[60] (Participant 4, August 4, 2021).

To further complexify the matter, in some locations such as Burkina Faso, the chapters of international organizations such as Amani cannot register as local or national entities, as this is a status reserved to endogenous organizations with a regional or countrywide scope. As an entity with ties to Canada and other satellite offices, Amani-Burkina Faso unambiguously remains an international NGO despite its local staff. Highlighting its ideological affiliation with the West, other Burkinabè participants additionally argued that

[59] The original passage, which is partially paraphrased above, is in French: "Parce que ça amène justement un certain nombre de questions : Comment est-ce que les besoins, les priorités des bureaux-pays sont considérés au niveau de l'organisation globale, et comment est-ce que les représentants des bureaux pays ont droit aux processus de décision au niveau de l'organisation globale ?"

[60] The original passage is in French: "Ça fait que ton MacDo, là, qui est à Pékin, il est membre du réseau MacDo. Comme membre du réseau MacDo, il faut qu'il respecte un certain nombre de choses […] Ben, parce que si tu veux t'appeler MacDo en Chine, il faut que… tu acceptes les standards."

the organization was foreign rather than local (Participant 12, October 9, 2021; Participant 25, March 15, 2022; Participants 35 and 36, March 29, 2022).

Meanwhile in Guatemala, Amani has abandoned the idea of registering as a local entity. Given the repressive context, the slightest appearance of opposition to state policy can jeopardize NGOs' operating permits or severely limit their capacity to act as agents of social change. Thus, registering as a local organization would be strategically imprudent, as some of Amani's activities, such as defending the rights of marginalized communities, though far from militant—might be perceived as a threat to state legitimacy. As such, they've retained their legal and administrative identity as an international organization. The organizations with which they work, though they acknowledge the extent of Amani's work "*en el terreno*" (in the field) and their strengthened national structure, also consider it to be a foreign organization. "Since we've known Amani, we've known it as an international organization, including Amani-Guatemala," remarks one individual (Participant 17, February 22, 21).[61] From an administrative perspective, it becomes clear from these examples that "nationalization" cannot be construed as a homogeneous process, nor can it be viewed as universally desirable or applicable. Amani's efforts to structurally redefine itself and its outposts as autonomous but linked entities, are, however, marked by more than administrative hurdles. Their desire for more "local" entities is confronted by populations' perception in the countries where they operate. In spite of establishing a local advisory structure and reducing the presence of expatriate staff, Amani remains a foreign organization in the eyes of the general public. Furthermore, their desire for standardization, which is manifested through knowledge transfer on the application of centralized operating procedures, policies and protocols, paradoxically deprives Amani country offices of the possibility to develop as autonomous entities with their own managerial instruments. Because such standards are developed in Canada (albeit with some level of consultation with country offices), it also supports extant North-South dynamics.

The following passage from a conversation with an advisory committee member from West Africa captures such tensions. According to this individual, the standards and requirements established by Amani, and upon which country offices' "independence" is determined, are unattainable. She highlights that her country office is expected to demonstrate an entrepreneurial model for securing its financial autonomy

[61] The original passage is in Spanish "Nosotras desde que conocimos a Amani, la conocimos cómo una organización internacional, incluso Amani-Guatemala."

from the head office; all the while, the Canadian headquarters are not capable of achieving the same level of autonomy, as Amani remains heavily dependent on its main donor, Global Affairs Canada.

> Me, I ask myself! When will we ever be independent? Because we've looked at the nationalization process, and we ask ourselves **WHEN** [vocal emphasis] we will get there […] We apply all the rules and then we ask ourselves at the end, do these rules help the local office move forward, or are they just there to control everything? So I can ask, "when will it happen?" Because the stages are so long that I can't even see the end, when will this "responsibilization" business end? When will a local office ever be declared autonomous? What is the criterion?[62] (Participant 12, September 10, 2021)

The same individual proceeds to describe a former project in which Amani and a Swiss donor were proposing to coach a local NGO towards a model of financial autonomy that extends beyond that of most INGOs:

> Accumulation? For me, accumulation means that you've surpassed financial autonomy and you are now saving. Can you imagine that? When will that ever happen for NGOs? And that is what was being defined as the threshold for coaching, and we had discussed that threshold to achieve, which is accumulation! Ah, so, these concepts, they arrive, and they're muddling, but brought back to reality, what does that mean for a local office? And when can we say that it's "local," and that it assumes its autonomy? And what does that entail? And what does it achieve? Because we have the impression, in any case, we have the impression that there's a lot of mistrust, and a lot of rules are imposed. That's it.[63]

The question of funding is not only a recurring theme within Amani's proposed restructuring, but also a knotty one. While some participants, such as the above-cited individual, view managerial standards as inhibitors of local autonomy, others consider them to be beneficial, especially as they are associated with financial gains. "This has given us a lot to diversify our project portfolio because now we have new donors who pay close attention to those [managerial] procedures," explains a staff member from another country

[62] The original passage is in French: "Moi, je me pose la question. Quand est-ce qu'on va être autonome ? Parce qu'on a regardé le processus d'autonomisation ! On se demande **quand** (emphase vocale) on va arriver à l'autonomisation, là […] On met les règles, on se demande à la fin, est ce que les règles là permettent au bureau local d'avancer ou c'est vraiment pour contrôler tout ? Alors moi, je peux aller dans le fond, mais aussi demander, 'quand est-ce que ça va arriver' ? Parce que les étapes sont tellement longues que moi, je ne vois pas la fin, là, quand est-ce qu'on va finir cette affaire de responsabilisation ? Quand est-ce qu'un bureau va être déclaré autonome ? Quel est le critère ?"

[63] The original passage is in French: "Moi, l'accumulation, l'accumulation, c'est qu'on a dépassé l'autonomie et qu'on épargne. Ça, vous imaginez ?! Quand est-ce que ça va arriver pour les ONG ?! Et là, c'était effectivement sur ça qu'on définissait le seuil de l'accompagnement, jusqu'où on va accompagner. Là on avait parlé, c'est ça, je parle de ce seuil dont on parlait, qui est d'atteindre l'accumulation. Ah ! Donc bon, les concepts, là ça vient, ça nous embrouille, mais ramené à la réalité qu'est-ce que ça veut dire pour un bureau local ? Et à quel moment on dit qu'il est local et qu'il prend son autonomie ? Et ça, ça recoupe quoi ? Ça permet d'avancer quoi ? Parce qu'on a l'impression en tout cas, on a l'impression qu'il y a beaucoup de méfiance et qu'on met beaucoup de règles. Voilà."

office. “Compared to other organizations that don’t have those things, we have a competitive advantage.”[64] (Participant 19, February 17, 2021). Indeed, and as argued in the previous chapters, the display of managerial expertise by INGOs’ satellites, which is the natural result of their affiliation with an INGO and internal shepherding practices, is the most essential condition for access to funding. It reassures risk-averse donors, who, as illustrated in case studies on Fiji and Vanuatu (Bamforth et al., 2020; Rosier & Savard, 2022) and South Sudan (Ali et al., 2018), prefer to channel their funds through INGOs’ satellite offices rather than local responders. In bidding processes, endogenous organizations lacking international affiliations are outperformed by INGO satellites, who can simultaneously claim a local dimension and the managerial expertise sought after by donors.

While it is generally agreed upon at Amani that financially autonomous satellite offices, much like franchising, present a viable business model—in fact, dozens of other INGOs have undertaken the same transformation—there also appears to be internal ambivalence about the moral justification of such a strategy. On the one hand, as clearly stated by this participant: “what we hope is that country offices will be able to capture funds that we, as the Canadian office, don’t have access to. And that would enable us to increase our programmatic volume, our project volume, while guaranteeing independent revenue at the level of Amani’s offices”[65] (Participant 7, August 12, 2021). On the other hand, though Amani’s explicit objective is to “build the capacity” of local organizations via the services proffered by its satellites, it is implicitly positioning itself as a competitor to these same organizations by planting a stake upon their territory. “Instead of creating a local Amani, why don’t we just partner with local organizations?” remarks a staff member from Canada. “Why compete with local actors?” he adds. “Let’s just support them, but let’s stay how we are. So, that is a different vision that exists within the organization, and it’s understandable. The argument is clear”[66] (Participant 10, September 2, 2021).

[64] The original passage is in Spanish: “Nos ha dado mucho peso para diversificar nuestra cartera de proyectos porque tenemos nuevos donantes que se fijan mucho en esos procedimientos y en comparación con otras organizaciones que no los tienen pues nos da una ventaja, una ventaja competitiva.”

[65] The original passage is in French: “Ce qu’on espère, c’est que les bureaux-pays puissent avoir accès à d’autres sources de revenus que nous, en tant que bureau du Canada, où on n’a pas accès… OK, donc ça permettrait d’accroître notre volume de programmation, notre volume de projets, tout en garantissant des revenus autonomes au niveau des bureaux nationaux d’Amani.”

[66] The original passage is in French: “Au lieu de créer un Amani local, pourquoi ne pas simplement travailler en partenariat avec les organisations locales ? Pourquoi faire la compétition aux acteurs locaux ? Appuyons-les, mais restons comme nous sommes. Donc ça, c’est une différente vision qui existe à l’intérieur de l’organisation, et ça se comprend. L’argument est clair.”

Similar preoccupations were also voiced by participants from local implementing NGOs and advisory committee members, particularly in Africa, who also expressed concern with regards to organizational overlap. Though he chuckled while saying it, one individual remarked that "maybe Amani will be an unfair competitor"[67] (Participant 36, March 29, 2022). The individual also noted the programmatic encroachment of Amani's country office upon a local epistemic territory comprised of civil society experts on women's rights and gender equality. To avoid competition, Amani's role, he suggested, must be limited to capacity building, not service delivery, as local organizations possess the relevant know-how and skill in this realm, in his opinion. However, by requiring that their satellites display greater entrepreneurship to achieve financial autonomy, namely by securing project funding, this encroachment upon local NGO territory is difficult, if not virtually impossible, to avoid.

Internally, and despite recognition of the issue as exemplified in the preceding paragraphs, there appears to be no formal policy against "unfair" competition with local NGOs. The decision of whether or not to respond to a call for proposals, in which Amani is likely to outperform local actors, appears to occur on an *ad hoc* basis. It rests largely on the assessment of individual staff members instead of an explicit organizational stance, again suggesting ambivalence. The many Amani team members I spoke with indicated that they would refrain from competing with their implementing organizations if the occasion presented itself, or propose joint mechanisms such as consortia, but the internal strategy pressures satellite offices into bidding for projects and accessing new revenue streams. And, even if Amani is not engaged in direct competition with its local subcontractors, its overseas presence nurtures dynamics that disfavour small, endogenous actors.

For this reason, and because of the numerous unresolved tensions described in this section, a restructuring of power between Amani headquarters, its satellites and local NGOs seems to be stalled mid-process. Or, as a pendulum swaying, on the one hand, towards localization—greater recognition of local expertise, leadership and ownership—, it pulls back on the reverse sweep, towards the model which privileges Western INGOs and their knowledge. In all likelihood, this why the question, "But your country offices, what is that?" remains a difficult one to answer for Amani.

[67] The original passage is in French: "Peut-être que ce sera une concurrente déloyale."

7.4 Another organizational conundrum: centralized decentralization

Reconciling the establishment of national satellites amidst calls to localize and "decolonize" aid is an important organizational challenge for Amani to overcome. However, another facet of their structural transformation displays contradictory tendencies: Instead of contributing to the desired state of horizontality, the proposed network maintains the primacy of expertise emanating from Canadian headquarters. The internal narrative presents one perspective: "Amani is a network that crosses knowledge. And within that network, all perspectives are equal" [68] (Participant 3, August 3, 2021). However, their actions present a more nuanced story.

To begin, individuals from the head office have spoken of the importance of "federating instruments" (Participant 3, August 3, 2021; Participant 7, August 12, 2021). "We have policies here on equality between women and men, sexual harassment, antifraud, on all those elements that are important to create common standards, federating elements, for us to have a common identity as a network. The entities must have similar identities" [69] (Participant 3, August 3, 2021). He explains that Amani has mechanisms to ensure strategic coherence between each member of the network through formal adhesion to strategic priorities. Another individual explains: "Each country office director is required to develop a business plan that aligns with our strategic plan for 2020–2025, and which features milestones towards becoming autonomous local entities […] All countries have adhered to that idea"[70] (Participant 7, August 12, 2021).

However, when asked if there was internal resistance to the proposed transformation among satellites, another participant responded quite candidly, "A lot." The individual then explains:

> About six months ago, maybe a year, I don't remember which country office, but I saw an e-mail … And they were really reluctant, they just wanted things to stay the way they are now. They just didn't "feel" it. They know their context, and are just thinking, "I'd rather just be Amani *status quo*

[68] The original passage is in French: "C'est un réseau qui croise la connaissance. Et dans ce réseau, il y a l'égalité dans la perspective."
[69] The original passage is in French: "Il y a des politiques ici sur le EFH, sur le harcèlement sexuel, sur l'antifraude, sur tous ces éléments qui sont importants pour créer des standards communs, fédérateurs. Pour qu'on ait une identité commune, comme réseau, les entités doivent avoir des identités similaires."
[70] The original passage is in French: "Les directions des bureaux-pays doivent développer un plan d'affaires qui s'intègre dans notre plan stratégique 2020-2025 et qui devrait contenir des jalons qui les amènent vers l'autonomisation […] tous les pays ont adhéré à cette idée-là."

> instead of trying to develop my own little McDonald's over here." You know, it's really not that easy.[71] (Participant 4, August 4, 2021)

We can infer from this citation that this country office was somewhat coerced into accepting the terms of Amani's restructuring, an imposed "autonomy," that paradoxically evokes subordination. Another participant comments that some national staff "have never felt invested in a mission of developing their organization" (Participant 7, August 12, 2021).[72] Assuredly, there is nothing unusual about this scenario; everywhere, subordinate entities are obliged to follow the dictates of mergers and acquisitions, departmental restructurings, relocations and much more. The unique character of Amani's transformation, however, is that it implicitly aims to redress postcolonial power imbalances within its structure, but also within the aid industry at large. Nevertheless, by piloting its internal reform, from an albeit participatory but top-down approach, Amani is flexing its power over its Southern affiliates. Its "franchise" standard—complete with policy and managerial instruments to which country offices must adhere, emulates the dynamics at work within the aid industry. Amani has created a micro epistemic territory, which it aims to govern through a federated system.

A federation, like a franchise model, always displays some level of centralization; its very nature is to structure independent entities, to which some planning and decision-making authority has been delegated, into a larger organization. Requiring that its affiliates submit a 5-year business plan that aligns with an organization-wide strategy is an example of delegated planning authority at Amani. It's a form of decentralization, contingent on adhesion to standards and demonstrated competence, that remains bound by the parameters of a centralized authority. On a micro level, this mirrors the process that is occurring within the localization reform. The decentralization of aid, which entails the delegation of certain degrees of authority to local responders, is controlled by power-wielding gatekeepers who produce the standards and tools, or the "federating elements" that define what constitutes aid, and who is considered a legitimate actor within the landscape.

[71] The original passage is in French: "Il y a six mois, peut-être un an, là, je me souviens plus quel bureau pays, encore je voyais un courriel là, et c'était vraiment à contrecœur. Ils aimeraient bien mieux rester comme ils sont, là. Eux, ils ne le sentent pas. Ils connaissent leur milieu, et ils se disent 'nous, on ferait bien mieux de rester Amani statu quo au lieu d'essayer d'avoir notre petit MacDo chez nous.' Tu sais, c'est pas évident."

[72] The original passage is in French: "Ils se sont jamais sentis investis d'une mission de développer leur organisation."

What role, then, does the Canadian office envision for itself within this new structure? "Regarding the security issue," explains a participant from a satellite, referring to Amani's duty of care vis-à-vis its staff and volunteers, "they did an audit to verify that we were compliant and then gave us feedback on how we were doing, how it can be improved. So, it is working that way."[73] The individual adds: "I don't know what their plan is for the future, but the role of the Secretariat in Canada would be to verify the standards, though this is still in progress" (Participant 19, February 17, 2022). The term "Secretariat" is currently favoured within Amani for the reformed role and identity of the Canadian office. Contrary to "head office," with its hierarchical resonance, "secretariat" suggests coordination and oversight, direction setting and administration. The practice of audits, however, is suggestive of enduring power dynamics rather than horizontality, as will be further discussed in the next section.

The new Amani Canada, one participant explains, "will maybe become a shell with a few experts, and ties to the donors"[74] (Participant 8, August 15, 2021). "We would have trilingual specialists in our programmatic priorities such as women and climate change, for instance," adds another individual. "So, we could have two or three resources here looking after that, women's economic empowerment, management in fragile contexts, so we become a pool of specialized resources, of expertise that we provide to country offices, rather than generalist managers"[75] (Participant 7, August 12, 2021). Another individual from a satellite office, however, contends that while the organization is indeed shifting some administrative and programming resources away from its headquarters, experts need to be local rather than based in Canada. Instead, Amani's strategy has been to deploy volunteers from Canada to "transfer" specialized skills; however, these individuals, while well-intentioned, lack the fine knowledge and embeddedness of local subject experts. "I still see a very centralized approach. I see many people—program managers, environmental specialists, gender equality specialists, climate resilience specialists, or

[73] The original passage is in Spanish: "Para el tema de seguridad hace unos meses nos hicieron una auditoría para verificar que los estuviéramos cumpliendo y después tenemos retroalimentación de cómo estamos, como lo estamos implementando, de cómo se puede mejorar, entonces está funcionando de esa manera."
[74] The original passage is in French: "Peut-être qu'éventuellement au Canada, ça va être une coquille, une coquille avec quelques experts, le lien avec les bailleurs."
[75] The original passage is in French: "Alors, on aurait des spécialistes trilingues dans nos priorités programmatiques de femmes et changement climatique, par exemple. On pourrait avoir deux ou trois ressources au Canada qui s'occupent de ça, renforcement du pouvoir économique des femmes, la gestion en contexte fragile, on devient plus un bassin de ressources spécialisées, d'expertise qu'on fournit aux bureaux-pays, plutôt que des gestionnaires généralistes."

whatever—but my impression is that many of these people are under contract in Canada"[76] (Participant 15, October 6, 2021).

Ultimately, Amani's organizational redesign would entail not only the centralization of expertise in Canada, but also the role of standard setting. As such, it reproduces enduring epistemological hierarchies in the aid sector. Though Amani's team is diverse and comprised of numerous diasporic individuals, indicating a strong coherence between human resources and the organization's identity and core values of inclusivity and horizontality, its structural model remains grounded in a Northern tradition. In addition to situating its country satellites within the wider debate on localization, another significant organizational conundrum awaits Amani, then: finding the balance between delegated authority and centralized control. Indeed, *what* you control, *how much* you control and *how* you control has important implications amidst increasingly vociferous challenges to the West's primacy in aid provision.

7.5 The shepherds' tools

As seen in the previous chapters, experts in the aid industry are able to guard their position and preserve the legitimacy of their role through their claims to the latest and most sophisticated knowledge. They rely, as Kothari (2005) writes, on the constant renewal of their language and technique, which, when combined with their cultural capital and association with "modern" ideas, safeguards their status as "experts." The following quotation from a Canadian employee illustrates the occurrence of such processes with Amani, in which Northern expertise is continually reiterated and authenticated through the organization's structure, mission of "capacity building" and display of more "advanced" knowledge than its Southern satellites:

> There's work to be done on equality between women and men, and they [satellite] have an equality specialist, or a gender specialist, but who's not exactly … up to date on all the latest things about positive masculinities, for instance. So then, we can provide support. We have someone in Canada who can go there for two weeks, provide support on positive masculinities, and then continue to follow up from a distance[77] (Participant 7, August 12, 2021).

[76] The original passage is in French: "Ça reste encore centralisé. Moi je vois qu'il y a quand même plusieurs personnes — chargés de projet, spécialistes en environnement, spécialistes en EFH, résilience climatique, ou je ne sais quoi, mais j'ai l'impression que beaucoup de ces personnes sont en fait sous contrat au Canada."

[77] The original passage is in French: "On a un travail à faire en égalité femmes-hommes, ils ont une spécialiste en égalité femmes-hommes ou genre, mais qui n'est peut-être pas tout à fait… à jour dans les histoires de masculinités

Amani's satellites have historically been dependent on Canadian headquarters for funding; however, the deficit thinking exemplified in the preceding passage suggest the maintenance of another, more subtle form of dependency. To achieve the objective of ultimately becoming independent entities, Amani's satellites are paradoxically dependent on the technical and managerial knowledge disseminated by Canadian headquarters, who acts as a transmission belt for the aid sector's institutionally developed episteme (which, to name a few of its elements, includes positive masculinities, participation, entrepreneurship, strategic planning, project evaluation and double-entry bookkeeping). To operate as equal and brand-compliant entities within the Amani network, satellites have little choice but to adopt Amani's policies, latest approaches and increasingly sophisticated managerialist instruments. "This is the path to autonomy," argues a participant from Canada, "through capacity building, and the local appropriation of those processes"[78] (Participant 6, July 23, 2021).

On a sector-wide level, this same process is occurring within the localization agenda, whereby the increase of direct funding to local actors is contingent upon their display of technical and managerial expertise required by donors. Consequently, INGOs like Amani have secured their status in the industry, as shepherds who simultaneously serve the interests of donors by tending to a knowledge territory and its population, but also by ensuring that newly admitted actors from the Global South, inevitably occurring through the process described above, adhere to the industry's common standards. "This is what we do at our level: We are the interface between donors that prefer to oversee large programs and budgets and objectives, and local NGOs," sums up a participant from Amani's Canadian office. "Through intermediary organizations such as ours, we channel resources, we channel resources directly, to build, construct, invest, whatever, and to complement that, we provide technical assistance"[79] (Participant 1, July 30, 2021).

Technical assistance, or "capacity building," occurs at two levels with Amani. On the one hand, it is provided as a service to national satellites, for instance, through "coaching" but also via audits or assessments upon which remedial training is provided. On the other hand, it features prominently within

positives, par exemple. Alors là, on pourrait donner un appui. On a quelqu'un au Canada qui peut aller là-bas pendant deux semaines, donner un appui en masculinités positives, ensuite assurer un suivi à distance."

[78] The original passage is in French: "L'autonomie ne peut que passer par là, en fait, par le renforcement et l'appropriation de ces processus-là."

[79] The original passage is in French: "C'est ce qu'on fait, à notre niveau : on fait une interface entre les donateurs qui préfèrent gérer des plus grands programmes et des enveloppes et des objectifs… puis des ONG locales. Par des organisations intermédiaires comme la nôtre, on achemine des ressources directement, pour bâtir, construire, investir, *whatever,* et en accompagnement de ça, de l'assistance technique."

the organization's programmatic approach and its work with local civil society actors whose effectiveness, financial autonomy and visibility it aims to enhance. "To be independent," argues one participant, "one has to master all those basic managerial practices that will position you as a credible actor"[80] (Participant 6, July 23, 2021).

However, what constitutes "basic" managerial practices within Amani warrants interrogation. In attempting to capture and standardize its internal body of knowledge, the Canadian office revived an outdated project implementation manual, which was updated in 2021 and 2022 through a consultative process in which country offices were solicited for their input. "So, this project manual will be mandatory within the Amani network, within the national offices," explains an individual. Though it is intended to promote greater internal coherence and efficiency within the organization, the project manual will also fulfill a control function, as illustrated by this passage from the same participant who reflects on its adoption by national satellites:

> If they don't apply it [the manual], or if they develop something that contradicts it, that's when Amani—the network— will intervene and say, "You're not respecting the rules." So that's an example […] Another example is that we have a participatory methodology with partners for monitoring and evaluation, so they have to apply that […] I think that … if we're talking about having a McDonald's in China, there has to be at some point an auditor that shows up in Beijing, that goes to eat at McDonald's and says "OK, this does not respect the rules," so he'll tell the folks at McDonald's Beijing that they're not respecting the rules.[81] (Participant 4, August 4, 2021)

Beyond the seeming contradiction of being *obliged* to apply a participatory method, the preceding quotation captures internal dynamics that can hardly be described as "horizontal." The project manual is a codified instrument of power, the shepherds' most essential tool; it effectively hierarchizes practices within the network as being either compliant, deficient or divergent, and assists in steering members of the Amani population towards a common standard. Internal policies, all of which reside in the Canadian headquarters—not unlike the ICRC and IFRC policies which are produced in Geneva and distributed through its network, provide an additional level of harmonization and control: "In Haiti, it's not the human

[80] The original passage is in French: "Pour être autonome, il faut maîtriser, en tout cas, ces pratiques de gestion de base, en fait, qui vont te placer comme un acteur crédible."

[81] The original passage is in French : "S'ils l'appliquent pas, ou s'ils développent quelque chose en contradiction avec, c'est là que le Amani-réseau va intervenir en disant que tu respectes pas les règles. Donc ça, c'est un exemple […] Un autre exemple, c'est on a une méthodologie participative avec les partenaires de suivi et d'évaluation, donc il faut qu'ils appliquent ça […] Je pense qu'il va falloir, si on parle d'avoir un MacDo Chine, il faut à quelque part qu'il y ait un auditeur qui débarque à Pékin, qui va manger au MacDo, puis qui dit bon, 'Ça, ça respecte pas les règles', ça fait que là il va dire aux gens du MacDo Pékin qu'ils respectent pas les règles."

resources policy of Amani-Haiti that predominates," explains the same individual. "It's the human resources policy of Amani [the network] that has to be applied."[82]

Further testifying to hierarchies at play within the organization, another individual remarks that some of the strategic policy elements put forward by the Canadian office, which are aligned for instance with Canada's Feminist International Assistance Policy, generated resistance at the country-office level. "So, our goal this year is to work on advocacy and policy change, with the local offices, but it's really difficult," argues a participant. "You take a theme such as LGBTQI and say that this will be one of the advocacy themes that we'll work on, and then you arrive in Senegal, and Senegal just doesn't want to work on that … and then, we talk about decolonization"[83] (Participant 8, August 15, 2021). While in no way discounting the urgency of addressing human rights violations and discriminatory practices, the participant's remarks expose an internal tension between the organization's equality and decentralization narrative, and its actions. It also exemplifies its ambivalent role as transmitter of the state's values. As it ushers this satellite towards the adoption of programming through policy instruments, thematic orientations and language with which some are uncomfortable, we are reminded that the threshold between accompaniment and cultural imperialism at Amani is ever fleeting, difficult to locate amidst ongoing attempts to reconcile ethical aid with effective aid.

The problem stems from an understanding of encounters between the Canadian office and its satellites that, shrouded in the narrative of equality, becomes ahistorical and apolitical. As such, the assumption that best practises emanating from the West—such as positive masculinities and LGBTQI advocacy—are thought to be extractable from their context and transferrable wholesale to Western Africa, in much the same way as managerialism's belief in its own objectivity and hence universal applicability. For donors and INGOs alike, the cultural appropriateness of the exported managerialist and technical knowledge seems at times neglected, as evidence by the preceding quotation and a similar example from Iraq provided in

[82] The original passage is in French: "En Haïti, par exemple, c'est pas la politique de gestion des ressources humaines de Amani-Haïti qui prédomine. C'est la politique de gestion des ressources humaines d'Amani [le réseau]."

[83] The original passage is in French: "Notre but cette année c'est de travailler sur le plaidoyer et le changement politique, en lien avec les bureaux, localement. Mais c'est très difficile. Tu prends un thème comme LGBTQI, puis tu dis, 'ça va être un des thèmes de plaidoyer qu'on va aborder', puis là t'arrives au Sénégal, puis le Sénégal veut pas travailler là-dessus par exemple."

Chapter 6, in which the donor, GAC, was requiring the enlistment of an LGBTQI organization within the project.

Replicating the dynamics observed at a higher level in the aid chain, whereby INGOs serve as transmission belts for gatekeepers' paradigms, Amani's Southern affiliates are thence mandated with disseminating and controlling managerial and technical knowledge among local civil society organizations with which they work. "My colleague, who is responsible for finances," explains one implementing partner from the Great Lakes region of Africa, "works very closely with Amani's office in Dakar." She adds:

> They have a controller there, a Senegalese woman, who works very closely, her assistant as well, two days don't go by without them verifying receipts, data entry, coding, with my colleague from finances. And then at a higher level, that's at the Canada-level, they have another controller who works with the Africa team, and etcetera. So it's a very close kind of monitoring.[84] (Participant 20, March 4, 2022)

Suggesting another incongruity between narrative and action, the chain of command described above is far from decentralized. Managerial tools are designed at Amani's headquarters, codified in the project manual, and rolled out through training on their use; local implementing organizations are required to use them unilaterally, which contributes to their uniformization. Though some local implementing organizations are very appreciative of the structure provided by the manual and the accompaniment they receive "because it enables us to do things well," [85](Participant 20, March 4, 2022), others displayed a more critical stance. "What I say, what I honestly think," remarks a participant from another one of Amani's local implementing organizations in West Africa, "there's a lack of debate, for us to develop tools so that really everyone can succeed in implementing the project. For this reason, sometimes we find it difficult working with organizations like Amani. Because the collaboration isn't well established at the very start"[86] (Participant 36, March 29, 2022). For this individual, collaboration manifests through the joint design of

[84] The original passage is in French: "Mon collègue, qui est chargé des finances, travaille avec le bureau d'Amani à Dakar. Il y a une contrôleure là-bas, une dame sénégalaise, qui travaille de façon vraiment très étroite, son assistante aussi, vraiment, il ne se passe pas deux jours sans qu'ils travaillent à la vérification des pièces, à l'entrée, l'encodage avec mon collègue des finances. Et à part, il y a un autre niveau, c'est le niveau du Canada, où un autre contrôleur, qui travaille avec l'équipe d'Afrique, et cetera. Donc c'est vraiment un suivi de proximité."

[85] The original passage is in French: "Cet accompagnement est privilégié parce qu'il nous permet de bien faire les choses."

[86]The original passage is in French: "Au niveau des outils, c'est préparé par Amani. Donc nous adhère à l'utilisation. Ce que je dis, que je pense de façon honnête, il manque de débat, pour qu'on essaie de mettre en place des outils vraiment pour que tout le monde peut arriver à exécuter ce projet-là. Donc c'est ce qui fait que quelquefois, on a des difficultés à travailler avec des organisations comme Amani. Parce que la collaboration dès le départ n'est pas vraiment très bien établie."

tools and process as opposed to their unilateral imposition. However, as revealed by the following passage from a Canadian employee, local NGOs have limited negotiation power, as their admission into the territory upon which they depend for funding is contingent on conformity:

> The system has become a real architecture, so you need to be part of it if you want to be a player in that system. So sometimes local partners struggle with that. [When a new tool or process is required] They're like, "What is this thing?", and "We don't care!" And we're like, "What are you talking about?" These are hours of our time that we need to invest, but it's important for them." (Participant 5, August 9, 2021)

In this passage which provides another example of shepherding, the importance of conformity has been established by Amani *on behalf* of the local NGOs whose expertise and leadership they paradoxically champion, rather than by the implementing organizations themselves, revealing underlying assumptions about local capacity. Indeed, Amani displays quite a lot of internal ambivalence about local technical and managerial knowledge, ranging from statements such as "It's not true that NGOs at the local level are ready to assume on their own"[87] (Participant 14, September 21, 2021) to "They know more than we do"[88] (Participant 15, October 6, 2021). Nonetheless, there is general agreement that though they may possess contextual insight and thematic proficiency—in gender, agriculture, engineering, health services or emergency aid delivery— this remains insufficient to guarantee them entry into the aid architecture, because managerial expertise supersedes all other forms of knowledge. And, when asked if they were ever provided with the opportunity to receive training from local, well-performing NGOs, a member of Amani's advisory committee in Burkina Faso responded negatively, suggesting that enduring epistemic hierarchies remain unchallenged: "No, that's not a common practice. We do get the feeling at times that the expertise comes from elsewhere" (Participant 25, March 15, 2022). Yet, the countries where Amani works are replete with young graduates, many of whom have studied abroad who often can't secure employment with local NGOs because, as one participant explains, "We create financial vulnerability for [local] NGOs in terms of their access to funding"[89] (Participant 13, September 16, 2021).

Paradoxically, the very same aid projects that are intended to build the capacity of local responders also feature financial constraints that hinder the accumulation of expertise. The projectification of aid (Piciotto, 2020) and funds' passage through multiple levels of intermediaries ultimately reduces local NGOs' access

[87] The original passage is in French: "Ce n'est pas vrai que les organisations, les ONG au niveau local, soient prêtes à assumer toutes seules."
[88] The original passage is in French: "Moi je considère même qu'ils en savent plus que nous."
[89] The original passage is in French: "On crée une précarité chez les ONG dans l'accès au financement."

to the operational funds needed to attract and maintain expertise. Instead, they are granted a percentage of project costs in the form of administrative fees, which must be accounted for alongside other project implementation expenses. Even within Amani, implementing organizations' administrative budgets are kept to a bare minimum, as exemplified by this passage from a Canadian employee:

> You've got the donors' expectations, and the competition, and that's why you find yourself with a project in 3 or 4 countries, with less and less funding for local partners … and then we have an issue because we are only funding 50% of an accountant, where there are so many risks that I think we should have funded 100% of a salary, for that person to be entirely dedicated to the project, for the entire month. But we want to please the donor, so we cut costs as much as possible while trying to achieve maximum results, with the most innovative approaches. And all that with the least possible people in the field. (Participant 6, July 23, 2021)

Lack of means, then, for some local aid providers is a direct result of Amani's North-South "centre of expertise" technical assistance model, which essentially funds external expertise. It also stems from the restrictive funding mechanisms associated with projects. Lack of means must therefore not automatically be construed as lack of capacity. Supplementing local contractors' budgets beyond that which is provided in government-funded grants, for instance through private and unrestricted funding, remains an institutional choice and practice that organizations like Amani are entirely free to endorse—and chose not to. As explained by a participant from the Canadian headquarters, "We are such an expensive organization that we need all of our administrative budget! […] It's hard to say that we're going to share that! Otherwise, we'll disappear as an organization!"[90] (Participant 1, July 30, 2021).

Finally, when local capacity and managerial prowess are recognized, as is the case with a well-established emergency responder in the Philippines which "for all intents and purposes doesn't need a partner"[91] (Participant 7, August 12, 2021), Amani maintains its "expert" posture vis-à-vis the organization. "What we're trying to do right now," explains the same individual from the Canadian office,

> is *transform this NGO* [italics added for emphasis] into a lead in the Philippines whereby we would just come in and provide support … we would jointly develop projects and grant them the lead responsibility, and we would come in with support on strategic functions within the project. We

[90] The original passage is in French: "On coûte tellement cher, qu'on a besoin de tous nos revenus de gestion! C'est difficile de dire qu'on va partager ça ! Sinon nous autres on va disparaître comme organisation."
[91] The original passage is in French: "[…] et qui à toutes fins pratiques, n'ont pas besoin de partenaire."

> would ensure that we're co-responsible for the project, of course, but we would mostly come in at the level of technical assistance.[92] (Participant 7, August 12, 2021)

This begs an important question: On the basis of what authority can one attempt to *transform* a foreign endogenous humanitarian responder that appears to be entirely functional? The answer, simply, is that it stems from one's role as a shepherd.

7.6 Conclusion: tensions and competing demands at Amani

In this chapter, I have argued that INGOs, as champions of vulnerable populations, are also at the service of powerful gatekeepers—the donors who are essentially their lifelines—and, as such, are contrived to assume ambivalent stances which result in internal contradictions. As products of a Western modernist ideology, to which the unsavoury qualifier of colonial is increasingly attributed, organizations such as Amani are rightly re-envisioning their role in a more horizontal model of solidarity, in which their newfound identity would be that of *convener*. Indeed, by distancing itself from the orthodox North-South model, the reimagined Amani network would ultimately gather individuals and organizations of varied background and expertise into a network within which knowledge is exchanged and cross-fertilized, to generate innovative solutions to the world's ills. That is what we would like to think.

However, Amani's nationalization and decentralization process are not without organizational risk. Consequently, the paradoxical flip side of this transformation is the centralization of its brand image through structure, internal policies, approaches and managerial instruments which are aimed at preserving internal coherence and an organizational quality standard. Yet, by adhering to a common ideology and delivery approach, which in fact mirrors that of the gatekeepers', these actors and their diverse epistemes are subjected to isomorphic processes that ultimately lead to a loss of diversity and learning. Opportunities for divergent thinking, for engagement with emergence, messiness, risk taking and profound political debate about international aid are sidelined by donors' mechanistic accountability systems. The most pernicious effect, then, is the maintenance of power—to define, to control, to assess,

[92] The original passage is in French: "Ce qu'on essaie de faire actuellement, c'est de transformer cette ONG en un lead aux Philippines où on vient en appui. Donc, on développe conjointement des projets et on leur donne la responsabilité principale, et nous on vient en appui sur des fonctions stratégiques au sein du projet. On assurerait une co-responsabilité quelque part quand même, là bien entendu, mais nous, on viendrait surtout en appui technique."

to provide expertise—among those who already wield it, as opposed to the contrary, which Amani aspires to.

We have seen ambivalence displayed through the ambiguous status and purpose of Amani's national satellites, for instance, whose presence can simultaneously be perceived as a boon and a threat to local aid organizations. Because of its need for self-preservation, Amani's strategy appears at times inconsistent, proposing for instance a multimillion-dollar North-South technical assistance program whilst championing decolonization, or oscillating between "letting go," and "pulling in the reigns" to ensure that it retains a certain level of control over its long-term viability. Internally, there are gaps between Amani's narrative of horizontality and the centralizing function of the Canadian office, which manifest as incoherence. Most fundamentally, as argued by a participant speaking about resource allocations, "If you haven't shared your administrative costs, already, your approach is not egalitarian"[93] (Participant 8, August 15, 2021).

Equality is challenged on many levels by a satellite office employee in the following passage, revealing that at Amani, this is a work in progress:

> Beyond the question of the project manual, procedures and all those things—which are elaborated by headquarters—there is the consideration of staff. That is a profound problem […] And what we see at the country level, is that if there is no financial incentive for headquarters, when there's no administrative revenue for headquarters, well … you can ask all you want, but you won't get any support to write up the grant proposal. Even though it should be reciprocal if we were truly equal! These are some of our challenges, but I think that once we resolve the issue of staff consideration, the mobilization of expertise will also be reciprocal. So in terms of progress, granted that I may not have sufficient hindsight, when I look at the short-term, I don't see any advances.[94] (Participant 9, August 18, 2021)

Such a statement, undoubtedly disheartening for the individuals at Amani who are profoundly committed to the empowerment of poor and marginalized groups, suggests that despite changes to the narrative,

[93] The original passage is in French: "T'as pas séparé tes fonds de gestion avec eux, ça fait que déjà là, l'approche est pas égalitaire."

[94] The original passage is in French: "Au-delà de la question des manuels, des procédures, et autres — c'est élaboré au siège, il y a la considération même du personnel. Ça, c'est un problème profond qui est là […] Le constat, c'est que quand le siège n'a pas d'intérêt financier, il n'y a pas de revenus de gestion au niveau du siège, bien… vous avez beau interpeller, vous n'aurez personne pour aider à rédiger la proposition ! Alors que ça devrait être réciproque, si on se traitait réellement d'égal à égal ! Donc, euh… ça fait partie des défis qui sont là, mais une fois qu'on aura réglé la question de considération, la mobilisation des expertises sera réciproque. Mais en termes d'avancées, je n'ai pas suffisamment de recul pour dire… mais quand je regarde dans l'immédiat, je ne vois pas d'avancées."

organizational transformation is hindered by underlying mechanisms that preserve the status quo. Reflecting the dynamics that have constructed the aid architecture as a technocratic industry, Amani's response to the arrival and inclusion of new actors and their epistemes upon its microterritory is first to assess, then shepherd towards the adoption of a model that is familiar and perceived as legitimate. The organization's federating elements, which are technocratic by definition—structure, plans, policies, procedures, project manuals—can thence be viewed as discursive artefacts which seek to protect its assets and stabilize a state of disorder brought about by change through homogenization. In the next chapter, I will apply insight gained from the case of Amani to further illustrate how similar contradictory processes are also evidenced in the localization reform, thereby limiting its transformative potential.

CHAPTER 8: RUNNING TO STAND STILL—THE HUMANITARIAN SYSTEM'S SELF-PRESERVATION MECHANISMS

8.1 Enter the paradox

In the previous chapters, I have argued that the aid architecture's claim to universalizing expertise has involuntarily waged a disvaluing war against the epistemic universe of certain populations. Less subtly, by championing the uncritical adoption of modern technology, management, economy and Western vernacular, aid agencies and INGO shepherds partake in a form of technocratic control that, reminiscent of a civilizing mission, transforms diverse and "unruly" populations of local aid responders into a uniform and recognizable group. While this harmonization of practices and epistemes is intended to improve efficiency, it also protects dominant actors against challenges to their epistemic territory. In doing so, they additionally limit the potential of encroachment of knowledges otherwise upon their territory; the chaos that might ensue from the removal of epistemic hierarchies and boundaries is thereby thwarted. Meanwhile, as will be argued in this chapter, the transformative potential that could be brought about by tension, innovation, and the meeting of varied perspectives, is reduced by the homogenizing and conformity-inducing processes of gatekeeping and shepherding.

Though standardization and professionalization are understandable responses to threats to the aid industry's legitimacy, they have also consecrated Westocentric forms of knowledge as natural and neutral solutions to crises around the world. Bolstered as universal and irrefutable, technocratic aid and its managerial instruments contribute to the reproduction of historical asymmetries between the Global North and the Global South, by structuring knowledge between that which is admitted as "valid," and that which is viewed as deficient. This then predetermines, but also justifies, assistance interventions on the basis of perceived expertise and a presumed lack thereof. Underwritten by political and ideological power, the technical and managerial knowledge apparatus of aid does not just reduce human suffering. It also contributes to the economic, social and cultural transformation of organizations in the non-West, as illustrated by the Amani case, so that they may be recognized as "knowledgeable" according to the West's standards, and hence, be admitted into the humanitarian territory.

In Chapter 1, I set out to understand why localization, as the latest reform of the aid industry, had failed to launch despite the ambitious—and sincere—commitments of donors' and INGOs' to place local actors at the heart of emergency response. My research, juxtaposed with an analysis of Amani's attempts to achieve an organizational reform that emulates the idea of locally driven response, reveals contradictory impulses that give rise to important questions. For instance, how can the localization reform hope to place local responders in crisis-affected countries at the centre of humanitarian response, while simultaneously disqualifying their capacity and the validity of their knowledge? How can the exercise of isomorphic control by powerful actors, which manifests as gatekeeping and shepherding, be reconciled with the reconfiguration of power dynamics to which localization aspires? Such questions denote persistent contradictions within the industry, incongruities and tensions that are, unsurprisingly, troubling the system's attempts to reform itself.

Such tensions, which result from the ebb and flow of oppositional trends (i.e., controlled emancipation, centralized decentralization, conditioned inclusion) suggest that the localization agenda is profoundly paradoxical. According to Quinn and Cameron (1988), whose work explores how organizations manage competing demands and tensions, contradictory and mutually exclusive elements are inherent in complex systems. As the defining characteristic of paradox, these tensions, as seemingly irreconcilable poles, are engaged in a tug-of-war. Within a paradox, conflicting elements are seemingly logical when considered in isolation. However, when occurring simultaneously, they appear irrational (Lewis, 2000). For instance, optimizing the efficiency of aid through increased control and standardization, as a stand-alone objective, is logical. Likewise, recognizing the crucial role of local actors is equally rational: When disaster strikes, the immediate, first-line response is one of proximity, not one that comes from afar. However, when considered simultaneously, attempting to standardize aid delivery while concurrently advocating for the inclusion of tremendously diverse local responders, is absurd. The former calls for control, while the latter requires flexibility and a loosening of the reins. Paradoxes, therefore, create conceptual difficulties within the localization agenda, because of contradictory elements that are seemingly distinct but which inform and define one another. As such, they can never be separated. They are "tied in a web of eternal mutuality" (Schad et al., 2016, p. 6).

8.2 The aid industry's competing demands

One of the most enduring paradoxes in aid, which also manifests in the localization agenda, opposes classic humanitarianism (i.e., the "saving lives imperative," with its short-term orientation) with a long-term approach termed by Hilhorst (2018) as "resilience", similar to Barnett's (2011) alchemical paradigm. To enhance local systems' ability to anticipate risks and respond to evolving circumstances, resilience mobilizes knowledge gained through reflection on past crises, which is essential to enduring stabilization, improved response capacity and ultimately, a reduction in the need for life-saving interventions. It effectively places local actors and their knowledge at the centre of humanitarian response. Yet the moral justification of classic humanitarianism, which is anchored in immediacy and technical (and most often foreign) expertise, is difficult to reconcile with the multidimensional and long-term nature of resilience. As illustrated in the following passage, the focus on immediacy leads to the prolongation of need into the future by undermining resilience and learning. The alleviation of suffering in the present, meanwhile, is compromised by the long-term orientation of resilience building that is championed by the localization agenda, as exemplified by an expatriate INGO worker:

> You see, whenever a project of (INGO) closes, it's always a disaster. Especially projects that have been running for like, 10 years, usually in the middle of nowhere. When I was working in Niger, we ran a hospital from 2005 to 2020 that closed in 2020. After that, you watch the entire economy of the village collapse, people have to leave. In the end, we're an employer.[95] (Participant 23, March 9)

The industry's managerial paradigm reveals similar temporal contradictions. Though the localization agenda has brought about a much-welcome reduction of short-term contracts with local responders in favour of multi-year funding arrangements, donors' and INGOs' continued use of logframes—and the ensuing requirement that local responders also demonstrate their prowess in results-based management—is ill adapted to the highly evolutive nature of complex crises. Though long-term projects support local actors' resilience by reducing their financial vulnerability, they simultaneously impair their autonomy of action by binding them into rigid contractual arrangements with donors and INGOs. Most

[95] The original passage is in French: "Tu vois, n'importe quel projet (d'ORGANISATION) qui ferme, c'est toujours un désastre. Surtout des projets qui ont comme 10 ans, en plus généralement c'est dans des *nowhere*. Quand je travaillais au Niger, on avait un hôpital de 2005-2020, qui a fermé en 2020. Mais après, tu vois toute l'économie du village qui s'effondre… les gens qui partent. À la fin on est un employeur."

antithetical, however, is the utilization of control mechanisms associated with aid's managerialist paradigm to empower local actors. Organizational autonomy is therefore paradoxically achieved through surveillance. From capacity assessments, compliance audits, project evaluations or "field visits," financial and narrative reporting, performance measurement and a slew of other accountability requirements, the shepherding processes documented in the previous chapters are intended to render local actors more resilient, and hence, more "capable" of assuming a central role in emergency response. Amani's efforts to "autonomize" its satellite offices through the achievement of performance standards demonstrates this eloquently, as does the following passage from an individual employed with a humanitarian standard-setting organization, in which the conflicting, yet interrelated, elements of resilience and control are clearly depicted:

> When we do an evaluation [of a local actor's technical and managerial knowledge relating to an international humanitarian performance standard], we see where the organization is strong, and where it's weak. And when we do this, we know what the organization's strengths are, and we have to recognize that strength. So the standard is a localization tool for us! Verification allows organizations to know where they're weak, to make the necessary efforts, and to improve. When you do that, as a local organization, you're signalling that you don't want to keep your weaknesses, you improve them, you have existing strengths, but you're improving your weaknesses to be better and to respect the standard. (Participant 47, April 12, 2022)[96]

Another participant highlighted the contradictory ambition to integrate local organizations into the humanitarian architecture, as per the localization agenda, while requiring them to adhere to a lengthy compliance annex. Mimicking the sound and action of a collar being tightened around her neck, she explained "It's like using a leash to keep close-by" (Participant 29, March 21, 2022)[97]. Meanwhile, another individual describes a pro-localization initiative led by Global Affairs Canada (GAC), whose aim is to progressively enhance local organizations' access to funds. "I'm a small organization, I don't have big projects, or even mid-sized projects, so I never get to GAC's threshold. So GAC has a strategy, as stupid as it may be," he adds, "which is maybe to build the capacity of small organizations through contracts, to give

[96] The original passage is in French: "Quand on fait une évaluation au niveau du (standard), on voit où est-ce que l'organisation est forte, et lorsque l'organisation est faible. Et quand on fait ça, on sait sur quel aspect les organisations sont fortes, et on doit reconnaître cette force ! Donc, c'est un outil de localisation pour nous. La vérification, elle permet aux organisations de voir là où elles sont faibles, de faire les efforts nécessaires, et de s'améliorer. Quand tu es dans cette démarche-là, en tant qu'organisation locale, tu es en train de démontrer que tu n'as pas vocation à garder des faiblesses, tu les améliores, tu as déjà des forces et tu améliores les faiblesses pour être meilleur et respecter la norme."

[97] The original passage is in French: "tirer la laisse et garder assez près."

them the chance to prove their capacity to manage projects, because there is this kind of glass ceiling that's difficult to shatter"[98] (Participant 45, April 8, 2022).

In reality, the technocratic roots of the aid industry, which were consolidated into a managerialist paradigm that was necessary to justify public spending, are not easily reconciled with a localization reform that is inclusive of diverse managerial practices, capabilities and knowledges. On the contrary, when confronted with ambiguity, which it equates to risk and disorder, managerialism reacts by augmenting its control mechanisms, a tendency observed and commented on by many research participants. Inclusion within the humanitarian landscape is therefore "granted" to local organizations, most of which are placed under the tutelage of INGOs, rather than recognized as a *de facto* possibility.

As such, though the industry aspires to the self-determination of local aid providers, its control processes are a double-edged sword that can shape subcontracted NGOs into instruments of service delivery. Training in the latest managerial techniques, which is intended to enhance local NGOs' financial autonomy by making them more readily contractible by donors and INGOs, blurs the threshold between instrumentalization and self-determination. As has long been argued by Smillie (1995), Lister and Nyamugasira (2003) and Michael (2004), contracting can deprive organizations—both local and international—of an important source of power and legitimacy, namely, their independence. Assuming contractual arrangements may lead local NGOs to disengage from their original constituency and mission ("*se dénaturer*" or shift away from one's nature, according to Participant 43, April 7, 2022). As Lister and Nyamugasira (2003) reveal, by becoming subcontractors to Western bilaterals, multilaterals and INGOs, local NGOs may gain financial resources, but simultaneously lose their capacity for advocacy and for holding their own state accountable. Financial autonomy is therefore counterintuitively linked to a certain degree of instrumentalization in which local NGOs become auxiliaries to the Global North and its international aid providers. Though local actors do enact agency by choosing to enter into such contractual arrangements, the unequal conditions under which they do so sustain power disparities.

Localization entails a restructuring of hierarchies towards greater horizontality and collaboration. However, as evidenced by the case of Amani, horizontality is difficult to achieve without the deployment

[98] The original passage is in French: "Je suis petit, ça fait que j'ai pas de gros projets, de moyens projets, ça fait que j'arrive jamais au *threshhold* d'AMC […] AMC a une stratégie, aussi bête soit-elle, d'essayer peut-être de bâtir la capacité avec des contrats, pour les petites organisations… dans le but de leur donner la chance de prouver leur capacité de gérer des projets, parce qu'il y a une espèce de plafond de verre qui est difficile à percer."

of centralizing instruments (common policies, protocols, project management procedures and quality standards, to name a few), which are intended to structure collaboration. Horizontality is paradoxically achieved through centralization, which in turn further solidifies the system's existing hierarchy. Likewise, past attempts to reform the industry through greater collaboration between actors—the creation of the cluster system for example, or even the elaboration of the Sphere standard by a network of humanitarian responders—have further centralized the system through coordination and regulation (Barnett & Walker, 2015; Heath, 2014). Whether coordination improves disaster response or not, it exercises power by assigning competencies and leadership roles that fail to address the tension between actors' desire for autonomy and harmonization through centralization.

According to Zarakol (2017), hierarchies in international systems such as the aid industry are social constructs which organize inequality as a solution to the potential problem of anarchy. While they may appear as fixed structures, they are in fact dynamic processes of negotiation and contestation among actors who seek to establish and maintain positions of power. For instance, the creation of regional governance structures and aid programs such as that of the Association of Southeast Asian Nations (ASEAN), as argued by Gómez (2021), can be perceived as a dynamic confrontation to the global multilateralism of the UN system. Likewise, the norms produced by the humanitarian system's dominant actors are also works-in-progress; as another manifestation of power and hierarchy, they are subjected to varying levels of agreement and discursive and behavioural contestation (Stimmer & Wisken, 2019). On the one hand, hierarchy can therefore provide stability, via the adoption of a common managerial paradigm, a "universal" code of conduct and quality standards, and even international human rights law. On the other, hierarchy can be exclusionary and oppressive, as it often privileges certain actors over others, whether deliberately or unintentionally, based on their perceived status or identity. This attempt to structure then paradoxically spurs contestation and the risk of destabilization, but in the short term, it preserves the *status quo*, as explained by a Philippine aid worker:

> We are participating in national discourse, but it's not that easy in terms of getting funding because one of the commitments is you have a multi-year funding. And there are pooled funds that should be established at country-level, but I think it's still at a negotiation phase. Because while we feel there's a pooled fund, like what happened when there was Typhoon Rai last December, so the pooled funds from donor countries were also given to UN agencies. Because there are UN agencies here, because they have systems in terms of respecting requirements and whatever in terms of donor agencies want, so it's given to UN agencies. It's not given to local NGOs. (Participant 31, March 23, 2022)

As observed throughout this research, by welcoming local NGOs upon aid's epistemic territory as a gesture of horizontality, gatekeepers' boundaries are subjected to confrontation by knowledges otherwise. However, the renegotiation that ensues serves to reaffirm hierarchies. The enduring existence of the "Humanitarian Club" (Barnett & Walker, 2015), comprised of ruling actors such as the UN agencies in the above-cited passage, whose status remains unfettered despite the localization reform, testifies to this process. The same can be said about the leadership positions within aid organizations, who remain largely occupied by individuals from the Global North (Bian, 2022), thereby seemingly paying little more than lip service to the decolonization agenda. For instance, when asked a participant why her organization had not offered a leadership position to the local employee whose merits she'd just lauded, I received the following answer: "Well, we're still a Western organization and that's how we think. We think that we need expats at the end of the day" (Participant 23, March 9, 2022).[99] Moreover, given the advantages and privileges that these dominant players enjoy, there is little enticement to disrupt the status quo. More recently, in their review of localization in Haiti, Colombia and Iraq, Robillard, Jean, et al. (2020) similarly noted that "[t] here simply are not enough incentives for international organizations to truly push for what some see as a loss of resource and privilege" (p. 13). Because of these competing demands, horizontality remains an elusive objective, if not a utopian ideal.

This sheds light on another pair of competing demands within the sector: innovation and stability. Piloting new ways of working in the aid industry, which entails fiduciary, programmatic and reputational risk—exacerbated by the fact that public funds are at stake—is simultaneously dependent on the stability of the aid infrastructure. As with any industry, strategic adaptation and innovation are necessary responses to challenges and opportunities in an ever-shifting external operating environment. The Paris Declaration for Aid Effectiveness (Organisation for Economic Co-operation and Development, 2005) is a deliberate attempt to address a political and neoliberal economic trend: threats to the sector's legitimacy stemming from claims of foreign interference, inefficiency and ineffectiveness, and poor accountability to affected populations. Like the localization reform, Amani's attempt to adopt a more horizontal structure is an adjustment to the gradual (albeit unequal) recognition of aid's coloniality occurring within the sector. Contrary to the Paris Declaration, which was primarily concerned with performance, for many actors, localization represents an important shift in the moral economy of aid (i.e., what is just and ethical).

[99] The original passage is in French: "Ça reste qu'on est quand même une *Western organization* puis qu'on pense comme ça. On pense qu'on a besoin des expats à la fin de la journée."

However, the decolonial narrative of fairness and reciprocity—which represents a departure from the post-WW II vision of aid—is incongruently juxtaposed with the need for organizational viability and institutional stability, as exemplified by the following statement from an Amani staff member:

> Here in Canada, we're always part of discussions with the humanitarian civil society sector, with Global Affairs Canada, and we push [for change] … but that's it … we don't push very evenly … It's like, as soon as our survival is threatened, our discourse softens. Sometimes we'll write joint briefs to the government, saying "don't forget this or that crisis," or more generally when it comes to humanitarian financing, to not just fund the multilaterals, but also the INGOs, under the pretext that we have local partners in the countries and we know Canada's feminist policy, and etcetera, so we find a lot of arguments to maintain our importance in the ecosystem. When in fact, there are many other ways of supporting local NGOs that don't require passing through Canadian NGOs.[100] (Participant 1, July 30, 2021)

The drive for institutional survival explains why, like Amani, scores of INGOs are establishing satellite offices or even relocating their headquarters to the Global South. This internationalization strategy, which for many Western organizations represents a structural innovation, would simply be termed "geographic expansion" in the private sector. Yet, for INGOs, it exemplifies the innovation-stability paradox, a balancing act of destabilizing an architecture of the past to enable the emergence of a new operating model. Paradoxically, for Amani, the future that it imagines as a departure from its former structure is also firmly anchored in the past. Because the empowerment of local actors poses a threat to Amani's long-term relevance as an aid provider, it finds new ways of repositioning its existence. For example, by rebranding itself as "a centre of expertise" at the service of its Southern satellite offices and implementing organizations, the Canadian headquarters draw on Amani's technocratic origins and reflexes to stabilize its identity in a period of destabilization. Meanwhile, the localization agenda similarly attempts a reformative departure from the exclusivity of the humanitarian club by inviting Southern NGOs upon its territory, while reaffirming its epistemic boundaries through gatekeeping and shepherding. What succeeds

[100] The original passage is in French: "Ici au niveau canadien, on fait toujours partie des discussions avec la société civile humanitaire, avec Affaires mondiales Canada, puis on pousse, mais c'est ça, on pousse inégal. Mais c'est comme… dès lors que notre survie se trouve menacée, soudain on ramollit dans le discours. Souvent on va écrire des notes conjointes au gouvernement, disant, 'il faut pas oublier telle ou telle crise', ou de façon générale dans le financement humanitaire, de pas juste financer les agences multilatérales, mais aussi les ONG sous prétexte que nous on a des partenaires locaux justement dans les pays et en plus on connait bien la politique féministe canadienne, et cetera, ça fait qu'on trouve aussi beaucoup d'arguments pour se maintenir en importance dans l'écosystème. Alors qu'il existe d'autres façons de soutenir les acteurs locaux qui ne passeraient pas par les ONG canadiennes."

is the push and pull of a tug-of-war between old and new, innovation and stability, exploration and *status quo*.

Likewise, Amani's policies, project management manual, standard operating procedures, and other federating elements centre innovation around the nationalization of its satellite offices, which curtails the exploration of significantly different ways of working alongside local aid providers. Yet, by reducing the risks that more profound innovation could pose, Amani protects itself from threats to its legitimacy and the resulting loss of resources. The use of the franchising metaphor by one of Amani's employees exemplifies such tensions. Just like Ritzer's (2004)'s concept of McDonaldization, the franchising structure envisioned by Amani represents the rationalization process of any institution intent on organizational growth while maintaining control over its operations and brand image. Ritzer, however, condemns—both literally and figuratively—the cultural impoverishment that ensues from McDonaldization. Furthermore, and as observed by Eberwein (2005) at the industry-level, this process of adaptation through geographic expansion has brought about an increase in professionalization and hence homogenization of aid workers' epistemes, independently of their origin. The prefabricated and formatted thinking that results, reduces the possibility of divergent thinking, which is a driver of the very innovation that organizations require to remain relevant in shifting environments.

In light of these competing demands, it is far from surprising that localization has yielded disappointing results. Plagued with such incongruent tensions, the humanitarian system's latest attempt at an institutional reform reveals its multiple contradictory elements. These are exacerbated by external factors such as a rise in nationalism and protectionism, the increasingly apparent weaknesses of multilateralism, climate change and the economic downturn caused by the pandemic and the war in Ukraine. As previously remarked, however, paradox is an inherent characteristic of complex systems. It would appear, then, that the absence of paradox is not an important determinant of success when attempting a reform. Instead, the manner in which competing demands are approached seems a more appropriate predictor of internal dysfunctions that can negatively affect a system's performance. Let us not forget that the aid industry is profoundly technocratic; its operational arm is a managerial paradigm that seeks to reduce chaos and ambiguity through hierarchical intervention design, linear causal logic, replicability and minute control. Neither technocracy nor managerialism has yet managed to befriend their foes in the humanitarian system: emergence and unpredictability.

Table 8.1 Competing demands in the international aid industry

Paradox	Manifestation of competing demands
Short-term and long-term orientation	• The focus on immediacy leads to the prolongation of need into the future by undermining local resilience and learning, hindering the capacity of local/national institutions necessary to reduce needs and populations' vulnerability to shocks. A long-term resilience orientation means that in the present, suffering may not be immediately or entirely alleviated, thereby reinstating the need for short-term interventions.
Autonomy and control	• Local actors achieve greater financial and decision-making autonomy by qualifying to receive funding from INGOs and donors. However, achieving this autonomy hinges on being subjected to control mechanisms to certify compliance and technical capacity. Local autonomy is therefore dependent on the exercise of control by INGOs and donors. Autonomy is, however, equated to risk, which paradoxically generates a need for control and order through increasing managerialism. • Autonomy, which is thought to be achieved through capacity building, leads to greater subcontracting of local NGOs. In some cases, this translates into a loss of self-determination, whereby autonomy is simultaneously achieved through instrumentalization as service providers to INGOs and donors.
Centralization and decentralization	• Horizontality between actors in the localization agenda is desired. Yet decentralization is contingent on the adoption of centralizing common standards, policies, procedures produced by dominant actors. These safeguard dominant actors' legitimacy and reduce the risk of chaotic decentralization. Horizontality is therefore simultaneously achieved and impeded by the instruments intended to control decentralization, which in turn further solidifies the system's existing hierarchy.
Innovation and stability	• Piloting new ways of working in the aid industry, such as the localization reform, entails a departure from the past and conditions necessary for innovation. However, innovation, which is essential to remain viable, can result in fiduciary, programmatic and reputational risk. Risk will be offset by an attempt to restore stability. The demand for innovation and a future-looking reform is therefore stymied by a need for stability and a return to the anchors of the past to stabilize organizational identity. Meanwhile, the need for organizational viability requires forward-looking transformation that destabilizes the conditions needed for successful innovation.

8.3 Paradox in the aid industry: ignore or embrace?

Aid is a contested territory, and its geographies are not just physical, but also political, ideological and epistemic. Hierarchy, between individuals, populations and within humanity as a whole, is the very basis for which humanitarianism exists. However, as Fassin (2010) reminds us, "the noble goals of humanitarian action (saving endangered others and alleviating suffering everywhere in an indiscriminate manner)" also contradict the "concrete terms under which humanitarian agents have to operate (producing inequalities and hierarchies)" (p. 239). Humanitarian governmentality is at the very heart of these contradictions. Evoking Foucault's (2004) ideas on "the conduct of conduct" (see also Clegg et al., 2006), the humanitarian system governs its population through various techniques that can include coercion (conditionalities imposed by gatekeepers), but also internalization (shepherding and acceptance of norms and values that align with the prevailing hierarchies). Both Fassin (2001, 2010) and Ticktin (2011) make a compelling demonstration of humanitarian governmentality in France and its impact on sustaining inequality. Achieved through gendered and racialized assumptions about the "suffering body" and a moral duty of

care, the actions of medical organizations such as Médecins du Monde and MSF, combined with French refugee policy, favour an HIV positive woman from Mali, an Algerian child with cancer, and a gay man sexually assaulted by the Moroccan police while closing doors on most others. The needs of some bodies— labouring bodies or exploited bodies— are thereby disqualified on the basis of their moral illegitimacy. That many INGOs are highly sensitive to the power of donors, while blind to the power they exert over aid recipient populations and local NGOs —the "partners" with which they seek horizontality—, suggests an internalization of norms, which result in masked disparities. Perhaps this explains why certain paradoxes described in the previous section have endured over time.

Moreover, paradoxes are either static and chronic—remaining consistent over time as enduring features, or dynamic and episodic, arising from specific circumstances (Smith & Lewis, 2011). Many contradictions in the industry, which have remained latent over time as inherently ingrained in the system, are of the enduring type, fundamental to the aid architecture. They cannot be resolved without challenging the system's underlying assumptions, such as the primacy of (Western) technocracy and the peripheral role of the Global South in knowledge production. However, these paradoxes are becoming increasingly apparent, as a result of changes being introduced into the system, such as the localization agenda, and the addition of a new element stimulating emergent outcomes: local NGOs. Despite being more visible, the enduring nature of these paradoxes may not be resolved by simply accommodating new elements or relationships, or by developing new frameworks such as the Grand Bargain.

The elimination of competing demands in a paradoxical situation is, in fact, neither achievable nor desirable. While individuals and organizations might experience tensions between oppositional elements, Buddhist, Hindu, and Taoist philosophies instead argue that doing so denies the interdependence between oppositional elements. Instead, as argued by Chia (2014), paradoxes should not be resolved but embraced and transcended. As an inherent part of organizational life, competing demands, when recognized and embraced, are essential to creativity, innovation and adaptability because they create the necessary conditions for dialectic thinking. Holding multiple perspectives, he argues, is key to navigating complexity and uncertainty, and to the development of a more nuanced understanding of the world. However, as demonstrated by this research, the international aid system's gatekeeping and shepherding processes prevent such dialectic thinking from occurring within its epistemic territory. Reform is attempted as a technocratic process without significantly reconfiguring the underlying assumptions that would be necessary to broaden our understanding of hierarchies in the aid industry.

Furthermore, research suggests that the fruitful navigation of paradox rests not only on the acceptance of contradictions, which must first be recognized, but also on their successful management. Studies have found, for instance, that defensive responses can result from mismanagement, pulling towards one extreme (Ashforth & Reingen, 2014). For example, MSF's firm opposition to the localization agenda and resistance to the resilience paradigm in favour of classic humanitarianism (the "emergency gap" approach) (De Castellarnau & Stoianova, 2018) suggests that the organization is leaning heavily towards one side of the competing demands, as opposed to engaging in debate with other postures. Resorting to either/or thinking of this kind sustains siloed thinking instead of dialectic exploration, whereby certain actors such as MSF, operate with a narrow focus on their own goals, at the expense of humanitarianism's broader objectives. The same occurs within Amani, as evidenced by its nationalization process, whereby the organization's institutional survival is achieved via satellite offices in the Global South. Instead of simply working with existing organizations, and championing their role as key players in humanitarian response, Amani is setting itself up as a powerful competitor to these same organizations. Fear of losing one's hard-earned foothold on the slippery slope of legitimacy (and the associated funding) may also lead risk-averse organizations to make decisions that are too conservative and dismissive of multiple perspectives, resulting in suboptimal outcomes.

Mismanaging conflicting demands can result in wasted effort and resources; the tug-of-war of pursuing opposing goals without strategy, prioritization or addressing tension can lead to a lack of focus, inefficiencies and missed opportunities for innovation. Failure to recognize and embrace competing demands may also lead to ambivalence, conflict and other organizational dysfunctions and, if not managed effectively, paradoxical elements can in fact annul each other's potential (Gebert et al., 2009). The performance and long-term viability of actors whose paradoxes are left unacknowledged and unaddressed is thereby stymied. The opposing elements achieve a stalemate, whereby neither can significantly alter the frontline of a contested territory. This is why, as aptly expressed by the Humanitarian Policy Group (2016), "[t] he reforms of the past decade have ossified the system rather than making it more responsive and flexible" (p. 37). Instead of diverse, heterogeneous solutions, ideas and practices, which are locally driven and designed, we are witnessing powerful waves of technocracy sweeping everything before them. Meanwhile, in spite of its outward show of activity, donor commitments, performance indicators and endless reports on localization, the aid system appears to be doing little more than treading water.

8.4 The obstinacy of hierarchy

It seems that the aid industry has reached an impasse of its own design, which manifests as an incapacity for change and innovation. The challenges it is experiencing in implementing the latest humanitarian reform suggest a lack of engagement with its internal contradictions, which limit the dialectic processes needed to stimulate a more profound consideration of opposing perspectives. The status quo is maintained, and hierarchies endure in lieu of the desired reconfiguration of power. Caught in an ideological deadlock, the system is leaning on its technocratic reflexes by calling on the expertise of policy-makers, planners and managers to redress the knowledge "deficiencies" of local responders, a modern iteration of the civilizing mission of yesteryear. The paternalist attitudes of a bygone age of aid, in which "humanitarians had a confidence in their superiority, a belief in their duty to help others and a conviction that local populations need to be educated and liberated from their backward traditions before they could participate in their own rule" (Barnett, 2011, p. 233), are reiterated today through capacity building. Gatekeepers and shepherds carry on with their business, and the primacy of the Western knowledge remains unchallenged because of the system's inability to engage with different epistemes.

If faith in expert knowledge helped extend aid's governmentality, today, it preserves it. The moral authority that practitioners claimed in the past has been replaced by their prerogative of specialized knowledge, advanced certifications and standard operating procedures. Though both forms of authority deny their politics, expert authority is particularly blind to its power because it believes itself to be objective and impartial. In his chapter on the humanitarian space and international law, Herman (2014) warns for instance that organizations who cling too tightly to the legal framework of humanitarianism as proof of their neutrality, impartiality and freedom from politics are blind sighting themselves, as the instruments in their toolbox were designed by the West. And, considering the coloniality of aid, expertise becomes a matter of who is assumed to possess knowledge, and where that knowledge comes from, as opposed to what is actually known (Kothari, 2006; Piquard, 2022). As such, aid excludes not just knowledges otherwise, but *de facto* categories of knowledge producers. The following passage from a conversation with a Canadian INGO employee exemplifies such hierarchies:

> Sure, specialized knowledge includes knowledge about the context, but knowing a community doesn't allow someone to set up a refugee camp quickly. Of course, there are people in South Soudan who are local, who know how to set up refugee camps, who have the local knowledge *and*

> [emphasized vocally] the knowledge about how to set up a refugee camp, because they've worked with MSF, and the Red Cross.[101] (Participant 45, April 8, 2022)

The passage suggests that South Sudanese individuals are incapable of producing this type of expertise on their own, and that their capacity is contingent on the assimilation of knowledge emanating from foreign organizations. Its deconstruction unveils the hypostasis of power relations that continue to shape the system, reminiscent of patterns of distribution from the colonial metropole to the colonies. Uninterrogated, such statements reaffirm, as argued by Yousfi (2014) and Alcadipani et al. (2012), that Western technical knowledge is the undisputed means of alleviating suffering, achieving well-being, and improving the productivity or efficiency of local actors. Indeed, the logic of coloniality is such that it legitimizes only one way of knowing, or producing knowledge (in the above-cited passage, the populations fleeing conflict do not produce knowledge about how to set up a refugee camp, for instance). The one way of knowing can only be found within the tradition of Euromodernity, configured through the liberal values and rationality championed by the likes of MSF or the Red Cross. And only those possessing this rationality, combined with specialized local knowledge which is a bonus, qualify as experts.

As demonstrated in the previous chapters, the primacy of foreign expertise, which localization does not adequately question because of its disengagement with paradox, is continually renewed and reaffirmed by gatekeeping and shepherding processes. Uninterrogated, managerialism, as the operational manifestation of technocratic aid deployed by shepherds, contributes to the uniformization of diverse practices and the erosion of alternatives. While it can be argued that institutional proliferation is a sign of a healthy civil society sector, and that donors and INGOs now have a greater number of "qualified" potential implementing organizations from which to choose, the isomorphism that we are witnessing significantly reduces the possibility of divergent and innovative perspectives.

Vignette: Los hombres de plástico

The ruins of Mayan cities and royal complexes are perfectly aligned with cardinal directions so as to optimize the use of light for a variety of agricultural, ceremonial and scientific purposes, such as understanding astrology and time, and complex mathematical predictions about the movements of celestial bodies with splendid accuracy. My friend, who is a custodian of hereditary knowledge, explains to me that Mayans have 5 cardinal points: East, West, North, South and Centre—which is represented by a

[101] The original passage is in French: "Les connaissances spécialisées, c'est les connaissances du terrain aussi. Mais connaitre la communauté ne permet pas à quelqu'un de monter un camp de réfugiés rapidement. Bien sûr qu'il y a des gens au Sud-Soudan, qui sont locaux, qui savent monter un camp de réfugiés, qui ont la connaissance locale et la connaissance sur comment monter un camp de réfugiés, parce qu'ils ont travaillé avec MSF, puis la Croix-Rouge."

ceiba tree, commonly revered for its ability to connect the upper world of divinities to that of living humans and the underworld. Centre is not a direction; it corresponds to an axis, conjured through ceremony, that situates individuals within a metaphysical and physical space. Centre also evokes the idea of home, being spiritually and physically anchored in the world.

When I heard this, I was struck by how much it makes sense. Could the lack of Centre in the West's understanding of the space/human rapport account for environmental pathologies such as overexploitation? I sense that we inhabit a world that is increasingly built without any attachment to nature, space and time, devoid of Centre—the here and now—that has shaped human existence for millennia. The Mayan cosmovision provides valuable insight for the Anthropocene, but it has been dismissed by Western science as esoteric mysticism. Might another form of knowledge, beyond environmental science and technological adaptation, hold potential to safeguard the conditions of human existence?

Readers may recall the doomsday prophecies that were all the rage in 2012, which surely explains why both the prophets and their knowledge have been relegated to the realm of mumbo-jumbo. In fact, the Mayan calendar never foretold the end of the world in 2012, but the end of a 5125-year life cycle known as "Man of Corn" in which humans perfected agriculture. When I asked my friend what cycle we had entered now, he shrugged and answered: "el hombre de plástico." *Man of plastic.*

Through its governmentality, managerialism creates a regime of truth that regulates and disciplines aid actors operating within its epistemic territory. It also institutionalizes hierarchy through narrative and symbols (Mumby, 1987), such as logframes or Sphere certifications, and thereby fulfills a political function. By privileging managerial knowledge and technical reasoning, it produces some actors as elite strategists, experts and managers while reducing others to tropes whose role is to subordinate themselves to the implementation of strategies. INGOs assume *de facto* authority, often acting as quasi agents of the state, not only in framing political discourse but also intervening in the fashioning of organizations in the Global South. Managerialism also constrains the questions that may or may not be asked, as revealed in the following passage by a Red Cross employee: "There's this kind of justification of the value add of international humanitarian actors when it comes to localization: it's accompaniment." Referring to the aid architecture and its hierarchies, he adds: "But I think that's only because of what we've created." He proceeds to explain that the nearsightedness of managerialist performance and accountability mechanisms stymies' the system's capacity to appraise the performance of its own paradigm:

> You really have to call into question what we've created around the [managerial] apparatus, and call into question the justification for that apparatus. OK, yes, mitigation of fraud, accountability for results, but are we really accounting for results? Are we really able to show impact? And OK, fraud, but what waste of resources are we now creating, by having created this managerial apparatus. (Participant 28, March 21, 2022)

Here, fraud and the difficulty to demonstrate results are apprehended as technical problems to be resolved by greater control, rather than as a social or political phenomenon, testifying to technocratic

consciousness (Habermas, 1990) at work. The system is oriented, through the technocratic formatting of actors' subjectivities, towards the optimization of systems and processes, as opposed to interrogating underlying political issues. A consensus within the system's actors is thereby achieved, not through democratic and participatory engagement between different perspectives, but through the most supreme exercise of power—securing compliance by controlling actors' subjectivities, or quite simply, ensuring that they desire what you want them to have. The outcome is an internalization of power wielders' expectations and conformity with the dominant paradigm. The result: Hierarchies, instead of being challenged, are unconsciously assimilated and perpetuated by aid actors, and particularly by INGOs, many of which unwittingly adopt the very same practices that they denounce. What emerges from this process—a manufacturing of humanitarian consent of sorts—is a hegemonic knowledge system whose continued existence supposes a policing and repression of counter-hegemonic actors and their knowledges and practices.

This can be achieved by discrediting otherness as non-compliance, backwardness or simply knowledge deficit. Alternately, it can occur through the concealment or non-acknowledgement of dissensus. The appropriation of knowledge deemed useful to the maintenance of their position is also another strategy used by dominant actors, whose expatriate workers, as revealed by Kothari (2005), transform locally produced knowledge into cultural capital that maintains their status and further legitimizes their interventions. Certain practices originating outside of the West, such as participatory rural appraisals (PRA) thereby become institutionalized and no longer distinct from mainstream discourse and practice. Likewise, Lannon and Walsh (2019) reveal in their article that aid organizations often seek out local, context-specific expertise to further their interests and acquire resources, rather than pursue an ambition of learning through multi-directional and complimentary knowledge transfer.

Finally, the destabilization of enduring hierarchies is also sidestepped by cooption. The localization agenda appears, for instance, to be inviting local actors and their knowledges into a hegemonic system, instead of transforming the power structures that maintain it in place. This manages opposition and maintains the stability of the ecosystem. The process can be observed within the localization reform, whereby the decentralization of power and decision-making authority to local aid providers is contingent on their demonstration of technical and managerial competence. The most critical voices are either excluded from the system, or limited in their effectiveness and counter-hegemonic potential by their very conscription into the aid architecture. In doing so, dominant actors have appropriated the localization agenda as a

potential space for critique and dissent, which annuls its transformative potential. Ultimately, it appears that localization will continue to serve the interests of the most powerful actors rather than the opposite. As an indication of this trend, consider the following statement from an individual employed with a Kenya-based network of NGOs from the Global South:

> Some parts of the international community that are finding ways to push back against some of the commitments that have been made, in very subtle ways. But I do think that, in the US … the US is a good example, because you have a lot of contract agencies that do humanitarian aid work. So the contract agencies alongside a couple of the other INGOs have managed to successfully push USAID to accept definitions of who's a local actor that now includes their country offices. (Participant 46, April 12, 2022)

Testifying to the same ambivalence that is driving Amani's nationalization process, the above-mentioned INGOs have construed localization as an opportunity to advance their interests and visibility, while simultaneously (and paradoxically) claiming the same for their implementing organizations.

8.5 Localization is not possible from within

In the last sections, I have argued that the lack of engagement with paradox in the aid industry is allowing its enduring hierarchies to remain unchallenged. As a result, the localization agenda, in its intent to reconfigure these very hierarchies that have historically excluded Southern organizations, is missing the mark. The aid system knows, and has known for decades, that its effectiveness revolves around an improved understanding of the local context in which aid is provided. In 2005, "ownership" of strategies was one of the five core measures proposed in the Paris Declaration for Aid Effectiveness to improve the quality of interventions. The roadmap's French translation, however, is more nuanced; in lieu of ownership, the term "appropriation" is used, which entails taking something for one's use, or adapting it to a defined purpose. The wording suggests that strategies may still originate outside of the Global South, but that they must then be claimed (as opposed to inherently owned) by local actors and populations. However, and in spite of generalized recognition that specialized knowledge of the context is essential to aid, INGOs and donors in the Global North are still very much grappling with the complex practicalities of locally relevant and adaptive programming. This is because it presents a challenge to aid's founding pillars: technocracy and the rule of the foreign expert; and the industry's managerialist paradigm which is intrinsically control-oriented. In the borderlands of the aid episteme, as knowledge of needs, strategies and opportunities grows, an adaptation is required that may therefore be at odds with gatekeepers' monocultural vision and ambitions.

If this adaptation is planned by those same actors whose system is so resistant to destabilization, as I've argued, then we no longer need wonder why the localization agenda has failed to take off. A reconfiguration of power planned by those who hold the power is profoundly paradoxical. Herein lies the problem: The terms of engagement with the reform to decolonize, localize, nationalize and dewesternize are predetermined by those issuing the invitation. Joining the conversation requires that all actors desiring admission learn the language and rules of the aid episteme. Convergence is thus assured. Meanwhile, the populations most familiar with the aid system's complicit role in disenfranchisement, and most likely to denounce it—the actors who refuse to learn the language and the rules of aidland who have been kept from acquiring its capital, or who simply have not been exposed to it—remain in the periphery. Inclusion of local aid responders, as defined by the localization agenda, ultimately does not challenge the power structure of aid. This explains why the system; now eight years post World Humanitarian Summit, has little to show for its grand effort.

The greatest paradox, then, for the aid industry, is a profound tension between the pull of something that is familiar and finite—an episteme with its clearly defined boundaries, its norms and conventions, its standards—and the exploration of something beyond, into the infinite, the uncertainty and the knowledges otherwise. That is the allure of a reform. Regretfully, and as evidenced in the literature review presented in Chapter 3, the most prominent voices on the subject of localization—the think tanks, policy groups, bilateral and multilateral organizations and INGOs— mask a shared faith in the tenets of technocracy and managerialism as the solution to ineffective aid. There is no exploration of something beyond. Yet, confronted with a problem of this magnitude, which would be considered "wicked" by Rittel and Webber (1973), it is clear that paradoxical thinking is necessary to move out of the impasse.

Wicked problems, such as the inability of the aid system to fulfill its grand promise, are multifaceted and can hence not be fully apprehended through a single perspective. Because it is subject to the interpretation of various stakeholders, the problem with aid resists definition and remains shrouded in uncertainty. Since wicked problems are linked to social, economic and political issues, addressing them may have unintended consequences, as has been demonstrated countless times over in the aid industry. Wicked problems are resistant to solutions, whose implementation may even generate new problems. Let us consider for instance how the application of technological determinism to the field of agriculture, now an essential component of post-crisis recovery in climate change affected regions, has become a source of new social, economic and ecological problems (Shiva, 1991). The localization reform's failure to effect significant

change, because it addresses a wicked problem from a technocratic and managerialist perspective, is similarly narrow-sighted: it overlooks the underlying political issue and gives rise to an ever-increasing sense of exclusion among aid providers in the Global South. Value conflicts are thereby exacerbated, as tensions polarize actors to either side of the paradox, making it difficult to transcend the impasse and engage in innovation.

What is needed in the industry, then, is paradox thinking: To welcome multiple perspectives and build a culture of openness to different and equal epistemes, and tolerate ambiguity and uncertainty. It can start small, within organizations, by accepting otherness not as a sign of nonconformity but simply as another option. In a report on learning generated by "last resort" localization induced by the COVID-19 pandemic in Melanesia and the repatriation of foreign staff, a simple remark made by a Red Cross employee hints at a good, but modest place to start: "National societies [in Fiji and Vanuatu] had to present their own response plan. It didn't look like a conventional plan, but it was accepted as such" (Bamforth et al., 2020, p. 7). In this comment, the Australian Red Cross allowed another actor to redefine a boundary. For those accustomed to order, this is a more radical, and more frightening approach to localization. However, for change to occur, localization requires a systematic overhaul that removes the system's boundaries, rather than attempting to transform it through existing channels.

At a time when a political reform of the aid infrastructure is called for and barely starting to take shape, its founding pillars, technocracy and managerialism, will react exactly as expected by attempting to stabilize their territory and stifle political imagination. The focus on technique, expertise and tighter managerial control will depoliticize the reform, and what will remain when the dust settles is aid's enduring hierarchy. For those actors still hopeful that an alternative exists, the following citation from Frantz Fanon (1965), the Martinique-born psychiatrist and anti-colonial revolutionary, may provide some inspiration. He stresses the importance of creating a new culture rooted in the experience of subjugated groups rather than an imitation of the oppressors'. "Decolonization," he writes, "which sets out to change the order of the world, is, obviously, a program of complete disorder" (p. 2).

The presence of gatekeepers and shepherds upon aid's territory curtails chaos and restores order. Therefore, the birthplace of reform might actually lie on the outside, beyond the epistemic boundaries of aid, a space of open-ended and innovative democratization that nourishes the impetus necessary for a deep alternative to emerge. There, we will be invited to abandon some of our normative assumptions and

disavow some of our inherited ideas—the first being that the ICRC and IFRC, the United Nations, donors and INGOs are all-knowing experts. Claims of expertise, truth, or even the universality of law, must be viewed in the context of the experiences and perspectives of affected populations. What constitutes aid should never be predetermined, but designed through meaningful discussions and negotiations that recognize competing demands and complexity. Finally, local aid providers are not implementers of externally constructed and universalizing normative truths; through their formidable agency, they create their own knowledge and truth, and solutions which are rooted in their epistemic context. Localization—or whatever it may thence be called—can thereafter fulfill an ambition of democratization: A process generated from the experiences of the people within their context, capable of challenging the privileged understanding of humanitarianism held by the West and its elite organizations.

CHAPTER 9: CONCLUSION—TOWARDS A POLYCENTRIC IDEAL OF AID

9.1 On ending the ontological occupation of aid

In the last chapters, I have argued that international aid, whichever its form, is profoundly technocratic in nature, giving rise to a most valuable asset in the industry: knowledge. I contend that the localization agenda's limited progress can be attributed to enduring hierarchies which are reaffirmed through processes of gatekeeping and shepherding. In a technocratic regime, this maintains the sacrosanct status of certain forms of knowledge possessed by power-wielding actors, instead of achieving the redistribution of power which the localization agenda calls for. The humanitarian reform is further stymied by dominant actors' insufficient engagement with the system's profound paradoxes, leading to dysfunctions and an inability for change. As a result, the expert-driven paradigm of gatekeepers and shepherds continues to control the local actors whose autonomy it paradoxically champions, resulting not only in a theoretical and practical impasse, but also most significantly, in cognitive and epistemic injustice. The transformative potential of the localization agenda is thus annulled.

In this concluding chapter, convention dictates that I provide recommendations and takeaways for aid actors. I could write things like "Donors should provide more incentives for INGOs to localize aid, such as the addition of a formal evaluation criterion to this effect in calls for proposals," or "introduce greater flexibility in reporting requirements for local actors." While these are worthwhile recommendations that I have in fact issued in other publications and contexts, I will abstain from that in this chapter for fear of sounding just like every other think tank, INGO or donor report on localization that I've consulted as part of this research. Furthermore, in light of the impasse with which aid is confronted, theorizing knowledge in the industry, instead of prescribing more of it as is the go-to reflex, might offer a novel angle. This is because the fundamental problem is not funding, nor does it have to do with contracting mechanisms, or even the industry's revered humanitarian principles. To overcome the practical and theoretical cul-de-sac which is stalling reform in the aid industry, we need to reframe the issue. So instead, I will write about the creation of disruptive spaces.

The rise of aid INGOs has brought many positive elements in terms of extending scope for innovation, expanding the breadth of partnerships, extending opportunities for citizen engagement, reaching the most

vulnerable populations and achieving flexible responses to emergent problems. Humanitarianism, once motivated by a moral responsibility for the plight of wounded soldiers, ailing civilians and eventually distant strangers, has given rise to the myriad manifestations of international solidarity that we are witnessing today. However, as argued by Lewis (2008), it has also become enmeshed in the intrusive impulses of Western modernity and more recently the expansion of neoliberal policy. The processes of gatekeeping and shepherding monopolize expertise and authority by professionalizing, homogenizing and technicalizing aid interventions, thereby limiting the existence of dissent within the industry. This reduces the counter-hegemonic potential of critical voices, at the very time when engagement with critique is direly needed to emerge from aid's impasse. The suppression of alternative interpretations of the problem brought about by disengagement with paradox, impoverishes decision-making, and weakens the system's capacity for innovation. To quote Dar and Cooke (2008), let us entertain "the possibility and indeed the necessity for an international solidarity in opposition to an amoral, virally pernicious, globalizing managerialism that tries to obliterate all borders and difference" (p. 3). What might opposition look like, then?

Aid, as a global institution with its own legal framework, code of ethics, managerial paradigm, standards, instruments and aspirations, has created the idea that we live in a world that has room for only one world, now globalized. First carried by colonialists, then missionaries, aid workers and now depersonalized media, the West has been quite successful at universalizing its idea of the world. However, the Zapatistas propose an alternative: the pluriverse, a world in which many worlds might fit. By recognizing the multiplicity of worlds and ontologies and opposing their universalization, the pluriverse destabilizes the pillars of Western modernity. It invites us to stop thinking about our world within the dominant categories that have nourished the aid industry (expert/non-expert), and as such, recognizes the wisdom, agency and capacity of populations caught in crises as the real experts in overcoming them. As remarked by Ferguson (1994) in The Anti-Politics Machine, "[t]he toiling miners and the abandoned old women know the tactics proper to their situation far better than any expert does. Indeed, the only general answer to the question, 'What should they do?' is 'They are doing it!'" (p. 281). Crafting everyday coping mechanisms is a measure of genius, not introduced from the outside, but fought for and achieved by those with something at stake.

This is not to say that we must end aid; on the contrary, as complex crises extend globally and translate into pandemics, food crises and massive population flows seeking refuge from climate change, the need has never been greater. However, it means that aid must abandon some of its certitudes regarding its

monolithic knowledge base, and the universality of modernity and its institutions, which have even, at times, been complicit in the creation, escalation, or maintenance of crises. To this end, Santos's (2004; 2014) writings on epistemologies of the South provide a framework with which we can begin to understand the creation of monoliths through active silencing of non-Western knowledges and experiences. Absences, he argues, are produced by monocultures, of knowledge or of economic systems for instance, to which they only remedy is to enable a "sociology of emergences." By opposing monocultures and their universal pretense, we can support the re-emergence of a multiplicity of social experience grounded in a variety of ontologies, and thereby become allies in epistemic justice. This is international solidarity that extends beyond the bounds of the North-South divide, because it can be applied at home, in Canada, where the very notion of solidarity and reconciliation between nations remains deeply troubled. Here and elsewhere, assistance continues to reflect the geographies and relations of core and periphery, creating certain spaces as superior sites of human progress from which the knowledge to protect and build the capacity of others is produced.

What we need then, is to create inter-epistemic spaces in which knowledges otherwise are not disvalued by the primacy of one dominant body of knowledge. We need to reimagine a territory no longer occupied by an elite paradigm. Through its complicit participation in the imposition of Western traditions, legal systems, managerialism and technocratic control, colonial languages and liberal values associated with Euromodernity, international aid has culturally, socially and economically "produced" the Third World as a site of helplessness (Escobar, 1995; Rist et al., 1986). In the process, it has come to ontologically occupy a space of self-determination that belongs to all populations, and not simply to aid agencies. By marginalizing discordant ways of knowing, relating to the world and surviving, it has historically denied some groups the capacity to define their own modes of existence, and continues to do so today. The negative construction of non-Western others as deficient—for example through capacity assessments and a perpetual need for training to assimilate Western knowledge—sustains the identity of dominant aid organizations. Then, once an absence of alternatives or dissenting voices is achieved, the default normative view of the settlers is taken for granted as the only viable option.

This process needs to be reversed through epistemic opening, because the absence of deep alternatives—a false consensus produced by ontological occupation—is a threat to everyone. Instead of rejecting knowledges otherwise as a threat to the supremacy of some forms of expertise, engaging with it might reveal solutions, or at the very least, generate dialogue. To this end, the vast contributions of pluriversal

and post-development practitioners and academics (see Ziai, 2017 and Acosta et al., 2019 for example), provide a good starting point for identifying the power relations in aid, and particularly in humanitarian assistance. They also champion epistemological coexistence and even hybridity with non-Eurocentric paradigms of well-being and social change. It has to go a step further, however. From a more radical perspective, de-occupation as a metaphor of decolonization must also include the repatriation of epistemic territory—a deeply unsettling act for an industry that has branded itself on the basis of its expert knowledge.

Repatriation must nonetheless avoid the trap of romanticizing ancestral or non-Western knowledge of the Global South as an infinite repository of solutions to aid's shortcomings. Communities that rely on traditional modes of subsistence are not necessarily exempt, for instance, from relations of domination and exploitation which disproportionately affect women, indigenous individuals or other vulnerable groups, as illustrated by the vignette in Chapter 5, "On being a disempowered bystander." Preaching an ethic of self-determination from an affluent perspective—and to that end, I recognize my own privilege as a Western-born researcher— is problematic and potentially paternalistic, if it claims to know better about the needs of vulnerable populations. Furthermore, hybridity is a reality that is well documented by Bhabha (1994). It is the enduring effect of contact between epistemic spaces and the renegotiation of identities. Applied to international aid, it has been described as a hyphenated condition or adaptation (Claeyé, 2011, 2012, 2014) that signals agency and resistance.

Repatriation entails, then, a recognition of that agency and the freedom of mobility between epistemes. Restoration also includes options to assimilate and/or reject knowledge—and everything in between, rather than being constrained into imitation. To this end, there are countless manifestations of epistemic opening from which aid providers can inspire themselves. A recent example, undertaken by the Jameel Obervatory and the international Livestock Research Institute in Nairobi, champions the participation of pastoralists alongside meteorologists in the elaboration of regional predictive models of drought in the Horn of Africa, which then inform multiple layers of adaptation strategies (www.jameelobservatory.org). Cattle herders have acute awareness of early warning signs that can improve the predictive capacity of satellite remote sensing. In much the same way, Vanuatu's strategy to reduce the consumption of imported staples and revive the cultivation and storage of cyclone-resistant root crops and inter-island/inter-regional trade networks, can be interpreted as an act of self-determination. While remaining

open to some forms of foreign aid, the strategy reclaims an epistemic space that has been occupied by colonial administrations and international relief agencies (Rosier & Savard, 2022).

In the end, is self-determination not what international aid aspires to today? For the last decades, and with increasing momentum since the World Humanitarian Summit, the system has attempted to transform itself to achieve a compelling vision in which aid is no longer the prerogative of foreign actors, but of strong states and a healthy civil society made up of organizations of all sizes and places of origin, working in complementarity. That ideal system, however, needs to recognize how its internal mechanisms paradoxically prevent such a vision from being achieved. Before envisioning the global civilization of the future through the likes of the Sustainable Development Goals and other universalizing roadmaps, the system must first create a space for "a new, plural, political ecology of knowledge" (Nandy, 1989, p. 266). Failing to do so, as I've argued in the previous chapters, prevents deconstruction and reform. To quote Audre Lorde (2008), "[t] he master's tools will never dismantle the master's house. They may allow us temporarily to beat him at his own game, but they will never enable us to bring about genuine change" (p. 50). Indeed, the reformative potential lies not at the core of the system, utilizing its own instruments, but within its periphery.

9.2 Aid as a polycentric system

One need not look very far to see things stirring on the outskirts of aid's centre. As the architecture drags its feet on a truly significant reform, external actors, most notably the Arab states of the Persian Gulf, and China, Türkiye and India to name a few, are important donors effecting change from the outside of the OECD's Development Assistance Committee (DAC). Recipient countries increasingly turn to these donors for overseas development assistance, some of which doesn't even qualify as such according to DAC norms. This is because these donors' demands for accountability and reporting are quite minimal compared to those of traditional funders (Nishimura, 2021).

Thus, the appearance of nodes and convening points such as regional multilateral agencies and collaboration platforms, innovative partnerships and linkages in the periphery of aid's centre, are illustrative of emergence, according to systems theory. They also serve as a reminder of distributed agency and radical interdependence in the ecosystem, best understood as a meshwork of relations, rather than a monolithic institution around which everything gravitates and eventually coalesces.

Another key insight of systems theory is that it recognizes emergent properties in complex environments which result from interactions between individual components. Contrary to the aid industry, whose centralized paradigm emphasizes order and control at the expense of flexibility and adaptability, a systemic approach awards greater attention to the social, cultural and political factors that interact within the system. In the context of international aid, this means recognizing local responders not just as actors to be potentially integrated into the architecture, but as components whose agency leads them to intermingle and cooperate with a variety of other stakeholders, leading to emergence outside of the dominant structure. Viewed from afar, aid's traditional episteme appears as a section within a vast tapestry, around which network nodes are continually being formed by populations and actors deploying strategies to exist in the world in response to their unique conditions. From this renewed vista, it is possible to visualize a polycentric model more closely aligned with the diversity of actors and their dynamic interactions. This new vista is not devoid of centres of decision-making or authority, but it functions through a plurality of centres representing different perspectives. Moving towards such a polycentric model of aid would encourage greater epistemic opening by recognizing and engaging with plurality, and promoting a better understanding of the relationships between diverse centres of knowledge, instead of relegating them to the periphery.

A polycentric humanitarian architecture would be more enabling of localization because of its decentralized decision-making processes and structure, and the dynamic involvement of multiple actors, including those which are typically not considered in crisis-affected communities: businesses, faith-based groups, refugee settlements, informal collectives and untold individuals who, as survivors, enact their own first-line response. This system, with its diverse leadership centres, would also provide for greater flexibility than the current model's mechanistic structure, which is ill fitted to rapidly evolving contexts. Climate change is undeniably outracing the bureaucracies of the United Nations, and the human dimension of crisis that will ensue lies outside of its grasp. Lest it become a relic of the past, a "ruin in an intellectual landscape" (Sachs, 2019, p. xv) through its inability to adjust and innovate, international aid would do well to shift towards a broadened multi-centred and emergent model, rather than remain the guarded epistemic territory of elite global actors.

9.3 Monoculture is not the way forward

To pursue the geographic metaphor, Berger and Luckmann's (1966) description of how knowledge is produced in "The Social Construction of Reality" provides a complementary angle of analysis. Aligning with

system theory's interest in linkages between components, they advance that knowledge and experience are produced by human interactions and the social structures that emerge as a result. Knowledge then, it can be argued, is stored as memory layers, in a process like sedimentation; as it accumulates, in the form of symbols and knowledge, it gains mass and solidifies as a construction through its institutions, which in turn sediment symbols and rituals as vectors of institutionalized knowledge. Given the diversity of human experience and the varied contexts within which knowledge is produced, it is only normal that this would manifest as multiple ontologies, and epistemes and social constructions, each of which is legitimate in its own right. It follows that the countless cultures that have evolved over time, are unique expressions of the human imagination, whose understanding of the world generates untold solutions to the most fundamental human condition: being alive.

However, as argued in the previous chapters, the Eurocentric way of understanding and engaging with the world—through the programmed expansion of colonizing institutions— has had a tendency to stifle the relevance of multiple knowledge systems and worldviews. Technocratic aid, whether it manifests as humanitarianism or development, is the manifestation of this expansionist European episteme. It is not just a benevolent and humane response to wartime violence and crisis as Dunantist historians lead us to think, or even an instrument of geopolitics, which hardly anyone denies today. International aid has waged a discreet war of its own, not against poverty or the consequences of religious radicalism or marginalization as we would immediately imagine, but against knowledges otherwise, through the steady devaluation of diverse epistemes.

The result of this stealth but steady expansion, carried out by ontological occupation and the failure to recognize other centres of knowledge production, has resulted in the cultivation of a single crop upon aid's territory. As we know, and as brilliantly demonstrated by Shiva (1991), monoculture, or the practice of growing one variety upon a vast territory, leads to the impoverishment of an ecosystem through the systematic annihilation of diversity. The organizations, ecofeminists and agriculturalists who champion food sovereignty know all too well that monoculture breeds devastation, impacting the delicate processes and the fine meshwork of interdependent plants, insects, animals and humans. It contributes to a degradation of soil, depleting it of the nutrients and microorganisms that nurture fertility, thereby reducing the possibility of an eventual recovery. Metaphorically applied to aid's knowledge territory, monoculture reduces genetic diversity, which is the essential condition to a thriving and resilient ecosystem, capable through emergence, innovation and malleability of adapting to shocks. When a threat

descends upon a monoculture, as it always does eventually, its defensive response is a pesticide of its own imagining, paving the way to further loss of diversity.

Managerialism, as I have argued, is a monoculture that creates erasures. Aid is one of its vectors of expansion and of acquiring ever-increasing territory, via the processes of gatekeeping and shepherding. As revealed by Alcadipani et al. (2012) and Frenkel (2008), the exportation of American management practices and education models to countries of the Global South contribute today to the decline of local management practices. Meanwhile, this erasure of alternatives enhances the legitimation of the West's hegemonic managerial paradigm (Mir et al., 2008), which is then further diffused through its acceptance by managers and elites in developing countries (Yousfi, 2014). And, as pointed out by Escobar in his remarkable book, "Designs for the Pluriverse", the tools we fashion in turn fashion us. As the aid sector's toolkit and its ubiquitous logframe, originally developed for use by the American military, shape the logic and parameters of international assistance, these tools in turn shape the managers who use them, and the communities in which aid is deployed. This is another process through which monoculture is achieved.

However, diversity in the world is limitless. Pluriversal politics remind us that the places we inhabit are made up of multiple ontologies and streams of knowledge that are far from being exhausted. They resist reduction to the Western experience. Saying "no" to a monoculture of ideas is therefore an invitation to dismantle "modernity's violently exclusionary ontological and epistemological presuppositions" (Sharma, 2021, p. 38), to engage in epistemic disobedience, partake in the sociology of emergence and create a disruptive space in which diversity can be restored.

9.4 Acknowledging cognitive and epistemic injustice

Recognizing the monoculture of aid means recognizing its impacts, and acknowledging that it has been complicit in erasures (Lec & Savard, 2022). For Davis (2009), the ecosystem of knowledge is an "ethnosphere": A territory, which, as humanity's greatest legacy, is host to the sum of ideas, inspirations, thoughts, intuitions, myths and beliefs that the extraordinarily inquisitive and adaptive human brain has brought into being since the dawn of consciousness. In much the same way that the biological matrix of life is being eroded by the loss of habitat, monoculture, and the skewing of delicate equilibria, the ethnosphere is also showing signs of ill health. The most obvious indicator is the increasing pace at which languages, as "old-growth forests of the mind," (p. 2) are disappearing. Their extinction over the next few

generations will translate into the loss of half of humanity's social, cultural and intellectual legacy (Davis, 2009).

The diversity of human experience is captured in the following passage by an NGO worker from Colombia, who speaks concretely of how knowledge associated with international aid, but mostly the process through which it expands, is often insensitive to power dynamics:

> As stand-alone knowledge, all those management tools and standards and practices don't perpetuate oppression. But I think that the delivery, the way in which it is shared, the context and the dynamics that are fostered, yes. I think in practice, often, yes. And I'm thinking of communities that I've worked with, you know, that have different ways of organizing, like Mayan women of the Highlands, or like *campesino* farmers on the coast. People have different ways of organizing, so I think that the way that it is presented, the way in which it is shared, the unspoken power dynamics, the erased histories, set the background for how and when and who shares this, are really important. And I think, not questioning them does unfortunately make this fall into another form of oppression. Like, it's not liberation. It's just some sort of whatever aid out of context and it perpetuates power dynamics. So I think knowledge is good, but that's not good enough. A skill is a skill, that's awesome. It might work. But *how* [vocal emphasis] we share it is probably 90% of the effect. (Participant 32, March 25, 2022)

How we share it means not trampling on other knowledges, lest they perish under the heavy footfalls of a dominant episteme. Indeed, aid's technical and managerial toolkits can be useful, but only on an equal footing with knowledges otherwise, through which mutual enhancement can occur, rather than in the arrogance of assumed superior wisdom. There is a social norm in the Māori worldview that captures this ethos, which is to tread gently to avoid harming people's *mana*. *Mana* is the essence of humanity which holds that individuals and groups are inherently dignified and valuable, a source of personal and collective identity, pride and strength. It is what allows the Māori to walk tall (Bishop, 2008). When *mana* is trampled upon, it brings about humiliation, a sense of shame, and a loss of dignity and identity. It is a form of violence. Admitting that aid, despite its good intentions, has been involved in some measure of trampling of *mana* over the years (and in the most extreme cases, bulldozing, both literally and figuratively), requires us to acknowledge a devastating result: cognitive and epistemic injustice.

Genocide, or the physical extermination of a people that includes measures to extinguish its culture and language (such as forcefully removing children from their homes to school them in another culture), is universally condemned. Yet ethnocide, which is the destruction of a people's way of life, has been endorsed by many aid actors as appropriate social development policy (refer to the vignette on West Papua in Chapter 2, for instance). Meanwhile, many aid actors seem largely oblivious to their unwitting

participation in epistemicide, a term which refers to the erasure of the knowledge systems and practices of marginalized or indigenous cultures by dominant groups. Santos (2014) theorizes that the West is afflicted by a particular difficulty to perceive its own role in epistemicide because for centuries in Europe, struggles revolved around class rather than coloniality. Indeed, the critical scholars of the Frankfurt School did not write about the coloniality of power, revealing a cultural blind spot that, for some, endures today.

This is perhaps why examples of epistemic injustice, and unwittingly epistemicide, abound in the aid industry, from the establishment of school curricula in refugee settlements that are inspired by those of donor countries and INGOs instead of tradition, to the replacement of village midwives by medically trained birth attendants supplied by foreign organizations, to the supplantation of locally relevant managerial approaches in favour of donors' upward accountability paradigm. As discussed in the previous chapters, performing capacity assessments aimed at identifying the knowledge gaps of local aid providers pits the knowledge of "experts" against the knowledge, or lack therefore, of local responders. Then, devising remedial training programs to shepherd local responders the world over towards the adoption of a universal managerialist paradigm, often with its English lexicon, contributes to cognitive injustice and the gradual disappearance of other epistemes by disvaluing other ways of organizing. It is a form of cultural assimilation that erodes the many ways in which individuals structure themselves on the ground to respond to crises.

While the spread of managerialism may seem mundane as an example, let us consider how British policy deprived India's weavers of self-determination through the planned destruction of their weaving skills during the colonial period. The British administration's land reforms, taxes and economic policies, disrupted weaving communities' social fabric and led to their dislocation from their ancestral lands and livelihoods, resulting in the loss of weaving knowledge as individuals were forced to adapt to new environments. Denigrating the Indian handloom, which was a symbol of self-sufficiency, is therefore not just an act of ethnocide or cultural suppression. It is also an act of epistemicide, because it led to the extinction of the ancestral knowledge that formed the basis of a population's existence in the world (Srinivas, 2008). Likewise, the colonial system of indigo production in India, which introduced European methods of cash-cropping, resulted in the destruction of indigenous knowledge systems whose implications for the country's economy and social fabric are still felt to this day (Mukherjee, 2019).

For INGOs in particular who have long championed the rights and voices of the world's poorest and most marginalized groups, this entails an important interrogation of how their role as shepherds is contributing to the marginalization of some forms of knowledge. For the aid industry, a renegotiation of the criteria with which to appraise capacity, competence and legitimacy (that does not obligatorily mirror their own) and with which to appreciate the contribution of local responders, would also be required. Accepting that all forms of knowledge are incomplete, including the knowledge of elite expert actors, which entail an abandonment of the technocratic view of aid and open up possibilities for greater epistemic dialogue instead of epistemicide. For that, it is crucial to remember that no single episteme can be elevated to the status of the norm, or standard—against which all other knowledges are measured.

9.5 Boundary spanners instead of shepherds

As we have seen, INGOs play a crucial connective role between donors' development policy and the aspirations of civil society organizations from the Global South. Through management and technical knowledge, they can solidify their position as mediators of relationships between different aid actors. As Girei (2016) warns, however, this harmonious vision glosses over tensions that result from power asymmetries in the system. The neo-Gramscian lens that she uses to analyze INGOs' position in the network reveals that they simultaneously serve as counter-hegemonic purpose by challenging the orthodoxy of aid, while also fulfilling a stabilizing role. This is because, as we have seen, donors' neoliberal agenda imposes the adoption of accountability systems upon INGOs, who mobilize managerial knowledge as capital to secure their legitimacy and that of their Southern offices or implementing organizations, in an increasingly competitive funding environment. This was observed throughout this research, for instance in the case of Amani, whereby the organization champions the horizontality with local providers whose leadership and expertise it recognizes, all the while orienting their satellite offices and implementing organizations towards the adoption of donors' managerial paradigm. INGOs' role as shepherds is suggestive of competing demands: On the one hand, engaging in transformative practices that support social change, while on the other, being complicit in epistemic injustice and to a certain degree, epistemicide, by uncritically promoting the strikingly Western-centric character of their technical and managerial knowledge.

However, the increasing ideological proximity of mainstream INGOs to donor agencies can have the undesirable effect of distancing them from the diverse local contexts and epistemes in which they operate. To bridge this gap, they have drawn on the uniformizing character of managerial and technical knowledge

to bring local NGOs into their fold, as in a centrifugal process, instead of adapting to their diverse and culturally rooted approaches. Rather than having emerged as part of civil society's own agenda, much of the aid sector's management knowledge is therefore the result of a forced consensus: Born from the industry's legitimacy crisis in the nineties, then transmitted to local aid providers through the compliance-inducing instruments of coercive isomorphism (i.e., funding conditionalities) and normative processes (i.e., capacity building). Though local aid providers deploy their agency when they partake in these activities, their strategies to survive in an increasingly competitive funding environment reflect the industry's enduring structure of knowledge.

To transcend the monoculture of aid, INGOs first need to consider the coloniality of management knowledge (Cooke, 2003b; Kothari, 2005) and how it is effectively deployed through shepherding to mould and transform local civil society. Such a transformation is not neutral; it serves gatekeepers in sustaining their hegemonic position, but most importantly, it undermines the counter-hegemonic potential of non-governmental action (Girei, 2016). Instead of shepherding, INGOs might then re-envision their role as explorers or boundary spanners (Koops, 2017; Stephenson Jr & Schnitzer, 2006) who "build bridges between different shores of human experience"(Acosta, 2017, p. 2602). In the management literature, boundary spanners are individuals whose role includes communication across organizational boundaries and the cultivation of relationships with external stakeholders (Stephenson Jr & Schnitzer, 2006). They work the borderlands where difference meets and almost inevitably overlaps.

In much the same way that engagement with paradox stimulates innovation in organizations, boundary spanning is recognized as an important aspect of organizational effectiveness and capacity to adapt to changes in the external environment. Though challenging, because it requires the navigation of diverse perspectives, interests and expectations, it plays a crucial role in organizations' capacity for renewal and hence long-term viability. Applied to the aid sector, INGOs are well positioned to occupy this indispensable exploratory and bridge-building function—and many already do. By consciously adopting this role, however, INGOs would shift away from shepherding because boundary-spanning is a multidirectional and hence reciprocal process in which local actors of all shapes and sizes also partake. Whereas shepherding is an exercise of power and control—albeit benevolent and discreet—boundary-spanning creates hyphens, decentralizes power and stimulates the creation of new nodes and emergent centres of knowledge production in the ecosystem of international aid. Because boundary spanning is a practice available to all, it reduces hierarchy through mutuality and a recognition of distributed agency. Hence, it

displays greater transformative potential in achieving horizontality than localization, as envisioned by the Grand Bargain. Instead of attempting to integrate isomorphic actors from the Global South into a guarded territory, boundary spanning would promote the acknowledgement of difference while exploring the generative potential of liminal spaces.

9.6 Engagement with restorative dialogue

Rediscovering an appreciation for the diversity of human ingenuity as expressed by culture is, according to Davis (2009), one of the greatest challenges of our era. Boundary spanning must therefore not be relegated to a strategic function aimed at organizational survival, but as an intentionally restorative, and hence political act in favour of epistemic justice. As a wicked and multi-faceted problem, the human suffering that humanitarianism hopes to alleviate is in effect the result of layers upon layers of fragility that blur the distinctions between analytical angles. A multidisciplinary approach is justified (Burkle et al., 2014), but more importantly, it is inter-knowledge that is required. The world certainly does not belong to the great disciplines of Western scientific tradition—predictive models, replicability, instrumental rationality, economics and optimization techniques—but to the much greater faculty of imagination, of which science is but one manifestation. Reason and imagination can therefore co-exist, and even cooperate in a balanced ecosystem; it is in the wake of their meeting that interknowledge is produced. Beyond the concept of hybridity (Bhabha, 1994), which entails some degree of mimicry or assimilation, interknowledge is emergent. Looking for example at the way in which China and India are increasingly unwilling to emulate the West, interknowledge also signals the capacity of non-traditional actors in carving out a space of agency for themselves in the interstices of the dominant structure.

The French philosopher and sinologist François Jullien (2012) provides insight on the production of interknowledge through his exploration of Chinese and Western worldviews. He distinguishes between two concepts: the gap ("*l'écart*"), and the in between ("*l'entre")*. A gap, he argues, exists between the two philosophical traditions because Western epistemes tend to emphasize binaries which produce alterity through logic and the search for "absolute" truth. Meanwhile, the Chinese worldview favours complementarity and dialectic between opposites; it is less prone to dualistic thinking and hence, "othering." Differing from the gap, the in between, as a liminal space, is a site that requires conscious crafting in the Western tradition because it is counterintuitive to binary thinking. Engaging in deliberate attempts to foster such a space of interepistemic dialogue within aid would enable recognition and understanding of differences while avoiding the pitfalls of value judgment (i.e., capacity shortages) and

cultural domination or assimilation (i.e., capacity building). It is disruptive and perhaps even unpleasant, as it involves unlearning and unformatting, as an invitation to think otherwise. Hence, fostering the in between is the very opposite of gatekeeping, which furthers the gap and the negative construction of the Other through its attempts to secure order and certainty.

Within a structure that is replete with hierarchy—in terms of political, economic, ideological and epistemic inequality, "working the hyphen" (Fine, 1994) is understandably difficult for actors whose long-term viability rests on their status within the system. This is why reform, as previously argued, is most likely to occur from the outside in, rather than the opposite. INGOs, as boundary spanners, enjoy significant mobility within the system because of their intermediary position and contact with countless stakeholders. However, to support the reform from the outside in, they must move away from the centre and towards the borderlands to engage with what is occurring in the periphery.

The connection between knowledge and mutual understanding is closely tied to how we use language in practical ways. Engaging in dialogue with those who hold different beliefs and assumptions can expand our ability to think and act involve ways. However, the dominant approach of aid, which prioritizes structure and management, often inhibits true liberation and emergence. Only when individuals have the freedom to enquire, conceive and plan, can structural changes unlock the creative potential of communities. This involves challenging the monopoly of knowledge held by elites and recognizing the rights of populations and local organizations to assert their existing expertise. It also means providing opportunities and support for self-enquiry to further enhance their self-knowledge, which serves as the foundation for their actions and experiences. However, as Nandy (1989) reminds us, it is possible that we will have to take into account, respectfully, the questions which are articulated in other forms, sometimes through the language of silence and disengagement. For, it is possible that some actors may aspire to other pathways to well-being than those associated with the discourse of aid. Unlike Fanon (1965), who calls for an active withdrawal of consent, Nandy is of the opinion that non-engagement with actors representing the dominant discourse, is a more effective strategy for emancipation.

Nonetheless, once we recognize these dynamics, we are partaking in restorative dialogue that can foster the reconfiguration of aid—and its managerial practices and technical knowledge—in such a way that they are embedded in local realities and embodied in the life experiences of those existing within the crisis, rather than rooted in the perspectives of the planners. The results might be—and I dare to think that it is

possible—a non-managerialist, and non-technocratic form of aid. This can allow varied populations who benefit from international solidarity to do so on their own terms, which includes refusing some forms of aid. The design of solutions can then be reoriented away from their technocratic paradigm towards creative experimentation with emergence, especially when appropriated by subaltern communities struggling to redefine their life projects. Then, what has been made absent is liberated from the dominant epistemology of the North. It is freed from non-existence, and all we need do is stand back to see what unfolds.

9.7 Make way for the choreography of autonomous design

In "Designs for the Pluriverse", Escobar (2017) writes that creation is always emergent but that it takes place according to two registers—the first is planned by others—for example, the SDGs, and the second is self-organized. Throughout history, humans have relied on their creativity, improvisation and resilience to keep moving forward. This ability to persevere has resulted in the spontaneous production of knowledge over the course of millennia. In the face of challenging circumstances that threaten the survival of populations, intelligence, adaptation and resilience are human faculties whose generative potential needs to be amplified. Instead of relying on technocrats and global experts whose planned solutions reflect one perspective of the many that are available, communities themselves, united by a shared determination to survive, can design their own existence.

When aid is then recognized as the locally grounded and emergent endeavour of myriad actors to "keep moving forward," what becomes of the "planned by others" register, such as the humanitarian principles or the Sphere standard? What might self-organized aid look like? Perhaps only the concerned populations can answer, as they know best: Rich and poor, women, men and every diverse expression of gender identity, urban dwellers and peasants, the displaced old and young, dependents and labourers—all devise strategies to overcome the countless problems with which they are confronted. In the end, the only question humanitarians should ask, then, is "How can we serve you?" That is localization, grounded in the premise that aid should respond to stated needs, rather than to the universalizing aspirations and standards of global planners. Perhaps this form of solidarity requires a new name to break from its tradition, for example "cooperation for transitions" or "cooperation for autonomy" (Esteva & Escobar, 2017).

If we cast aside for a moment the charters, the standards, the capacity assessments and the logframes, the 70-page compliance annexes, and all the other tools which define what aid looks like, what might we see taking place? In a passage from her book titled "Wayward Lives, Beautiful Experiments," Hartman (2019) provides a metaphorical description of what might be encountered when women—or any marginalized group—negotiate hostile terrains through their imaginative power. It has the properties of a chorus, which according to the Greek etymology, means to dance within an enclosure. The chorus contains and articulates the history of struggle, tumult and upheaval but also collaboration and improvisation, it is an "incubator of possibility, an assembly sustaining dreams of the otherwise" (p. 348). "Inside the circle, it is clear that every song is really the same song, but crooned in infinite variety, every story altered and unchanging: *How can I live? I want to be free. Hold on*" (p. 349).

Humanitarian organizations depict a bleak future, predicting ethnic cleansing, colossal flows of populations fleeing duress and suffering under conditions of even greater hardship, near-apocalyptic climate change-related disasters, pandemics, and increasing inequality and poverty. Should these predictions materialize, the coming decades may not hail the end days, but they will certainly offer opportunities for renewal and reconstruction.

What can be done? The less explored possibility of emergence within the periphery of the aid infrastructure, of autonomous design, is to seek out the typically non-state forces and organizations that challenge the existing dominant order and to see if links can be established within the plurality of expertise and the practical needs and aspirations of populations as they have articulated them. This is not a reform, but the gradual erosion of a monolith by the ebb and flow of tides, the waxing and waning of external currents that ultimately reconfigure the geography of a territory. As the chorus grows and gains momentum and we make way for its spontaneous choreography, we must therefore entertain the strong possibility that there will be no need for what aid organizations propose. If there is one takeaway that I can offer in this concluding chapter, then, it is the following: "International agencies and INGOs, there is no guarantee that your knowledge and skills will remain relevant."

And that is all.

Vignette: Coda, or the restaurant at the edge of the world

Two years is long enough to call a new place "home", but also long enough to suffer simultaneously from homesickness. Nearing the end of my contract in the South Pacific, I tried to ward off a sense of estrangement and depression by driving around the island of Efate, where the road (then a dirt track, now a paved circuit courtesy of China) offered wild and idyllic vistas of the ocean. Having shared the entirety of our picnic supplies with a group of kids during a beach stop, my daughter complained of hunger. But now there was no food to be found—darkness was approaching, and the rare roadside fruit sellers had packed up their goods for the day.

I remembered that during our previous round-island drive, I had noticed a sign for a restaurant along a rural stretch of road upon which we were driving. Any business in these remote parts of the island is as strange as a casino in the desert, except that if you don't pay attention, you will never notice the modest sign that announces its existence. And sure enough, because I was looking, there appeared in my headlights a wooden board that read, "RESTAURANT TURN LEFT." I followed the directions and drove along a trail through tall grass, leading to a small house in the distance. It being off-season for tourists, I assumed it would be closed, and I felt oddly intrusive even though the sign had beckoned me to turn left. However, a light was on in the house. I turned off the car engine. I couldn't see the ocean, but I could hear it. At dusk, a restless Pacific is as loud as an oncoming train.

A man came out to greet us. He was an American in his sixties, shirtless and barefoot, wearing a pair of perilously disintegrated cutoffs and a long-overgrown haircut. I forget his name, but he was a Peace Corps volunteer from the '70s who'd "gone local" and refused to return to the US, trading comfort and boredom for life off the grid. Now, he was the owner of a lost restaurant in the middle of nowhere. Business didn't seem to be doing well at all, and the South Pacific climate had visibly dispensed a generous dose of wear and tear to the few chairs and tables that remained. His restaurant was all but dead, but I saw vestiges of his dream: a wide cement terrace to entertain many guests, an (empty) outdoor bar and an infinity pool whose edge aligned with the ocean, giving the impression that the two were one and the same. Before I could decide whether to stay or leave, a woman appeared—a local woman—bearing a menu that offered one dish. The matter was thus settled. She disappeared with our order, rice and fish. I swam with my daughter in the starlight-speckled pool. We ate, then there was little else to do but head home.

Driving back in the darkness, I started hearing a crunching sound under the wheels of the car, and worried that I might be killing crabs. The road was littered with shells, so I sent my daughter ahead of me to chase the critters out of the way in the headlights. She immediately ran back to inform me that we had come upon an army of giant African land snails silently gliding across the road. They're an invasive species that transmit a meningitis-inducing parasite to humans, in addition to devastating gardens. So, instead of saving them, we decided to crush as many as we could.

During the days that followed, I was overcome with a sadness that I couldn't name. I think I envied the American for his dream to eke out a modest living in paradise, and his audacity to stay behind when everyone else, like me, was passing through, on the way to another place. I would have liked to stay too. I wonder what became of him and his quiet companion. The last cyclones were not kind to the region.

I was told years later that the island's residents and government officials succeeded in curbing the snail invasion, though it took some time. I like to think that on that strange night, I played a tiny, anonymous part in their endeavour. But the memory of a restaurant at the edge of the world and my child pointing at snails in the headlights is the only trace that I was ever there, captured here on paper, lest I forget one day.

APPENDIX A: LIST OF ATLAS.TI CODES

Code

Accountability
Action by North
Adaptation
Administrative burden
Advocacy
Agility
Aid definition
Alignment
Ambiguity
Assessment
Autonomy
Balance
Barrier
Beneficiary
Bottom-up
Budget
Bureaucracy & Managerialism
Business of aid
Capacity building
Capture
Cash transfer
Centralization
Challenges to localization
Civil society
Claim—Global South
Co-construction
Cognitive dissonance
Collaboration
Communication
Community of practice
Competencies—North
Competencies—South
Competition
Compromise
Conflict
Conformity
Consortium
Consultation
Context
Contingency
Contract
Control

Coordination
Corporate culture
Corruption
Cost effectiveness
Country office
COVID
Criteria & requirement
Critique
Debate
Decentralization
Decision-making
Decolonization
Delays
Dependence
Direct delivery
Direct funding
Discourse
Distance
Divergent definitions of localization
Donor
DRR and preparedness
Duty
Effectiveness
Elite
Emergency response
Endogenous
Entrepreneurship
Epistemic justice/injustice
Equality/inequality
Equity/inequity
Ethnocentrism
Evaluation
Evolution of practice
Expats
Federation elements
Feminist perspective
Flexibility
Formatting
Funding
Funding—Southern actor
Gap
Gatekeeping
Governance
Grand Bargain
Guidelines

Help
Hierarchy
History of Amani
History of sector
Human resources—North
Human resources—South
Identity
Ideological clash
Ideology—Global North
Impact
Imposition
Inability to understand—North
Inclusion
Information
INGO
Innovation
Institutional survival
Instrumentalization
Integration
Interface
Interference (ingérence)
Intermediary
Internal processes
International agenda
Isomorphism
Knowledge—North
Last resort localization
Leadership
Learning
Legitimacy
Linguistic barrier
Local and national dynamics
Local capacity
Local population
Local resources
Localization definition
Loss
Loyalty towards organization
Management of organization—Global North

Management tools
Managerial approach
Marginalization
Maturity
Mobility

Nationalism/nationalist sentiment
Nationalization
Needs
Negative repercussions
Negotiation
Neoliberalism and market dynamics
Network
Nexus
OCHA & cluster
Oppression
Organizational values
Orientation
Overhead
Ownership
Paradox
Participation
Partnership
Paternalism
Perception of injustice
Performance
Personal interests
Polarization
Policy
Political interests
Power relations
Priority
Private funds
Private sector
Professionalization
Project
Project design
Proximity
Quality
Reconfiguration
Relevance
Representation
Reputation
Resistance
Respect
Responsibility
Risk
Role
Self-determination
Shared/sharing
Shepherding

Soft skills
South as “Other”
Southern actor
South-South
Stakeholders
Standards
State—South
States (global)
Stereotype
Strategy
Structure—Amani
Structure/architecture of sector
Sub-contracting
Sustainability
Technical expertise
Technocracy
Temporal dimension
Tension
Traditional
Transfer of power
Transformation
Transparency
Trend
Trust
UN organizations and multilaterals
Uncertainty
Visibility
Vision—Amani
Volunteer cooperation
Vulnerability
Work conditions

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