

Are we there yet? Localisation as the journey towards locally led practice

Models, approaches and challenges

Arbie Baguios, Maia King, Alex Martins and Rose Pinnington
March 2022

Key messages and recommendations

Based on a literature review and examination of different models of localisation, we have derived six key messages:

1. power shapes the journey towards localisation;
2. power also shapes the destination (locally led practice);
3. resource transfers to Global South actors remain extremely low;
4. agency and ways of being are neglected;
5. good models for localisation already exist, including those originating from the Global South;
6. there is a dearth of data and evidence especially in measuring localisation progress.

This analysis led to four key recommendations:

- **Recommendation 1:** Learn from, and accelerate, localisation models that already exist – especially from the Global South.
- **Recommendation 2:** Transfer greater resources, including by tackling root causes of risk aversion and redesigning funding flows.
- **Recommendation 3:** Reduce encroachment of local actors' agency and respect their ways of being by rethinking organisational roles, stepping back if appropriate, and shifting mindsets.
- **Recommendation 4:** Let Global South actors lead the campaign to promote localisation and locally led development.

Acknowledgements

About this publication

This brief has been prepared by the authors in partnership with ODI, Sharing Strategies, Shining Hope for Communities (SHOFCO) and the Global Alliance for Communities. Financial support for the report was provided by The Children's Investment Fund Foundation (CIFF) and the Bill and Melinda Gates Foundation, through the Sharing Strategies Fund at Dalberg Catalyst.

We are grateful to all participants in Room 11 of the 17 Rooms initiative convened by the Brookings Institution and The Rockefeller Foundation for their inputs throughout the research process.

The authors would also like to thank those who provided valuable and thoughtful comments and suggestions, including Jamie Drummond, Kennedy Odede, Tony Pipa, Mark Miller, Duncan Green, Harold Rosen, Courtenay Cabot Venton, Joe Powell, Bruce Batkin, Don Steinberg, Jeroo Billimoria, Bram Van Eijk, Wendy Kopp, Azza Karam, Zenda Ofir, Sam Worthington, Dayna Connolly, Nilima Gulrajani, Annalisa Prizzon, Sierd Hadley, Alan Hudson, Chris Roche, Kenny Imafidon, Bhékinkosi Moyo, Mayor Svante Myrick, David McNair, Hamzat Lawal, Oluseun Onigbinde, Faustina Fynn-Nyame and Leah Kibe. In addition, the authors extend thanks to those who worked hard to support the project, including Emily Gay, Elise Garrity, Megan Jones, Richard Hughes, Tegan Rogers, Sara Hussain, Eve Stanislawski and Matthew Foley.

Finally, the authors would like to thank everyone who participated in the consultation sessions held for this research, as well as Jenny Hodgson at the Global Fund for Community Foundations for supporting this process. The consultation inputs have fed directly into this study's findings and recommendations. We are very grateful for everyone who took the time to share their ideas and experiences.

Readers are encouraged to reproduce material for their own publications, as long as they are not being sold commercially. ODI requests due acknowledgement and a copy of the publication. For online use, we ask readers to link to the original resource on the ODI website. The views presented in this paper are those of the author(s) and do not necessarily represent the views of ODI or our partners.

This work is licensed under CC BY-NC-ND 4.0.

How to cite: Baguios, A., King, M., Martins, A. and Pinnington, R. (2021) Are we there yet? Localisation as the journey towards locally led practice: models, approaches and challenges. ODI Policy Brief. London: ODI (<https://odi.org/en/publications/are-we-there-yet-localisation-as-the-journey-towards-locally-led-practice>).

1 Introduction

Localisation and locally led international development practice have long been discussed, but have still not been delivered. Systemic barriers have posed challenges, and the term ‘localisation’ itself is contested. Now, the tumultuous months of the Covid-19 pandemic could provide a critical juncture to finally move forward with this crucial agenda. The pandemic has highlighted structural inequalities in the global system, and disrupted ways of working in the international development sector. The Black Lives Matter movement has brought conversations about racism and colonialism to the fore, which have further emphasised the need to address entrenched inequities within the development and humanitarian sectors. And the climate crisis has highlighted the need for global action on humanity’s challenges that is responsive to local realities.

This brief summarises emerging analysis in an ODI report that aims to set out the key issues in this agenda. The report adopts a cross-sectoral approach, highlighting new and existing models and approaches in the **humanitarian, development, philanthropic** and **private** sectors. It examines the barriers and challenges to localisation and locally led practice, with a view to informing a campaign for systemic change to move forward with this agenda. The paper is based on a rapid report of the literature and evidence on localisation and locally led practice; two consultations with over 100 participants, targeted at Global South actors; and analysis of 28 existing models and approaches.

The complete list of references and sources is contained in the [full report](#), from which this summary draws.

2 Analysing localisation efforts

2.1 A framework for characterising localisation

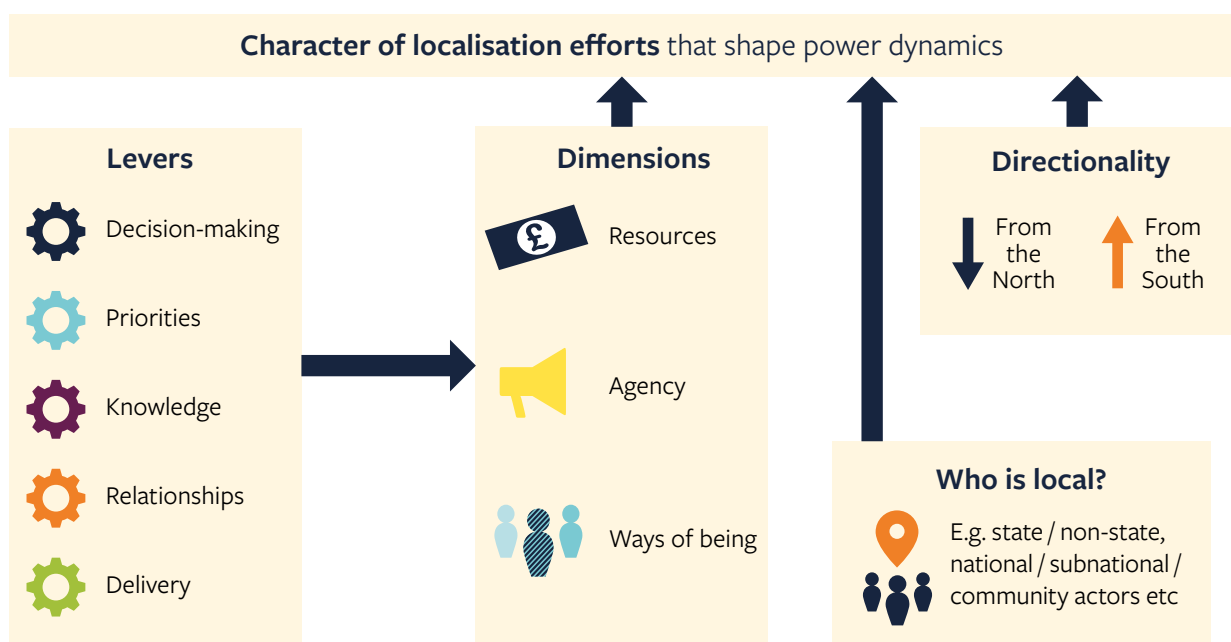
There are many different ways to define localisation. This report viewed localisation as the journey towards an end goal of locally led practice. There are different ways to undertake this journey, and the framework (Baguios, forthcoming) used in the report focuses on three key dimensions: resources, agency and ways of being:

- A. Resources:** Quantity, quality and accessibility of funding transferred directly to local actors.
- B. Agency:** Ability of local and national actors to identify their own problems, and choose their own priorities and solutions.
- C. Ways of being:** Respecting the dignity, identity, values and ways of working of local and national actors, using a decolonial lens.

According to this framework, genuine localisation, therefore, must go further than simply shifting funding or operations from North to South; it must also avoid encroaching on existing agency, respect ways of being, and grapple with the power dynamics that influence locally led practice.

The second element of the framework includes a series of ‘levers’, or ways that localisation efforts could be designed, that would have different effects on the resources, agency and ways of being of local actors. These are: decision-making, priorities, knowledge, relationships and delivery (Figure 1).

Figure 1 A framework for characterising localisation



Source: Authors

The third element of the framework relates to the importance of clarifying and interrogating the question of ‘who is local?’. This report calls for a more critical, nuanced and reflective approach to this question (Table 1).

Fourth, the framework highlights the directionality of localisation efforts, in terms of whether they originate from the Global South or Global North.

This framework helped us examine various localisation models. It is important to note, however, that we did not use the framework to undertake a comprehensive evaluation of specific cases.

Alongside examining the many examples of localisation efforts, the report also explored the barriers to localisation, drawing on the framework to analyse them.

Table 1 Who is local?

Example	Definition of ‘local’
Global South movements, networks and funds	<ul style="list-style-type: none"> • Communities across the Global South • Community-led organisations • Community foundations • Community and other proximate leaders • Local and national civil society organisations in the Global South
North to South funds and funding mechanisms	<ul style="list-style-type: none"> • Grassroots actors and movements • Local and national organisations based in the Global South • Representatives from Global South country governments • Private sector representatives from the Global South • Organisations rooted in the communities they serve
Global networks	<ul style="list-style-type: none"> • Local and regional governments across the Global South and North • Community-based organisations • Social entrepreneurs and innovators across the Global South and North • Local leadership
Policy frameworks and initiatives	<ul style="list-style-type: none"> • Local and national non-state actors (headquartered in their own aid-recipient countries, not affiliated to an INGO) • National and sub-national state actors (state authorities in aid-recipient countries at local or national level) • Local and national organisations from the Global South
Practical and measurement tools	<ul style="list-style-type: none"> • Local and national organisations from the Global South • Civil society organisations in the Global South • Community-led organisations in the Global South • Global South organisations and partners

Note: Derived from a review of 28 models and approaches.

2.2 Barriers and challenges to localisation

Analysis of the barriers to localisation sheds light on the gap between rhetoric and reality; between the widespread use of localisation discourse and its implementation on the ground. The barriers are well known and well documented, but have tended to be seen from the perspective of donors. This has been connected to top-down definitions of local actor capabilities and characteristics, which do not respect different ‘ways of being’ and which are used to demonstrate the perceived risks of providing funding more directly. Ultimately, however, the literature points towards donor risk perceptions being more commonly based on assumptions than evidence (Barbelet et al., 2021).

These perceptions are also derived from the continued prevalence of colonial mindsets, which are connected to Global North donors continuing to retain significant decision-making power, delegating most of their implementation and channelling the bulk of their funding to organisations from their own countries, rather than funding Global South actors directly. Structural racism and racial bias also continue to characterise how ‘development’ is carried out, whether through strategy setting, organisational structures, fundraising, language or knowledge generation (Peace Direct, 2021).

There are also risks associated with localisation for national and local organisations, particularly when efforts to increase funding directly are not accompanied by equal attention to agency and ways of being. These include damaging accountability to communities, undermining efforts for genuine self-help, increasing competition between civil society actors and eroding their capacity for collective action, as well as security risks in humanitarian contexts. Underlying all of this, a key risk is that an effort is labelled ‘localisation’ without actually shifting power to local actors. This risk is reflected in the report’s framework for analysing localisation efforts, where each dimension is characterised and informed by complex power dynamics.

2.3 Localisation models and approaches

There are a wealth of innovative and varied models and approaches to localisation, many originating from Global South organisations and networks (Figure 2). The identified initiatives have four overlapping purposes: movement-building and collective advocacy; shifting quality funding to the Global South; supporting proximate leaders; and knowledge creation and sharing (including frameworks for measuring localisation).

For policy-makers seeking to support localisation, this classification and review of existing initiatives provides a starting point for inspiring decision-making. A full overview of each initiative can be found in the [Annex](#).

Figure 2 Examples of initiatives promoting localisation and locally led practice



Note: The mapping of models and approaches is illustrative rather than exhaustive, and is not intended as a comparative evaluation of different initiatives.

The report also discusses different ways in which interventions by Northern bilateral and multilateral donors can support the dimensions of localisation, and highlights a selection of their approaches, including cross-government agreements such as the Grand Bargain. Some bilateral Northern donors and multilateral donors are already engaged in activities to ‘localise’ their funding. However, these focus entirely or almost entirely on providing resources more directly to Global South actors (as opposed to agency or ways of being) – and even then, resources are minuscule compared to the funding going to Global North actors. In fact, ‘despite a small increase, developing country-based CSOs continued to receive the lowest share of support among all categories of CSOs (6.1% in 2019 up from 5.4% in 2018)’ (OECD, 2021: .7).

Progress to change this has been slow. With levels of tied aid increasing across several Northern donors (OECD, 2021: 5), accompanied by high levels of informally tied aid, funding going directly to local actors in the Global South remains limited. As well as the level of funding, there are issues with quality, including a lack of core funding (Barbelet et al., 2021), and limited transparency about Northern localisation efforts, which hampers improved accountability.

3 Key messages

The wider report on which this brief is based sought to understand the issues surrounding localisation. In particular, it reviewed evidence and concepts related to localisation to develop a framework that could highlight issues and disparities; reviewed localisation models and approaches; and outlined the challenges and barriers that have stalled localisation and the shifting of power to local actors. From these, we make the following key observations.

Power shapes the journey

It determines whether or not localisation – as the journey – can actually lead to locally led practice. Just because an effort is labelled as localisation does not mean that it actually shifts power to local actors. At the same time, many barriers and challenges to localisation are related to power. For instance, if local actors had more bargaining power and were able to say ‘no’ to models and approaches that did not meet their needs, the ‘barriers’ to localisation would be seen in a different light, and the perspective of local actors on these barriers would be more salient to decisions about models and approaches. Power even shapes the issue of ‘who is local?’ – those who have it get to define who counts as local. As such, there is no objectively correct answer to the question ‘who is local’: the context and system that actors inhabit are inherently complex and contested. Achieving the goal of locally led practice requires careful attention to these questions.

Power also shapes the destination

Through our framework, we see the goal of the journey of localisation as the shift of power to local actors: that is, truly locally led practice. The goal informs which localisation model or approach is most suitable. If the goal is defined in terms of aid effectiveness, then a more limited set of tools will be used. This will then reinforce a mindset where Global North actors are the protagonist as the arbiters of effectiveness, while local actors are viewed as risky, corrupt and ‘low capacity’ subcontractors. If localisation is to be transformative, it should work towards the goal of local actors being the designers of their own solutions, with external actors providing support to enable this.

Resource transfer remains extremely low

Such low levels of resource transfer expose a huge gap between ambition and action in the sector’s efforts to fund more directly – even when ambition is only measured in terms of funding, and not also about agency and ways of being. Targets and metrics (such as the Grand Bargain or ‘country programmable aid’) have been continually missed. If the international aid and development sector is sincere about shifting power, this needs to be addressed. More attention should also be given to the transfer of other non-financial resources, such as knowledge and technology.

Agency and ways of being are neglected

Many of the methods that do deliver on resource transfer often fall short on agency and ways of being. This can lead to a situation where localisation becomes instrumental (e.g. the end goal is effectiveness at the cost of encroaching on local actors' agency and disrespecting their ways of being). This type of approach does not deliver the full potential of localisation. Meanwhile, providing donor resources while also respecting ways of being and not encroaching on agency can sometimes, or even often, involve donors working in new or different ways that call for stepping back, letting go or creating space.

Good models already exist

More encouragingly, there are many flourishing localisation models and approaches which can be transformative, and which go beyond a narrow focus on resources to also deliver on agency and ways of being. Many of these models and approaches originate from the Global South, often via networks of actors. These models, particularly from the Global South, can be supported in ways that best serve their objectives. There is also a lot to learn from them in the wider effort to promote localisation and locally led practice.

Data and evidence are needed

While there are many models/approaches that can inform how localisation efforts could be done, there remains a gap in terms of collecting data and evidencing the progress of such efforts. Current tools that collect data on resource transfers do not give a full and clear picture of how much – and what kind of – funding actually goes to Global South actors. It is also very difficult to get data on funding flows from donors showing the final recipients in the delivery chain. Meanwhile, good measurements for encroachment of agency and respect for ways of being have yet to be developed.

Many of these observations are not new and, indeed, one prevailing feeling from many participants in our consultations was that these issues have been discussed repeatedly, but without enough change. But now, the critical juncture that we currently face, due to tumultuous political, cultural, social and economic changes in the last year and a half, may provide an opportunity to finally bring about change on this agenda.

4 Recommendations

This report proposes four key recommendations, which are then drilled down into more specific actions for different actors. The specific actions are detailed in the table in the Appendix. Due to the interconnected nature of the actors, many of the actions overlap and inform each other. These are not new but draw on the evidence, literature and examples discussed in the paper, as well as the responses to the consultations held in August 2021.

Recommendation 1: Learn from, and accelerate, localisation models that already exist – especially from the Global South

As shown in our review of localisation efforts, there are already numerous initiatives, especially from the Global South, showing promise in genuinely shifting power to local actors. A selection of these initiatives can be accessed in the [Annex](#) of the report. International actors can support these existing models/approaches, and there is no need to start from scratch. There are also efforts by some Northern donors to publicly share information about work to promote locally led practices (such as through the USAID Local Works programme).

Recommendation 2: Transfer greater resources, including by tackling root causes of risk aversion and redesigning funding flows

There are several actions that international actors can take in tackling risk aversion and redesigning funding flows to increase resource transfer to Global South actors. These include reflecting on the basis of risk thresholds and ensuring that risk thresholds are well informed using available evidence; building trust through better relationships with local actors; and strategically countering narratives that feed challenging domestic political environments (e.g. campaigning for protection of aid budgets; not perpetuating white saviour narratives in fundraising). Finally, more attention needs to be given to transfer of non-financial resources, such as knowledge and technology, in an equitable manner that does not impose a hierarchy of knowledge with a bias towards the Global North.

Recommendation 3: Reduce encroachment on local actors' agency and respect their ways of being by rethinking organisational roles, stepping back if appropriate, and shifting mindsets

On its own, transferring resources is not enough to deliver change. Truly reducing encroachment on agency and demonstrating respect for ways of being requires a more radical change. International actors need to rethink their roles (and, in some cases, even take a step back) so that local actors can pursue genuine locally led development. For example, this might mean reduced funding channelled through intermediaries, necessitating a change in the contracting practices of

donors, and posing a challenge to for-profit entities. Doing this will not be easy and may indeed be painful. It requires deep institutional reflection among international actors on the role that they play now and in the future.

Recommendation 4: Let Global South actors lead the campaign to promote localisation and locally led development

The campaign to promote localisation and locally led development must be led by Global South actors, and must amplify and elevate Global South voices and perspectives. Localisation efforts that do not demonstrate this cannot embody the principles of locally led development; in other words, the journey – if not being driven by Global South actors – risks not arriving at the destination. This can be seen as ‘localising’ localisation efforts. Moving forward, the campaign process needs to be open, diverse, inclusive, respectful and participatory – one in which Global North and South actors can learn from each other, and where local actors are at the helm.

Appendix 1 Recommendations and specific actions

Recommendation 1: Learn from the Global South

Target actors	Actions
All international actors	<ul style="list-style-type: none">● Refrain from starting projects from scratch without learning first, and instead seek out existing initiatives (as well as measurement frameworks) particularly from the Global South to learn from, support and invest in● Invest in knowledge, evidence and learning (ideally via Global South-led processes) around existing localisation efforts and cases of locally led development● Strengthen the bargaining power of local actors, for instance through supporting local/national umbrella organisations/networks of Global South CSOs, connecting Global South/local leaders and practitioners in a wider network-of-networks
Bilateral and multilateral donors	<ul style="list-style-type: none">● Develop a common vision and collective approaches that can lead to system-wide reforms and support the acceleration of existing localisation efforts (instead of piecemeal, uncoordinated projects that have limited impact)● Invest in data and evidence, utilise existing research produced by bilateral/multilateral donors themselves (e.g. USAID's Local Works), and continue to generate such research and evidence, especially by Global South/local academics/policy-makers● Be transparent about – and enable easier, public access to – relevant data (such as funding flows) on localisation, for example via tracker on funding flows to local actors.
Intermediaries (INGOs, for-profit organisations, UN and others)	<ul style="list-style-type: none">● Refrain from 'projectising' localisation efforts (i.e. setting up another localisation project) – instead, work on the necessary systemic and organisational changes and processes required to accelerate localisation.
Philanthropic actors	<ul style="list-style-type: none">● Continue to support and accelerate the efforts of Global South/local actors that may be overlooked by larger agencies and international intermediaries

Table 2 Recommendations and specific actions (cont)

Recommendation 2: Transfer greater resources	
Target actors	Actions
All international actors	<ul style="list-style-type: none"> • Set higher targets of quality (i.e. multi-year, flexible, covers core costs) funding to be transferred directly to local actors, and deliver on these targets, and recommit to existing targets where appropriate (e.g. Grand Bargain 2.0) • Review contracting/granting practices and redesign these so that they primarily favour local actors. If intermediaries are absolutely necessary, then they should have progressive funding practices (e.g. multi-year, flexible, not onerous) • Coordinate to tackle risk aversion and its root causes, especially in challenging domestic political environments (e.g. through campaigning and review of fundraising/comms practices) • Support innovations for progressive funding approaches • Open up spaces for local actors to lead/participate in priority-setting and decision-making when it comes to funding • Pursue knowledge and technology sharing between international and local actors (e.g. via peer learning), including ways to measure these, and in an equitable manner that does not entrench knowledge hierarchies
Bilateral and multilateral donors	<ul style="list-style-type: none"> • Appoint independent body (e.g. ICAI in the UK) to hold relevant ministries/departments to account for meeting commitments to transfer quality funding to local actors • Identify and aim to meet bureaucratic requirements that can enable greater transfer of funding as directly as possible to local actors, and in transferring funding to support localisation efforts
Intermediaries (INGOs, for-profit organisations, UN and others)	<ul style="list-style-type: none"> • Reflect on the role of these actors as funding intermediaries (see Recommendation 4) and redesign existing funding mechanisms to expand access and reduce constraints on local actors – for example by rethinking the model of sub-contracting/sub-granting • Transfer quality funding more directly towards local actors (e.g. to actors that are not affiliates/sub-offices of international organisations) • Review fundraising, communication and campaign work so that it does not perpetuate unhelpful narratives such as white saviourism • Hold donor governments to account in their commitment to transfer greater, quality resources to local actors
Philanthropic actors	<ul style="list-style-type: none"> • Transfer quality funding more directly to local actors, particularly ones that may be overlooked by donors and international intermediaries • Support innovations on progressive funding mechanisms • Engage philanthropic donors to demonstrate the value of greater, higher-quality funding transferred to local actors, and encourage more donors to support this

Table 2 Recommendations and specific actions (cont)

Recommendation 3: Reduce encroachment of local actors' agency and respect their ways of being	
Target actors	Actions
All international actors in general	<ul style="list-style-type: none"> • Engage in sector-wide reflection and build consensus and commitment to systematically rethink roles (and even step back) to align with the vision of localisation and locally led development • Support collective and coordinated efforts to change ways of working, especially in changing performance metrics/benchmarks that facilitate gracefully stepping back and accelerating localisation and locally led development, and explore indicators that emphasise the process of localisation efforts including trust and flexibility, as well as the outputs of projects • Understand and map the capabilities that already exist within the Global South (in a way that does not impose a Northern-centric threshold of 'capability' among local actors) • Invest and support anti-racism and decolonial efforts (e.g. research and learning, best practices) that aim to change institutional ways of working and shift mindsets (e.g. recognising Global South/local capacities, knowledge production)
Bilateral and multilateral donors	<ul style="list-style-type: none"> • Maintain the integrity of international development objectives (including for localisation and locally led development) • Be held accountable by an independent body (e.g. ICAI in the UK) as well by civil society on commitments to reduce encroachment on agency and to respect ways of being of local actors • Establish ways in which Global South actors can participate in setting the agenda and priorities of international development departments/ministries • Create more spaces where Global South actors and leaders can directly engage and co-create with each other and government officials in their domestic contexts, including by external actors stepping back from their own relationships with local actors, in order to avoid crowding out local relationships
Intermediaries (INGOs, for-profit organisations, UN and others)	<ul style="list-style-type: none"> • Reflect on the future of the role of intermediaries and develop concrete plans to adapt to the realities of a different way of working that steps back in some areas, while scaling up localisation and locally led development – for example by rethinking performance metrics/benchmarks (e.g. higher incomes; bigger organisations) • Set up or work within peer networks among other intermediaries that can foster gracefully stepping back and promote best practices of not encroaching on agency and respecting ways of being • Support the generation of knowledge, evidence and learning on how to reduce encroachment of agency and achieve greater respect for ways of being of local actors • Engage and hold bilateral donors to account in their commitment to truly shift power to local actors
Philanthropic actors	<ul style="list-style-type: none"> • Model to bilateral/multilateral donors and intermediaries progressive funding practices that do not encroach on agency and respect ways of being • Invest and support locally led initiatives overlooked by bilateral/multilateral donors and intermediaries that promote anti-racist and decolonial practices within the development sector

Table 2 Recommendations and specific actions (cont)

Recommendation 4: Let Global South actors lead the campaign to promote localisation	
Target actors	Actions
All international actors in general	<ul style="list-style-type: none"> • Open up space so that the full diversity of Global South/local actors – not only elites, but also marginalised groups – can participate in the campaign process and wider localisation movement • Open up leadership positions to Global South/local actors, and be represented by Global South/local actor partners and counterparts, particularly in high-level and decision-making forums • Amplify existing campaigning and communication initiatives and efforts led by Global South and local actors
Bilateral and multilateral donors	<ul style="list-style-type: none"> • Develop consistent and clear policy on localisation informed by Global South realities/priorities, and that speaks to the three dimensions (resources, agency, ways of being) • Invite Global South/local actors to engage with staff, including at the minister/secretary or equivalent level • Identify internal champions within bureaucracies – including at high/senior levels – who can support the campaign and the wider movement • Formalise, institutionalise and publicise commitments to delivering on demands for localisation and locally led development
Intermediaries (INGOs, for-profit organisations, UN and others)	<ul style="list-style-type: none"> • Amplify and elevate Global South/local partners in relevant forums/platforms, especially those who may be overlooked because they are not affiliates of international organisations/networks • Create and maintain spaces for Global South/local actor leadership and participation beyond this campaign
Philanthropic actors	<ul style="list-style-type: none"> • Bring in and invest in Global South/local actors in international campaigns that may be overlooked by donors and intermediaries • Demonstrate that alternative systems are possible within the international development sector, drawing from existing progressive initiatives within the philanthropy space