

From Transnational to Transcalar: Re-envisioning Advocacy in a Changing World

Written by Christopher L. Pallas and Elizabeth Bloodgood

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International advocacy has a long history, reaching back centuries to abolitionism and early women's rights movements (Drucker, 1981; Limoncelli, 2006; Miers, 1998). Yet as a subject of scholarly inquiry in international relations, international advocacy only began attracting significant scholarly attention in the 1990s. As the end of the Cold War freed policymakers from continually balancing East-West power, nongovernmental organizations (NGOs) found increasing success in lobbying for new global policies. NGOs fomented policy change at the World Bank, drove the creation of the World Commission on Dams, and persuaded states to sign the Ottawa Convention banning landmines (Anderson, 2000; Charnovitz, 1996; Davies, 2013; Fox & Brown, 1998).

Keck and Sikkink's (1998) *Activists beyond Borders: Advocacy Networks in International Politics* was a landmark effort to explain and theorize this new international phenomenon. They advanced what became known as the boomerang theory of transnational advocacy. According to the theory, transnational advocacy networks form when local activists are blocked (often by their local or national government) in their efforts to change local policies or practices and respond by reaching out to international NGOs for assistance. These international NGOs rally the support of foreign governments or international institutions, which apply pressure to the actors causing the blockage. Advocacy thus flows in a local-international-local pattern.

While Keck and Sikkink's theory had broad implications, scholars applying their work often used it in a narrow way, leading to a number of limitations and lacuna in the literature on transnational advocacy. First, most scholars focused on NGOs as the primary actors in international advocacy; thus, the study of transnational advocacy networks became the study of transnational networks of NGOs. Second, local activists initiating the boomerang were often assumed to be located in the low- and middle-income countries of the global South, while their international partners were assumed to be based in the high-income countries of the global North. The local-international-local pattern that Keck and Sikkink posited was thus reduced to a South-North-South pattern, in which transnational advocacy occurred as well-meaning Northern actors sought to aid oppressed or marginalized Southern populations, embedding a distinct power dynamic. Third, different definitions of transnational advocacy were used depending on whether the actors were from the global North or the global South. Northern NGOs were described as engaging in transnational advocacy when they addressed international policy issues or worked across borders, even if they undertook that advocacy alone, whereas Southern NGOs were described as engaging in transnational advocacy primarily when they engaged with international partners.

In 2017, a group of scholars convened to begin addressing these research challenges, assisted by funding from the International Studies Association. We acknowledged that the aforementioned limitations had empirical roots in the central role played by Northern NGOs in international politics in the 1990s and early 2000s. However, we also observed that these assumptions no longer reflected empirical realities and were actively hindering scholars' ability to recognize and explain a new wave of advocacy on international issues, much of it being led by Southern actors. The dialogue begun in 2017 culminated in the publication of *Beyond the Boomerang: From Transnational Advocacy Networks to Transcalar Advocacy in International Politics* in March 2022.

Drawing on research we conducted in places like Brazil, Mexico, and Vietnam, the volume offers two key

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observations about how advocacy has changed since the development of the boomerang theory (Pallas & Nguyen, 2018; Rodrigues, 2016; Starobin, 2018). First, structural changes at the global level have limited Northern NGOs' influence with policymakers and reduced their access to partners in the global South (Heiss & Chaudhry, 2018; Heiss & Kelley, 2017; Uhlin, 2016). For example, the increasing autonomy of national branches of international NGOs like Greenpeace Brazil and the rise of national organizations like the China Civil Change Action Network provide alternative partners and sources of policy expertise that resonate more with their national government (Henry & Sundstrom, 2022; Rodrigues, 2022). Increasingly authoritarian governments have also limited national organizations' access to foreign funding as a quiet means of closing civil society space without directly attacking constitutional rights to freedom of association or expression. Without support from abroad, many organizations must cease operation, as witnessed by the demise or relocation of groups in Egypt, Ethiopia, Russia, Cambodia, Hungary, and India, to name a few (Chaudhry & Heiss, 2022).

A trend of opening access to international organizations has accompanied the trend of closing civil society space at home. While some advocacy campaigns have been forced to operate at more local levels by the lack of international partners, other campaigns have found success at global levels by engaging with intergovernmental organizations such as the United Nations. For example, even traditionally closed organizations like the Asian Development Bank have developed formal institutional mechanisms to collaborate with civil society organizations and NGOs (Uhlin, 2022).

Reduced international NGO access to national organizations and governments has been accompanied by an additional structural effect. The development of South-South networks has limited Southern NGOs' need for Northern assistance. Previously, Northern NGOs served as coordinators of international networks and as subject matter experts, sharing information and expertise with Southern counterparts. They have also often claimed to be the primary representatives of Southern voices. South-South networks have replaced Northern NGOs in each of these roles. Networks like the Latin American Network for Fair, Democratic, and Sustainable Cities (RLCJDS) coordinate monitoring and advocacy (Appe, 2022). The Dhaka-based Southern Voice created a "digital knowledge hub" to compile research from Africa, Asia, and Latin America about the social and economic effects of COVID-19. Such networks also seek to articulate a Southern perspective in international conversations, sometimes specifically countering the language and approaches of Northern NGOs (Appe, 2022).

Second, the agency and identity of advocates has changed. Southern NGOs have improved their organizational capacity and are increasingly able to use local political systems to resist or modify the implementation of global policies in their countries (Pallas & Nguyen, 2022; Rodrigues, 2022). In so doing, they are often allied with a new cast of advocates, including government actors and businesses (Henry & Sundstrom, 2022; Starobin, 2022).

In Vietnam, for example, high-capacity local NGOs in the HIV/AIDS sector successfully used inside lobbying tactics to reform the policies of international donors and technical agencies funding HIV/AIDS work in Vietnam (Pallas & Nguyen, 2022). NGOs in Thailand have used a similar approach to lobby the Global Fund to Fight AIDS, Malaria, and Tuberculosis to continue its funding for work in that country (Pallas and Stewart, forthcoming). In Brazil, local NGOs using outside lobbying tactics succeeded into drawing international attention to the environmental impacts of the Brazilian oil industry without any Northern assistance; when foreign NGOs later joined the effort, they did so in a horizontal, peer role, rather than as senior partners (Rodrigues, 2022).

We also have witnessed an increase in the diversity of actors engaged in advocacy on international issues. From Mayan beekeepers to Buddhist monks to Maasai chiefs to crowdsourced platforms like Avaaz, nonstate actors take on a greater range of organizational forms, sizes, issues, and resources (Cloward, 2016; Hall, 2017; Starobin, 2018). While not all of these actors intend to be international advocates, they are affected by international politics and policies and so respond to them. In so doing, they shape the global dialogue around policies and their implementation across scales and locations in more complex fashions than imagined previously.

Based on these data, we determined that contemporary advocacy in international politics is better conceptualized as transcalar than as transnational. Transcalar advocacy describes efforts to change the policies or practices of other actors when those efforts transcend different levels or "scales" of action, such as the municipal, national, regional, or

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global. The term discards assumptions that local advocacy must cross national borders or enlist international partners to affect the content or application of global policy. It also discards the assumption that advocacy depends on NGOs as initiators or key partners.

As a result, the concept captures a much fuller picture of contemporary advocacy, involving a wider variety of initiating actors, partners, and targets. It also recognizes the wide variety of directions in which influence can flow, including North-South, South-North, and South-South. Mayan beekeepers partnering with local businesses to use the Mexican courts to target a multinational corporation are doing transcalar advocacy (Starobin, 2022). So too are Chinese NGOs partnering with their national government to affect global agreements on climate change (Henry & Sundstrom, 2022) and Masai chiefs working to complete the implementation global norms against female genital mutilation in Kenya (Cloward, 2022).

To explain how advocacy can take such diverse forms, we developed a new theory of activism that models campaign formation as a sequence of strategic decisions. In each campaign, activists need to make interdependent decisions about scale of operations, their target, the type of advocacy, and potential partners. In practice, organizations may not take a linear approach to these choices, but modeling the decisions as a sequence helps illustrate the ways decisions are contingent.

First, activists must select a scale of action, such as local, national, regional, or global, for their campaign. For example, activists working on climate change can choose to target municipal policies on local industrial emissions or the global standards countries set under the Paris Accord's Nationally Determined Contributions.

Next, activists must choose the targets of their advocacy, such as governments or private actors (e.g., businesses or even NGOs). For example, activists wanting to make vaccinations against COVID-19 more accessible could target the manufacturer Pfizer to push for discounted rates for poorer countries, the United Nation's COVAX program to adjust distribution plans to prioritize countries with the least access to vaccines or the government of Canada to provide more funding for vaccines to COVAX. Some of these targets, however, may be more or less accessible, depending on the scale of action the activists have chosen.

Activists also need to decide if they wish to work within existing institutions for change, via inside advocacy, or protest from outside of the system for more dramatic change. Inside strategies often go unnoticed by the general public, while outside strategies, like the trucker convoy protests in Ottawa against mask and vaccine mandates, can attract significant media attention. Activists may also leverage some institutional actors against others using the court system, for instance, to force a change in the policies or behavior of other state actors.

Finally, activists also need to decide if they want to work alone or with partners and, if they want partners, which partners to choose and how to collaborate with them. While we observe the growth of public-private partnerships such as the Forest Stewardship Council (Henry & Sundstrom, 2022) and of regional networks like the Latin American Network for Fair, Democratic and Sustainable Cities (Appe, 2022), increasingly activist groups also work independently, only seeming to collaborate inadvertently because they share similar targets or goals.

Based on these empirically grounded observations about the changing nature of global architecture and nonstate agency, we developed several predictions for likely future activism and advocacy campaigns. First, Southern-based and Southern-directed advocacy will increase as more states arrive at middle-income status. Middle-income states are more likely to have high-capacity advocacy organizations staffed by well-educated professionals who choose advocacy work out of a sense of passion or calling rather than in response to a scarcity of formal-sector jobs. Moreover, restrictive state environments for NGOs, like in Vietnam or China, can accelerate the development of such highly capable NGOs by concentrating resources in a smaller number of organizations.

Second, we expect activists to choose partners designed to enhance the appeal of their message to the key audiences at the scale they have chosen. Thus, Chinese climate change activists lobbying on global policy choose to partner with the Chinese government (Henry & Sundstrom, 2022), whereas activists in Rio de Janeiro, seeking to challenge the national oil company Petrobras' pollution of the Baia de Guanabara, partnered with national

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environmental NGOs, labor unions, and professional associations located in Brazil (Rodrigues, 2022). The result will be campaigns that look very different from the expectation of the boomerang model that the primary partners of local activists will be large international NGOs. Advances in global communication will also make it easier for activists to find partners with similar strategies and outlooks, limiting the need for compromise and negotiation. Thus, we also expect to see less marketing and reframing of local causes on the part of activists seeking to attract international partners to their causes (c.f. Bob, 2005).

Third, the reduction in access to national NGOs will encourage international NGOs to engage in more footloose campaigns lacking a clear national basis. The forerunner of such efforts is The International Campaign to Abolition Nuclear Weapons, which never gained much traction in the two countries where the campaign was initiated, the United States and the United Kingdom, yet scored a major international victory in 1996 when the International Court of Justice determined that the use of, or threat of use of, nuclear weapons was illegal.

We predict that the empirical data on transcalar advocacy will continue to accumulate, as new coalitions of activists lobby local and international policymakers or enlist national and subnational government agencies as partners in their advocacy activities. The boomerang pattern of advocacy may continue to persist in certain instances, but will increasingly give way to more locally informed and locally managed efforts to shape the content, implementation, or impact of global policies and pressures: a new era of transcalar activism.

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