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## Institutional learning in North–South partnerships: Critical self-reflection on collaboration between Finnish and Tanzanian academics

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### **Abstract**

Knowledge production and its possibilities and pitfalls in North–South research partnerships have gained increasing attention. The previous literature has identified certain pervasive challenges, and suggested a variety of ways to change partnerships, ranging from improvement of current collaboration activities to fundamental transformation of the hegemonic Eurocentric criteria for knowledge. Against this backdrop, we ask what kinds of learning can take place in research partnerships. We draw from two sources – an institutional approach and a classical categorization of learning proposed by Gregory Bateson – to develop a heuristic for analysing institutional learning in North–South research partnerships. Moreover, based on previous empirical studies and our own experience with academic collaboration between Finnish and Tanzanian scholars, we reflect on the ways in which learning in its different forms shows in partnership practices that need to deal with different, intertwined institutional fields.

Keywords: levels of learning; institutional learning; North-South partnerships; development studies

## Introduction

A typical form of North–South knowledge production is research collaboration between universities located in both hemispheres. Recently, the complexities of North–South research partnerships have received a wealth of analytical attention, for instance, in the context of health research (Kok et al. 2012), education (Barrett et al. 2011), political science (Bleck et al. 2018), urban studies (Baud 2002) and refugee studies (Hynie et al. 2014; Landau 2012). Research partnerships have also been vividly discussed in development studies, and these have pointed to the pervasive asymmetries in collaboration processes as well as the struggles of addressing simultaneously the goals of academic rigor, policy relevance and social engagement (Carbonnier and Kontinen 2015; Melber 2019; 2015; Oswald et al. 2019). Additionally, postcolonial contributions have argued for acknowledging the colonial legacy of development (Ziai 2016), and for linking development studies with the more fundamental debates concerning decolonizing knowledge (Ndlovu-Gatsheni 2018; Schöneberg 2019).

The critical analyses of the challenges and pitfalls of North–South research partnerships commonly refer to ‘systemic issues’ (Bleck et al. 2018: 558) or ‘systemic shortcomings and imbalances’ (Ishengoma 2016a). These are factors that are challenging to be addressed by individuals or individual organizations alone, and reflect the funding structures and the hegemonic status of Eurocentric knowledge. However, the conceptualizing of the connections between ‘system’ and the everyday collaboration practices often remains vague. To address this gap, Skupien (2019) suggests differentiating macro, meso and micro levels of analysing partnerships, in which the global tendencies, societal factors and daily interactions intertwine. To build relationships between individual behaviour in projects and more enduring structural phenomena, Carbonnier and Kontinen (2015) draw from organizational institutionalism (e.g. DiMaggio and Powell 1983; Greenwood et al. 2017) where socially constructed institutions

are understood as comprising ‘regulative, normative, and cultural-cognitive elements that, together with associated activities and resources, provide stability and meaning to social life’, and thus, are durable social structures constituted by symbolic, social, and material aspects (Scott 2014: 56-57). Institutions are enacted by the very organizations and individuals whose agency has the potential to change them.

The discrepancies between the normative ideals of North–South partnerships and their realities within the current circumstances have frequently been pointed out (Ishengoma 2016a, 2016b; Melber 2019). A number of illuminating examples of trying to ‘walk the talk’ of equal partnerships show that despite the best intentions and reflective approaches, it is hard if not impossible to escape all the typical pitfalls (Barrett et al. 2011; see also the edited volumes Halvorsen et al. 2017 and Halvorsen and Nossun 2016). Consequently, learning in partnership through explicit reflection of the power relationships (Eyben 2006), and engagement in self-reflection by ‘those entering the minefield but trying to avoid being trapped on all sorts of common devices related to paternalism’ (Melber 2019: 274) have been suggested. In order to expand the concept of learning to cover institutional change in addition to individual reflection, Carbonnier and Kontinen (2015, 152) suggest institutional learning be defined as ‘changes in norms, rules, and practices that extend the boundaries of a single organization’. In this article, we seek to further develop a conceptualization of what different kinds of ‘learning’ can take place in the North–South partnerships. Using Gregory Bateson’s ‘logical categories’ as a heuristic to analyse learning (1987/1962), we offer a conceptualization of levels of learning (see also Kontinen 2018:33), and discuss these levels in the context of institutional learning in North–South partnerships. On the basis of extant research and our own self-reflections on a collaboration between Finnish and Tanzanian scholars, the article addresses the question: What are the typical manifestations of different levels of institutional learning in North–South partnerships?

In what follows we first articulate our conceptualization of learning. After that we shortly position ourselves within the debates. Then, drawing from our conceptualization, we discuss the potential manifestations of different levels of institutional learning, and the additional challenge related to learning as navigating between multiple institutions in the practices of knowledge production in the North–South research partnerships.

### **Levels of learning from an institutional perspective**

The notion of levels of learning means, for us, qualitatively different forms of learning, not linear order from one level to a higher one. We base our categorization on the classical theory of logical types from the concept of learning proposed by Gregory Bateson (1987/1972), which has been further developed, for instance, in the organizational learning literature (Argyris and Schön 1978; Tosey et al. 2011; Tosey and Mathison 2008). For Bateson, the logical categories do not equate with real-life practices, but are rather a heuristic that can be used to analyse learning. He argues that learning always implies some kind of change, thus the logical categories of learning can be distinguished by the kinds of change they denote. Moreover, qualitatively different levels of learning can also be distinguished by what kinds of errors they address. On this basis, Bateson categorizes learning into zero learning, learning I, learning II, and learning III.

The level of *zero learning* refers to a minimal change, like a routine reaction to a certain stimulus (Bateson 1987/1972). In everyday life, zero learning takes place in instances where the same information is continuously received from a similar external event, each time evoking a stereotyped response. Bateson provides an example from his era, the reaction of workers to the factory whistle at the end of a working day; today we could think of the *ping*

that indicates an email has been received. As long as our inbox contains a new email after the sound, we routinely check it and no specific attention is given to the event, and there is no need to correct any mistakes, or change our behaviour. However, when the routine way of acting is disturbed, when there is no new email in the inbox after the sound, learning might start. Often, we tend to dismiss zero learning as something undesirable and as a sign of stagnation. However, when analysing empirical realities, the importance of not changing, and the significance of unconscious skills, routines, and performances should be recognized (Tosey et al. 2011: 298). Without continuous flows of routine action, the everyday life of individuals (or organizations, for that matter) would be impossible.

While zero learning implies no need for correction, the level of *learning I* refers to change in the ‘specificity of the response by correction of errors of choice within a set of alternatives’ (Bateson 1987/1972). In other words, a learner revises her choice between given alternatives. In organizational learning literature, the notion of learning I has inspired the idea of single-loop learning (Argyris and Schön 1978), that is, of learning to perform any given task better through making better choices, for example, about the tools used for the performance of the task. Thus, single-loop learning in organizations is primarily concerned with effectiveness. It addresses the challenges of how to best achieve the existing goals, and its results are evaluated vis-à-vis existing norms and measures of performance (Argyris and Schön 1978: 22). Most activities, either individual or organizational, entail single-loop learning in an attempt to get the work done in the most effective way.

Consequently, *learning II* refers to revision, not of the choice, but the set of alternatives from which the choice is made (Bateson 1987/1972). Learning II can also be called *learning to learn*, as it refers to the ‘change in the process of learning I’. Bateson (1987/1972) argues that while learning II includes a change in the set of alternatives, it can also refer to ‘changes in the manner in which the stream of action and experience is segmented or punctuated into

contexts together with changes in the use of context markers'. In practice, this kind of punctuation can refer to the ways in which events, interaction, and relationships are understood on the basis of a kind of tacit agreement between the persons involved. This agreement includes shared, although implicit, understanding of the situation, the expected roles and the contextual frame. When these understandings are changed, learning II takes place. In organizational learning literature, learning II has been the basis for the notion of double-loop learning (Argyris and Schön 1978). Double-loop learning refers to learning where organizations not only learn to do things better, but learn to do 'better' things. In practice, learning II in an organization includes reflection on organizational values, assumptions and goals, as well as the consequent change in them. The outcomes of learning II cannot be measured by the existing norms and measures of performance, as these are questioned and changed within the same process.

In the same vein, *learning III* refers to change in the process of learning II. Learning III includes a 'corrective change in the system of set of alternatives from which the choice is made'. Bateson (1987/1972) argues that learning III is rare, as it requires receiving freedom from the bondage of habits, and implies a profound redefinition of the self. At the individual level, such learning can occur in psychotherapy, or religious conversion. In general, learning III includes confrontation with old premises. Such confrontation can be made through exaggerating or making caricatures of the old premises in a process of changing these fundamental elements of identity. As selfhood develops throughout a lifetime, it can be seen as a product or aggregate of learning II that has taken place over an extended time-span. Therefore, in learning III this established 'self' will become almost irrelevant, and that makes learning III challenging (Bateson 1987/1972).

Even if, in his original account, Bateson emphasizes the rareness of learning III, in organizational learning literature the parallel notion of triple-loop learning has gained

currency. It builds on Argyris and Schön's ideas of single- and double-loop learning, and refers to change in entire organizational paradigms and epistemologies. Especially in some consultancy approaches, triple-loop learning has been considered the desired goal for any organization. However, this prioritization has been criticized for providing 'utopian solutions', including fundamental paradigm changes (Tosey et al. 2011: 298–301), while in many organizational situations, learning I would suffice to enable the needed greater use of existing competences (ibid. 303). Bateson's category of learning III, taken seriously, involves high risks since it includes total transformation of individual selves and organizational identities (Tosey et al. 2011: 298–304).

In general, qualitatively different learning can occur, for instance, in individuals, organizations and institutions (Kontinen 2018: 33). It is clear that significant individual learning takes place in North–South research partnerships. Individuals learn new knowledge and research skills, but they also learn to manage collaborative projects, as well as to identify some of the challenges in partnerships. Accordingly, organizational learning in order to implement better partnerships occurs. In this article, however, we focus on institutional learning: learning as a change in institutional norms, values, and practices. The notions of organizational and institutional learning have sometimes been used as synonyms (Edwards 1997: 235; Whatley 2013). However, drawing from organizational institutionalism, we contend that institutions refer to a larger, historically evolved constellation of organizations, practices, funding systems and rules which form a recognizable social area (Scott 2014). Consequently, institutional learning refers to changes in these aspects that take place as a result of a reaction to the realization of an error, problem, or other kind of feedback that evokes reflection and change.



### **Positioning of the critical reflection of the authors**

Learning in development partnerships is said to require continuous reflection from practitioners (Pasteur 2006: 21). Their engagement in ‘self-reflexivity’ (Eyben 2006), and the consequent change in ‘personal practices of individual actors’, have been proposed as means to change the complex development system (Groves and Hinton 2004: 14–16). Reflection aims to promote profound dialogues between partners and the identification of new collaborative ways of working. Critical reflection should address, for example, power relations, changes in the rules and procedures needed in partnerships, and the possibility to use new words and meanings to facilitate real dialogue (Chambers and Pettit 2004: 138; Groves and Hinton 2004: 14–16). We therefore combine our self-reflections with a discussion of the manifestations of different levels of learning. To achieve this, we next introduce our experience of North–South partnerships.

The first author, primarily representing the ‘North’, entered the terrain of North–South collaboration while completing her PhD studies on the topic of partnership between Northern and Southern NGOs (Kontinen 2007). The research permits for her fieldwork in Tanzania in 1999–20000 required some kind of local academic institutional collaborator. In this case, the collaborator was a lecturer from the University of Dar es Salaam. As a PhD student with no experience in North–South collaborations, she fell into most of the common traps, including using the collaborator mainly as a paid data-collector in the rural villages. Yet she remembers how awkward and uncomfortable she felt as a young PhD student positioned as kind of ‘employer’ of a much more experienced Tanzanian colleague. In the course of learning to be more analytical of North–South partnerships, she became aware of the somewhat taken-for-granted but flawed ways she had acted, and was increasingly committed to try to act otherwise.

After completing her PhD, the first author participated in three institutional capacity-building projects in collaboration with the University of Helsinki, University of Zambia, and University of Dar es Salaam. The capacity-building projects included arranging seminars in Finland and in the partner countries for, in the first project, master's students and, in the second and third projects, for PhD students. Especially during the last project, she and some of her colleagues started to feel uneasy and question some of the ways the partnership was conducted as well as the institutional constraints for it (Komba et al. 2015). In order to 'act differently', she actively participated in co-editing a book (Kilonzo and Kontinen 2015), where the participants of the project could publish chapters around their own research interests – and not primarily around those emphasized by the Northern professors. The collaboration expanded by preparing a successful application for a joint research project, Growth into Citizenship in Civil Society Encounters (GROW; 2015–2019), and an additional joint publication on the history of development studies in Tanzania (Komba et al. 2019). The GROW project acted as a platform for a continuation project of Theory and Practice in Learning into Citizenship (CS-LEARN; 2018–2022). Both research projects were funded by the Academy of Finland's programme for development research, and they explicitly searched for ways of collaborative knowledge production. The first outcomes of GROW were reported in an edited volume published by Routledge (Holma and Kontinen 2020), with a high number of contributions from Southern scholars. The first author also had the privilege to work as a visiting researcher at the University of Dodoma for extended periods of time, and thus familiarized herself with the everyday working life of Southern partners. At this point, she feels she has learned a lot about 'doing differently' in partnerships, but still recognizes the many ways partnerships revert to traditional roles and norms.

For the second author, originally from the South, the first encounter in a North–South collaboration took place through Rural Integrated Project Support (RIPS), a bilateral

development programme collaboratively funded by the governments of Finland and Tanzania. He started as an intern for three months soon after completing his bachelor's degree at the University of Dar es Salaam in 2003, and later on worked full-time as a rural development facilitator up to June 2005, when the programme was phased out. Since then, the second author has participated in a number of capacity-building projects that involved universities from Tanzania and Finland. For example, during his postgraduate studies (2005–2007) in the Institute of Development Studies (IDS) at the University of Dar es Salaam, he studied for five months at the University of Jyväskylä where he participated in the Master's Degree Programme for Development and International Cooperation as an exchange student in the framework of the North–South Higher Education Support Programme titled Developing Development Studies (DDS). As a PhD student (2010–2013), the second author benefited from DDS I & II, wherein he participated in academic seminars regarding PhD research, graduated in 2013, and also contributed two chapters to an edited book (Kilonzo and Kontinen 2015). Later, after establishing a career at the University of Dodoma, the second author worked at the University of Jyväskylä for two-and-a-half years as a postdoctoral researcher in the GROW project, and co-authored a number of chapters in an edited book (see Nguyahambi & Chang'a 2020; Nguyahambi & Kontinen 2020).

Throughout the engagement in different partnerships with Finnish academics, the second author has learned several practical lessons. First, in some ways Southern researchers typically consider Northern researchers as punctual and good time managers. With this thinking in mind, the second author always opted to be punctual in meeting deadlines and to arrive for meetings early. However, he came to realize that his Northern counterparts would not always be on time or meet the agreed deadlines. He realized that things such as 'good time management' are stereotypes that we tend to exaggerate.

Second, the recent collaborative research in GROW has taught the second author that there is a way in which North–South collaborative research can allow sharing of ideas and co-production of knowledge. In the beginning, his interaction with Northern research team members reflected some kind of superior–subordinate relations. In this respect, he had expected to receive instructions and guidelines rather than engage in interactive sharing of ideas. Over time, he realized that his Northern counterparts expected him to initiate ideas for discussion. He had previously seen and participated in research collaboration where Southern researchers conduct data collection in the manner that they play the role of research assistants. However, in this recent experience, his Northern counterparts fully engaged in all research activities, including data collection in the field, and the Southern partners participated in each stage up to publication. For that matter, knowledge development was not ‘knowledge transfer’ but a participatory process of knowledge creation that involved interactive discussions where ideas were presented and interrogated together among all team members. When one team member developed a draft paper, it was subjected to critical discussions in the team, and revised accordingly before being submitted for publication.

Third, the second author has learned that international scientific conferences are not only for presenting finished research results, but also for sharing research ideas in order to obtain more input for further knowledge development. He has seen Southern colleagues who hesitate to submit abstracts or papers at international conferences because they feel they lack something conclusive to share, and hence deprive themselves of the chance to receive constructive comments and feedback. He has seen Northern researchers presenting their papers at international conference with the note that ‘it is still a working draft’. Through different academic partnership activities, he obtained access to funding that enabled him to participate in international conferences where he got the opportunity to engage in academic debates on thematic issues related to his research area. Indeed, he came to realize that

knowledge development is the result of rigorous and interactive discussions. Thus, through debates, criticisms and feedback, participants get to engage in revising already existing ideas and in turn learn or accommodate different ways of looking at different issues. For example, after several presentations of papers at international conferences, he was able to develop journal articles and book chapters that could be submitted for publication.

Fourth, productive engagement in academia requires more than earning a PhD. He realized that what he used to consider routine activities in his academic work may also be accomplished in better ways. He realized that his work could be made not only enjoyable to himself, but also more interesting to his students. For example, before and after completing his PhD, he was fully engaged in teaching that mainly relied on reading books, journal articles and related academic materials. Through engagement in research activities under a postdoctoral programme, he started sharing his own research-based experiences to illustrate examples in his teaching activities. This improved his confidence in knowledge sharing and also helped students to easily digest examples he shared during seminars and lectures. In this respect, the opportunity for postdoctoral work has not only strengthened his research skills, but also enhanced his teaching in term of illustration of issues. Though he cannot claim to have changed completely, he can admit that engagement in North–South collaborative research has enabled his professional development.

### **Institutional learning in North-South research partnerships**

After the short description of our personal learning, we now combine them with some previous research on partnerships and use the heuristic of the three levels of institutional learning – learning I, II and III – to reflect the kinds of specific content these categories have in the context of North–South research partnerships. We also discuss the challenges related to

categorizing institutional learning, and suggest an additional view of learning as navigating between different institutional fields.

### ***Learning I: Improving practices within existing institutional constellations***

Level I institutional learning, or first-order learning, refers to learning to perform better the current tasks within the existing mainstream institutional framework. In learning I, much of the existing, historically formed norms, values, practices and positions are taken for granted, and learning is geared towards doing what we already do in a more effective way.

For research partnerships, such learning would refer to improving collaboration practices within the existing frameworks, which provide certain taken-for-granted ways in which the collaboration is planned and implemented. The existing perspectives, leading to the identified pervasive systemic problems (Ishengoma 2016a), are based on the taken-for-granted idea of knowledge and resource gaps between the actors in the North and South. The problem to be solved within these perspectives is, on the one hand, the capacity deficit of the Southern actors, and on the other hand, the need for access to data for the Northern ones. Historically, such ideas have been the prevalent ones (Skupien 2019), and to some extent they continue to show in the collaboration practices despite the wealth of critique over past decades.

Thus, learning I refers to practical improvements while the institutional environments remain more or less the same. Collaboration within the existing funding structures and partnership roles is executed in a more effective way. The most prevalent, often taken-for-granted, institutional conditions are the donor-recipient positions related to funding flows (Ishengoma 2016a; 2016b; Bradley 2017), and the idea of one-way ‘capacity building’ as a base for academic collaboration. For instance, Mago (2017) conceives capacity as ‘knowledge

transfer' from North to South and suggests it should be done in a more effective way. In the same vein, Ishengoma (2016a; 2016b) criticizes the North–South partnerships as ineffective in increasing research capacity in Southern universities, and proposes improvements such as long-term funding and basket funding to address the problems. They both argue for learning to build capacity and fund research activities in a more effective way within the current institutional contexts.

In terms of research process, the institutionalized roles are often those of Southern academics occupying the role of data collectors and 'assistant researchers', whereas the Northern researchers are the ones who draft the research questions, analyse the data, develop theory, and publish in international journals (Carbonnier and Kontinen 2015; Melber 2019: 279; Landau 2012: 559). Thus, learning I can mean an increased capacity of Southern partners to understand the (Northern) research agenda and to use the data collection tools in a proper way. At the same time, the learning I of Northern actors relates to their ability to clearly communicate the aims of the research they have defined, provide proper training for fieldwork, and learn to behave in a culturally sensitive way during their (often short) visits to the partner institutions. At the most basic level, such learning refers to acquiring information about the proper ways to dress or to address people.

Moreover, learning often includes improvement of communication. At a minimum, this might mean learning to communicate in an understandable language, and to remember to communicate in time. For instance, in our own experiences it easily happened that while Northern partners, according to the 'traditional roles', assumed responsibility for the academic content of workshops conducted in the South, they communicated these to partners at the last minute, leaving little time for preparation to fulfil their suggestions. Though the internet has enormously improved communication possibilities, challenges persist on both sides of the partnerships, such as unanswered emails or the failure to make use of any new

digital platforms due to competing demands of time (Barrett et al. 2011: 36). According to our experience, communication can be improved by using easily accessible WhatsApp groups. However, accessibility still does not always equate with effective or different use, as these platforms can still be used in a manner where ‘orders’ for activities to be implemented in the South come from the North.

In learning I, the existing, taken-for-granted power positions are rarely explicitly reflected on. Consequently, most of the learning needs concerning knowledge production are predominantly seen to reside in the Southern institutions. Often, this perception is shared and endorsed by all the participants. In addition to the Northern actors assuming a position as the ones who know and who are able to build the capacity of others, Southern actors also demand better capacity-building and more research funding within the existing frameworks. In learning I, the challenges in relationships are seen as problems that can be addressed by improvements; by providing more training in research skills and project management approaches, by introducing new communication forums and learning to use a better communication style, and by keeping each other aware of cultural differences and conventions. Thus, learning I is about learning to conduct better partnerships within the existing institutional frames and roles.

### ***Learning II: Reforming the partnership practices***

If learning I takes place merely without reflecting on the institutionalized roles and positions of the partners, in learning II, the challenges and pitfalls of the existing approaches are identified. Learning is not only geared towards improving the existing practices, but also changing the very institutional norms and practices. Learning II is based on the ideas that partnerships include negotiations between actors that have different interests, values and



goals (Long 2001), and that cooperative relationships in development always have to deal with the historically formed asymmetries related to funding relationships (Wallace 2006). Therefore, rather than being based on a superficial assumption of having joint objectives and shared meanings, institutional learning II acknowledges and openly deliberates the differences (Johnson and Wilson 2009: 130).

In research partnerships, acknowledged issues have included the lack of reciprocity and mutuality (Ishengoma 2016b: 168), mismatch in motives (Ishengoma 2016b: 169), and conflicting agendas (Ishengoma 2016a). If these are not acknowledged and discussed, they can lead to frustrations, self-censorship (Ishengoma 2016a) or passive silence by Southern partners (Hynie et al. 2014). Therefore, a clear discussion of expectations and key concepts has been suggested for reaching more equal partnership (Bleck et al. 2018). Moreover, institutional learning II explicitly acknowledges the power relationships created by the donor–recipient relationships, and reflects the implications of these for the collaboration practices (Eyben 2006). The acknowledgement of ‘pervasive inequalities’ (Bradley 2017: 60), or the ‘neo-colonial nature of donor-recipient relationships’ (Ishengoma 2016b: 149) in learning II leads to a search for ways to change these institutional preconditions and their effects.

Practical attempts to shift the power relationships have included leaving room for conceptualization and proposal writing by Southern partners, and to exercise distributed leadership in implementation (Barrett et al. 2011: 33–34). In our experience, changing the practices of proposal writing in a situation where the potential funder is a Finnish research funding agency was very challenging. We wrote a proposal for our second joint project, CS-LEARN, in a shared Dropbox folder and indicated clear turns for each university to contribute. However, the final responsibility of editing everyone’s contributions in a coherent whole within the given space was the responsibility of the Northern principal investigators.

The more fundamental fact, however, was that the initial idea of a research project combining lived experiences of citizenship in Uganda and Tanzania and the scholarship of philosophical pragmatism came from the Northern scholars and remained as such throughout the proposal writing, and this arrangement was not challenged by the Southern partners.

Additionally, at the beginning of the recent GROW project, the Northern partners introduced a collaborative, open approach when it came to the definition of concepts and methodologies. At the same time, Southern participants expected to be provided clear advice and ready-made tools to be used in data collection. This was based on their previous experiences from research partnerships with no room for discussion on concepts and methodologies. In this respect, they wondered whether the Northern partners actually had any idea what the project was supposed to be about, and felt that they were required to perform how ‘good’ they are in engaging in critical, conceptual discussion. Eventually, all the members got used to dealing with the uncertainties, and engaged in discussions and planning. This enabled an innovative dialogue between theoretical conceptualizations and the vast methodological experience of the Southern partners.

An additional manifestation of institutional learning II has been attempts to change the publication and authorship practices in collaborative efforts, and to invite Southern research partners as authors and not treat them as somebody who just collected data and is only worth mentioning and thanking in a footnote. However, in a contrary perspective, Thomas (2018) reflects on the suggestions of Southern partners of co-authorship for publishing in international journals – which he did not eventually accept – and argues that such practice would only promote learning of the existing publication conventions, and not promote the needed change in the norms of knowledge production. In our experience, the joint production of publications, edited volumes as well as individual articles has been the best way of mutual learning. We have learned to look at our material from different perspectives and to produce

new knowledge out of the shared analysis. However, the joint publications do not emerge easily. They require an investment of time as well as money for joint writing retreats that enable the authors to focus on the book as a whole as well as on the individual book chapters. The simple act of arranging time and an opportunity to concentrate on writing significantly facilitated the contributions to our recent edited book (Holma and Kontinen 2020).

For capacity building, learning II means distancing oneself from the perspectives of ‘gap filling’ and knowledge transfer from North to South, and recognizing the existing capacities on both sides and the capacity benefits for the Northern institutions as well (Hynie et al. 2014: 7). Moreover, learning II can direct the enhancement of capacities towards ‘autonomous pathways of knowledge production’ that would better reflect the local concerns in the Southern institutions (Baud 2002: 154). On the basis of our experience, we contend that the best means of academic capacity building is doing research together (Komba et al. 2015), with jointly acquired external resources.

As our reflections suggest, much of the learning in our experience has been on the level of learning II through questioning and reforming the traditional norms, roles and practices. However, in so doing, we have managed to reform some of the institutionalized practices, but not fundamentally triggered any changes in the institution itself and the principles of knowledge production and funding structures inherent in it.

### ***Learning III: Transforming the institutional presumptions***

Learning III, or the third order learning, is defined as a change not only in alternatives but in the system of alternatives. Such a change might, for institutional learning, indicate a fundamental change in the existing institutions and their preconditions. Thus, learning III is

not only improvement or change in the institutional practices, but questioning and transforming the institutions themselves. Based on recent contributions, especially from postcolonial perspectives, learning III in North–South research partnerships could mean, first, abandoning the notion of ‘development’ and categories of global ‘North’ and ‘South’ as generalizations that reconstruct the global asymmetries; second, changing the Eurocentric epistemological principles of academic research; and third, changing the nature and role of the higher education institutions.

The last potential lesson resonates with the recent demands for decolonizing universities. For instance, the ‘Rhodes must fall’ movement in South Africa has urged a change in the Eurocentric curricula. More fundamental demands for decolonizing universities echo the long-lasting critique of colonialism regarding its tendency to ‘transform non-European areas into fundamentally European constructs’ (Mudimbe 1988: 1; Mbembe 2017). For example, Ndlovu-Gatsheni (2018) has argued for the transformation of ‘universities in Africa’ into ‘African universities’, where decolonial attitudes in knowledge production can be cultivated and epistemic freedom from Eurocentric thought achieved. Thus, there should be a way out of the ‘epistemological colonialism’ (Ndlovu-Gatsheni 2018: 191). In this debate, the Eurocentrism of current epistemologies, concepts, theories and methodologies has been pointed out, accompanied by calls for epistemological freedom, decolonizing the mind and the articulation of Southern theories and methodologies (Bhabra 2007; Ndlovu-Gatsheni 2018; Tuhiwai Smith 2012). In general, the articulation of Southern theories has referred, in social sciences for instance, to starting theorizing from the lived experiences in the global South rather than departing from the conceptualizations, such as state, citizenship or civil society, developed on the basis of history in the global North (Connell 2007, 2014; Comaroff and Comaroff 2012; Lewis 2002).

In development studies, the need for diversifying epistemologies has been frequently discussed. For instance, in the early 1990s, a Foucauldian critique of Western reason and rationality emerged. Identification of the power effects of development discourses formed a basis for the elaboration of alternative development and post-development agendas (Apffel-Marglin and Marglin 1990; 1996; Escobar 1995; 2011; Sachs 1992). Both the historical and conceptual legacy of colonialism in development was acknowledged (Cowen and Shenton 1996; Cooke 2003; 2008; Kothari 2005), and a critical stance was taken towards the Enlightenment, modernity and the very notion of development. Additionally, a need to acknowledge multiple modernities and alternative development trajectories embedded in a variety of non-Western localities was articulated. Recently, similar arguments have emerged, drawing on postcolonial theory (Schöneberg 2019; Strongman 2014; Sylvester 1999; Ziai 2016). Some examples explicate potential postcolonial contributions to development (McEwan 2009), theorizing postcolonial politics for development (Kapoor 2008), and analysing the construction of the Southern 'Other' (Eriksson Baaz 2005).

In our experience, we became increasingly aware of these debates, but did not get far in contributing to level III of institutional learning. In our recent research projects we have attempted to develop a conceptualization of citizenship on the basis of the everyday experiences and people's own conceptualizations rather than starting from theories of citizenship discussed in the Eurocentric literature. However, our research design, methodologies, and ways of reporting the results have clearly followed the Eurocentric model of knowledge production. When it comes to the notion of development, and the categories of North and South, in our research partnership we eventually started to joke about these categories. Yet even though the way we talked about our relationship changed, the institutionalized roles themselves did not.

Learning III in partnerships would mean not only changes in institutional relationships but also in the principles of research and knowledge production. On the basis of our experience, the universities in both the North and South have shared the basic principles of Eurocentric, scientific knowledge production, and there have been few efforts to find alternatives and subscribe to different epistemologies.

### *Learning as navigating with institutional plurality*

Different levels of learning might be recognizable when it comes to investigating learning within a certain institutional field with particular norms, values and practices (Scott 2014). However, North–South research partnerships take place at the intersection of a variety of fields (Carbonnier and Kontinen 2015), meaning they are practiced under the condition of an institutional plurality that needs to be continuously navigated (Mair et al. 2015). Therefore, the practices of partnerships are constantly evaluated against different, sometimes contradictory, criteria, such as the extent of scientific excellence versus the amount of capacity building provided. Consequently, an important element of the learning as change in institutionalized practices is dealing with different demands, taken-for-granted assumptions, and pressures to change towards different directions. We argue that in the North–South research partnerships relevant institutional demands originate, at the least, from academic research, international development, and the societal contexts the partnering universities are located in.

The institutional field of international research, as it currently stands in its Eurocentric and ‘universalistic’ form, holds certain prevailing ideas and principles of good academic knowledge production, as well as the institutional arrangements for research training and

academic career paths. In a simple way, the institution values rigorous research that follows certain methodological procedures, which are contested and under continuous negotiation, but nevertheless, all subscribe to certain kinds of systematic practices and efforts to achieve trustworthiness. In that regard, in order to be a legitimate member of this particular institutional field, one is required to learn certain (discipline-specific) methodologies, procedures of theory building, and a style of writing that communicates with an academic audience. It is taken-for-granted that such skills are learned gradually from the master's to the PhD level, both of which view supervision from more experienced researchers as a prerequisite. Career paths are typically constructed in a way that becoming an independent researcher takes place in the postdoctoral phase. The institutional incentives for proceeding in the academic career, as they currently are, value publications in highly ranked journals, as well as the winning of competitive research grants. As Bradley (2017: 61) observes, the skills needed for building research partnerships are not necessarily rewarded in the existing systems. In our experience, when the first author was evaluated for an associate professorship in international development studies, the two external evaluators did not even mention her successful attempts to build North–South research partnerships in their statement, which focused on the number and quality of publications and the teaching experience in Finnish universities.

Much of the literature on donor–recipient relationships points to the challenges of funding relationships and project models. However, such dependence on outside research funding is an everyday reality in most universities across the globe. For example, approximately half of the entire budget of the home department of the first author comes from external, competitive research funding in the forms of projects. Therefore, being dependent on external project funding is a pervasive phenomenon across academia, not a specific feature of development research. However, what is different is that, for instance, the African scholars rarely have

access to national research funding (Landau 2012). Moreover, they also lack direct access to international research funds, and are required to access research funding through partnerships with universities in the North (Bradley 2017). Moreover, what differentiates the project funding for, say, a collaborative research project between Finnish and Norwegian Universities from a project with a Tanzanian university, is that in the latter case it is not only the field of research that is dealt with, but also the field of international development, which holds different, historically formed institutional norms and practices.

International development is an institution with a particular history. It is guided by international development policies and goals, and has its own organizational constellation. The pervasive donor–recipient relationship is typical, but it is also continuously seen as problematic. Much of the research conducted in North–South research partnerships is funded by specific development research programmes that are typically funded, in part, by foreign affairs ministries or official aid agencies, and are thus not only selected on the basis of their academic quality but also for their compatibility with development policy goals. As a consequence, donor influence on the contents of research is often greater than in ‘ordinary’ research, and the development policies can also determine the countries that are eligible to be funded in partnerships (Bradley 2017), with additional restrictions by the donor countries to prioritize their ‘partnership countries’.

The institution of international development – and development studies, for that matter – has a colonial legacy, which can also be seen, to some extent, in the selection of partner countries and institutions. Bradley (2017: 61) suggests that good partnership requires suitable ‘institutional chemistry’, which might be easier to achieve with countries without a direct imperial past. The imperial powers such as Great Britain, France, German and the Netherlands re-constituted their relationship with their former colonies, and engaging with ‘international development’ and the consequent ‘development research’ was part of this



transformation. Additionally, the Third World Movement in the 1960s and 1970s geared many academics towards issues related to global development, and particularly to developing countries. In Finland, development studies started with a few Third World activists, and has only gradually been included in universities – to date, the University of Helsinki is the only university with a full academic programme in development studies.

The authors' own research partnerships would not have been possible without funding from the Academy of Finland's programme for development research, partly sponsored also by the Finnish Ministry for Foreign Affairs from its development aid budget. The research on issues concerning Africa is marginal, and not very likely to receive research funding from 'ordinary' sources. Development research funding enables a wealth of research, but also has strings attached. Not many academic fields are supposed to have as significant policy relevance or practical implications as development research should. This has implications for the kinds of research that is possible. Usually, there is little room for theorizing, and universities in the South easily end up producing descriptions and policy recommendations (Landau 2012: 558).

Moreover, while the funding agencies typically require partnerships, the funds are allocated to Northern institutions. This positions the Northern academics, often unwillingly, in the position of 'donor' in relation to their collaborators. The final financial responsibility remains with them, and cannot be divided between the universities, as might be the case in a conventional research consortium, where each institution is directly accountable to the funder, and not to their collaborator. In such a situation, if the principal investigator who has the final responsibility delegates leadership to Southern universities in the name of good partnerships, the PI becomes detached from the detailed practice, but still has to be accountable towards the funder for the research conducted by the Southern partners (Barrett 2011: 40). In partnerships, academics from both sides are easily turned into full-time managers, who communicate about budgets, per diems, mileages, receipts and reports rather

than theoretical or methodological issues. Moreover, for an individual Northern academic, being perceived as the representative of the general category of ‘donor’ can create an unfamiliar feeling. For instance, at the beginning of her stay at the University of Dodoma, the first author was sometimes identified as a *Mzungu wa Ajali* (‘Ajali’s white person’), with the belief that she was in possession of significant amounts of money to be directly distributed to anyone she wishes.

In addition to struggling with the international institutional fields of academic research and development cooperation, partnerships have to deal with the societal environments in each country. The basic difference in development studies in the global North and South has traditionally been that the former has preoccupied with other nations, those labelled ‘underdeveloped’, or ‘developing’ countries, the latter has been mainly geared towards the development challenges of their own nations. Especially in Tanzania, development studies played an important role in post-independence nation-building (Komba et al. 2019). In the 1970s, the Institute of Development Studies in the University of Dar es Salaam was central in spreading the ideology of African socialism prevalent at that time, and functioned as an intellectual hub for the critique of imperialism and anti-colonial debates. A few courses of development studies were compulsory for every university student regardless of their academic programme.

One of the institutional differences when it comes to the role of universities is that Southern universities are more teaching oriented, which often jeopardizes the time allocated for research. Typically, academic staff members have heavy teaching loads, and significant time has to be allocated, for instance, for marking exams (Barrett et al. 2011: 36). Also in our experiences, the academic staff members were occupied with teaching a large number of courses, often with over 500 students, especially at the BA level. Though staff from Northern universities also tend to speak of ‘teaching loads’ that are too large, there is typically more

flexibility to include research activities in one's schedule, because research output is prioritized by Northern universities.

Other additional institutional features of Southern universities often cited are inadequate salaries and less secure employment (Hynie et al. 2014: 7). These lead to extensive searches for consulting opportunities in order to supplement salaries and make ends meet (Landau 2012: 561). This, in turn, can lead to a kind of internal brain drain (Ishengoma 2016a) where the most capable academics are busy with consultancies rather than involved in more profound research and in training new academics. When it comes to the security of employment, our experiences contradict these observations. For instance, at the University of Dodoma, most academics had permanent jobs from the very beginning, even before they held a master's degree. At the same time, most of their Northern colleagues had precarious short-term jobs and were frequently forced to openly compete for next level jobs, if available.

There are differences in perceiving the role of research and career paths. At the University of Dodoma, for instance, the overall logic was that research is conducted during one's PhD studies, and thereafter it might not be the priority. The few PhD holders are immediately placed in leadership positions, and thus have even less time and incentives for engaging in research. When the second author was employed as a postdoctoral researcher at the University of Jyväskylä, some of his Tanzanian colleagues wondered the following: 'What is "postdoctoral"? You have finished your PhD. Are you going to study again?'

A further institutional difference related to societal context is the extent to which academics spread their time across different social obligations. While this is obvious when it comes to meeting the different needs of an extended family, it also shows in the functions of the universities. In very practical terms, for instance, when a colleague dies, which unfortunately is a frequent event, the entire work of the university can cease for a few days. The clear

priority (no matter what kind of submission deadlines there would be) is to arrange for the collection of financial contributions, and for the event to show the final respects to the deceased. For example, the second author assumed leadership of the burial arrangement of a staff member who died when preparations for fieldwork were underway, and that hampered the thorough focus on the fieldwork phase at hand.

## **Conclusions**

In this article we asked what the typical manifestations of different levels of institutional learning in North–South partnerships are. In order to answer this question, we proposed a heuristic of levels of learning in order to understand diverse changes in North–South knowledge production practices, and further, focused on institutional learning. We showed how the learning in North–South partnerships takes place mainly on levels I and II. Learning I manifests in attempts to ‘do the things better’, to conduct more effective partnerships that take for granted the existing institutionalized roles of Northern scholars assuming the academic leadership, and focuses on capacity building of Southern universities in a framework for the best possible realization of Northern-based research agendas. This learning focuses on better transfer knowledge from North to South, and improvement of communication. Learning II, ‘doing better things’ manifests in the explicit acknowledgement of differences and pervasive power relations, and attempts to add a change in these within the criteria of good and effective collaboration. Guidelines for equal partnerships and increasing the engagement of Southern partners in agenda setting, analysis and publications in addition to the traditional data collection, are examples of such learning.

The heuristic of three levels of learning, potentially exercised by individuals, organizations or institutions, facilitates understanding of the complexities of the much discussed gap between ‘system’ and ‘practice’ in the North–South research collaborations (Bleck 2018; Ishegoma

2016a). According to the institutional perspective, the institutional norms, role and practices – the ‘system’ – are enacted and reconstructed in practical action of individuals and organizations. Therefore, much learning takes place in a way that strengthen the continuation of ‘business as usual’ within the historically evolved constellation of organizations, practices, funding systems and rules (Scott 2011). Level II ‘institutional learning’ requires both top-down and bottom-up initiatives in order to change these prevailing, taken-for-granted practices and preconceptions.

Additionally, we argued that when it comes to institutional learning, partnerships entail learning and change according to diverse criteria set by different institutional fields. Thus, our contribution to the understanding of ‘institutional learning’ (Carbonnier and Kontinen 2015) is to add institutional plurality (Mair et al. 2015), and coming to grips with it in our understanding of the concept. We showed how the learning in North–South partnerships does not only refer to changes in collaboration practices within the field of ‘development’, but also, and maybe even more importantly so, learning to navigate between the demands and pressures from the multiple institutional fields. It means negotiating between the criteria, opportunities and constraints posed by each institutional area: international research, as based on a certain ideal of scientific knowledge production and measured by academic publications; international development co-operation, with its orientation around the notions of development and capacity building; the societal environments, which include the main roles and tasks of universities, and available funding for them; and the role of social networks, with the consequent implications for resources and time available for research.

Navigating the different institutional fields often leaves the research collaboration in a frustrating situation where the partners have to struggle with multiple demands, and not perceive it as an ideal partnership according to any specific logic. In this situation, an easy choice would be either to give up any North–South research partnerships, or alternatively, to

continue conducting ‘business as usual’. However, as Melber (2019: 276) suggests, we should identify joint ‘counterhegemonic strategies’ in order to promote institutional learning and change in the power architecture of knowledge production. In these strategies, improvement and reformation should not be dismissed, as they might prove to provide pockets of counterhegemonic action. Accordingly, in our collaboration, we were not able to experiment with nor identify institutional learning III, a fundamental change in the current constellations of existing institutional fields relevant to partnerships. We, just as many other development scholars, have yet to learn how our collaborations can support the decolonization of knowledge production in the current situation where researchers from both the North and South are embedded within the prevailing Eurocentric system of knowledge production and funding structures. The struggle with ideas of ‘doing differently’ thus continues.

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