GLOBAL DEVELOPMENT

DISRUPTED

Findings from a survey of 93 leaders

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B | Global Economy and Development at BROOKINGS

Global development disrupted: Findings from a survey of 93 leaders

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Contents

Executive summary 4

1. Overview and key themes 5

2. Survey questions 9

3. A Changing landscape for development 14

4. Hope, fear, and uncertainty: How development gets done 25

5. Maximizing impact—and sustaining relevance 37

6. Conclusion 41

Appendix A: Respondents 42

Appendix B: Response themes 46

Appendix C: Respondent organizational breakdown 53

Executive summary

A survey of 93 leaders, representing a wide range of organizations working to advance human well-being and economic development, reveals a global development sector in transition and perhaps even turmoil. Ending extreme poverty is no longer the de ning lens through which development is viewed: State fragility and climate were mentioned nearly three times more often than poverty, and migration was mentioned more than twice as often. Leaders worry that responses to these and other global challenges are inadequate.

Though we found clusters of consensus, overall the survey reveals broad fragmentation across the global development sector, with respondents identifying a startlingly wide range of priorities, concerns, opportunities, and paths forward. The most frequently mentioned challenge is access to funding and resources, which is viewed as a fundamental challenge to addressing human needs worldwide as well as to the nancial health and viability of development organizations and their missions. Leaders report excitement about new actors in development, new partners, new innovations, new applications of technology and data, new models of development nance, new revenue streams, and the potential of all these trends to improve development outcomes and, in the process, people's lives. They see the rise of middle-income countries, local partners within developing countries, the private sector, and the role of China as long-term trends that will transform global development. Together, these and other trends are forcing development organizations to innovate—and, for some, to worry about their sustained relevance.

1. Overview and key themes

The global development sector is grappling with complexity. In 2018, we interviewed 93 leaders from governments, multilateral agencies, foundations, multinational corporations, development NGOs, and private sector development contractors to assess their views on how global development is changing and how their own organizations are adapting (see the list of participants in Appendix A).[1] This research reveals a fragmented development ecosystem and an ever-expanding cast of players. It illuminates worries about how to stay relevant in a world that is heading in many di erent directions at once. During this upheaval, development leaders are innovating, harnessing technology in exciting ways, using data to drive decisionmaking, and empowering partners on the front lines. They are painfully aware that not all of their organizations are likely to accomplish their goals or continue to exist in their current form. Overall, the survey results paint a picture of a global development sector rife with experimentation and transition. The most productive paths forward are not yet clear.

Some key themes emerged:

Whereas poverty reduction once provided a common north star to guide global development efforts, leaders no longer see poverty as a unifying framework for their collective efforts. This diminished focus on poverty is likely a result of success. More than 1 billion people have lifted themselves out of poverty over the last 25 years and the global poverty rate has reached a historic low. Countries with growing middle classes increasingly can both drive and pay for their own development, leading respondents to mention the rise of middle-income countries 2.5 times more often than poverty. They point to signi cant improvements in development levels, especially in key indicators of health but also in education and skill levels. One observer noted that “the development agenda has shifted to middle-income countries,” and another that the “dialogue today is more about moving countries to middle-income status than lifting up the desperately poor.”

Leaders highlighted a growing bifurcation between countries trapped in a toxic blend of conflict, state fragility, and poverty and those that have escaped to middle-income status. They expect this divide to grow. Meanwhile, they underscored that countries of all income levels struggle with persistent pockets of poverty and rising inequality. Poverty remains a concern but is deeply enmeshed with other challenges and hard to address in isolation.

Leaders enumerated a long list of development challenges that compete for attention and resources. Among issues seen as neglected or insu ciently resourced, climate

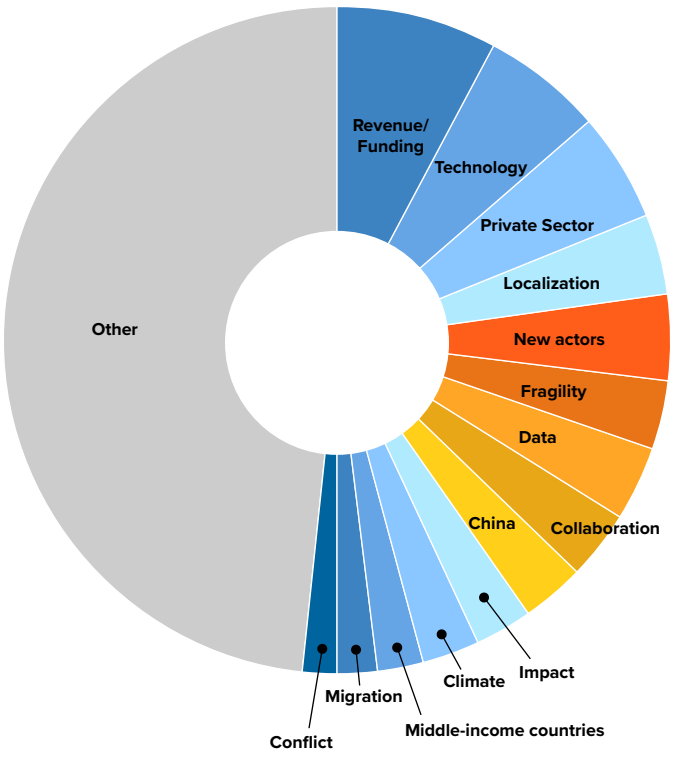
1 Throughout this report, we cite respondents' comments without specifying individual names. We identify anonymous respondents in varying ways, including as "observers," "leaders," "survey respondents," and "an NGO executive," inter alia.

change tops the list, followed by youth, state fragility, and governance. Leaders urge a greater focus on gender, emphasizing both the needs and the potential of women and girls.

New actors are proliferating in the global development sector and, in the process, diluting the power of old hierarchies. Western governments that long served as the primary funders and often the drivers of international development have been joined by China, India, and other countries with rapidly growing resources, as well as by foundations and high net worth individuals, multinational corporations, and social investors. Resources from the private sector, remittances, and domestic taxation now dwarf traditional foreign aid (Overseas Development Assistance, or ODA). New funding mechanisms like development nance that leverage private sector investments, social enterprises, impact bonds, and others are not just creating new revenue streams but also changing where resources are directed and how development work is conducted. Survey respondents largely see these changes as positive, but they worry about important work that could fall through the cracks. Neither immediate humanitarian relief nor infrastructure investments can be readily nanced by private funds. This work consists of long-term development assistance that helps make communities more resilient to crises and improves prosperity, governance, and security su ciently that countries graduate from needing external assistance.

Overall themes

Share of responses



Politics, both geopolitical and domestic, are contributing to an overall landscape of complexity. Respondents fret about rising nationalism and populism around the world, which they see as threatening progress in international development. There is a need, they say, to communicate more e ectively with publics about the impact of international development, its e ectiveness in addressing humanitarian needs, and why it bene ts their own countries' interests. Many are concerned over a growing political demand to connect development to immediate national interests rather than long-term goals like global economic growth or the reduction of human su ering. They also underscore concerns about rising authoritarianism and closing space for civil society around the world.

Leaders are struggling with the pace of change and striving to stay relevant and innovate. They face funding concerns, closing space for international NGOs and development companies, and declining positions of trust. They worry about having the right talent and adapting their organizations' cultures. They are striving not just to adapt but also to harness new technologies, the potential of new partners, and data to make a greater impact.

Levels of optimism vary. One observer, who has served in government, NGOs, and foundations, sees a "massive amount of inertia in the system—in aid agencies, the World Bank, foundations—so that change will be modest as to render current models irrelevant." Others express hope and see opportunity. One respondent anticipates "many developing countries achieving sustained economic growth and an expanding middle class that will be a force for stability, entrepreneurship, and innovation." On balance, most leaders see a turbulent mix of opportunities and challenges, which they are endeavoring to navigate through various means.

Surprisingly, certain issues typically at the forefront were rarely mentioned during the interviews. Along with poverty, issues of inclusion and inequality are typically front and center in discussions of development, as are human rights. Yet respondents referenced these issues infrequently. Respondents referenced Africa several times, but few other regions or speci c countries were highlighted. Multilateral actors such as the U.N., the World Bank, and other development banks were seldom discussed although they are principal actors in the development eld. And, despite enormous concerns in the development sector after 9/11 and its aftermath, the use of development to serve political or security ends was rarely mentioned. Terrorism and extremism were referenced only a handful of times across 93 interviews. Peace earned just a few mentions and violent crime almost none.

Methodology

The project is grounded in a survey of 93 leaders in the development sector—current and former senior government o cials and leaders in civil society, philanthropy, and business. We asked ve core open-ended questions over the course of interviews lasting 30-45 minutes. The vast majority were conducted orally by one of the authors, and in a few instances by both authors. A small number of surveys were conducted in writing when more direct interaction proved di cult, and one interview was conducted with a small group rather than one-on-one.

The goal of the study is to identify trends and how development experts are dealing with the present and viewing the future and to share that knowledge to facilitate smart and rapid adaptation. The focus is on what experts currently see as challenges to development and how they are responding. We do not judge or independently validate their responses in this study.

While we believe the survey unearths useful perspectives, we ask our readers to remain mindful of our methodology's limitations:

- While the study is based on a survey of a substantial sample of leaders (93 in total), it is not an exhaustive survey of the sector.
- While we attempted to make our survey broadly representative of the sector, it is not a scienti cally rigorous sample.
- While respondents' answers are at times quoted in the main report, those quotes are often drawn from the authors' notes, not from a verbatim transcript. This is why we have anonymized the insights. Any errors or misinterpretations are the responsibility of the authors.

The survey is intended to assess only the thinking of leaders of development organizations. It is not a needs assessment of developing countries and did not survey the direct bene ciaries of development.

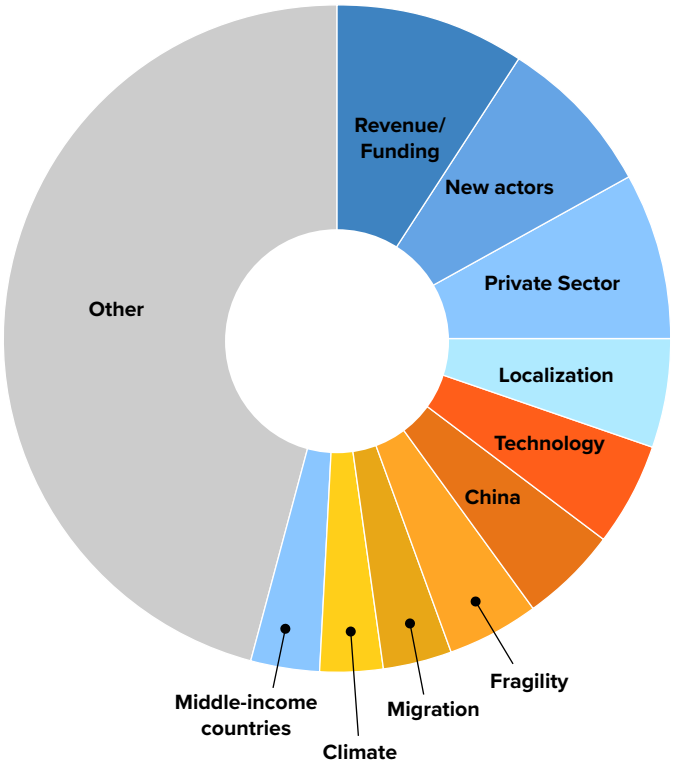
2. Survey questions

The full answer tables for each of the questions can be found in Appendix B.

Question 1: What are the most important changes you see taking place in international development today?

Overwhelmingly, respondents emphasize a high level of disruption to the traditional development ecosystem. The single most frequently referenced disruption pertains to changes in funding (39 responses), the rise of new actors (33), the increased role of the private sector (33 responses), China (20), and middle-income countries (13). Other frequently mentioned issues are a trend toward localization in which developing country governments as well as local civil society organizations and private companies play increasingly important roles (22 responses), the proliferation of technologies (21 responses), and fragile operating environments characterized by a con uence of weak governance, con ict, climate-induced social stresses, and social unrest (19 responses).

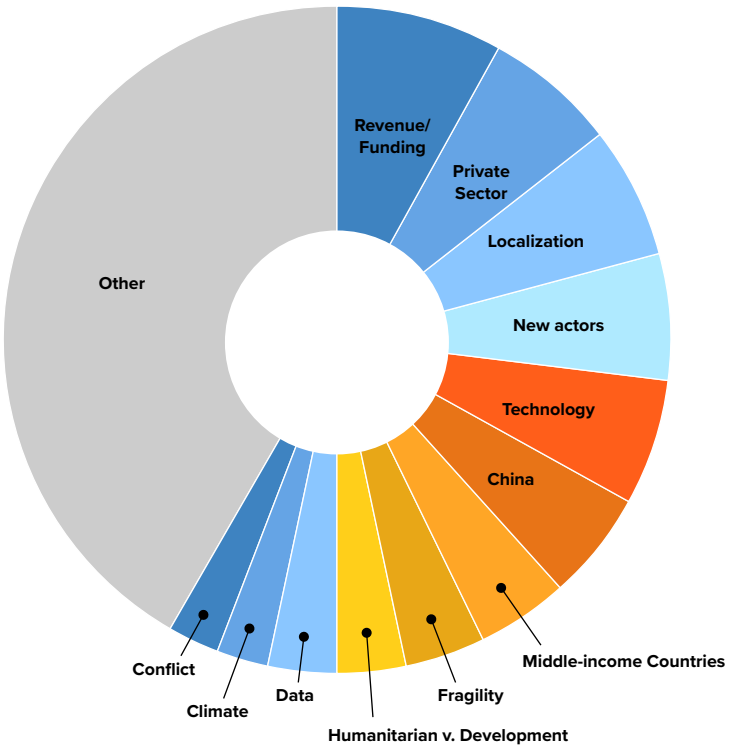
Share of responses



Question 2: How do you think international development will be different in 5-10 years?

Respondents expect the key trends mentioned above to continue and intensify. They see changes in revenue and funding as the number one trend (31 responses) followed by the continued rise in the private sector (25 responses), localization (24 responses), new actors (24 responses), and technology (23 responses). Respondents also speci cally highlight the growing role of China (21 responses) and the rise of middle-income countries (17 responses) as well as the growing risk of fragility (15 responses). As discussed later in the analysis, a signi cant number (13 responses) see these trends as leading to a growing divide between organizations that, on the one hand, focus on relieving immediate humanitarian su ering in disasters and complex emergencies with funding from traditional bilateral and multilateral donors, and, on the other, those that work in middle-income countries on longer term issues of development, often employing non-traditional nancing mechanisms like development nance, impact bonds, social enterprise, and private sector solutions.

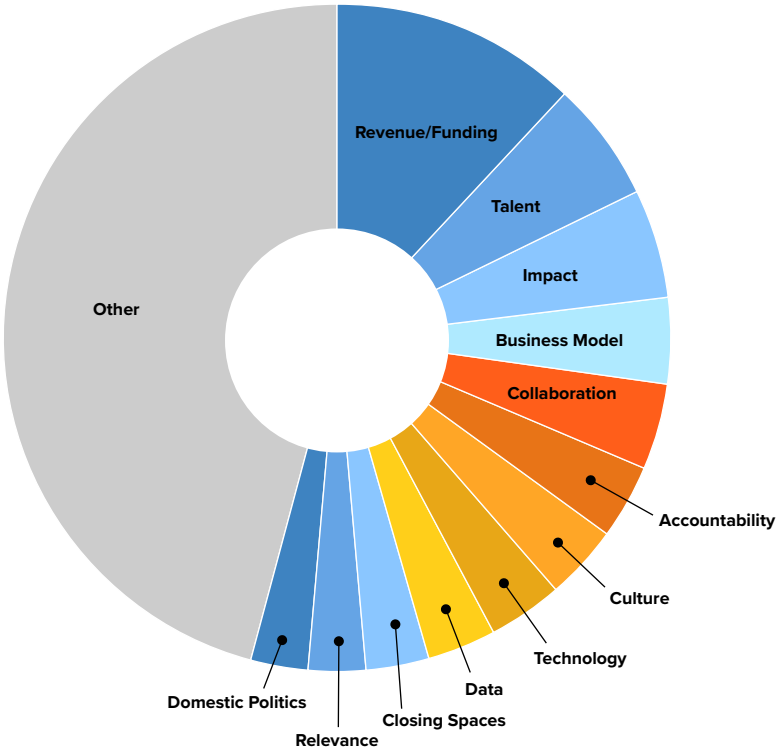
Share of responses



Question 3: What are your organization's biggest challenges, internally and externally?

Revenue and funding were the most frequently mentioned issues (40 responses)—with twice the number of references as the next most cited issue. Talent was referenced next (20 responses) and, interestingly, is a challenge shared across the spectrum by NGOs, private contractors, funding organizations, and government and multilateral agencies. Impact (17 responses) and business model (14 responses) were the most mentioned challenges after that, re ecting widely held concerns about adapting to a rapidly changing environment. Collaboration was mentioned next (14 responses), with many leaders arguing that it is important but di cult to do well. Six of the private sector organizations underscored how hard it is for them to nd the right partners with whom to collaborate. Accountability (12 responses) is seen as a challenge, primarily by both nonpro t and private sector implementing organizations, due to the complex and onerous compliance requirements they must navigate for a host of di erent funders. Leaders also mentioned organizational culture (12 responses) and the challenge of maximizing technology (12 responses) and data (11 responses).

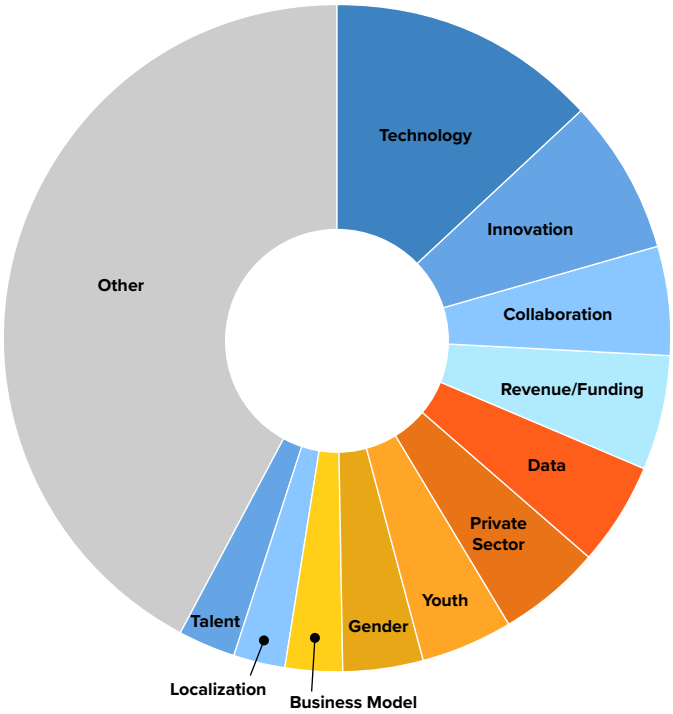
Share of responses



Question 4: What are the new initiatives or new directions in your organization (or international development generally) that you are most excited about?

Technology was, by far, the most common answer (34 responses)—though, as elaborated on later, there is wide variation in the types of technologies the respondents identify. Innovation (19 responses) and collaboration (14 responses) were the second and third most common answers. Among the innovations referenced are growing localization and bottom-up approaches, technology that will make development e orts more e ective, greater use of data that will make programs more evidence-based, empowerment of women, and a greater focus on impact. Greater collaboration is seen as a means for joining together partners with varied capabilities and across multiple sectors to produce better solutions to complex challenges. Leaders are excited about new revenue streams and funding models (14 responses), particularly from new donor countries and philanthropists, but also from their own investment in social enterprises and new instruments such as impact bonds. Leaders expressed enthusiasm about the greater use of data (13 responses) and partnerships with the private sector (13). They are also excited about initiatives focusing on youth (11 responses) and gender (10 responses).

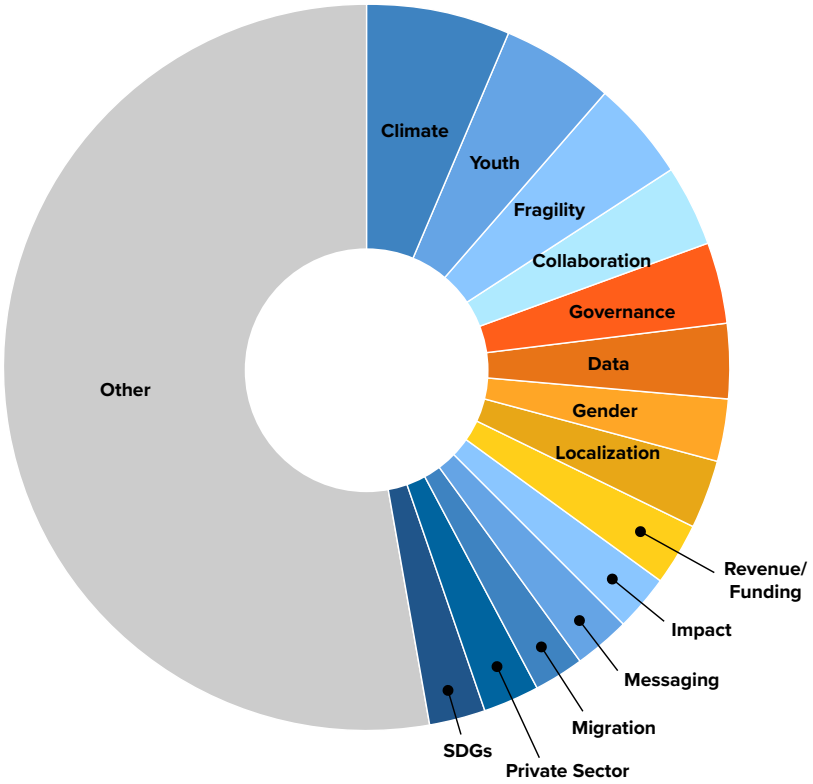
Share of responses



Question 5: What are the most neglected challenges or opportunities you would identify in the global development sector?

Compared with other questions in the survey, there is less consensus among leaders about what are the most neglected challenges and opportunities in the global development sector. The most frequent answer was climate and climate change (16 responses), followed by youth (12 responses), fragility (11 responses), governance (9 responses), collaboration (9 responses), and data (8 responses).

Share of responses



3. A Changing landscape for development

Power is diffusing

Several NGO leaders express concern about a retreat from the “rules-based, rights-based” approach to development, which they thought hit a zenith in 2015 with the launch of the Sustainable Development Goals (SDGs) and the Paris Agreement on climate. New challenges to international norms and development orthodoxies, based on neoliberal economic policies and democratic notions of rights and governance, have emerged. Several respondents note that the multilateral system as we have known it for the past several decades is under attack and needs revision.

One NGO leader sees the world as characterized by “di used power.” People are conceiving of power di erently, she said, and conceptualizing it as both more decentralized and more multipolar. “The aid architecture is changing,” another NGO leader said, “from a G-7 to a G-20 frame.”

“The post-World War II era is over,” another NGO leader said, "The world is in ux and the Bretton Woods institutions are no longer t-for-purpose.” He reported that the private sector is adapting to the new order but the development community is not. Traditional models of development, infused with Western values and led by government aid agencies, are being challenged by autocratic or private sector-driven models, many respondents observed.

As the number and diversity of in uential players expands, some survey respondents predict that traditional development actors—not just Western bilateral donors but also institutions such as the World Bank and the regional multilateral development banks—will play a lesser role. New players will change the dynamics of global development to the disadvantage of the old powers. As one observer expressed it, “These institutions were built by old coalitions and need to adjust to the dynamics of new coalitions.” Conversely, some expect a larger role for the regional development banks as they are closer to the development action. Several anticipate additional funding being channeled through the World Bank and others predict that multilaterals will become the banks for fragile states. There is broad agreement that non-Western voices will become stronger.

Some respondents anticipate what might be termed an “end of development” due to an increasingly meaningless distinction between “developing” and “developed” countries. Developing and developed countries participate in an increasingly multidirectional ow of ideas, technologies, human talent, and expertise, we were told. Countries of all income levels grapple with common social, economic, political, and environmental problems. They struggle with issues such as migration, con ict, and climate change—either at home or involving neighbors. They struggle with issues of inequality, polarization, marginalization, and corruption . As one NGO leader explained, “The concept of international development,

which implies fairly clear distinctions between developing and developed countries, is less clear than a decade ago." Another development leader noted, "There are problems that are common to all or almost all countries. What is an e ective social safety net? How do we reach people with services? How do we improve productivity in the public sector? We need to share global knowledge and create planet-wide solutions to problems that extend to most countries." Another sees "an end to development as a discrete profession as domestic and international issues become intermingled and the need grows for sector-speci c, not broad international development, expertise."

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Demographic change is altering the landscape. One NGO leader cataloged a con uence of demographic shifts including "more middle-income countries (but with pockets of poverty), more people out of dire poverty, urbanization, rapidly expanding youth populations, nearly 70 million forced migrants." Another explained that population growth has contributed to the pressures of migration and an expanded youth cohort, with the upside of a larger work force but the challenge of creating millions of jobs.

Several respondents noted that the threshold of more than 50 percent of the world's population living in urban areas has been crossed. The upside of urbanization is that cities are a source of new ideas, innovation, and more lucrative employment. The downside is slums, crowded spaces, and inadequate infrastructure. Megacities could become ungovernable. Several NGOs expressed frustration in guring out how to work with concentrated populations in urban areas, with another explaining that social needs, and how they should be addressed, di ers for urban and rural residents.

New actors are disrupting development

A recurring theme in our interviews is the rise of new actors in international development. Indeed, if we combine mentions of the various new actors—the private sector, the rising power of middle-income country governments, China, India—it is one of the most frequently mentioned themes in the survey. With a host of new players, the development sector is fragmenting and increasingly characterized as "a distributed network," as one NGO leader put it, in place of what to-date has been a few actors following a more coherent shared agenda. One interviewee observed that the development structure is "shifting from a few donors to many, from grant money to diverse nancing."

The evolving, more crowded, decentralized development ecosystem is seen as "an opportunity but also as a more complex environment with greater competition for traditional NGOs." New actors are seen by some respondents as opportunities for partnering and funding but, more frequently, as disrupters of the traditional development paradigm that complicate development. "NGOs are no longer the only game in town, and government is seeing the private sector and local institutions as better partners," said a respondent.

One respondent characterized development as becoming more “hybrid,” featuring the combined e orts of NGOs, social enterprises, private-sector actors, and governments. Another added that even existing actors are taking on new roles; for instance, donors may evolve to become brokers between public and private partners rather than simply providing resources. Gaps between the worlds of traditional NGOs and foundations and the private sector and impact investing world are expected to narrow.

One foundation leader sees an opportunity for philanthropists: “Foundations can connect dots between new players and sources of expertise.” Another foundation leader sees a challenge: “How should we engage so many di erent actors?”

Private Sector

Respondents see the private sector as a signi cant new actor in development. Governments are acknowledging that business plays an important role in development—creating jobs, introducing innovation, providing tax revenues, and expanding trade. Companies are coming to recognize the business potential in emerging markets. They understand they have a role to play in development and that through the creation of “shared value” they can both bene t their business interests and advance development. One corporate executive explained the perceived role of the private sector as evolving from a source of money, to a source of innovation and expertise, to a leader in creating conditions of demand and supply that make development sustainable over time. A big frustration for corporations is how to measure the social impact of their activities.

There is a big opportunity for collaboration with the private sector—we are just uncovering the economically sustainable and scalable models by which private sector actors can bring their capabilities and products to meet development challenges, in close partnership with government, NGOs, and international development organizations.

Business has a catalytic role to play and private nance will drive development, we were told. Purely private sector solutions to development challenges will emerge as well as partnerships with government and multilateral agencies and NGOs. One business executive anticipates greater private sector engagement in the development arena and “new business models that sustainably support the development agenda.” Another business leader indicated that the private sector is looking at ways to have more sustainable impact since businesses “don’t want to just keep writing checks year after year.” As one business executive explained, “There is a big opportunity for collaboration with the private sector—we are just uncovering the economically sustainable and scalable models by which private sector actors can bring their capabilities and products to meet development challenges, in close partnership with government, NGOs, and international development organizations.”

All parties need to learn how to work better together. While NGO leaders anticipate more frequent partnerships with the private sector, some are frustrated with how hard it is to reach

partnership arrangements. Private sector respondents share the frustration with how di cult it is to partner but see no alternative. According to one, “Collaboration is essential to solving complex problems that have multiple root causes and require a variety of interventions, especially when multiple entities are serving the same community of bene ciaries.”

China

Respondents highlight the growing role of China in global development, making it the second most frequently mentioned new actor after the private sector. China is changing global development, they said, bringing new resources and shifting long-standing priorities. The issue is what rules, standards, and norms undergird China’s assistance, according to respondents. “The challenge from China is a healthy wake up call,” said one respondent, with the potential to renew U.S. development tools and strategy.

Concerns about China varied among respondents. Negative views are less common among the private sector leaders we interviewed. In contrast, government and nonpro t leaders express deeper concerns. For instance, one respondent in this category said China o ers an alternative model that constitutes “an existential threat” to more traditional donors with more traditional concerns such as human rights and governance. Some expect China to advocate a di erent development model that will complicate relations with traditional Western donors. Some are concerned that China’s development model will dominate in the future, with prosperity as the sole metric and issues such as governance and human rights falling in importance. Several respondents argued that China is seizing a vacuum left by the United States.

Others see a need to better assess China’s role as a global development leader, to understand its potential as a donor and what the rami cations are for recipients and the donor community. There is an opportunity, one respondent said, to see if there are “common principles we can align with.”

The role of middle-income countries and “local” power centers is growing

Respondents were broadly positive about the rising prosperity, sense of agency, and role of middle-income countries in their own development. They recognize the growing capacity of developing country governments to lead e ectively and the much larger number of capable leaders and institutions. More countries will take control of their development and graduate from assistance, respondents said. These countries will turn more to their own citizens for expertise.

Survey respondents, and especially public sector leaders, focus on the potential of middle-income countries to contribute to global development. They can “pick up more of the freight,” as one respondent put it. Another respondent hoped middle-income countries could be “game changers” in nancing the SDGs. One development expert anticipates that international development will become increasingly de ned by development nance and focused on infrastructure, and therefore less focused on the poorest or most marginalized populations. Another sees domestic resource mobilization (DRM)—also known as tax revenue—as the key source of nancing of development in most countries going forward, along with private nance and ows of remittances from diasporas. ODA will concentrate in a few fragile states and respond to humanitarian crises, we were told.

Respondents see the practice of “localization”—investing in the rising power of local institutions and leaders—as an improvement on the traditional model of the donor-driven paradigm. Across the board, the leaders we interviewed support putting local government and organizations in the lead and empowering those with the best understanding of local needs and opportunities. They believe local governments and organizations are more accountable to their communities. “Close is the new big,” said one development organization CEO.

We did hear skepticism about whether donors will actually “walk the talk” and embed localization into their programming. “Despite the rhetoric, there is an absence of locally designed and owned activities, a lack of local buy-in, a lack of local consultation,” said one NGO leader. Another respondent reports that local organizations are not receiving a new ow of funding. Still another argues that development e orts have not “seized the opportunity to be more accountable to the bene ciary.” His organization is seeking to nd organizations and people closest to the target population and empower them. These local actors, he said, understand the problems and the local dynamics far better than international NGOs.

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Local ownership and development progress have expanded hitherto untapped reservoirs of talent and capabilities, which, several NGO leaders noted, raises questions about the relevance of western expertise and NGOs. One expert observed that in developing countries “there are legions of tech-savvy professionals of international standards. They are part of a globalized world and doing business globally.” As another leader expressed it, “There is a complete change in where the smart people are—it is no longer a bunch of white guys ying in from the West to x other people’s problems.”

With the exception of very specialized skill sets, Western expertise will become increasingly less relevant and the role of expatriate development experts limited. Most leaders we interviewed see this as a positive trend, because, according to one development professional, “Unless development is owned and led by nationals, we reinforce the false impression that development is someone else’s responsibility.” Expatriate experts lack the depth of understanding of the local culture and how it works. Better solutions will be o ered by local actors.

Fragility, conflict, and migration will dominate the development agenda, soak up resources, and create a two-tiered world

The mix of fragility, con ict, and migration is a major disrupter to the traditional development paradigm and impedes progress on development objectives. According to many respondents, state fragility is one of the most critical threats to development progress. Some respondents expect greater volatility, con ict, fragility, and humanitarian crises. No one we surveyed suggests less.

Public sector and nonpro t leaders—and particularly those in large organizations rather than in medium and small organizations—believe fragility receives inadequate attention. Survey respondents point to the toxic combination of fragility, con ict, and migration as the second most neglected challenge in development. Leaders sense a lack of urgency, even though fragility is considered such a signi cant challenge to development. One NGO leader bemoaned “There is no focused e ort, no prioritization. We need new strategies, new partnerships, and an integrated approach.”

Respondents are frustrated not only by the human su ering caused by fragility but also by their own inability to reduce it. As one NGO leader observed, “There is a lack of understanding of the causes of fragility, the contagion e ect, and the bene t of addressing it through alliances.” Another noted, “We need to unlock the fragile states conundrum but lack the good tools to address the challenge.” Another observed, “Funding and solutions for fragile environments have not been prioritized or operated at a scale that can achieve outcomes.”

Those we spoke to believe that insu cient attention has been directed to dealing with “people on the move.” “The explosion of refugees is no longer just a humanitarian problem,” one respondent said, “it is a protracted challenge. It is being addressed through technical solutions in providing services and goods rather than treated as a fundamental root cause.” Some respondents stressed the needs of school-age children who are refugees; the needs go beyond the standard requirements of education to dealing with psycho-social trauma and its impact on the brain. If we are not providing refugees with the right services, we are running the risk of a lost generation of young people, potentially lost to radical movements, one survey respondent said.

Not all respondents mentioned the negative consequences of migration. One development expert underscored the positive consequences: “The single greatest thing to promote human welfare and development is to encourage cross border migration.” However, he noted that the “door is being closed rather than opened.”

Respondents see the emergence of a two-tiered world, comprised of countries that are prospering on the one hand, and fragile countries beset by con ict, complex emergencies, and, sometimes extremist ideologies, on the other hand. Fragility is expanding the gap between rich and poor countries, they said. As explained by one observer, those with education and broadband access will prosper; those without will be left behind as the rest of the world advances rapidly.

Many see a growing split between humanitarian relief designed to curb urgent human su ering—a commitment and need unlikely to disappear—and global development e orts designed to promote long-term changes that lift people out of poverty and build the institutions necessary to make them more resilient to crises. Trends in development funding are exacerbating this division, we were told. Private capital will increasingly nance development progress in middle-income countries. Those left behind in fragile

> **The explosion of refugees is no longer just a humanitarian problem, it is a protracted challenge.**

environments will be supported by grant funding. Some respondents are concerned that the progress in middle-income countries and increased levels of private sector funding will lead to the premature departure of donors before reforms advance su ciently to ensure countries continue to reach the next stage of development. Some respondents worry that humanitarian crisis response will crowd out funding for longer term development, especially if climate change induced natural disasters continue to increase in frequency. Others worry that NGOs and private sector development organizations will themselves move development work to the back burner and shift more of their work to the humanitarian side since that is where the money is. One NGO leader does not think that funding will last, arguing that "donor fatigue will increase in parallel with growing fragility and domestic nancial demands in donor countries."

Fragility is creating a bifurcation between development and humanitarian e orts but also an imperative to bring the two together, some respondents argue. The long-term antidote to fragility is building resilient communities, we were told. Humanitarian programs should lay the foundation for subsequent development e orts, which in turn should strengthen communities' resilience to ward o the next crisis.

Insu cient attention to governance (which, to respondents, encompasses issues related to democracy and corruption), is seen as contributing to the challenges of fragility and development more broadly. Several respondents explained that poor governance is the single most important reason countries do not develop but our models don't know how to address it. Dysfunctional governance discourages private investment, the foundation of economic progress. One development leader opined, "We don't yet know how to break the cycle of poor governance and rule-of-law—it takes generations to support the change, to break the cycle." A former government o cial notes that "corruption can erase years of development progress, reduce trust in government, and undercut accountability." One interviewee noted that problems cannot be solved at scale without well-functioning governments.

Climate change and its consequences are the most under-addressed threat

Development leaders across all sectors name climate change as the most neglected issue in global development. They view climate change as the Damocles sword overhanging development and human progress. The fundamental problem, we were told, is that climate change is seen as far o in the future and too complex to address. But as low-lying lands become subject to ooding, populations grow, and weather patterns become more severe, it will become a central issue.

Development leaders expect the consequences of climate change to exacerbate food insecurity, fuel con ict, and generally undermine development progress. One expert complained that "Climate change will swamp everything we do in the future, but we lack the vision to see how it will impact our work across sectors." A former government o cial sees "a dire situation of climate change worsening natural disasters and humanitarian crises and fewer resources available to galvanize transformative development. We need to build resilience in communities to o set the impact of climate change." Another former government o cial says the future of development will need to be more about the "planet than the people" and we need to think more about how the environment intersects with human welfare.

Despite worries about neglect, some respondents report an increased focus on climate and the environment as an exciting area of innovation and progress. The climate accords are exciting even if momentum is slowing, said one respondent, and it is encouraging to see subnational governments involved in these issues. Another reports an increased environmental focus by donor-advised philanthropic funds. Funders are focusing beyond just providing material support for basic needs, said one respondent. They are factoring in the protection of lands and environment.

> **Climate change will swamp everything we do in the future, but we lack the vision to see how it will impact our work across sectors.**

Youth and gender are priorities for many, but not all

Leaders see youth as a large and important demographic factor that will impact the future of development. Eleven leaders, concentrated in smaller and implementing organizations, report that they are excited about work involving young people. More than 40 responses across the survey focus on the potential of youth. One leader said youth are exciting to work with because they are both digitally empowered and anti-authoritarian by nature. Another expressed excitement about a growing focus on youth in Africa. Still another reports seeing corporations focusing on supporting youth in both Africa and Latin America. Another leader is excited about their organization's work helping youth to nd work and stay out of gangs. Yet there is no organized e ort to invest in the potential of young people. One leader asked, "Where is the comprehensive plan to engage youth?"

Booming youth populations, particularly in Africa, were mentioned frequently by respondents, who often stress the critical need for productive employment and the imperative of job creation on a massive scale. On one hand, there is excitement that a new generation, with more educated and engaged girls and women, will bring energy and innovative ideas. But there also is the fear of millions of young men with access to social media and no gainful employment.

Supporting youth is not only ripe with potential, we were told, investing in youth now could head o the need to deal with potential or real threats in the future if their needs are not met. Youth require a whole new approach to workforce development given rapid automation, said one leader.

Respondents report that resources are not matching the need. "There is not much funding to support youth yet but the urgency is now," said one NGO leader. Our own survey con rms this. NGOs and implementing organizations are far more focused on youth than funding organizations.

Some respondents indicate that the development community underestimates how young people can make a di erence. We have failed to target youth in our programming and tap into the skills of young people. It was noted that young professionals want to be engaged in the practice of development, but existing organizations aren't utilizing their energy and talent. Youth, therefore, are establishing hundreds of social enterprises and NGOs, likely

> **Women's empowerment is possible at the community level and we need to focus on developing women as leaders. But we also need a systems-level approach and a clear focus on outcomes.**

making many of the mistakes of their predecessors, and we don't yet know their impact. We operate in a top-down mode, said one development leader, but "they function through networks and don't trust our institutions."

Numerous respondents expressed excitement about an increased focus on gender, particularly new investments in women and girls. They see women's empowerment high on the agenda and anticipate new levels of investment in helping women to gain technology skills and start businesses. One development organization is infusing a gender perspective across its entire portfolio, reporting that it improves development outcomes if gender is considered from the earliest stages of program design.

The expansion of gender equity, and especially the empowerment of girls and women, is broadly seen as a bright aspect of the future. Educated and actively involved women will bring innovation and energy to communities and economies, enhance family welfare, and reduce inequities in societies, we were told.

Leaders of small organizations are particularly inclined to see insu cient progress in seizing the transformative potential of empowering women and girls. "The world has a warped concept of what it means to be a leader and the role of men," said one respondent. "If we are to make permanent progress on gender issues, we need to focus on leadership and include the behavior of men in our programs." Another asserted that "women's empowerment is possible at the community level and we need to focus on developing women as leaders. But we also need a systems-level approach and a clear focus on outcomes."

"Gender work is isolated in siloed projects but needs to be addressed through systemic change. More pressure needs to be put on governments," one respondent said. Attention is hindered by cultural issues, institutional structures, and a lack of commitment, said another respondent.

Domestic politics, nationalism, and populism are complicating development

Respondents across the spectrum see domestic politics, rising populism, and nationalism in donor countries as threatening support for development. This is shifting the focus of foreign assistance more to the self-interest of the donor—including economic, commercial, and national security bene ts—with a lower priority placed on the traditional mission of addressing the needs of developing countries and underserved populations.

Public sector leaders are particularly concerned that rising nationalism and populism are generating isolationism and calls to spend tax dollars at home. Domestic political support for long-term development has weakened and led to more focus on development as an instrument of foreign policy and national interest. This trend is spurred in part by geopolitical competition from actors such as China, which sees development as central to its foreign policy strategy and achieving national interests.

Respondents see migration as continuing to fuel nativist politics in Europe and the United States. The dramatic increase in migration is creating a political backlash in donor countries and diverting ODA to addressing the needs of refugee in ows.

There is particular concern over a perceived withdrawal of U.S. leadership in international development and a fear it will have long-term implications. One former government o cial asked, “Will the U.S. have the standing and prestige to be trusted to e ect change in a positive way even if it has the money?”

To counter U.S. domestic skepticism about development, many call for greater e orts to show the American people that progress is being made and to help the public see the successes of development as well as the challenges, which tend to dominate news coverage. They call for more investment in sharing successful narratives of international development, in ways that are more emotive and less technocratic.

Some view diminished U.S. in uence as a temporary dynamic, others as long-term. One former U.S. government o cial fears the American people increasingly will “see the world through the lens of competition, be less generous, and ask ‘what’s in it for us?’” Another sees a lack of knowledge by the public on the progress in development and misperception that the “world is going to hell in a handbasket” as fueling a retrenchment of U.S. global leadership.

Some respondents anticipate a rising geopolitical rivalry will negatively impact global development. National interests of donors will play a larger role. Western countries will be motivated less by poverty and more by power and in uence. More of those interviewed expect a reversion to nationalist instincts and a revival of “great power competition.” A few optimists see a reversal of this trend in the o ng, but they concede that their assessment is based more on hope and a belief in the pendulum swing of history than on hard evidence.

The Sustainable Development Goals focus energies for some

The SDGs o er a common framework for addressing development issues, we were told. They are viewed as a missed opportunity if not taken up. What is lacking is a comprehensive frame to orchestrate the energy necessary to address them.

The SDGs were referenced 24 times overall. They were highlighted more frequently by funders than by implementing organizations. And they were mentioned by three di erent development leaders as the thing that most energizes them. One leader is excited because he sees progress on the SDGs. Another leader in a funding organization is excited about the SDGs because they align energy and create new opportunities for leverage and partnership beyond discrete projects. Another said that the development of measurable targets will allow the SDGs to become anchors of development.

Various respondents anticipate greater attention to the SDGs going forward, arguing they have not been seized upon more rapidly because they are seen as “too far down the road.” The analysis of another business executive is that what is holding back the SDGs is the lack of a business plan, which should have been developed from the beginning. “A credible nancing plan would make the vision all the more likely.” A corporate executive stated, “Connections need to be drawn across the SDGs, such as the impact of housing on the environment, and to speci c development programs.”

Rising authoritarianism and closing space for international and domestic civil society is impairing development

Almost 10 percent of respondents volunteered that restricting NGOs is a major challenge. Increasingly, governments don't want outside organizations in their countries. Meanwhile, development leaders note more constraints on civic actors within countries globally. There is growing wariness among international NGOs, even those focused on humanitarian causes. Compliance, registration, and reporting requirements are growing and creating more complexity and need for more sta and legal expertise to remain compliant.

NGO leaders, and former U.S. government o cials, express serious concern over the closing space for civil society and a retrenchment from democratic norms that seemed to be advancing just a decade ago. One development leader reports her organization is deeply concerned about closing spaces for civil society around the world. Her organization has an ongoing internal debate about how much it is possible to separate economic rights from human rights—and has rea rmed a need to continue to focus on the latter. It is prioritizing the building of social movements that amplify the voices of people from marginalized communities.

Declining trust in international NGOs is another broad social trend a ecting international development. This lack of trust has many causes. Multiple respondents mentioned the need for NGOs to confront sexual harassment. An NGO leader focused on the more systemic issue of declining trust in traditional institutions, including international development NGOs. Without trust that NGOs will safeguard people and communities, he said, it would be hard for the development community to thrive.

4. Hope, fear, and uncertainty: How development gets done

New trends in funding, technology, the application of data and innovation, and collaboration are upending traditional practices of development—who does it, what approaches they use, how it is paid for, and the impact they expect to have. Respondents view these trends largely as positive. Yet these trends also present major challenges that weigh heavily on the minds of development leaders.

Leaders' biggest worry: How to pay for development

By far the most common theme across our survey was the question of how to pay for international development. Issues related to revenue and funding were mentioned 131 times by the international development leaders across government, the private sector, nonpro t organizations, and philanthropic institutions. More often than not, respondents expressed concern with the relative decline in ODA, about how to pay for development going forward, how to access new forms of nance, and for the ability of their own institutions to continue advancing international development objectives. Yet, they were also hopeful and cited many positive trends: the ability of developing and middle-income governments to pay for services through tax revenue; the ability of the private sector to lift people out of poverty; the rise of new funding models such as social enterprise and impact investing; and increased experimentation with innovative means of development nance.

When asked about the biggest internal and external challenges facing their organizations, international development leaders overwhelmingly point to resources and funding. Revenue and funding are top concerns for leaders of both private and nonpro t organizations. "Funding is always the biggest challenge" said one NGO leader. "Most of our biggest challenges are nancial," said another. "Fundraising, fundraising, fundraising," said another.

As a result of these pressures, many of the leaders surveyed report that they are trying to diversify funding sources. They are working to become less reliant on public sources of funding, especially the U.S. government. Some NGOs reliant on donations from private individuals point to an aging donor base as a concern. They are experimenting with other means of generating revenue through social enterprise models, earned income for goods and services, impact investing, and partnering with new donors and the private sector. For many, raising unrestricted funds that they can apply to the ends they believe will have the highest return on investment, including their own organizational strengthen and resilience, remains the holy grail of fundraising.

Concerns about government funding focus not just on the possibility of that funding declining but also on its unpredictability due to domestic politics. One NGO CEO observed that the development strategies of both the U.S. and U.K. governments constitute a “black box,” making it hard for NGOs to perform e ectively. We do our best when we have clear ve-year priorities so we can build technical capabilities, thought leadership, and a research base, he said. He drew the comparison to the defense industrial base and e orts by governments to maintain that base as a strategic asset. He explained that governments do not devote nearly the same thought to maintaining expertise and a research base related to development.

NGO leaders lament the challenge of raising unrestricted funding and the heavy reliance on funding for individual projects. Our organization wants to think of itself as a social enterprise, a thought leader, and a long-term partner to governments and other organizations in the countries where we work, said one nonpro t CEO. But the reality is that the money comes largely through funding for individual projects, and it is hard to align this with being a proactive, global organization that is not just a project implementer for clients. It is hard to innovate without unrestricted funding, said another development leader. There is a shortage of funds to build the internal capacity of development organizations to stay relevant, said another CEO. Funding is typically tied to speci c projects. It is hard to nd funds to invest in the future, said another.

Funders report their own challenges. For U.S. government agencies, earmarks on aid are a major challenge and limit exibility. Designing multi-year development programs in one-year budget cycles is also a challenge. Government leaders know that they need to take a long-term approach to get the best results, but they are forced to work with short-term funding. Government representatives also lament a reduced level of sta relative to funds expended. This is leading to more funds going to multilateral institutions or multi-funder instruments and money being spent on existing programs rather than experimenting with new ones.

Foundations are seeking opportunities to leverage their resources and attract larger funding streams. They see that with funders providing support in di erent ways, with di erent philosophies, and with di erent reporting requirements, they are bu eting development organizations that are struggling to work with a range of funders at once. Experts observe many new philanthropists entering international development but note they do not yet have a mature understanding of how best to operate.

Respondents working in impact investing worry that there is a continued scarcity of truly exible or catalytic capital in the impact investing sector. Though there is much excitement about impact investing, there is currently a strong bias to market-based investments with expectations of a market rate of return. There is little on the spectrum between pure market-based investments on one side of the continuum and pure grant models on the other, one respondent said.

Overall, no one we interviewed was happy with the current funding model of supporting short-term development projects. One foundation leader was particularly strident, calling the current funder ecosystem “completely dysfunctional” because funding doesn’t ow e ciently to organizations with the best impact. Since there is not an e cient distribution of resources, this person said the sector as a whole remains low-performing and ine cient. There is a major disconnect between resources and need, said one CEO, between what will be done and what should be done.

Another funder, in the corporate sector, said that nancial sustainability is a major challenge. Those in the private and philanthropic sectors can't be expected to just write checks year after year. Instead, we need to create systems that can live beyond initial nancial support, the funder said. Another said that, although funding from private companies had increased as companies see their interests tied to growth in emerging markets, the level of investment has not yet caught up with the need.

> **Funding is always the biggest challenge.**

Another NGO leader argued that the short time horizons of corporations and other funders make it hard to think big and bring successful projects to scale. Government funders need to make generational commitments if they want to address generational challenges—three to ve-year project time frames are insu cient. Another lamented that incentive structures encourage short-term project-focused interventions rather than broader approaches that in uence whole systems. Funding uncertainty, and the unwillingness of donors, public and private, to fund NGO strengthening and overhead, are, as one leader expressed it, "preventing NGOs from planning and investing in processes and technology innovation that they need to be more e ective and e cient and provide better solutions."

Some see the situation getting worse, not better. Donors increasingly seem interested in drawing a line directly from their resources to change on the ground in the short term. This drives money to projects with immediately quanti able outputs, said one NGO leader. He continued, NGOs almost never have resources exible enough to spend in ways that lead to the best outcomes. One NGO argued that donors focus too much on indirect costs and overhead versus value for money. Meanwhile, a funder observed that development organizations shift their missions to chase dollars. A near universal concern, especially from NGOs, is the uncertain, even declining, funding from traditional donors. ODA is seen as static at best.

The rapid change, especially the shrinkage of ODA as a percentage of development nance, is upending development. A big unknown that development experts are grappling with is what the impact will be—the impact on development, how implementers will navigate the wider opportunities for funding, and how funders should adjust the ways they provide nancing.

Looking to the future, development leaders say the public sector will have to more strategically leverage its assets—less paying for services and more acting through its "bully pulpit, convening power, and in uence over public policy and regulatory structures." As ODA funds decline relative to private capital investments and remittances, some see ODA as now serving more of a catalytic role. As such, ODA should be used to leverage other sources of nancing rather than directly fund services. Another said that government leaders are not focusing on understanding the changed role of ODA as it shrinks in relative size, and how it can best have a constructive impact and be e ective.

New funding models and partners are raising hopes and driving innovation

Many leaders expressed excitement about the expansion of sources of funding to new donors, private nance, and foundations. There is substantial interest in new forms of nance, such as social investing, impact bonds, venture capital, impact investing, blended nance, and social enterprise.

Respondents expect new, diverse, and hybrid forms of nancing that sit between grant and commercial capital. There will be more collaboration across sectors—government, business, civil society—and more public private partnerships. In contrast to the classic philanthropic approach, the focus will turn to investment and results. Emphasis will be on catalytic uses of ODA. Experimentation will lead to new and innovative ways to nance development. Development nance will be more exible and more outcome-driven.

Changes in funding models are catalyzing people to think di erently about impact and how to measure it. Development leaders see lots of innovation to fund development work, ranging from wider use of social enterprises with their own revenue streams, grand challenges, direct cash grants to bene ciaries instead of service provision, and a range of new nancing mechanisms such as impact investing and the new U.S. International Development Finance Corporation following the passage of the BUILD Act. They are pleased to see greater mobilization of private sector funds as well as a blurring of lines between for-pro t and not-for-pro t sectors.

Respondents mentioned a range of innovations and new initiatives. One NGO has developed a whole new co ee business and supply chain to support its work. Another group includes organizations across the nonpro t, public, and private sectors that have come together to support a ordable housing. A number of NGOs interviewed have launched or even franchised their own social enterprises. They are using their own funds to invest in social enterprises started by others and to mobilize private capital. They mentioned new partnerships with development nance institutions and private sector investors. They are excited to move away from grant-based funding and towards more of an investment mindset. They are excited about raising revenue for development through earned income.

Another area of excitement concerns the growth of resources in middle-income countries and the ability of both the government and private sector in such countries to pay for more development work. Opportunities for economic growth as well as for leveraging private funds to support local partners holds promise. Respondents are excited that locally run enterprises can drive economic growth and are eager to see what their organization can do to help accelerate that growth. The mobilization of resources within countries is viewed as an important step towards long term sustainability. One private sector development organization reports that it is buying local development organizations because it sees future opportunities in developing and middle-income countries, not aid agencies based in Western capitals. Many NGO leaders see their organizations as moving away from providing services to relying more on local partners and serving as catalytic forces for innovation.

Funders too are optimistic about new developments related to funding. Two foundation leaders interviewed were enthusiastic to see a shift back to giving long-term unrestricted support for both movements and organizations. We heard excitement about structures in which multiple funders partner to put up substantial funds over a period of years while applying identical terms and reporting requirements to reduce the burden on grantees.

We heard about more philanthropic interest in pooling resources and sharing sourcing and diligence to increase e ciency. One funder reported an e ort to get funds owing much faster—within two weeks—with many fewer restrictions on activities. The explicit intent, the person said, was to complement more rigid funding structures required by government aid agencies. Another organization is asking whether it should give grants to private sector organizations, in recognition of the new ways private sector organizations are advancing social good. Another funder is evaluating how to make better funding bets at di erent stages of organizations' growth. It is possible that funders have been too quick to focus on the desire to withdraw support and to see exiting as a marker of success. However, even if the rst investment was successful, some organizations may need further capital in order to take the next step in their evolution.

Respondents welcome the growing role of the private sector in development. We have passed a tipping point, one respondent said, and people now widely accept that long term development is about job creation and private sector employment, not just about delivering services to poor people . People now accept that markets matter, said another, and that the private sector has a key role to play. We also heard that the private sector is becoming more focused on development in order to grow and sustain strong markets. Development is good for business and business is good for development, we were told.

One private sector leader reported excitement about the concept of shared value. Though not a new idea, the person reported hearing companies discuss the concept more. The person also sees a trend towards viewing the private sector as more than just a funding source, and corporations are thinking about how to leverage their whole business model to provide value and improve lives.

> **We have passed a tipping point, and people now widely accept that long term development is about job creation and private sector employment, not just about delivering services to poor people.**

Respondents see new ways of engaging the private sector in development. For instance, there are growing costs associated with natural disasters, and these costs could continue to escalate with climate change. Currently, the public sector pays the bill. However, one development leader sees interest in moving the burden from the public sector to capital markets. There are opportunities to do more up front to reduce disaster risk exposure. By monetizing that reduced risk exposure, we could tap into more resources to increase the resilience of societies to natural disasters, he said.

However, despite this excitement, there also are concerns. The development community has yet to fully understand or embrace new forms of development nance. NGOs are testing how to access new sources of nancing, but uncertain as to how to capture these opportunities. Development "needs to master a blended approach"—joining the public, private, and civil sectors," said one leader. "There is a large amount of capital to be tapped but the opportunities of innovative nancing are not yet realized." A private sector expert feels that "the role of private investment is not talked about in a realistic way. Impact

investing is considered in the context of market rates of return, but reaching underserved and vulnerable populations requires blended nance." An NGO leader explained a key problem where funders fund in silos, not in an integrated approach to the human conditions—but that is how development happens.

Development leaders express broad excitement about technology but vary widely about which technologies are likely to be most transformative

When asked about the most exciting new initiatives or new directions in their own organization or international development more generally, 33 development leaders pointed to some initiative or innovation related to technology—the most mentioned theme no matter the size of the organization. And, indeed, technology was among the most frequently cited themes in our entire survey.

What is striking, though, is how little consensus there is regarding the types of technologies that are likely to be most in uential in international development or in which organizations are investing. In fact, most of the 33 respondents to this question o ered di erent answers to this question.

The range of technologies or technology-related initiatives referenced include the following:

- Arti cial intelligence (mentioned 3 times)
- Digital identi cation (mentioned 3 times)
- Big data (mentioned 2 times)
- Online/distance learning (mentioned 2 times)
- Electronic fund transfers directly to individuals in humanitarian crises
- Electronic cash transfers to replace service delivery
- Partnering with and channeling Silicon Valley knowledge for application in development
- Blockchain
- Use of drones to deliver blood supplies
- Adapting technology to development
- Hiring a chief digital o cer
- Use of cell phones, satellites, etc. to enable high-touch programming without humans
- Mobile money
- Under-exploited tech potential for development interventions related to health and nance
- Applications of interactive technologies to peacebuilding
- Tech platforms rather than projects
- Potential to scale technological solutions to address systemic issues
- Potential for information and communications technologies to improve accountability
- Biometric identi cation
- GPS
- Technology to help deliver government services better
- Country-based digital strategies

- Data analytics and modeling
- Technology to enable greater scale of interventions, lower costs, and better data collection
- Natural language processing
- Robotics
- Upgrading information technology to improve communications and connect better with donors and eld o ces
- Civic tech and using technology to help people have a voice in their own development
- Investing in technology to become knowledge enterprise and to share what is and isn't working
- Precision agriculture and climate smart agriculture
- Using technology to expand civic education and reach young people
- Expansion of internet and mobile phone access
- Autonomous vehicles
- Gene editing of seeds

There is a general sense that technology o ers great opportunities to improve the speed and e ectiveness of development. Many respondents view technology as becoming a vital driver of development and allowing us to address problems in smarter, innovative ways. Interestingly, a focus on technology correlated with organizational size, with leaders of large organizations being most concerned about data and technology and leaders of smaller organizations focusing on these issues less.

Technology and the ability to access and analyze vast reams of data are seen as "change agents"—as major new factors, mainly with positive, but also negative, rami cations. One NGO leader noted, "Data and the digital revolution are bringing better data, better tools, better data analytics, allowing us to be better informed, but that technology is rapidly outpacing the ability of the development community to adapt to its capabilities." Another said that "Digitalization helps drive e ciency by reducing costs, time, and errors; frees up sta time; and with the right data provides deep insight about the lives and impact of programs for bene ciaries."

Many observed that technology dramatically facilitates the ability to communicate, but one NGO leader posed the dilemma that "the internet and social media allow easier, real-time access to disparate communities, and at the same time puts in question the value of NGOs." Another said, "Access to information and knowledge is growing at blinding speed, transforming what even the poorest can know, in real-time. The rate of change is disorienting to millions of people."

In addition to seeing opportunities, leaders worry about the organizational challenge of keeping up with technological change and maintaining relevance. One NGO leader says rapid technological change will force NGOs to become more agile and adaptable but staying ahead of the tech curve will be a huge challenge. They must be more forward looking . Another observed that if an NGO isn't world-class in its use of technology, it will not be able to deliver on its mission.

> **The most effective organizations will be those that can use data insights and efficiency gains to better serve the communities, and beneficiaries, where they work.**

Leaders also noted the challenges of technology to societies worldwide. Technology is seen as not just a job creator but also a job destroyer. One respondent noted that the impact of technology will displace millions of workers globally and raise questions about which jobs development organizations should be training people.

Yet another challenge is the revolution in communications technology is being captured by autocratic rulers to strengthen their hold on power. While a few expect technology will "squeeze corruption out of the system," others express concern there will be a growing use of technology for social control by authoritarian governments that stymies the ourishing of civil society.

Development leaders love data and under-use it

We heard repeatedly about development leaders' enthusiasm for data. They see increased rigor in the development sector driven by an increased focus on data and an explosion of exciting work involving data and data analytics. Leaders are investing in capabilities to use data more e ectively in their own organizations and feel they will be better equipped to demonstrate impact through data. They want the U.S. Congress and other funders to use data more in their own funding decisions, and more use of data in calculating the social return on investments. They want to expand the use of data and give stakeholders greater ability to manipulate data for their own use. One respondent expressed hope that advances in data and information storage could fundamentally alter power dynamics, allowing people to more e ectively hold others accountable.

One CEO reported particular excitement about the ability of bene ciaries to rate the quality of services provided directly, saying that the feedback and accountability provided by this change had transformed the organization. The organization solicits feedback every time it delivers a service, at every step—asking bene ciaries two questions: (1) Were you satis ed with service? (2) What idea do you have to make us better? By incorporating this data systematically, the organization has seen a 20 percent improvement in 3 months with no change in its budget.

One business respondent anticipates a stronger shift toward digitization and that "the most e ective organizations will be those that can use data insights and e ciency gains to better serve the communities, and bene ciaries, where they work." As one development expert says, as data, including big data, become ubiquitous, the intersection of the internet, cell phones, and data will allow for new enterprise models (social and for-pro t) to solve global problems.

Funders, in particular, see data as a core area of focus. One observer notes a "love a air with data—the upside being the knowledge that is generated and a greater focus on metrics to gauge progress, the downside is a cold-eye assessment and over-reliance on simple metrics to assess progress."

Despite this enthusiasm, the development eld has yet to gure out how to organize and e ectively use data. NGOs are not investing adequately in developing the capacity to handle data. They complain that funders are unwilling to help them build the capacity to collect and manage data, so they remain dependent on old, out-of-date information. There is data on outputs but missing is data on long-term impact and almost no post-project evaluations ve to six years after a project closes. As one NGO leader explained, "We

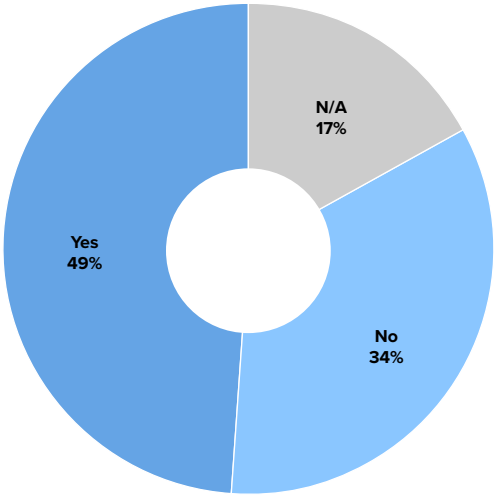
are in an indefensible situation where everyone wants to identify and support sustainable interventions but we have almost no data to demonstrate impact."

Only one respondent mentioned the challenge of data security—a major surprise given highly publicized accounts of compromised information security.

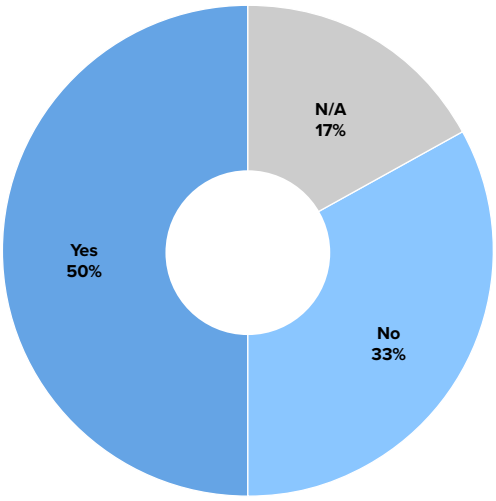
Development organizations are striving to innovate

When asked what new initiatives or new directions in their own organizations—and in international development generally—they are most excited about, respondents brightened. New technologies and impact models, coupled with the pressures they are facing, are leading to a surge of innovation in the sector. Leaders mention new applications of technology, new forms of collaboration including with the private sector, new approaches to nancing development, greater use of data, and greater focus on youth.

Whether respondent's organization employes subsidiaries, joint ventures, or other legally separate entities



Whether respondent's organization conducts development work in the U.S.



We heard about a wide range of innovations to enhance impact. These include moving beyond speci c projects or initiatives to try to have more of a systems-level impact, forming coalitions within speci c countries to address select challenges, systematically experimenting with di erent innovations to see what works best to address challenges related to agriculture, and new partnerships and collaborations, such as that between the International Rescue Committee (IRC) and Sesame Workshop to educate refugee children. There is an explosion of local civil society organizations in the countries where we work, said one development leader, and we are learning how best to support and work with them for the long term. Leaders are excited to see companies and NGOs more engaged in policy advocacy campaigns, joining together to shift policy at the governmental level in the U.S. and globally. They are increasingly focused on how to develop plans that can go to scale.

Other organizations report innovations related to their own business model and organizational structure. For instance, one NGO is identifying undervalued organizations close to their bene ciaries and then using its own resources to accelerate their impact. Another CEO said his organization is outsourcing knowledge processes (not just accounting

and information technology services) to India, which is turning out hundreds of thousands of STEM graduate students per year. As a result, the organization is spending a fraction of the amount to develop presentations, do research, conduct market intelligence, and carry out other functions. Big management consulting companies have done this for years with success and development organizations could do more of this too, he said.

Several respondents anticipate a dramatic change in the development ecosystem, away from a linear, project-based model to more of a platform focus on impact across the system.

When asked to name the new initiatives in their organization or new directions in international development they are most excited about, we heard a wide range of answers. Some of their answers include:

- Leading with science and bringing thought leadership and cutting-edge technology to development problems; going deep in certain critical areas instead of trying to be all things to all people
- Consolidation in the development sector, mergers, and acquisitions
- A focus on inclusion and inclusive growth rather than just poverty
- Uniting organizational focus around inequality and what drives it
- Non-violent civic action
- The potential to play a more catalytic role in concert with many di erent actors
- The opportunity to address disease by bringing hard science to health issues as well as expertise from all over the planet
- Health breakthroughs that could transform development. AIDS is no longer a death sentence; this could be true for measles, malaria, and other infectious diseases
- More focus on climate change and sustainable business practices
- More focus on holistic e orts to address climate and energy issues using all the tools in a philanthropist's tool box, including investment funds, grant dollars, networks, voice, etc.
- A wider range of new actors and approaches in development than in the past
- Helping professionals to have an international exchange experience
- Accelerated education for refugee populations in fragile environments
- Lifelong education and learning
- Soft skills assessment and workforce readiness in low resource environments; new tools to identify children with learning disabilities in low resource environments
- Philanthropy becoming smarter about non- nancial support, leveraging a full range of capabilities to support grantees, e.g., pro bono legal services, communications support, etc.
- Greater focus on thinking of bene ciaries as the customer, not the donor, and giving communities more choice and voice in program design.

Need for more collaboration and coordination

Respondents mentioned collaboration frequently as both an opportunity and a challenge. They agree broadly that development e orts would be better served through greater collaboration and a more systematic approach to coordination. An NGO leader explained, “Exciting things can happen when we work across donors and across government departments, but we are only at the tip of the iceberg in trying this in host countries." A business executive expressed the need for greater collaboration in terms of “taking insights and learnings from one entity to share with others that serve the same community, and to share the costs of management and delivery in order to maximize value-for-money."

Collaboration with the private sector o ers economically sustainable and scalable models, we were told.

Development e orts need to catalyze collaboration to achieve better outcomes. “We will never meet the ambitious development agenda if we stay working in silos,” said one development leader. Another asked, “How can business, philanthropy, government, and civil society come together in a more matrixed way, beyond just two partners?” A few respondents see the beginning of a shift to more systems thinking. The complexity is driving greater collaboration and multi-stakeholder approaches among government, NGOs, and the private sector.

> **Exciting things can happen when we work across donors and across government departments, but we are only at the tip of the iceberg in trying this in host countries.**

Respondents emphasize several collaboration challenges, including the fragmentation and absence of coordination among donors. According to one former government o cial such dysfunction is especially important “in di cult situations with a dire need for integrating development, diplomacy, and security.” Funders continue to nance discrete projects and single-sector siloed approaches rather than the systems approaches and scale that are required.

Leaders across di erent types of organizations—public sector and corporate leaders, private implementers, funders—told us why collaboration is so di cult. It can be hard to nd the right partners. It can be hard to avoid duplication of e ort. It can be hard to nd the right mix of oversight and freedom when collaborating with partners. It can be a struggle for NGOs to collaborate when they are also competing for funding. It can be a struggle for NGOs to gure out how to partner with the private sector. It can be a challenge to collaborate within organizations and cut across organizational silos. Private sector leaders told us repeatedly that it is a challenge for them to nd the right partners across government, NGOs, and local partners.

Respondents express frustration over the attitude of the U.S. government toward partnering. One executive at a private sector development organization sees less collaboration and partnership between the U.S. government and contractors and more of a “we-they”

mentality. An NGO executive said her organization has less voice and in uence with the U.S. government than in the past. We are treated like a contractor even though we are an NGO, she said, and has been told by a U.S. government o cial that “all NGOs look alike.” Another noted that there is more micro-management by donors than in the past and less space to give organizations a chance to nd solutions.

Accountability is a double-edged sword

The development leaders we interviewed expect to be held accountable for their work and their impact but point to a number of practical challenges related to accountability. Donors are demanding more accountability but don’t want to pay for the overhead and sta necessary to achieve it, said one leader. Our systems are expected to be as accountable and e ective as those in the private sector, said another NGO leader, but we can’t invest anywhere near the amount of resources that companies do. Keeping up with the compliance requirements of various donors is a challenge, said another leader, since donors have di erent requirements. Another respondent said the sector is over-regulated and too much energy is spent on compliance versus results.

The increased focus on compliance has led to more risk avoidance and a failure to take chances. An NGO leader said that concerns about compliance were taking precedence over humanitarian principles in con ict zones like Syria and Yemen. In the past, another leader said, there was more willingness to aid innocent civilians no matter who controlled the territory but that has now changed due to fears that aid could be diverted to bene t terrorists.

Another respondent called for organizations to be judged less on getting money out the door and more on results. Others were more critical of development organizations. A big challenge in the sector is a lack of accountability for impact, which is linked to poor measurement and evaluations, misguided incentives, and organizational cultures.

5. Maximizing impact—and sustaining relevance

Respondents expressed deep concern about the ability of longstanding development organizations, in both the nonpro t and private sectors, to adapt quickly to the growing complexity and remain relevant. How to stay relevant is especially a big issue for NGO leaders. The business model of these organizations was referenced 35 times—and not once optimistically. Talent was the second most referenced challenge after revenue and funding, a theme echoed by representatives of government aid agencies globally who worry about a skills mismatch between the capabilities of the past and the depth of nancial and data expertise that would be needed going forward. Indeed, many of the biggest challenges raised by the leaders we surveyed are internal to development organizations and their own ability to deliver, not about the external environment.

Development organizations lack confidence in their business models

Concerns about business models were mentioned frequently in our survey. There is a mismatch, many say, between short-term project funding; the high and consistent levels of investment needed to ensure appropriate standards of compliance, performance, and impact measurement; and the need to innovate and position for the future. An expert observed that “The development industry has not grasped the change that is underway and the need to adjust. Things are okay, but just holding on.” Another opined “To develop is to change, but the development community is not changing.”

Respondents highlighted a number of challenges. We need to get beyond old paradigms of donor/recipient and experiment with new approaches, said one leader. We are middlemen—where is our value added, asked another. Our sta see funders like DFID and USAID as their bosses, lamented another. How can we create a sense of allegiance behind our mission and also have a business strategy? We need to get beyond the constraints of project-driven models, said another, because it distracts us from true systemic solutions and incentivizes us to focus on symptoms rather than cures.

One NGO leader explained that the development community is segmented into large NGOs o ering a range of services, small NGOs operating in discrete niches, and medium-sized caught in an uncertain middle, with great uncertainty as to what is the right con guration going forward. Another opined that it is a huge challenge to be a middle-sized NGO. We are not able to attract money like the biggest NGOs that have recognizable brands.

Development organizations are experimenting with a number of changes to their business models, beyond simply diversifying funders or specializing. They are experimenting with subsidiaries that will allow them to access di erent types of nance and use di erent business models. They are spinning out organizations to sell products and services and raise earned income. They are creating “families” of organizations to pursue their missions

rather than relying on a single large organization. They are creating social enterprise models that blur the lines between nonpro t and for-pro t institutions.

One longtime development leader expressed worry that most NGOs have a funding model that is very vulnerable. He expects government-funded foreign assistance to decline, sees funding from foundations as erratic, and worries about private funding drying up. Together, these trends could lead to a concentration of power in a few large organizations.

One NGO CEO observed a fundamental tension between her organization's mission and its resource needs. When raising private money, organizations need a big and well-known brand, she said. But a well-known brand runs up against mission because building a big brand means putting ourselves up front—it's about us not them. For instance, to have a big brand, international NGOs tend to open local branches but perhaps instead we should be working with local NGOs, she said.

One development leader expressed worry about development organizations constantly chasing the latest trend. The development community has a tendency to focus on the " avor of the month," she said, and has been fairly ckle. Lots of issues have taken center stage over time: infrastructure, rural development, agriculture, empowerment of women and girls, fragile states, technology, the role of the private sector. This changing set of priorities can be disruptive, she argued.

> **To develop is to change, but the development community is not changing.**

Another development leader said the development sector has become too competitive, which raises transaction costs for organizations trying to work in international development. It is not unusual, he said, to see 15 proposals for a single project—and all of those proposals require a lot of resources to develop. In addition to the level of competition in the sector, the same leader observed that development organizations have too few di erences between them.

Several respondents see a need for and anticipate consolidation in the development community, among both NGOs and multilateral agencies. They feel consolidation would bring greater e ciencies and e ectiveness. This happens in the private sector but not su ciently with development organizations, so they run the risk of becoming less relevant and e ective. One reported that, "There is lots of talk about merger and acquisitions, but little action." NGO mergers are occurring, but not to the extent needed, said another.

A number of NGO leaders anticipate considerable disruption in the NGO space. The NGO community, as one leader expresses, "is in for a clearing out—mid-sized NGOs will struggle to de ne their space, and those with a more de ned niche will target either service delivery or systems change (inherently more political in nature)." Another sees "bene t lying with being either large or small—large can do more visible, innovative things, and small can be nimble—mergers and acquisitions will lead to consolidation of NGOs." One NGO leader articulated this trend in terms of consolidation leading to a "few large, all-purpose

institutions with budgets over $1 billion along with boutique NGOs that ll a speci c niche." Another predicts mergers that result in fewer small- and medium-size NGOs and "domination by a few large ones that embrace innovation and disruption." Contrary to that, an NGO leader questions the relevance of large NGOs and anticipates they will break up into small units or become more like contractors.

NGO leaders anticipate a proliferation of new business models and expansion of requirements around ensuring and measuring impact, accountability, and transparency. The growing emphasis on short-term results and evidenced-based decisions con icts with the need for a long-term, agile approach in fragile environments. There will be a growing requirement for innovation to meet the demands of sustainable solutions driven by local forces and the ability to demonstrate "value for donor dollar."

Several leaders responded that NGOs will move away from service delivery and become "platforms or networks rather than traditional organizations." The distinction between funders and implementers will be blurred as NGOs become not just service deliverers but also investors in social enterprises. NGOs will face greater competition for declining resources, which will be tied to outcomes.

Development leaders are worried about talent

Nearly one in four development leaders across the sectors surveyed cited talent as one of their biggest challenges. The need to recruit, grow, and retain top talent was mentioned repeatedly, particularly by those in implementing organizations. Talent is increasingly mobile, some note, and young people change jobs and organizations frequently. After organizations invest in growing talent, employees may leave to go work for another organization. This is an asset and a credit in some ways, but it also creates challenges. There is a need to nurture more diverse talent and stop putting so much focus on expatriate sta , said one interviewee. We need more tech savvy, more data savvy, more women leaders, and more leaders from non-Western countries, said another.

NGO leaders raised concerns more speci c to their sector and to this particular time in the sector's evolution. One of the most frequently mentioned challenges is the need for talent with skills for the future. The sector needs fewer generalists and more people with very speci c technical capabilities in niche areas, we were told. There is a growing need for specialized expertise, though respondents interpreted this trend di erently. One expert anticipates development expanding its scope to encompass new types of expertise, essentially bringing new talent and knowledge into the fold.

Development organizations increasingly need people with a very di erent mindset, we were told. Managing project grants is very di erent from working with private sector investors or social enterprise models. It requires di erent skills, a di erent vocabulary, and even a di erent professional culture. These di erences between past and future talent needs can create tensions in development organization, acknowledge one interviewee. The development community does not know the private sector or understand private capital well, said one respondent. We need to cultivate a workforce that is more entrepreneurial, more agile, and with a perspective that spans sectors, said another. We need a workforce that understands new challenges and is not mired in the past, said another.

One international development leader said that retaining and growing talent for humanitarian work is a particular challenge since crises are so dangerous and complex

that people can't do this type of humanitarian work for a long time, neither emotionally nor nancially. They can't endure the lifestyle and perpetual insecurity indenitely. Organizations lose a lot of talent and expertise when people burn out.

Respondents also stressed worries about protecting their talent. Safety and security are a challenge for organizations across the sector and leaders worry about how to best protect their staffs in fragile environments.

Development leaders are wrestling with how to increase impact

A top challenge for development leaders is achieving impact. Though leaders report seeing progress in rigorous monitoring and evaluation, measurement of impact, and accountability as an area of accomplishment in recent years, they want to achieve even greater progress. Some worry about the challenge of making individual projects add up to larger impact. Others point to the challenge of measuring impact, particularly those involving complex social phenomena that are inherently di cult to measure. Others note the desire to just have more impact or to amplify impact at the lowest possible cost.

NGO leaders, in particular, express frustration that there is growing demand to demonstrate results but no consensus on what and how to measure impact. Measuring long-term impact is di cult and agreement on how to do that is hindered by competition in the development community.

"Culture eats strategy for breakfast"

Eleven respondents, mostly among leaders of implementing organizations, mentioned culture as a major challenge for their organization. They express fear that their organizations are not agile enough, prioritize compliance over innovation, and shun risk. They fear their organizations are so attuned to working with government donors like USAID that they nd it hard to work with other funders. Development leaders want their organizations to adopt more market-driven solutions but nd organizational cultures have not fully embraced the new mindset required. They are trying to be global organizations that have the right amount of centralization and accountability but also remainexible enough to foster creativity locally. They are grappling with complexity, which creates a loss of nimbleness and cumbersome decisionmaking.

Organizational culture is seen as part of positioning development organizations for the future. One CEO is enthusiastic about building an organization that is more proactive, that creates and pursues opportunities, in a sector that is set up to respond to solicitations. Another CEO is devoting his time to deep culture change in his organization, reorienting the organization's entire approach to empower the goodness of eld sta and what they want to do in the world. Another CEO said she is trying to create a culture where it is okay to discuss failure, ask tough questions, and learn.

6. Conclusion

Development means change—something development leaders both live by and struggle with. Trends like climate change, migration, rising nationalism and populism, state fragility, and closing space for civil society present development leaders with formidable challenges. The rising in uence in international development of new actors such as China, developing and middle-income countries, civil society organizations, and the private sector undermine old paradigms and drive new approaches to development. Meanwhile, new technologies, booming youth populations, and shifting demographics o er both massive opportunities and negative or unintended consequences. There are more ways to fund development, or at least certain elements of it, even as traditional sources of foreign assistance come under pressure. There is better data and more rigorous ways to assess impact. All in all, our research shows a turbulent time for international development but one rife with transformative potential.

For the leaders we interviewed, the questions of how to conduct development e ectively in this changing landscape, how to pay for it, and how to nd the right partners and talent loom large. There is both innovation and angst. There is pride in the progress of development—in a billion people removed from absolute poverty, real advancement in health, education, and gender inclusion, and good outcomes from organizations' individual projects—but an awareness that another billion remain in poverty and the success of individual projects do not always advance development. So, there is self-awareness, and a willingness to be self-critical. Our survey reveals a sector mindful of its own shortcomings as it struggles for clarity going forward. Development leaders know their organizations must change even as they express pride in impact.

We hope this report sheds light on how dedicated individuals and institutions are striving to advance international development. We hope it sparks important discussion on how they, and all of us together, can advance our shared causes of greater prosperity, security, justice, environmental sustainability, and human well-being.

Appendix A: Respondents*

First Name	Last Name	Title	Organization
Tom	Adams	Chief Impact O cer	Acumen
David	Arnold	President and CEO	The Asia Foundation
Nazanin	Ash	Vice President, Global Public Policy and Advocacy	International Rescue Committee (IRC)
J. Brian	Atwood	Senior Fellow in International and Public A airs	The Watson Institute for International and Public A airs, Brown University
Jan	Auman	President, Global Development Services	Tetratech
Daniella	Ballou-Aares	Partner	Dalberg
Therese	Bongard	Senior Adviser	Embassy of Norway
Jim	Boomgard	President and CEO	DAI
Sundaa	Bridgett-Jones	Senior Associate Director	The Rockefeller Foundation
Sean	Callahan	President and CEO	Catholic Relief Services (CRS)
Ann Mei	Chang	Author	"Lean Impact"
Hilary	Cherner	Managing Director	Arabella Advisors
Larry	Cooley	President Emeritus	MSI
Steve	Davis	President and CEO	PATH
Tom	Dente	President and CEO	Humentum
Shanta	Devarajan	Senior Director, Development Economics	World Bank
Liz	Diebold	Principal	Skoll Foundation
Daryl	Edwards	Senior Advisor, Department of Foreign A airs and Trade	Embassy of Australia
Patrick	Fine	CEO	FHI 360
Paul	Foldi	Vice President for International Development A airs	Professional Services Council
Roger	Ford	Managing Director and Global Lead	Accenture Development Partnerships
Henrietta	Fore	Executive Director	UNICEF

**After going to press, the authors realized that the name of an additional respondent was omitted, making the total number of leaders surveyed 94, not 93.*

First Name	Last Name	Title	Organization
Jennifer	Ganten	General Manager, Public Policy and Corporate Responsibility	Chevron
Hafez	Ghanem	Vice President, Africa	World Bank
Dan	Glickman	Vice President, Congressional Program	Aspen Institute
Anne	Goddard	President and CEO	Child Fund
Stephen	Gro	Vice President	Asian Development Bank
Trevor	Gunn	Vice President, International Relations	Medtronic
Carrie	Hessler-Radelet	President and CEO	Project Concern International (PCI)
Hussein	Hirji	Counsellor (Economic / Development)	Canadian Embassy
Karl	Ho man	President and CEO	PSI
Tara	Hogan-Charles	Associate Director, Global Government Relations and Public Policy	Procter & Gamble
Dana	Hyde	Former CEO	Millennium Challenge Corporation (MCC)
Shamil	Idriss	President and CEO	Search for Common Ground
Carol	Jenkins	President and CEO	World Learning
Chris	Jurgens	Director, Impact Investing	Omidyar Network
Ted	Kattouf	President and CEO	AMIDEAST
Anoop	Kaur	Director, Donor Services-Grants	Silicon Valley Community Foundation
Tom	Kelly	Development Counsellor	Embassy of the United Kingdom
Neal	Keny-Guyer	CEO	Mercy Corps
Raj	Kumar	President and Editor-in-Chief	Devex
Jim	Kunder	Principal	Kunder-Reali Associates
Laura	Lane	President of Global Public A airs	UPS
Peter	Laugharn	President and CEO	Conrad N. Hilton Foundation
Ruth	Levine	Director of Global Development and Population Program	Hewlett Foundation
Nancy	Lindborg	President	U.S. Institute of Peace (USIP)

First Name	Last Name	Title	Organization
Elizabeth	Little eld	Senior Counselor	Albright Stonebridge Group
Robert	Mallett	President and CEO	Africare
Peter	McPherson	President	Association of Public and Land-grant Universities
James	Michel	Senior Adviser	Center for Strategic and International Studies (CSIS)
Shaun	Mickus	Global Director, Social Business Practices	Johnson & Johnson
Sarah	Mihalecz	General Manager, Sustainability, North America	Tata
Carolyn	Miles	President and CEO	Save the Children
Derek	Mitchell	President	National Democratic Institute (NDI)
Robert	Mosbacher Jr.	Co-Chair	Consensus for Development Reform (CDR)
Todd	Moss	Senior Fellow	Center for Global Development (CGD)
Susanna	Mudge	President and CEO	Chemonics
Tara	Nathan	Executive Vice President, Public Private Partnerships	Mastercard
Andrew	Natsios	Director of the Scowcroft Institute of International A airs and Executive Professor	The Bush School of Government and Public Service, Texas A&M University
Jane	Nelson	Director of the Corporate Social Responsibility Initiative in the Mossavar-Rahmani Center for Business and Government	Kennedy School of Government, Harvard University
Emma	Nilsson	Counselor (Development), Trade and Economic A airs	Embassy of Sweden
John	Norris	Deputy Director for Policy and Strategic Insights	The Bill & Melinda Gates Foundation
Larry	Nowels	Consultant	Hewlett Foundation
Michelle	Nunn	President and CEO	CARE USA
Paul	O'Brien	Vice President	Oxfam America
David	O ensend	President and CEO	Education Development Center (EDC)
Hilary	Pennington	Executive Vice President, Programs	Ford Foundation
Dan	Peters	Senior Program O cer, Development Policy and Finance	The Bill & Melinda Gates Foundation

First Name	Last Name	Title	Organization
John	Podesta	Founder and Director	Center for American Progress (CAP)
Susan	Reichle	President and CEO	International Youth Foundation (IYF)
Mary	Robinson	President	Mary Robinson Foundation
Dan	Runde	Senior Vice President	Center for Strategic and International Studies (CSIS)
Tessie	San Martin	President and CEO	Plan International USA
Sonal	Shah	Executive Director, Beeck Center	Georgetown University
Asif	Shaikh	President and CEO	PaxTerra
Anne-Marie	Slaughter	President and CEO	New America
Gayle	Smith	President and CEO	ONE Campaign
Kevin	Starr	President and CEO	Mulago Foundation
Don	Steinberg	President and CEO	World Learning
Matthew	Swift	Co-Founder, Chairman, and CEO	Concordia
Sarah	Thorn	Senior Director, Global Government A airs	Walmart
Daniel	Twining	President	International Republican Institute (IRI)
Connie	Veillette	Senior Fellow	Lugar Center
Mark	Viso	President and CEO	Pact
Jane	Wales	Vice President, Philanthropy and Society	Aspen Institute
Wade	Warren	Chief Strategy O cer for International Development	Deloitte
William	Warschauer	President and CEO	Technoserve
Paul	Weisenfeld	Executive Vice President, International Development	RTI International
David	Weiss	President and CEO	Global Communities
Aaron	Williams	Senior Advisor—Emeritus, International Development & Government Relations	RTI International
Daniel	Wordsworth	President and CEO	American Refugee Committee
Sam	Worthington	CEO	InterAction
Jung	Yang	Donor Services O cer, International Grants	Silicon Valley Community Foundation
Alix	Zwane	CEO	Global Innovation Fund

Note: Respondent titles are accurate as of August-December 2018.

Appendix B: Response themes

Overall response themes

Themes	Frequency
Revenue/Funding	131
Technology	95
Private Sector	84
Localization	67
New actors	65
Fragility	58
Data	56
Collaboration	54
China	51
Impact	47
Climate	46
Youth	41
Talent	39
Innovation	38
Middle-income countries	36
Business model	35
Migration	32
Complexity	28
Conflict	27
Messaging	25
Gender	24
SDGs	24
Closing Spaces	23
Domestic Politics	21
Accountability	20
Globalization	19
National interest	19
Populism/ Nationalism	19
Humanitarian v. development	18
Relevance	18
Consolidation	17
Culture	15
Scale	15
Geopolitics	14
Governance	14
Poverty	14
U.S. Leadership	14
Bifurcation	13
Jobs	13
Health	11
Sustainability	11
Urbanization	9
Inclusion	8
Demographics	6
Disruption	6
Inequality	6
Learning	6
Systems approach	6
Corruption	5
Democracy	5
Education	5
Fragmentation	5
Organization	4
Social enterprise	4
Trust	4
Cash transfers	3
Competition	3
Delivery	3
Focus	3
Networks	3
Security	3
Transparency	3
Uncertainty	3
Capacity building	2
Capacity strengthening	2
Connectivity	2
Constituency	2
Distributed solutions	2
Food security	2
Human rights	2
Inequity	2
Infrastructure	2
Journey to self reliance	2
Multilaterals	2
New Players	2
Politics	2
Resilience	2
Science	2
Systems Change	2
Training	2
Africa	1
Agriculture and food security	1
Beneficiaries	1
Capitalism	1
Catalyze	1
Civic action	1
Civic education	1
Coordination	1
Crises	1
Development progress	1
Development successes	1
Diaspora	1
Dignity	1

Themes	Frequency
Direct cash grants	1
Displaced children	1
Early childhood development	1
Earmarks	1
Economic downturn	1
Economic growth	1
Efficiency	1
Emerging markets	1
Energy	1
Environment	1
Exchange	1
Extremism	1
Family planning	1
Fatigue	1
Future Generation project	1
Holistic approach	1
How to make development better	1
Human capital	1
Humanitarian	1
Identity	1
Illicit flows	1
Independence	1
Independent USAID	1
INGOs	1
Instability	1
Latin America	1
Long term focus	1
Long-term support	1
M&E	1
Marginalized populations	1
Multilateral system	1
Multilateralism	1
Multipolar	1
National charity laws	1
National dialogue	1
Nationalism	1
Networking	1
Nexus between development, diplomacy, security	1
Nutrition	1
Optimism	1
Outsourcing	1
Passion	1
Pay for Performance	1
Peace	1
Political	1
Political will	1
Population	1
Populism/ Nativism	1
Procurement	1
Public misperceptions	1
Public support	1
Reconciliation	1
Refugee populations	1
Regions	1
Reproductive health	1
Reproductive rights	1
Reputation	1
Resources scarcity	1
Rights	1
Risk	1
Root causes	1
Seattle-centric	1
Sex abuse	1
Sexual harrassment	1
Social entreprise	1
Social Impact Measurment	1
Social movements	1
Standards	1
Systems Focus	1
Systems-thinking	1
Technical assistance	1
Tolerance	1
Ubanization	1
UN	1
Violent extremism	1
Water	1
Water scarcity	1

Question 1 Response Themes
What are the most important changes you see taking place in international development today?

Themes	Frequency
Revenue/Funding	39
New actors	33
Private Sector	33
Localization	22
Technology	21
China	20
Fragility	19
Migration	14
Climate	13
Middle-income countries	13
Complexity	12
Data	12
Impact	9
Populism/ Nationalism	9
SDGs	9
Collaboration	8
Conflict	8
Poverty	8
Closing Spaces	6
Domestic politics	6
National Interest	6
US Leadership	6
Youth	6
Globalization	5
Geopolitics	4
Innovation	4
Messaging	4
Scale	4
Talent	4
Urbanization	4
Accountability	3
Business model	3
Fragmentation	3
Sustainability	3
Bifurcation	2
Cash transfers	2
Consolidation	2
Demographics	2
Disruption	2
Gender	2

Themes	Frequency
Health	2
Humanitarian v. development	2
Inclusion	2
Inequality	2
Uncertainty	2
Connectivity	1
Delivery	1
Development progress	1
Development successes	1
Economic downturn	1
Education	1
Food security	1
Governance	1
Human rights	1
Humanitarian	1
Inequity	1
Jobs	1
Learning	1
Multilateral system	1
Multilaterals	1
Networks	1
Political	1
Politics	1
Relevance	1
Social entreprise	1
Systems approach	1
Systems Focus	1
Transparency	1
Trust	1

Question 2 Response Themes
How do you think international development will be different in 5-10- years?

Themes	Frequency
Revenue/Funding	31
Private Sector	25
Localization	24
New actors	24
Technology	23
China	21
Middle-income countries	17
Fragility	15
Humanitarian v. development	13
Data	12
Climate	10
Conflict	10
Bifurcation	9
Collaboration	9
Impact	9
Business model	8
Innovation	8
Youth	8
Complexity	7
Migration	7
Consolidation	6
Geopolitics	6
National interest	6
Closing Spaces	5
Globalization	5
Jobs	5
Talent	5
Accountability	4
Domestic politics	4
Scale	4
SDGs	4
Messaging	3
Populism/ Nationalism	3
Relevance	3
Sustainability	3
Disruption	2
Gender	2
Health	2
Poverty	2

Themes	Frequency
US Leadership	2
Cash transfers	1
Constituency	1
Crises	1
Distributed solutions	1
Fragmentation	1
Governance	1
Inequality	1
INGOs	1
Multilaterals	1
Networks	1
New Players	1
Public misperceptions	1
Regions	1
Resilience	1
Social enterprise	1
Systems approach	1
Uncertainty	1
Urbanization	1

Question 3 Response Themes
What are your organization's biggest challenges, internally and externally?

Themes	Frequency
Revenue/Funding	40
Talent	20
Impact	17
Business model	14
Collaboration	14
Accountability	12
Culture	12
Technology	12
Data	11
Closing spaces	10
Relevance	10
Domestic politics	9
Complexity	8
Fragility	7
Localization	7
Messaging	7
Private sector	7
Innovation	6
National interest	5
New actors	5
China	4
Geopolitics	4
Migration	4
Populism/ Nationalism	4
US Leadership	4
Youth	4
Conflict	3
Gender	3
Globalization	3
Governance	3
Organization	3
Scale	3
Security	3
Climate	2
Competition	2
Consolidation	2
Corruption	2
Delivery	2
Demographics	2
Focus	2

Themes	Frequency
Middle-income countries	2
SDGs	2
Systems approach	2
Trust	2
Bifurcation	1
Constituency	1
Democracy	1
Disruption	1
Earmarks	1
Efficiency	1
Emerging markets	1
Extremism	1
Fatigue	1
How to make development better	1
Human rights	1
Humanitarian v. development	1
Identity	1
Inclusion	1
Independence	1
Jobs	1
M&E	1
Nationalism	1
Networks	1
Passion	1
Politics	1
Populism/ Nativism	1
Public support	1
Reputation	1
Risk	1
Seattle-centric	1
Sexual harrassment	1
Social movements	1
Sustainability	1
Systems Change	1

Themes	Frequency
Transparency	1
U.S. Leadership	1
UN	1

Question 4 Response Themes
What are the new initiatives or new directions in your organization (or international development generally) that you are most excited about?

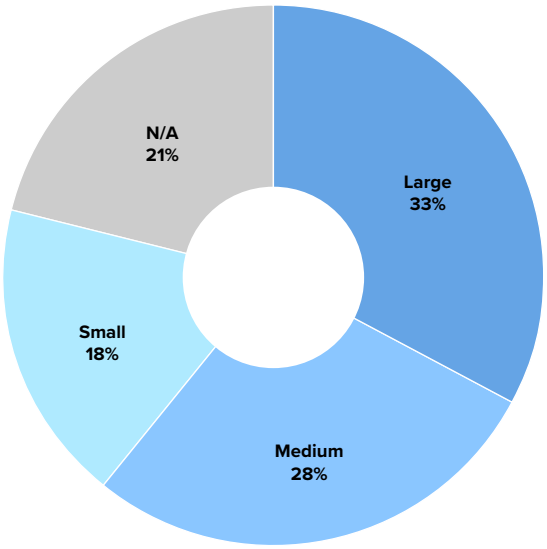
Themes	Frequency
Technology	34
Innovation	19
Collaboration	14
Revenue/Funding	14
Data	13
Private sector	13
Youth	11
Gender	10
Business model	7
Localization	7
Talent	7
Fragility	6
Impact	6
Climate	5
Messaging	5
Globalization	4
Health	4
Culture	3
Inclusion	3
Jobs	3
Learning	3
Middle-income countries	3
Scale	3
SDGs	3
Social enterprise	3
Sustainability	3
China	2
Consolidation	2
Journey to self reliance	2
Poverty	2
Systems approach	2
Accountability	1
Beneficiaries	1
Capacity strengthening	1
Civic action	1
Civic education	1
Closing spaces	1
Conflict	1
Direct cash grants	1
Distributed solutions	1
Domestic politics	1
Education	1
Environment	1
Exchange	1
Focus	1
Food security	1
Future Generation project	1
Holistic approach	1
Human capital	1
Humanitarian v. development	1
Inequality	1
Inequity	1
Instability	1
Long-term support	1
Migration	1
National dialogue	1
National interest	1
Networking	1
New actors	1
New Players	1
Nutrition	1
Optimism	1
Organization	1
Outsourcing	1
Peace	1
Relevance	1
Resilience	1
Science	1
Sex abuse	1
Technical assistance	1
US Leadership	1
Water	1

Question 5 Response Themes
What are the most neglected challenges or opportunities you would identify in the global development sector?

Themes	Frequency
Climate	16
Youth	12
Fragility	11
Collaboration	9
Governance	9
Data	8
Gender	7
Localization	7
Revenue/Funding	7
Impact	6
Messaging	6
Migration	6
Private Sector	6
SDGs	6
Conflict	5
Consolidation	5
Technology	5
China	4
Democracy	4
Urbanization	4
Business model	3
Corruption	3
Education	3
Health	3
Jobs	3
Populism/ Nationalism	3
Relevance	3
Talent	3
Capacity building	2
Demographics	2
Globalization	2
Inclusion	2
Inequality	2
Infrastructure	2
Learning	2
New actors	2
Poverty	2
Training	2
Africa	1
Agriculture and food security	1
Bifurcation	1
Capacity strengthening	1
Capitalism	1
Catalyze	1
Closing Spaces	1
Competition	1
Complexity	1
Connectivity	1
Coordination	1
Diaspora	1
Dignity	1
Displaced children	1
Disruption	1
Domestic politics	1
Early childhood development	1
Economic growth	1
Energy	1
Family planning	1
Fragmentation	1
Humanitarian v. development	1
Illicit flows	1
Independent USAID	1
Innovation	1
Latin America	1
Long term focus	1
Marginalized populations	1
Middle-income countries	1
Multilateralism	1
Multipolar	1
National charity laws	1
National interest	1
Nexus between Development, Diplomacy, Security	1
Pay for performance	1
Political will	1
Population	1
Procurement	1
Reconciliation	1
Refugee populations	1
Reproductive health	1
Reproductive rights	1
Resources scarcity	1
Rights	1
Root causes	1
Scale	1
Science	1
Social Impact Measurment	1
Standards	1
Sustainability	1
Systems change	1
Systems-thinking	1
Tolerance	1
Transparency	1
Trust	1
Ubanization	1
Violent extremism	1
Water scarcity	1

Appendix C: Respondent organizational breakdown

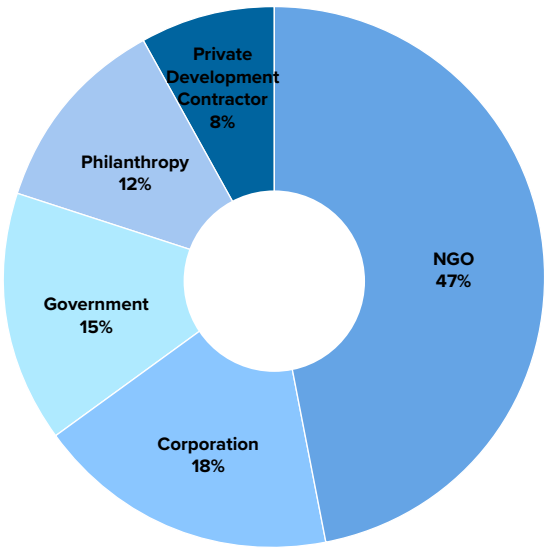
Breakdown of the organizations that the respondents represent:



Large Organization
Above $250 million

Medium Organization
$50-$250 million

Small Organization
$50 million or less



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