

Evaluation in Transition: The Promise and Challenge of South-South Development Cooperation

Zenda Ofir

Honorary Professor, School for Public Leadership, Stellenbosch University, South Africa; Richard von Weizsäcker Fellow, Robert Bosch Academy, Berlin

Abstract: *In order for the evaluation field to ensure its salience over the next decade, high-profile areas of work have to be sought where evaluative practices are underexplored or undervalued yet can help inspire and accelerate urgently needed transformations while also advancing evaluation theory and practice. This article highlights one such opportunity, offered by South-South cooperation (SSC), an increasingly powerful force in international development yet overshadowed by the frameworks, narratives, and approaches of North-South cooperation (NSC), better known as international development cooperation or development aid. The values, principles, achievements, and challenges that define SSC are seldom discussed at evaluation events or in the evaluation literature, and development evaluation continues to be shaped largely by theories from the Global North and by North-South interactions, despite the growing prominence of SSC and the Global South in world affairs. This article is dedicated to creating awareness of the current situation by highlighting how more intensive engagement with the unique aspects and underexplored opportunities of SSC might help shift paradigms and practices in evaluation, especially but not only in the Global South.*

Keywords: *aid, development, development evaluation, Global South, Indigenous, South-South cooperation*

Résumé : *Pour que le domaine de l'évaluation assure sa pertinence au cours de la prochaine décennie, il faudra cerner des secteurs de travail où les pratiques d'évaluation sont sous-explorées ou sous-évaluées, mais pourraient tout de même aider à inspirer et à accélérer des transformations dont le besoin se fait urgemment sentir, tout en continuant à faire progresser la théorie et la pratique de l'évaluation. Le présent article souligne une telle occasion, offerte par la coopération sud-sud, un mouvement qui a le vent dans les voiles dans le domaine du développement international, mais qui reste dans l'ombre des cadres, des trames narratives et des approches de la coopération nord-sud, mieux connue sous le nom de coopération au développement international ou aide au développement. Les valeurs, les principes, les réalisations et les défis qui définissent la coopération sud-sud font rarement l'objet de discussions lors d'activités d'évaluation ou dans la recherche sur l'évaluation; et l'évaluation dans le domaine du*

Corresponding author: Zenda Ofir, School for Public Leadership, Stellenbosch University, PO Box 610, Bellville, South Africa; zenda.ofir@gmail.com

développement continue à être largement façonnée par les théories du Nord et par les interactions nord-sud, malgré l'importance croissante de la coopération sud-sud et du Sud global dans les affaires mondiales. Le présent article est consacré à la sensibilisation à la situation actuelle en mettant en lumière la façon dont un engagement plus intensif à l'égard des aspects uniques et des possibilités sous-explorées de la coopération sud-sud pourrait aider à modifier les paradigmes et les pratiques en évaluation, particulièrement, mais non seulement dans le Sud.

Mots clés : aide, développement, évaluation du développement, Sud global, coopération sud-sud

“A common endeavour of peoples and countries of the South, born out of shared experiences and sympathies, based on their common objectives and solidarity ... South-South Cooperation is a partnership among equals ...”

Resolution 64/222 of the General Assembly, Nairobi Outcomes Document High-Level UN Conference on South-South Cooperation, 2010

The concept of “transformation” is rapidly gaining prominence across sectors and fields of work, including in evaluation. The dire need for drastic change in how humanity lives, interacts with one another, and treats the ecosystems on which all life depends has been brought sharply to the fore by the confluence of the interconnected crises that define the era of the Anthropocene—climate change, biodiversity loss, the overshoot of planetary boundaries, and, most recently, the COVID-19 pandemic. The watershed year of 2020 has intensified the need for transformative solutions to the world’s most intractable emerging challenges. The already-faltering efforts to achieve the Sustainable Development Goals (SDGs) are likely to be set back by decades.

This situation demands an urgent response by the global evaluation community. Evaluation as professional practice has to be an effective support for transformational change, and it holds significant promise to do so. Yet despite encouraging developments, leading evaluators continue to argue that if evaluation is to contribute to transformation in line with its potential, the field itself will need to transform. Progress in this direction has been slow, the result of a long list of converging factors that include the political economy of evaluation, the pervasive focus on projects, short-term and results-based thinking, over-reliance on quantitative measures, accountability pursued at the cost of learning, superficial engagement with how change actually happens, inappropriate evaluation criteria, inadequate attention to the interests of nature, and insufficient attention to deep differences in worldviews despite the blending of cultures that globalization has accelerated (see, for example [Chaplowe & Hejnowitz, 2021](#); [Cram et al., 2018](#); [Eyben et al., 2015](#); [Ofir & Gallagher, in press](#); [Patton, 2020](#); [Picciotto, 2020](#); [Schwandt, 2009](#); [Sibanda & Ofir, 2021](#)).

If this situation is to change, new or expanded areas of work in evaluation have to be found to open up opportunities to shift convention and cultivate new

paradigms in the evaluation field. This article draws attention to one such opportunity: shifting development evaluation away from the dominant influence of North-South cooperation (NSC; most often referred to as “international development cooperation,” “official development assistance,” or “aid”) toward evaluation conducted in support of South-South cooperation (SSC). The article first sets out the landscape for SSC, highlighting the reasons for the divide between the Global South and the Global North, and the nature and growing importance of SSC. It then describes a few of the most prominent efforts to monitor and evaluate SSC, and the persistent challenges in doing so. Finally, it suggests some preconditions for success, as well as five ways in which evaluation expertise can advance the evaluation of SSC and support evaluation in the Global South to grow in strength, profile, and impact.

THE SOUTH-NORTH DIVIDE

The distinction that defines the Global South and Global North¹—previously insensitively called, respectively, the “Third World” or, more recently, “developing countries,” and the “First World,” “developed countries” or “advanced economies”—is made on historical, socio-economic, and political rather than geographic grounds. The solidarity between countries in the Global South is the result of their shared history of colonization and marginalization. It is most visibly reflected in the committees, statements, and documents of the 148-country Non-Aligned Movement (NAM) formed during the Cold War, and the closely aligned and overlapping 134 countries that make up the G77+China, a group representing the Global South in many international fora. It is:

a common endeavour of peoples and countries of the South, born out of shared experiences and sympathies, based on their common objectives and solidarity, and guided by, *inter alia*, the principles of respect for national sovereignty and ownership, free from any conditionalities. South-South cooperation should not be seen as official development assistance. It is a partnership among equals based on solidarity. (UNGA, 2009, p. 5)

The division of the world into two parts remains controversial, with some arguing that the diversity of countries in the Global South and their rise in GDP over several decades make this distinction moot. It is true that neither the Global South nor the Global North is a historical, cultural, or economic monolith, and development interests and political alliances have become increasingly fluid, yet global indexes and studies continue to show severe and persistent disparities between the two. The divide is furthermore neither inevitable nor natural but has been engineered by powerful countries in the Global North over centuries and in increasingly subtle ways, right up to the present (Hickel, 2017; Love, 1980; Terreblanche, 2014).² According to a recent study, between 1960 and 2018 the drain of resources from the Global South to the Global North as a result of unequal exchange totalled US\$62 trillion (constant 2011 dollars), or US\$152 trillion when accounting for lost growth—enough to end extreme poverty around the world hundreds of times over: “Rich countries continue to rely on imperial forms of

appropriation to sustain their high levels of income and consumption” (Hickel et al., 2021, n.p.). At the same time, the narrative was cultivated and propagated that that all countries had to strive to catch up with, and be like, the “advanced” countries in the Global North.

The divide also underlies many of the political challenges that negotiators face in global fora. An illustrative example is the highly contested notion of Common but Differentiated Responsibilities and Respective Capabilities (CBDR-RC) that was eventually, in 2015, included as a principle in the UN Framework Convention on Climate Change. Bitter debates about responsibility for mitigating strategies took place before its inclusion in the Paris Agreement, and no wonder: Per capita, greenhouse gas emissions in the Global South are much lower than in the Global North, and while the latter has been responsible for 92 percent of the historical excess CO₂ emissions to date, the former, including China, has been responsible for only eight percent (Hickel, 2020). At the same time, countries in the Global South continue to be far more exposed to, and suffer much more severe damage from, the consequences of climate change than countries in the Global North. In this context, then, the recent rise of the Global South and of SSC is unequivocally important.

THE RISE AND IMPORTANCE OF SOUTH-SOUTH COOPERATION

Over the past six decades, NSC has been a major force in development and, as a result, also in evaluation practice. At the same time, SSC has been one of the most visible reflections of the solidarity between countries in the Global South. Initiated in 1978 in Buenos Aires by 138 UN member states,³ SSC has gained increasing prominence over the past two decades as a result of the rapid rise in GDP in countries like Brazil and China while traditional aid flows became more constrained (Besharati, 2019); in 2019, the Global South accounted for more than 50 percent of global GDP and more than 40 percent of global trade, and SSC was emphasized in more than 80 United Nations sustainable development frameworks. It provides a crucial platform to strengthen the diplomatic negotiating power of the South in political dialogues. It is also seen as a vital factor in efforts to transform development⁴ and recover from the pandemic (UNDP, 2016; UNSG, 2017, 2018).

SSC collaboration is informed and also defined by a set of mutually agreed-upon principles and is supported by intergovernmental centres such as the UN Office for South-South Cooperation (UNOSSC) in New York and the South Centre in Geneva. South-south relationships are also reflected in so-called “Triangular Cooperation,” defined as South-driven partnerships between two or more countries in the Global South, supported by one or more countries or multilateral organisations in the North (OECD, 2018).

The growing importance of SSC in the Global South and worldwide makes a compelling case for evaluation specialists in the Global South to be more attuned to the principles, dynamics, challenges, and opportunities that underlie SSC. Yet few have an express focus on this field of evaluative work. This is a result in how the field has evolved, which is the focus of the next section.

EVALUATION IN THE GLOBAL SOUTH

Over the past two decades, evaluation in the Global South has grown in leaps and bounds. Active Voluntary Organizations for Professional Evaluation (VOPEs) have proliferated. According to the website of the International Organization for Cooperation in Evaluation (IOCE), in 2018, officially registered as well as unofficial evaluation associations and networks were present in 63 and 27 Southern countries, respectively; an estimated 25,000 of the 41,500 persons worldwide who identified themselves as evaluation specialists, or as sufficiently engaged with evaluation to join communities of practice, were from the Global South. Their representatives are fully engaged and are often leading international initiatives and platforms. Global networks and initiatives such as EvalPartners, the International Development Evaluation Association (IDEAS), IOCE, and Eval4Action facilitate planning, sharing, and learning opportunities between countries in the South and the North. In Africa and Latin America, culturally sensitive evaluation standards have been developed, and postgraduate education and training in evaluation have been strengthened. Efforts to develop country-owned national monitoring and evaluation systems and parliamentary fora have been gaining momentum, with growing demand from governments as well as local to regional agencies. The Twende Mbele initiative in Africa is one prominent illustrative example of collaboration between countries in the Global South that has enabled several national governments to work together to strengthen their monitoring and evaluation systems, share experiences, and develop relevant capacities in government (Goldman et al., 2018).

The growing interest in transformational change has also manifested itself among evaluation specialists. Building on the impetus provided by the 2030 Agenda for Sustainable Development with its Sustainable Development Goals (SDGs), evaluation seminars, webinars, conference themes, literature contributions, and special interest groups aim to spur a stronger engagement by the global evaluation community with transformative solutions. Promising contributions include practices that bring systems and complexity concepts into evaluation practice, such as Developmental Evaluation and Blue Marble Evaluation, work in centres such as the Centre for the Evaluation of Complexity Across the Nexus (CECAN), Indigenous frameworks and perspectives, and evaluation frameworks that incorporate ecological sustainability and social justice. The Prague Declaration on Evaluation for Transformational Change adopted by the IDEAS Global Assembly on October 4, 2019, further focused attention on the urgency of the matter.

Despite impactful efforts, significant challenges remain (Dighe & Sarode, 2019), not least of which being that the foundational theories in evaluation and a majority of evaluation practices have their roots in the Global North or in practices embraced and promoted through NSC. Yet studies that informed this article highlighted at least four fundamental shifts that are progressively redefining evaluation through the engagement of evaluation specialists from the Global South: (1) the demand for, as well as ownership of, evaluation is growing rapidly in those parts of the world; (2) practitioners are slowly becoming more responsive

to societal realities and worldviews through initiatives such as “Made in Africa Evaluation” by the African Evaluation Association; (3) there is growing awareness of the urgent need for more holistic, systems-informed, integrated approaches in support of sustainable, transformative development; and (4) new development challenges as well as the climate and Black Lives Matter movements have initiated a search for new frameworks, narratives, and approaches to development, and hence to its evaluation. While these shifts are felt worldwide, they are increasingly driven by evaluation specialists from the Global South, and especially by minority Indigenous societies across the world. They challenge long-standing dominant perspectives of what constitutes good and useful development and evaluation, and they inspire innovation in approaches and methods.

Despite the aforementioned intensifying efforts to unlock the promise of evaluation theory and practice for the Global South, including through the South-South Cooperation in Evaluation (S2SE) initiative initiated in 2017, there has been relatively little focus by the global evaluation community on SSC evaluation. Studies that informed this article highlighted a dearth in the formal and even informal literature of development evaluations rooted in SSC principles and needs. Evaluation around the world remains a largely Western construct (Chouinard & Hopson, 2016), readily absorbing the values, priorities, and approaches promoted by influential NSC institutions. Evaluation in the Global South of collaboration between countries—whether commissioned by Southern agencies or part of NSC or South-South and Triangular Cooperation (SSTC)—is therefore still overwhelmingly imbued with principles and practices emanating from the Global North, which adds to the technical as well as political challenges experienced in efforts to evaluate SSC. This is the focus of the next section.

CHALLENGES IN EVALUATING SOUTH-SOUTH COOPERATION

Over the past decade there has been growing interest in how best to develop strong monitoring and evaluation systems for SSC, complemented by appropriate institutional capacities. Besharati (2019) confirms the findings of studies that informed this article that, despite its importance, few systematic evaluations of SCC effectiveness, quality, and impact have been undertaken. In the absence of relevant evidence, debates have therefore been dominated by rhetoric from both critics and supporters of the group of emerging donors from the Global South. A new set of financiers of development and its evaluation inevitably brings new perspectives and ways of working, but frameworks and models for SSC evaluation have been slow to emerge. Fledgling international development agencies established by SSC providers still have much to learn about systematic knowledge production and management, and about evaluation (Li, 2017).

At the same time, political and technical complexities abound in SSC modalities, relationships, and viewpoints (UNCTAD, 2019). After decades of technical and knowledge exchanges among countries in the South, SSC now has an increasingly diverse array of modalities of support, implementation approaches, and

results. Its boundaries are often unclear, and only a relatively small percentage of SSC represents the typical “aid” modalities of NSC. For example, [Mthembu \(2019\)](#) defines SSC flows as official transfers by official government ministries or agencies of money, goods, and services to countries in the Global South for their economic development and welfare. It includes concessional finance including grants, interest free loans, humanitarian assistance, volunteer programs, technical cooperation, and other concessional loans. Non-concessional finance such as military aid, commercial lines of credit, commercial export seller credits, and commercial export buyers’ credits do not qualify.

With the plurality of approaches, modalities, and scales of SSC, developing common monitoring and evaluation frameworks has been a challenge, especially as SSC does not yet have the benefit of a long-standing history of collaboration such as that forged in the Organisation for Economic Co-operation and Development’s Development Assistance Committee (OECD-DAC). This has hindered the production of clear and comparable data and information about the scope, extent, and quality of SSC, and limited transparency and common understanding of the nature and scope of SSC flows ([Besharati, 2019](#)). This situation continues to feed incorrect or incomplete media narratives about SSC. It also intensifies concerns among SSC providers that existing monitoring and evaluation methodologies might not account for the real value of SSC.

The political challenges are equally complex. Major SSC providers now increasingly exert influence on how development is done and perceived. At the same time, they have come under pressure to use the evaluation systems and approaches developed by the powerful traditional donors working under the auspices of the OECD-DAC. SSC providers insist that their support should be treated as complementary; neither SSC nor NSC should be seen as superior or subordinate to the other. Their concerns stem from the fact that NSC approaches and measures do not sufficiently acknowledge the very real differences between them ([Bracho, 2017](#)). For example, when per capita income is taken into account, the SSC providers are still poor and they therefore cannot completely untie aid, as economically rich countries can afford to do.

These differences are to a large extent the result of their different origins. As noted by [Besharati \(2019\)](#), SSC has its roots in anti-imperialist sentiments during the Cold War, while NSC stems from colonial and post-colonial relations between the Global North and Global South: “[SSC] was a movement that sought to counter Northern dominance, liberate countries from Northern dependency, and give Southern countries a stronger voice in shaping the global governance and development agendas. . . . SSC represented the opposite of what North-South relationships were perceived to be. Instead of a one-way charitable aid relationship, SSC was defined as a two-way cooperative relationship” (p. 13).

Discussions in international SSC forums right up to the 40th Anniversary of the Buenos Aires Plan of Action for Promoting and Implementing Technical Cooperation among Developing Countries—the “BAPA+40” conference held in 2019 in Buenos Aires—have consistently highlighted the risk to the interests

of emerging economies if SSC were to be straitjacketed uncritically into “overtly or covertly driven” OECD-DAC measurement, comparison, ranking, and peer-review processes that are not sensitive to their particular contexts and approaches (Besharati, 2019).

KEY INITIATIVES IN THE EVALUATION OF SOUTH-SOUTH COOPERATION

Since 2009, a number of institutions, initiatives, and civil society groupings have tried to develop monitoring and evaluation approaches for SSC,⁵ focusing on the measurement of SSC, including the quantifying of its volumes and the quality of its cooperation and partnerships. However, progress has been hampered by the absence of a conceptual framework and by data, budgetary, and capacity constraints among Southern actors (Besharati, 2019). As an illustration, I highlight here two prominent examples.

The Global Partnership for Development Cooperation

SSC providers are not a monolith, and some have focused on working within traditional donor guidelines. The Global Partnership for Effective Development Cooperation (GPEDC) was initiated during the Fourth High-Level Forum on Aid Effectiveness in Busan in 2011 to find common ground between agencies engaged in NSC, SSC, and SSTC. The initiative was contested from the start, reflected in tense efforts to seek a universal arrangement for accountability in development cooperation (Constantine et al., 2015; Li et al., 2018). Key countries such as Brazil, India, China, and South Africa were unwilling to join, or withdrew, due to perceptions that the GPEDC was being positioned to serve as continuation of established North-South practices.

Despite the subsequent loss in standing, the partnership developed a monitoring framework for rapid voluntary reporting based on 10 indicators for four principles for development cooperation developed at the High-Level Forums on Aid Effectiveness in Paris in 2005 and in Busan in 2011. The framework focuses on the quality of development partnerships, but prominent countries in the G77+China consider it firmly rooted in NSC agendas. In the meantime, initiatives such as the Asia Evaluation Week, the Shanghai International Program for Development Evaluation (SHIPDET), and other interactions between government officials and evaluation specialists facilitate the exposure of SSC providers to state-of-the-art evaluation practices worldwide.

Applying South-South cooperation principles

Although SSC providers differ among themselves in their approaches to development, they have many more significant differences compared with traditional donors—in experience, perspectives, modalities of support, and ways of working. Importantly, in line with their origin, since the beginning they aspired to avoid the asymmetrical relationships prevalent in NSC and saw themselves instead as

partners in horizontal relationships defined by mutual benefit, exchange, friendship, and solidarity. This is reflected in a set of principles formally adopted by the G77+China in July 2009 (G77, 2009),⁶ most recently confirmed at the BAPA+40 conference in Buenos Aires. They are therefore considered crucial underpinnings for SSC and have a very different tenor compared to the principles that have guided NSC since the first High-Level Forum on Development Effectiveness in Paris (Table 1).

The most significant effort to date to remedy this situation was 20 months of multi-stakeholder consultations by the Africa Chapter of the Network of Southern Think Tanks (NeST Africa), which culminated in an SSC M&E framework for use at both project and country level. Based on the principles in the Nairobi Outcome Document (G77, 2009), 20 indicators are organized along five dimensions of quality and effectiveness (Table 2). Case studies were launched to test the framework, and other regional NeST initiatives have followed suit, adapting the framework to their contexts. A related framework was also developed and tested by experts at the China Agricultural University (Li, 2018).

The two-way interaction at the core of SSC is an unusual focus for evaluation. For example, in a case study on agricultural collaboration between China and Tanzania, attention was on the political, social, economic, and cultural impacts

Table 1. Comparison between principles that have guided South-South and North-South cooperation

South-South cooperation principles	North-South cooperation principles
<i>Nairobi Outcomes Document (UNGA, 2009)</i>	<i>Paris Declaration and Accra Agenda for Action (2005–2011)</i>
Multilateralism	Ownership (by recipient)
Environmental sustainability	Alignment (of donors with local systems)
Mutual benefit, win-win, and horizontality	Mutual accountability
Capacity development	Harmonization (between donors)
Mutual learning, knowledge exchange, and technology transfer	Development results (that will be measured)
Transparency and mutual accountability	<i>GPEDC principles for effective international development cooperation (2012)</i>
Respect for national sovereignty	Ownership of development priorities by developing countries
National ownership and independence	Focus on results
Equality	Inclusive development partnerships
Non-conditionality	Transparency and accountability to each other.
Non-interference	
Inclusivity and participation	
Results, impact, and quality	

Source: Adapted from multiple sources

Table 2. Framework for assessing the quality of South-South cooperation

DIMENSIONS	INCLUSIVE NATIONAL OWNERSHIP	HORIZONTALITY	SELF-RELIANCE AND SUSTAINABILITY	ACCOUNTABILITY AND TRANSPARENCY	DEVELOPMENT EFFICIENCY
INDICATORS	Multi-stakeholder partnerships	Mutual benefit	Capacity building	Data management and reporting	Flexibility and adaptation
	People-centred inclusivity	Shared decisions and resources	Knowledge and technology transfer	M&E systems	Time and cost-efficiency
	Demand-driven	Trust and solidarity	Use country systems and human resources	Transparency and access to information	Internal and external coordination
	Non-conditionality	Global political coalitions	Domestic revenue generation	Mutual accountability and joint reviews	Policy coherence for development

Source: Besharati et al. (2017)

of Chinese intervention in Tanzania, accompanied by reflection on the implications of Chinese approaches to development and their respective advantages and disadvantages, based on the different contexts between the two countries (Li, 2018). From an SSC perspective, such intentional self-reflection helps to reduce or avoid inequalities in relationships and interference in the internal affairs of the other country.

The difference from the one-directional accountability that characterizes NSC in practice is obvious, and since it is much easier to adhere to the NSC principles, their influence on SSC has been significant. Evaluation specialists steeped in NSC are often ignorant of the SSC principles, and commissioners of SSC or SSTC evaluations do not necessarily integrate them into terms of reference. The SSC principles are thus inevitably not fully applied, and as a result, some African countries participating in SSC have reported challenges similar to those experienced with Northern donors.

Other contributions

Several countries and networks have taken the lead in moving beyond a focus on SSC financial flows and coordinated South-initiated approaches to help improve SSC or SSTC results. For example, in Latin America, the Ibero-American Programme for Strengthening SSC, a triangular cooperation initiative that spans 21 countries, has developed guidance to monitor and evaluate SSC and set up a platform for member states to record SSC data and publish annual reports. Brazil's Agency for Brazilian Cooperation (ABC) has developed its own methodology for quantifying its SSC activities. In India, the think tank Research and Information System for Developing Countries (RIS) worked on a toolkit and analytical framework for SSC impact assessment. In Africa, through the UNDP Regional Service Centre for Africa and the ADUA-NEPAD Planning and Coordinating Agency, 15 African countries came together in 2018 to develop the First Africa SSC Report, with a system for data collection on SSC activities.

These efforts tend to be more closely aligned with NSC practices and less inclined to refer to the SSC principles or their underlying values, reducing the opportunities to determine the value of their unique framing.

ADVANCING EVALUATION IN SUPPORT OF SOUTH-SOUTH COOPERATION

The vast majority of evaluation specialists working in development, including those from the Global South, have little knowledge of the history, challenges, or foundational principles of SSC or of the controversies surrounding the relationship between NSC and SSC. These issues are largely invisible in mainstream evaluation conversations, publications, guidelines, and criteria. This situation opens up opportunities to strengthen underdeveloped areas of work that can enhance SSC and its evaluation and also broaden the value and contributions of the range of approaches and methods used by evaluation specialists in the Global South. This

final section proposes some actions and shifts that can help shape evaluation in support of SSC, and in the Global South in general, and highlights a few preconditions for such benefits to be fully explored.

Intensifying principles-based evaluation

The principles-based monitoring frameworks developed by NeST Africa (Table 2) and the China Agricultural University help make an attractive case for the application of principles-focused evaluation based on the GUIDE approach (Patton, 2018). Evaluation can test the extent and credibility of their application and their meaningfulness and utility on the ground, hold stakeholders to account for intervention design and implementation in line with the Nairobi Outcomes Document, and examine the value of the combination of principles for conceptualizations of development fit for this time. It can help clarify how well development initiatives work that are intended to be based on mutual accountability and learning as well as solidarity as equal partners, avoid interference in each other's affairs, and seek win-win situations. It furthermore provides evaluation specialists in the Global South with the opportunity to embed principles-focused evaluation more effectively in development and evaluation practice as part of the essential evolution of evaluation to embrace a much stronger systems orientation.

Advancing collaboration on SSC with policymakers, researchers, and other specialists

The importance of systematizing data and information on SSC (and on SSTC) has been confirmed at BAPA+40. The development of national and/or regional SSC/SSTC strategies and ecosystems is also considered to be essential for greater coherence and to help providers and beneficiaries of such support ensure progress toward the achieving the SDGs. Yet in all these efforts and discussions, the full extent of the value that evaluative practices can add to such work seldom features, and evaluators as a professional grouping are not explicitly mentioned in documents that discuss the road ahead. Evaluation specialists working with the SDGs can therefore help raise the profile of and advocate for SSC. They can also integrate such foci into national research- and/or learning-oriented monitoring and evaluation systems. Special efforts can be made to collaborate more intensively with policymakers, researchers, data specialists, and others already working on SSC through, for example, the Network of Southern Think-Tanks (NeST). However, evaluation specialists who enter this field of work will have to be politically and technically savvy, aware of the dynamics that have affected SSC to date.

Questioning and countering dominant narratives about development and evaluation

“Cultural mythologies” are propagated within and across societies through the flow of narratives, stories, and memes (Waddock, 2020). The pervasive influence

of dominant narratives on development and on evaluation practice is a severely understudied yet crucially important area of work, especially for evaluation specialists in the Global South (Ofir & Gallagher, in press). Lent (2017) shows how those with power create dominant narratives and mental models that “colonise” minds even though such narratives are often incomplete or incorrect. For example, narratives that resulted in acceptance of neoliberal economic models in the Global South over the past five decades have had a highly destructive influence on development efforts (Hickel et al., 2021); its tenets were inevitably also reflected in evaluation practice. An ideology with deep roots in the Enlightenment period, neoliberalism has dominated macroeconomic and political strategies in the Global South for five decades. It entrenched in the most powerful development theories and practices not only notions of rationality, reason, “objective truth,” and the scientific method but also mechanistic and individualistic views of the world that separated humans from one another, and from nature, and justified dominance over nature. It downplayed personal experience, differences in conceptions of human and societal rights, the value of relationships nurtured through “practices of reciprocity and redistribution” and responsibility for the whole community, and stewardship instead of dominance over nature (Waddock, 2020).

In contrast, the often-dismissed values and norms underlying many cultures in the Global South, as well as minority Indigenous traditions in the Global North,⁷ have been imbued with insights about global systems, complexity concepts, notions of social justice, and the importance of living within “the pattern of creation” (Pio & Waddock, 2020; Yunkaporta, 2019). Such insights are now recognized as crucial to turn societies and nature back from the brink of destruction. An example of the need to develop new narratives about how change or development happens is provided by Ang (2014, 2016) in her acclaimed study of the reasons for China’s extraordinarily rapid economic development over just four decades. Ang crushes the narrative that strong institutions need to be built as a priority for countries to develop, yet billions of aid dollars have been spent through NSC interventions on institution building, irrespective of the stage of development of the country. Ang’s work demonstrates that new narratives about the value and timing of institutional development are needed, anchored in a systems view of the world. Institutions have to be allowed to co-evolve, for example with the development of markets, cognizant of the different strategies needed during early and late stages of growth: “The practices that sparked early development were opposite to the best practices evolved at late development stages. . . . To activate the developmental potential of ‘weak’ institutions in developing contexts, we must first change the mindset that only practices found in the developed world are the best and that everything else that deviates from these standards are wrong” (Ang, 2014).

Learning from and promoting transformative development approaches and their connection with SSC

Nearly all progress toward poverty elimination over recent decades has been due to one country only: China. Its transformative development and the dramatic

improvements in the population's quality of life are widely recognized as unique in history in scale and pace (Alston, 2020; World Bank, 2020). While it does not hold itself up as a model for the world to follow, important lessons can be learned from its experience, especially as none of the conventional development narratives and models laid the foundation for its rapid economic rise (Ang, 2016; Waddock, 2020). Instead, at the core of its success has been the anchoring of national development plans and policies in approaches informed by a complex systems view of the world and concepts and practices such as scenario modelling and experimentation (Husain, 2017), directed improvisation and co-evolution (Ang, 2016), and learning-oriented monitoring and consultation that support rapid policy adaptation and scaling (Jordan, 2015)—all long before these ideas became fashionable in development plans and actions in the Global North.

While other countries in the Global South have displayed transformative economic growth over recent decades, none has been as rapid or as intensively documented as China. As the foremost provider of SSC, its actions can be potentially transformative across regions, especially through its Belt and Road Initiative (BRI). This situation offers significant as-yet-underexplored opportunities for learning about transformative development in the Global South, and the role of SSC in this process.

Deepening insight and innovation using philosophies and worldviews from the Global South

A focus on SSC will also advance opportunities to build on some of the unique interests and knowledge from the Global South, even if it is not yet prominent in this field of work. For example, perspectives from East and Southeast Asia on how the world works are seldom prominent in development or evaluation literature, overshadowed by documented experiences from other parts of the Global South or from minority Indigenous societies in the Global North. Yet complex systems-informed perspectives relevant to evaluation are abundant in philosophies such as Buddhism and Taoism, which, together with Confucianism, share concerns about harmony and interdependence and about the relationships both among people and between people and nature. Fundamental concepts such as yin and yang refer to the interdependence and complementarity between humans and the universe, nature and mind, natural events and man-made systems. They predict disaster if the natural order of the universe is opposed—a belief that is manifesting visibly in the era of the Anthropocene. These philosophies offer potential for innovations in evaluation practice that can help accelerate the shift away from a Newtonian-Cartesian view of the world. For example, the Buddhist understanding of causation emphasizes that cause and effect arise together and are recursive; that the notion of interdependence means that the observer of a process of cause and effect cannot be isolated from the process itself; and that “impact” as defined in the West does not exist—only a “*combination of conditions that come together in a certain way at a certain point in time*” (Russon, 2014; see also Dinh et al, 2019; Russon & Russon, 2010).

Despite being age-old philosophies, they already implicitly and sometimes explicitly influence policies and practice. Perhaps the best-known example is the Gross National Happiness (GNH) Index in Bhutan, which is based on Buddhist principles and has steered the country's policies toward what is today the world's only carbon-negative country (Yanka et al., 2018). In another example, Dinh et al. (2019) discuss the Buddhist understanding of evidence based on intrinsic validation rather than empirical verification, and they demonstrate how Buddhist principles can be applied to the Most Significant Change (MSC) technique, finding them compatible yet prompting nuanced interpretations and displaying differences that may lead to new ways of approaching such evaluation methodologies.

Preconditions for success: Shifts in mindset, power and focus

Colonial dominance and decades of NSC driven relationships have shaped the idea that 'modernisation' means striving towards Western consumption patterns, social relationships and ways of seeing the world (Lent, 2017; South Commission, 1990; Yunkaporta, 2019). Evaluation specialists have not necessarily escaped what Hall and Tandon (2017) calls epistemicide, the killing of knowledge systems, or what Ngugi wa Thiongo'o refer to in 1986 as the "detonation of a cultural bomb" during colonization (cited in Ndlovu-Gatsheni, 2017). It has stripped many in the Global South, including highly educated specialists, of knowledge about and confidence in their own philosophies, knowledge systems, and ways of working. In evaluation this situation has been exacerbated by the power asymmetries inherent in NSC relationships. The importance of culturally responsive evaluation, culturally responsive Indigenous evaluation, "Made in Africa" Evaluation and other efforts aimed at determining how evaluation can be Indigenized cannot be underestimated. Yet on the spectrum from "least Indigenized" to "completely Indigenous evaluation" (Gaotlhobogwe et al., 2018), efforts are still largely concentrated in making incremental adjustments to approaches that have their origin in the Global North—this in light of the fact that all foundational evaluation theories and nearly all practices have their origins in the Global North and are documented primarily in English. While it is obviously valuable and also essential to seek out and adapt existing evaluation theories and approaches that resonate well with the worldviews and experiences of the Global South, the very different principles underlying SSC and NSC show why this can also be a sensitive matter. It is worth exploring what evaluation in the Global South could have looked like if it had been invented and furthered in some of its distinct cultures, or if it had been informed by SSC principles.

This situation will not change unless the financiers of development and the commissioners of evaluation in the Global South are prepared to support experimentation and research among evaluators working in tandem with Indigenous specialists. Those with the power to determine the design of interventions, how success is defined and measured, and the criteria on which evaluations are based

are in a good position to advance dominant narratives about how the world works, how change happens, and what constitutes effective development or evaluation. The NSC industry continues to drive much of what is being done in development evaluation, and detractors view many of the current practices as cultivating mindsets and methods that run counter to the pursuit in the Global South of “genuine” long-term, sustained development and self-determination. Some of the practices being questioned include fragmented “aid” projects that create dependency on external agents; results frameworks that promote development based on linear notions of change; and, despite rhetoric to the contrary, insufficient consideration of differences in values, contexts, cultures, and power dynamics. The tendency to allocate contracts to Global North-based firms (often working through subsidiaries in the South) and the dominance in evaluation training of Global North specialists and practices are also seen as signals of a system that does not agree with the principles that define SSC.

Commissioners and other specialists in the Global South and Global North have yet to enter what researchers and evaluators [Cram and Phillips \(2012\)](#) have called “the interstitial space ... a middle ground whereby researchers can acknowledge their own worldviews and come together for fruitful transdisciplinary engagements” (p. 36). Leadership in new approaches to commissioning evaluations can help shed inappropriate practices for something more attuned to the needs of SSC and the Anthropocene era. Then the necessary blending of existing evaluation practice from the Global North with theories and methodologies derived from the Global South can be done with greater skill, confidence, and impact.

IN CONCLUSION

This article has attempted to highlight the value that a much more robust focus on South-South (and triangular) cooperation can add to the advancement of evaluation as practice in service of the Global South. Despite ongoing work in this regard, developments in SSC evaluation that reflect its unique nature, principles, and technical and political dynamics have not been prominent in international evaluation publications, events, and practices. Evaluators as a specialist grouping are also largely absent from SSC fora. Given the growing importance of SSC, this has been a missed opportunity, especially as the field of evaluation is currently grappling with how to ensure that its evolution at this time is fit for the challenges confronting humanity and the planet. Evaluation specialists in the Global South remain under the influence of a practice that continues to be driven largely by narratives and frameworks from the Global North. It is therefore my hope that this article will help to create greater awareness of the opportunities and benefits that more robust engagement with SSC in the Global South can offer—including the potential to help create a new paradigm for evaluation that fully serves the interests of the Global South, informed by state-of-the-art developments in SSC, NSC, and Indigenous fields of work.

ACKNOWLEDGMENTS

The author wishes to acknowledge the contributions of Neissan Besharati, whose authoritative writings and conversations with me have been important influences on this paper. This research was supported in part by a grant from the Packard Foundation.

NOTES

- 1 The Global South consists of around 140 countries, with a combined population of more than 6 billion. The Global North consists of around 60 countries, with a combined population of more than 1 billion.
- 2 See also the writings of renowned intellectuals from the Global South and Global North such as Noam Chomsky, Eduardo Galliano, Shashi Tharoor, Joseph Stiglitz, Ha-Joon Chang, and Dambisa Moyo.
- 3 Buenos Aires Plan of Action for Promoting and Implementing Technical Cooperation among Developing Countries (BAPA), most recently again confirmed in April 2019 at the BAPA+40 Second High-Level United Nations Conference on South-South Cooperation.
- 4 For example, through the Belt and Road Initiative (BRI), International Solar Alliance, alliances such as the BRICS and CIVETS, the Asian Infrastructure Investment Bank (AIIB), New Development Bank (NDB), and the India-Brazil-South Africa Facility for the Alleviation of Poverty and Hunger (IBSA Trust Fund).
- 5 Such as the IBSA Trust Fund, BRICS Policy Center, South African Institute of International Affairs, China International Development Research Network, Research Institute for Applied Economic Research, Research and Information System for Developing Countries, the German Development Institute, and Centre for Policy Dialogue.
- 6 The South-South cooperation principles were endorsed by the heads of state and government of the Non-Aligned Movement at its XVth Summit in Egypt in July 2009 (NAM Doc. No. NAM/2009/FD/Doc.1, para. 358).
- 7 Articulated in the United Nations First Report on the Status of Indigenous Peoples, these are (as quoted and commented upon by Waddock, 2020) as follows: sustainability or biodiversity (vs. monoculture), collectivity or cooperation (vs. competition), naturalness or organic (as opposed to mechanistic), spirituality including rituality (including but not just scientific), process-orientation toward effectiveness (vs. just efficiency), subsistence or domesticity, and customary law or locality (as opposed to globality).

REFERENCES

- Alston, P. (2020, July 2). *The parlous state of poverty eradication*. Report A/HRC/44/40 of the UN Special Rapporteur on Extreme Poverty and Human Rights, presented at the Forty-Fourth Session of the Human Rights Council. <https://chrgj.org/wp-content/uploads/2020/07/Alston-Poverty-Report-FINAL.pdf>
- Ang, Y. Y. (2014). *Making details matter: How to reform aid agencies to generate contextual knowledge*. Winning Entry, GDN Next Horizons Essay Contest: The Future of Development Assistance. Supported by the Bill and Melinda Gates Foundation.
- Ang, Y. Y. (2016). *How China escaped the poverty trap*. Cornell University Press.

- Besharati, N. (2019). *Measuring effectiveness of South-South cooperation*. Occasional Paper No. 52. Southern Voice.
- Besharati, N., Rawhani, C., & Rios, O. G. (2017). *A monitoring and evaluation framework for South-South cooperation*. Network of Southern Think-Tanks, Africa Chapter. http://www.saiia.org.za/wp-content/uploads/2017/05/saiia_NeST-Working-Paper_20170515.pdf
- Bracho, G. (2017). *The troubled relationship of the emerging powers and the effective development cooperation agenda: History, challenges and opportunities*. Discussion Paper 25/2017. German Development Institute.
- Chaplowe, S., & Hejnowitz, A. (2021). Evaluating outside the box: Evaluation's transformational potential. *Social Innovations Journal*, 5. <https://socialinnovationsjournal.com/index.php/sij/article/view/704>
- Chouinard, J. A., & Hopson, R. (2016). A critical exploration of culture in international development evaluation. *Canadian Journal of Program Evaluation*, 30(3), 248–276. <https://doi.org/10.3138/cjpe.30.3.02>
- Constantine, J., Shankland, A., & Gu, J. (2015). *Engaging the rising powers in the global partnership for effective development cooperation: A framing paper*. Institute of Development Studies.
- Cram, F., & Phillips, H. (2012). Claiming interstitial space for multicultural, transdisciplinary research through community-up values. *International Journal of Critical Indigenous Studies*, 5(2), 36–49. <https://doi.org/10.5204/ijcis.v5i2.89>
- Cram, F., Tibbetts, K. A., & LaFrance, J. (Eds.). (2018). *New directions for evaluation 159*. Wiley Periodicals and the American Evaluation Association.
- Dighe, S., & Sarode, T. (2019). Evaluation in the Global South: Practices, problems, and prospects. *Reconsidering Development*, 6(1). <https://pubs.lib.umn.edu/index.php/reconsidering/article/view/2077>
- Dinh, K., Worth, H., & Haire, B. (2019). Buddhist evaluation: Applying a Buddhist world view to the Most Significant Change technique. *Evaluation*, 25(4), 477–495. <https://doi.org/10.1177/1356389019841654>
- Eyben, R., Guijt, I., Roche, C., & Shutt, C. (Eds.). (2015). *The politics of evidence and results in international development: Playing the game to change the rules?* Practical Action.
- Gaotlhobogwe, M., Major, T. E., Koloï-Keaikitse, S., & Chilisa, B. (2018). Conceptualizing evaluation in African contexts. *New Directions for Evaluation*, 159, 47–62. <https://doi.org/10.1002/ev.20332>
- Goldman, I., Byamugisha, A., Gounou, A., Smith, L. R., Ntakumba, S., Lubanga, T., . . . Rot-Munstermann, K. (2018). The emergence of government evaluation systems in Africa: The case of Benin, Uganda and South Africa. *African Evaluation Journal*, 6(1). <https://doi.org/10.4102/aej.v6i1.253>
- G77. (2009, September 25). *Ministerial declaration of the 33rd annual meeting of the ministers of foreign affairs of the member states of the group of 77 and China*. <http://www.g77.org/doc/Declaration2009.htm>
- Hall, B. L., & Tandon, R. (2017). Decolonisation of knowledge, epistemicide, participatory research and higher education. *Research for All*, 1(1), 6–19. <https://doi.org/10.18546/rfa.01.1.02>

- Hickel, J. (2017). *The divide: A brief guide to global inequality and its solutions*. Penguin Random House.
- Hickel, J. (2020). Quantifying national responsibility for climate breakdown: An equality-based attribution approach for carbon dioxide emissions in excess of the planetary boundary. *The Lancet Planetary Health*, 4(9), E399–E404. [https://doi.org/10.1016/s2542-5196\(20\)30196-0](https://doi.org/10.1016/s2542-5196(20)30196-0)
- Hickel, J., Sullivan, D., & Zoomkawala, H. (2021). Plunder in the post-colonial era: Quantifying drain from the Global South through unequal exchange, 1960–2018. *New Political Economy*. Advance online publication. <https://doi.org/10.1080/13563467.2021.1899153>
- Husain, L. (2017). Policy experimentation and innovation as a response to complexity in China's management of health reforms. *Globalization and Health*, 13(1), Article No. 54. <https://doi.org/10.1186/s12992-017-0277-x>. Medline:28774319
- Jordan, L. S. (2015). *Learning by doing: China-Africa co-operation and state learning: Policy insights* 29. South African Institute of International Affairs.
- Lent, J. R. (2017). *The patterning instinct: A cultural history of humanity's search for meaning*. Prometheus Books.
- Li, X. (2017). *Should China join the GPEDC? The prospects for China and the Global Partnership for Effective Development Co-Operation*. Discussion Paper 17/2017. German Development Institute.
- Li, X. (2018). *Filling the knowledge gap in South-South cooperation: An evaluation framework and its application in China-Tanzania cooperation*. China Institute for South-South Cooperation in Agriculture, China Agricultural University. <http://cissca.cau.edu.cn/module/download/downfile.jsp?classid=0&filename=f49794c88eea449a920880fcaa323b72.pdf>
- Li, X., Gu, J., Leistner, S., & Cabral, L. (2018). Perspectives on the Global Partnership for Effective Development Cooperation. *IDS Bulletin*, 49(3). <https://doi.org/10.19088/1968-2018.153>
- Love, J. L. (1980). Raúl Prebisch and the origins of the doctrine of unequal exchange. *Latin American Research Review*, 15(3), 45–72. https://www.jstor.org/stable/2502991?seq=1#page_scan_tab_contents
- Mthembu, P. (2019). *Towards BAPA+40: Challenges in defining South-South cooperation and development cooperation from Southern powers*. Network of Southern Think-Tanks, Africa Chapter.
- Ndlovu-Gatsheni, S. J. (2018). The dynamics of epistemological decolonisation in the 21st century: Towards epistemic freedom. *Strategic Review for Southern Africa*, 40(1), 16–45. <https://doi.org/10.35293/srsa.v40i1.268>
- OECD. (2018). *OECD triangular cooperation toolkit*. Author.
- Ofir, Z., & Gallagher, L. (in press). The danger of the single story: Evaluation, ethics and the Global South. In R. D. Van den Berg, P. Hawkins, & N. Stame (Eds.), *Ethics for evaluation*. Taylor & Francis.
- Patton, M. Q. (2018). *Principles-focused evaluation: The guide*. Guilford Press.
- Patton, M. Q. (2020). Evaluation criteria for evaluating transformation: Implications for the coronavirus pandemic and the global climate emergency. *American Journal of Evaluation*, 42(1), 53–89. <https://doi.org/10.1177/1098214020933689>

- Picciotto, R. (2020). From disenchantment to renewal. *Evaluation*, 26(1), 49–60. <https://doi.org/10.1177/1356389019897696>
- Pio, E., & Waddock, S. (2020). Invoking indigenous wisdom for management learning. *Management Learning*, 52(3), 328–346. <https://doi.org/10.1177/1350507620963956>
- Russon, C. (2014). Impact evaluation based on Buddhist principles. *Journal of Multidisciplinary Evaluation*, 10(23), 73–77.
- Russon, C., & Russon, K. (2010). How the *I Ching* or *Book of Changes* can inform Western notions of theory of change. *Journal of Multidisciplinary Evaluation*, 6(13), 193–199.
- Schwandt, T. A. (2009). Globalising influences on the Western evaluation imaginary. In K. E. Ryan & J. B. Cousins (Eds.), *The SAGE international handbook of educational evaluation* (pp. 19–36). SAGE.
- Sibanda, A., & Ofir, Z. (2021). Evaluation in an uncertain world: A view from the Global South. In R. D. Van den Berg, C. Magro, & M.-H. Adrien (Eds.), *Transformational evaluation for the global crises of our times* (pp. 37–61). IDEAS.
- South Commission. (1990). *The challenge to the South: Report of the South Commission*. Oxford University Press. https://www.southcentre.int/wp-content/uploads/2013/02/The-Challenge-to-the-South_EN.pdf
- Terreblanche, S. (2014). *Western empires, Christianity, and the inequalities between the West and the rest, 1500–2010*. Penguin Books.
- United Nations Conference on Trade and Development (UNCTAD). (2019). *Defining and quantifying South-South cooperation*. <https://unctad.org/webflyer/defining-and-quantifying-south-south-cooperation>
- United Nations Development Programme (UNDP). (2016). *Accelerating sustainable development: South-South and triangular cooperation to achieve the SDGs: A UNDP strategy*. https://www.undp.org/content/dam/undp/library/development-impact/SS_TrC%20Docs/South-South-UNDP-Strategy-22Jul16_50yr_logo.pdf
- United Nations General Assembly (UNGA). (2009, December). *Nairobi outcome document of the high-level United Nations conference on South-South cooperation, sixty-fourth session*, New York, A/64/L.37. https://digitallibrary.un.org/record/673444/files/A_64_L.37-EN.pdf
- UNSG. (2017, August 7). State of South-South cooperation: Report of the secretary-general 2017. UN Doc. No. A/72/297, para. 2. <https://undocs.org/A/72/297>
- UNSG. (2018, September). *Report on the role of SSC and the implementation of the 2030 agenda for sustainable development: Challenges and opportunities*. Seventy-Third Session, A/73/383. https://www.un.org/ga/search/view_doc.asp?symbol=A/73/383&Lang=E
- Waddock, S. (2020). *Transforming towards life-centered economics: How business, government, and civil society can build a better world*. Business Expert Press.
- World Bank. (2020). *China overview*. <https://www.worldbank.org/en/country/china/overview>. Accessed January 11, 2021.
- Yanka, D., Newman, P., Rauland, V., & Devereux, P. (2018). Sustainability in an emerging nation: The Bhutan case study. *Sustainability*, 10(5), 1622. <https://doi.org/10.3390/su10051622>

[Yunkaporta, T. \(2019\)](#). *Sand talk: How indigenous thinking can save the world* (1st ed.). Harper One.

AUTHOR INFORMATION

Zenda Ofir is an evaluation specialist from South Africa focused on the interests of the Global South, on the relationship between humanity and nature, and on how evaluation can best support efforts to accelerate progress toward urgently needed transformations (zendaofir.com). A former president of the African Evaluation Association (AfrEA), she has worked on assignment in over 40 countries as an evaluator and advisor on policy, strategy, and practice.