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Rewiring the Evaluation Marketplace for a Changing World

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Background: Three experienced professionals with backgrounds in evaluation, strategy and development economics critique the market forces influencing the evolution of the development evaluation field.

Purpose: Reconfiguring the evaluation marketplace would help the field respond to the current realities of global development and position evaluation to be more dynamic, innovative, and influential.

Setting: Not applicable.

Intervention: Not applicable.

Research Design: Not applicable.

Data Collection and Analysis: Not applicable.

Findings: The authors propose six actions to reconfigure and rewire the evaluation marketplace to respond to polycrisis and act more influentially.

Keywords: *development evaluation, evaluation market.*

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> Evaluation and evaluators cannot and should not be neutral bystanders in public policy and philanthropy, especially in this existential moment that defines our responsibility as individuals, citizens, and professionals to stand up, speak up and show up.
>
> —Thomas Schwandt, 2019a

A Defining Moment

We are writing at a moment of fundamental rupture in the global order and deep turbulence in international cooperation. With new wars, the weakening of long-standing development institutions, and growing disregard for democratic global agreements and the rule of law, it is critical to pause and understand the implications of this moment for global development and for how our field of evaluation must change.

What the emerging global order and international cooperation will look like remains unclear. For many, particularly in Global Majority regions, this rupture is a necessary "wake-up call" and a real opportunity to reimagine development around local ownership and self-reliance. We may experience Amitav Acharya's (2018) "multiplex" order, in which "re-globalization" is led by Asia and Global Majority nations who increasingly deploy non-alignment to get what they want [1] or Anne-Marie Slaughter's (2004) view of "middle power," where new coalitions of the willing create new multilateral arrangements.

What is clear is that things will never be the same. We posit that if the evaluation marketplace were reconfigured to respond to the current realities of global development it could drive innovation and position evaluation to be more dynamic, innovative, and influential.

In "The Old Aid Model is Dead. Now Comes the Fight for What Replaces It.," Raj Kumar paints a picture of major shifts away from official development assistance (ODA) to more investment-focused models:

> As we move from an aid model to an investment model, this new era will be shaped more by development finance institutions, multilateral development banks, private capital, and philanthropy.
>
> For what remains of more traditional bilateral aid, we can expect a much stronger focus on new operating models that concentrate on cost-effectiveness and creating benefits for donor countries. This means a system less focused on contracts and grants and more on private-sector engagement, investing in the government systems of allied nations, and supporting public-private coalitions and social enterprises. (2026, para. 19–20)

The shift toward an investment model raises deeper questions. Development framed primarily through the lens of private capital risks prioritizing financial returns over human outcomes, potentially reinforcing existing inequalities and patterns of extraction. Evaluation must be prepared to interrogate not only efficiency and effectiveness but also whose interests are being served and at what cost.

So too the landscape of development and evaluation will need to reflect new non-OECD countries such as the Gulf States and China that are rapidly growing their development assistance in a manner tightly tied with their increasingly robust foreign policy and private-sector ambitions.

This issue of *JMDE* asks how evaluation should respond to the transformational imperative to contribute to the radical changes essential for a regenerative, socially just, and equitable future for humanity and the planet. This is not a question for evaluators alone. It is a question for all those involved in the business of development, philanthropy, and public policy. If evaluation is to matter, it must shape how decisions are made, how resources are allocated, and how power is exercised.

Our view is that evaluation in its current form is not fit for this task. Without fundamental change it risks becoming irrelevant in a rapidly transforming global development system.

Drawing on our experience across international development, development economics, and philanthropy, and our current work in rethinking development and evaluation, we examine the emerging contours of a reconfigured global development system and ask how the evaluation marketplace must evolve to remain influential and relevant.

We focus on the evaluation marketplace because it remains an overlooked part of evaluation infrastructure and underexamined relative to methods and theory, yet it powerfully shapes both. The evaluation marketplace can either hold our field back or stimulate innovation to respond to the

[1] Instead of conventional measures like economic or military power, "interaction capacity" among states, or the relative ability of nations to exercise leadership and organize cooperation are the key world order measures.

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polycrisis and a reconfigured global development agenda. Other lenses, such as methodological innovation or epistemic justice, are also important, but here we prioritize market dynamics as a foundational driver of incentives, behavior, and change.

Our intent in this article is not to diminish the good work and achievements in our field so well documented by Stern and others in *Evaluation*'s 20th anniversary reflections (Stern et al., 2015) but to stimulate a deeper understanding of the role the evaluation marketplace could play in the action that is urgently needed of us now.

How Did We Miss the Calls for Change?

In hindsight, there have been signals for decades that disruptive change in global development cooperation and evaluation was inevitable and necessary.

We focus here on selected historical signals that, in our view, were particularly salient but insufficiently acted upon. Other important strands of critique—especially from feminist, decolonial, and Global South perspectives—have also shaped this discourse but are not explored in depth here.

As Raj Kumar (2026) highlights, "Even before recent shocks, the traditional aid model was too disconnected from results, too slow, too fragmented, and too reliant on a narrow set of partners that often circumvented governments and papered over the need for tough reforms (para. 14). While some organizations (like UnlockAid.org) and legislators proposed reforms long before the current 2025–26 rupture, overall, the global development system failed to reform outdated development policies, institutions, and systems that were, for the most part, artifacts of postcolonial WWII institutions that reinforced dependencies and were woefully inadequate in shifting power, resources, and capacity to those whose lives and futures depend on it. Similarly, many in our evaluation field felt that evaluation had fallen far short of its potential to drive transformative change to address the polycrisis. The current geopolitical rupture and ensuing upheaval deepen our concern for the relevance and survival of evaluation in its current form.

In the days following the disbanding of USAID in 2025 we looked to our professional evaluation associations and leaders to respond with urgency and evidence on the consequences to the lives of millions of people. Evaluators' careers are built on collecting and synthesizing evidence, yet our professional associations struggled to respond. Instead it was journalists Nicholas Kristof and James Robinson (2025) of the New York Times who quickly (within 48 hours) put together "good enough" data from African countries to demonstrate the human cost. This raises a striking question. Why did our field, built on evidence, fail to respond quickly?

Our point is that to remain relevant in a reconfigured global development system, evaluators cannot be bystanders. We must understand political dynamics, anticipate change, and develop the capabilities to respond in real time. To echo Tom Schwandt (2019b), to even hope to be relevant to the new configurations of international cooperation and new players, evaluation and evaluators must not be bystanders. We must stand up, speak up, and advocate for what we know.

There Is No More Critical Time Than Now to Reshape Evaluation and Its Marketplace

How should we start? By heeding the wise advice of our past visionary leaders

Even though they may not have imagined the current geopolitical upheaval of today, many visionary evaluation leaders tried for decades to tell us that change was critical, underscoring the need to engage politically to ensure that our evaluative knowledge and evidence influence decisions, strategies, and actions. As far back as 1969, Guba noted that most evaluations fail to understand or address decision-making processes. And 40 years later Chelimsky, in her 2008 American Evaluation Association presidential plenary address, argued:

> ... evaluators practicing in the public domain can never escape the world of politics, first, because it's precisely that world that gives our work legitimacy, authority, and the potential for real consequence, and second, because governmental structures that trigger the need for evaluation in the first place also trigger the political maelstrom in which evaluative independence is so often tested. (p.401)

In his 2001 work on rethinking, reshaping and reforming evaluation, Sulley Gariba (Abrahams et al., 2024), like Chelimsky, urged us to see evaluation as an inherently political endeavor, requiring evaluators to be politically astute in positioning their perspectives, influencing agendas by communicating and acting in a compelling, politically savvy manner.

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More recently and perhaps most poignantly, Tom Schwandt's [2] "Post-Normal Evaluation?" (2019a) captures the essence of change needed. Not only does he reinforce the political nature of evaluation and the need to be politically savvy; he reminds us that in these chaotic and "post-normal" times evaluation needs more than a technical fix but a revised ethics and moral compass that guides both competent evaluators and competent citizens alike. In essence, he argues for a more ethically robust evaluation practice to guide decision-making in a world where traditional, evidence-focused methods are insufficient.

As a field, we largely missed or ignored the warnings of Chelimsky, Gariba, Schwandt, and others, and for the most part remained on the margins of strategy, management, and politics. This was not for lack of insight as these warnings were articulated clearly from within our field and from without. The failure was one of attention, incentives, power, and some would say courage. As a field we did not sufficiently listen, adapt, and act, and this has diminished both our influence and our ability to respond to the moment.

What Role Could the Evaluation Marketplace Play in Responding to Change?

As noted by the authors of a rare study of the US evaluation market, our field pays a lot of attention to ideas, theories, and methodologies, but little attention to the market conditions and drivers that incentivize key components of our evaluation practice (Lemire et al., 2018). The interplay between theory and practice and with evaluation market dynamics has been largely unexplored. By not awarding sufficient attention to the ways in which the scope, design, methodology, and deliverables of evaluations are shaped by the push and pull of market actors, commissioners, and providers, we fail to appreciate the fundamental conditions for the development of evaluation theory and practice, as well as respond to and anticipate changes in market demands and needs. Accordingly, examining the evaluation marketplace is called for (Lemire et al., 2018).

We could not find similar in-depth quantitative analyses of the international evaluation market. However, the International Evaluation Academy has recently identified market dynamics for further exploration in their recent forward-looking Three Horizons study (Ofir, 2025).

What follows is our understanding of market composition, dynamics, and challenges based on our experience, our wide reading of the current geopolitical context for evaluation, and our participation in virtual and in-person forums on rethinking global development and measurement/monitoring, evaluation, and learning (MEL) practice.

Understanding the International Evaluation Marketplace

Evaluation, like other sectors, operates in a marketplace of professional services, with profit-seeking suppliers, demand-side clients, and market dynamics that can either accelerate the market toward the future by stimulating and incentivizing innovation and change or hold the field back from advancing, risking obsolescence. Supply-side evaluation service providers—individual consultants, firms, NGOs, and universities—gear their business models, services, and pipeline capacity building to meet the demands of the largest buyers in the market. The largest clients in the international evaluation market are multilateral institutions, UN agencies, World Bank group and government-related institutions, and, to a lesser extent international organizations and private foundations (with the global US-based Gates Foundation funding a disproportionate share of philanthropy-driven evaluations [Kinarsky, 2018]).

As in other markets, those with the largest market share shape the demand and shape the pipeline of future service providers. Multilateral institutions, UN agencies, the World Bank group, and government-related institutions primarily commission independent program evaluations to account for results, document what worked and what did not, and recommend program improvements. Guided by an agreed set of criteria (e.g., OECD-UNEG Evaluation criteria [3]), suppliers of evaluation services and pipeline training

[2] It is with great sadness that we acknowledge the passing of Thomas Schwandt in January 2026—a huge loss to our field, especially now in difficult times. We need him now more than ever.

[3] The 2016 OECD DAC Evaluation Criteria (relevance, coherence, effectiveness, efficiency, impact, sustainability) are the global standard for evaluating development interventions. Adopted by the United Nations Evaluation Group (UNEG), these six criteria provide a normative framework to assess the merit, worth, and value of projects and policies, ensuring accountability and learning across international

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initiatives then align their MEL services and training to meet market requirements.

It is noteworthy that during the consultations on revisions to the OECD DAC evaluation criteria during the period 2017–2019 there was strenuous pushback on the criteria from a decolonization perspective (e.g., criteria seen as too Eurocentric [van der Puije & Satzinger, 2025]) and many appeals to move away from the mechanistic application toward approaches that embrace complexity and uncertainty and stimulate innovation. However, in the end, there were few substantive changes to the criteria; instead, better definitions and instructions were introduced on how to apply them less mechanistically. In retrospect we see this as a lost opportunity to stimulate a more relevant and dynamic evaluation marketplace that could drive innovation and change; perhaps not surprising, given there was little demand from within the large agencies themselves. Accountability to the funders and donors continues to be the biggest driver of funded evaluation practice.

This is the central dilemma. Most demand in the international market for evaluation (UN, MDBs, governments) remains focused on accountability-driven program evaluation for governance rather than innovation and future-facing learning. There are, of course, exceptions, but not enough to shift our field overall. As a result both supply and demand continue to align with what is required, not what is needed. This is not simply a technical imbalance. It is a reflection of power. Those who commission evaluation define the terms of inquiry, the boundaries of acceptable methods, and the uses of evidence. Until these dynamics shift, innovation will remain peripheral.

Although some interesting innovation has happened within some large agencies (e.g., UNICEF, GEF, and UNDP), it has often taken place outside independent evaluation functions. Most evaluation pipeline training efforts across both the Global North and Global Majority regions (such as the International Program for Development Evaluation Training (IPDET), the CLEAR Centres, and The Evaluation Institute) understandably focus on what most market players require. This leaves little incentive for innovation, adaptation, challenging convention, and evolving our field.

Although philanthropy, NGOs, civil society, social enterprise, and private-sector innovators are a relatively small part of the evaluation market, they have played—and continue to play—an outsized role in innovating and demonstrating new ways of responding to a changing world, the polycrisis, and complex geopolitical dynamics. They have sparked a modest but important expansion of MEL services and skills beyond program accountability, including innovations focused on voice, power, social movements, networks, system change, real-time monitoring and feedback, storytelling and narrative, organizational performance, and tech-enabled MEL.

These market players have succeeded in driving stronger learning and stakeholder feedback loops, and more recently some are integrating foresight capacities alongside their impact and strategy functions. In part, they have been able to do this because they operate as integrated models where evaluation works alongside program and strategy, often with greater flexibility to fund innovation and respond to change beyond projects and program results. They are also not obliged to use the OECD-DAC criteria, although some choose to or adapt the framing.

The most recent segment of the MEL market comprises social enterprises and impact investors—a field that focuses on both market-based financial returns and social returns. They too have driven innovation in what works for market-based funders with the initiation of impact measurement and management (IMM) and the use of real-time monitoring and sensor-feedback technology.

What Holds the Evaluation Field Back from Innovating Like Other Markets?

Compared to most sectors—where both supply- and demand-side actors invest systematically in innovation and research and development (R&D) because their future depends on it—the evaluation field exhibits a striking absence of sustained, market-wide investment in innovation. Efforts tend to be episodic, grant-funded, and peripheral rather than embedded in core business models.

This raises fundamental questions: Why are incentives for innovation so weak? And why has the evaluation market not evolved in step with the broader transformations shaping development, technology, and public policy?

Economic theory helps clarify why some markets innovate more than others by examining how incentives are shaped by market structure. Joseph Schumpeter (1942) argued that large, dominant firms can drive innovation because they

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have the resources to invest in research and development, and because competition threatens to displace them through "creative destruction." However, later work shifts the emphasis from firm size to the nature of competition itself. Philippe Aghion and colleagues (2005) argued that the relationship between competition and innovation is not straightforward: When competition is too weak, firms become complacent and have little incentive to innovate; when it is too intense, profits are squeezed, reducing the returns to innovation. Innovation is highest at moderate levels of competition, where firms are under pressure to improve but still expect to benefit from doing so.

Building on this, Jonathan Baker (2007) emphasizes the importance of contestability—that is, whether new firms can realistically enter the market and challenge incumbents. Even if a market appears competitive, innovation will suffer if dominant players can block entry, shape rules in their favor, or lock in their position. In such settings, incumbents face little real threat and have fewer incentives to innovate.

Taken together, these insights suggest that innovation flourishes not simply where there are many firms, but where markets are open, dynamic, and contestable. By contrast, markets with concentrated demand, high barriers to entry, and weak or distorted price signals—where buyers do not reward better or more innovative solutions—tend to underinvest in innovation because neither incumbents nor new entrants have strong incentives to take risks or develop new approaches.

The evaluation field exhibits many of these less favorable characteristics. Applying these insights reveals a set of structural constraints—on both the demand and supply sides—that dampen incentives to innovate and limit the emergence of new approaches.

We do not, in this paper, explore in detail how these market dynamics interact with specific sectors (such as health, climate, or education), nor how they play out in different regional contexts. These are important areas for further inquiry, particularly as evaluation demand becomes more diversified and locally driven.

Static Market: Accountability-Driven Demand

At its core, the evaluation market is shaped by demand driven more by compliance and accountability than by learning and adaptation. While accountability is essential, its dominance tends to narrow the purpose of evaluation to verification rather than insight. This creates a system that prioritizes predictability over broader learning and discourages innovation. Governments, bilateral agencies, multilateral institutions, and philanthropy (to some extent) commission evaluations largely to meet accountability and reporting requirements. While these functions are essential, their dominance creates a narrow conception of value, where the primary objective is to verify performance rather than generate insight or inform adaptive decision-making and strategy.

This orientation introduces several distortions, as terms of reference (ToRs) often prescribe methods and frameworks—such as logframes and logic models and use of the OECD DAC criteria—and expected outputs in advance, leaving little room for methodological experimentation, innovation, and emergence. Risk aversion is pervasive, as commissioners face reputational, political, and time pressures that discourage deviation from established approaches. Short-term contracting cycles further reinforce these tendencies, limiting incentives for both commissioners and evaluators to invest in long-term capability development or innovation. Procurement and accreditation systems, meanwhile, generate weak price signals for innovation, as they rarely reward creativity and adaptive design beyond minimum compliance thresholds.

From an economic perspective, this reflects a principal–agent problem under conditions of asymmetric information—which means that funders prioritize what is observable and defensible, while evaluators respond by minimizing risk. The result is a system that systematically favors predictability over learning and discourages meaningful innovation.

Philanthropic actors have attempted to counterbalance this dynamic by supporting innovative approaches to MEL, participatory and adaptive designs, technology-enabled approaches, and real-time learning. While some have proven to be excellent, most remain fragmented and relatively small in scale, and have not yet shifted the dominant demand paradigm.

In the absence of a fundamental shift—from accountability-driven compliance to adaptive learning and decision support—innovation in the evaluation market has remained at the margins.

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Fragmented Ecosystems

The evaluation field operates less as a unified industry than as a fragmented "evaluation marketplace" (Nielsen et al., 2018), spanning development, public policy, impact investing, and ESG (environment, social, and governance) criteria. Each of these segments is governed by distinct norms, incentives, and professional networks, shaping how evaluation is conceptualized and practiced.

These divisions are reflected in the institutional architecture of the field. Traditional evaluators tend to cluster around professional associations such as the American Evaluation Association, European Evaluation Society, Africa Evaluation Association, and others where the focus remains largely on evaluation within the public sector, including governments, the UN, and multilateral agencies. In contrast, actors in impact investing and social enterprise operate within parallel ecosystems, engaging through platforms such as the Global Impact Investing Network (GIIN), SOCAP, Social Value International, and the Donor Committee for Enterprise Development, often using distinct measurement frameworks such as the Operating Principles for Impact Management and IRIS+. Cross-participation across these segments remains limited.

This fragmentation constrains the cross-fertilization of ideas and limits the emergence of hybrid approaches. Methods and tools are often duplicated across parallel systems, while innovations in one domain struggle to diffuse into others. As a result, ideas, talent, and capital do not circulate freely across the field.

From a market systems perspective, this reflects both high transaction costs and weak network externalities. Innovation tends to flourish in environments where recombination is possible—where ideas, capabilities, and technologies can be combined in new ways (Arthur, 2009). Since technologies co-evolve with their economic and institutional contexts, innovation depends not only on invention but also on the broader ecosystem that enables such recombination. By contrast, the evaluation field remains characterized by institutional silos that inhibit these dynamics.

A more integrated marketplace—one that more deliberately connects public, private, and social sector evaluation ecosystems—could significantly accelerate innovation. By enabling greater interaction and exchange, such integration would allow for the recombination of ideas, methods, and approaches, thereby fostering a more dynamic and responsive evaluation field.

Tied Aid and Concentrated Demand Power

The evaluation market has operated for decades in the shadow of tied aid and highly concentrated purchasing power, shaping both demand and supply. On the demand side, tied aid restricts procurement by favoring firms from donor countries, limiting competition, and reinforcing path dependency as large agencies repeatedly contract the same providers. At the same time, domestic demand for evaluation services in Global Majority regions remains underdeveloped, as local institutions often lack resources, capacity, and autonomy to commission evaluations independently.

These dynamics are mirrored on the supply side. Barriers to entry are high, limiting participation by smaller and local firms. With limited competitive pressure, incumbent firms face weak incentives to innovate, and capabilities tend to remain aligned with donor preferences rather than evolving in response to diverse contexts.

Despite sustained efforts to eliminate tied aid, it has persisted over decades (Ganga, 2024). With the rise of nationalist economic agendas such as America First and similar trends in Europe, tied aid is more likely to evolve than disappear—becoming less rules-based but potentially more closely aligned with national and private-sector interests, with effects that may endure or intensify. Global commitments such as the Grand Bargain and the Charter for Change have aimed to promote untying and localization of resources and capacity, but progress has been slow and uneven (Alexander, 2023).

Although philanthropies are not formally bound by tied aid, their funding practices have often produced similar effects through centralized control. Emerging evidence—including a localization study supported by the IKEA Foundation (Nwankwo et al., 2025)—suggests that some foundations are beginning to support more locally led approaches. If sustained, these shifts could help reshape both funding and evaluation ecosystems.

At present, however, the system continues to resemble a quasi-monopsonistic market, in which a small number of dominant buyers shape both demand and supply—limiting competition and constraining innovation.

Efforts to rebalance power within the evaluation field—particularly by strengthening Global Majority evaluation associations and expanding the role of local evaluators—have long been recognized, but remain constrained by the dominance of large development institutions. Even

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so, a small but growing demand from Global Majority governments and newer philanthropic actors to procure evaluation services locally signals incremental change. If scaled, these trends toward localization, decolonization, diversified demand, and greater funding flexibility could begin to reshape market dynamics more fundamentally.

Barriers to Entry and Limited Contestability

In most sectors, innovation is driven by new entrants that challenge incumbents and disrupt established practices. In the evaluation field, however, persistently high barriers to entry limit such competitive pressures. Reputational thresholds—especially prior experience with major donors—create a circular dynamic where new actors struggle to win contracts without prior experience, while contracts go to those already established.

Further complicating entry is the inherently cross-disciplinary nature of evaluation. Effective evaluation often requires expertise across multiple disciplines and multiple domains, including health, climate, governance, and economics. For new or smaller organizations, assembling such a broad and credible range of capabilities can be both difficult and resource intensive.

These constraints are reinforced by compliance-heavy procurement and accreditation systems that favor larger firms, as well as the dominance of standard frameworks (notably those aligned with OECD DAC criteria), which can discourage methodological diversity and experimentation. As a result, many potentially innovative actors—including smaller local firms with deep knowledge of context, tech-enabled firms, participatory research groups, and AI-driven providers—remain at the margins, with limited influence on mainstream practice. Without deliberate efforts to lower barriers to entry and increase the contestability of the market, innovation in evaluation is likely to remain peripheral, incremental, and fragmented, rather than becoming a central driver of transformation within the sector.

Weak Market Intelligence

The evaluation field lacks robust systems for market intelligence and strategic foresight, although the latter has gained prominence in recent years in some foundations and governments. There is little systematic tracking of trends, risks, or emerging opportunities, and existing efforts tend to focus on internal practices rather than external evolution.

Limited investment in R&D and horizon scanning constrains the field's ability to anticipate and respond to major shifts, including artificial intelligence, big data, and climate risks. As a result, the market operates in a reactive mode, often delayed in adapting to change rather than shaping it. Strengthening market intelligence could enable more coordinated investment and better alignment between future demand and emerging capabilities.

Limited Market Maturity Without Transformation

There is growing evidence that the evaluation market—particularly in high-income countries (US and Europe)—is entering a mature or plateau phase, with slowing growth in spending and demand (Lemire et al., 2018). This is particularly true in the wake of the disbanding of USAID. This also reflects broader patterns identified in analyses of the evaluation marketplace by Nielsen, Lemire, and Christie (2018).

Future trajectories remain uncertain amidst geopolitical turmoil. For the US market, Nielsen and Lemire (2026) outline scenarios ranging from transformation driven by new technologies and new actors to stagnation in a fragmented system to uneven and partial change. As Christensen (1997) suggests, mature markets often require disruptive innovation or structural shifts to renew themselves. Without such shifts, there is a real risk of stagnation.

Global Majority evaluation markets remain underutilized and underdeveloped for reasons discussed in this article—however, with a shift to more bilateral development assistance and local delivery, Global Majority evaluation markets could grow and diversify to meet a newly configured global development business model.

Toward a More Innovative Evaluation Market

The constraints on innovation in evaluation are deeply structural. On the demand side, compliance-driven procurement, risk aversion, and concentrated purchasing power weaken incentives for innovation. On the supply side, high entry barriers, fragmented ecosystems, and capability lock-in limit dynamism.

Addressing these constraints will require coordinated shifts. Demand must be reframed toward learning, innovation, adaptation, and decision-support. Procurement and accreditation systems need to become more open and flexible,

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allowing space for new entrants and diverse approaches. Localization efforts can help rebalance power and stimulate new forms of demand. At the same time, greater integration across ecosystems can enable the recombination of ideas that drives innovation.

Strengthening market intelligence and investing in R&D will be critical to ensuring that the field can anticipate and respond to emerging trends. Intermediaries that connect demand and supply in new ways (new local players, new geographies, spanning private, public and NGO sectors) may also play an important role in reducing transaction costs and enabling innovation.

Ultimately, fostering innovation in evaluation will require a transition from a donor- dominated, compliance-driven market to an empowered, learning-oriented one—where both buyers and suppliers have aligned incentives to experiment, invest, and evolve in response to a rapidly changing world. Implicit in the empowerment dimension is shifting power and resources closer to the local contexts in which change happens.

What the Evaluation Market Will Need Going Forward Will Not Be the Same as the Past

The emerging development finance landscape is likely to look very different in the near future. We must anticipate those changes and reconfigure evaluation services, actors, approaches, and new ways of collaborating to respond to a much-changed development finance landscape.

Kumar (2026) suggests we will need to respond to:

- **New and evolving dimensions of development**, including more private-sector engagement, stronger roles for government, public-private coalitions, social enterprises, and hybrid forms of cooperation between governments and private agencies, corporations, foundations, and NGOs. This also includes investing in the government systems of allied nations, supporting public-private coalitions and social enterprises, and a stronger focus on cost effectiveness and benefits for donor countries.
- **New players beyond OECD (**Organisation for Economic Co-operation and Development) donor countries, including China, Gulf States, and more corporate and private capital investors
- **Less delivery via international nongovernmental organizations (INGOs), and more via national and local governments and private sector** (who may then hire local NGOs)
- **New roles for intermediaries / INGOs**, shifting from implementors to resource mobilizers for local actors, ecosystem builders, and enablers.

The Short Game and the Long Game

In the world of politics there is always a short game and a long game. The short game now for our field is to quickly adapt to the new geopolitical reality while making some long overdue changes in the architecture and power dynamics of global development and evaluation that will take us to the long game once the current disruptions have faded.

Evaluation as a profession and a marketplace now needs to reimagine new partnerships and alliances and evolve strategic capabilities to respond to this new configuration of global development. While we certainly do not have all the answers, we are confident that this is the direction that evaluation must go now if it is to survive and thrive. The question is no longer whether evaluation must change but whether it can change fast enough. The risk is not incremental irrelevance but structural obsolescence.

What follows is not a comprehensive solution but illustrative propositions that suggest a direction of travel. These ideas have emerged from recent platform discussions, past advice from our peers, current literature, and our own insights. We offer them here in the hope that they spark further discussion, debate, experimentation, and actions that evolve our field:

Proposition 1: Develop a More Politically Astute and Influential Presence by Repositioning Evaluation

Can we learn from past advice to reposition evaluation and evaluators to be more influential in responding to a much-changed global development landscape?

This is not a new issue. As Chelimsky (2008) said, evaluation is political… it always has been. Yet for decades, MEL expertise was promoted largely as mastering technical skills, methods, and techniques necessary to deliver high-quality MEL products. While still essential, these are not sufficient to equip teams and leaders to effectively navigate power and political decision-making systems, or to

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build relationships with political leaders and understand the political issues and forces at play, especially now. The ability to "read the room," engage, have a point of view, and communicate and influence in a strategic, politically savvy way to advocate for what the evidence tells us are essential must-have skills.

Can we build into recruitment and professional training the experience, skills, and confidence to diagnose, leverage, and influence power—including communicating, advocating (even lobbying) to shift mindsets and influence those with the power to make decisions?

Can we persuade more foundations and NGOs to reposition their impact functions to be an integral part of strategy, foresight, and management?

Could we engage and influence philanthropy leaders through their networks (e.g., Philea, CEP, WINGS, etc.) to follow the lead of some in reshaping and repositioning their evaluation functions to be an integral part of strategy, foresight, and management?

Could we challenge multilaterals to consider a similar shift and support those in their system who are advocating for change? This may be politically difficult now amidst the current turmoil, but it is worth considering. At a minimum, we need to encourage them to build the strategic communication capacities of their evaluation teams and leaders.

There is no perfect solution, especially now.

Proposition 2: Build a More Integrated and Diverse Market

Can we better integrate private sector, social enterprise, and impact investing evaluation into the broader evaluation marketplace to create more synergies and dynamism to meet the priorities of a reconfigured development system?

If, for the foreseeable future, global development is dominated by an investment model shaped more by development finance institutions, multilateral development banks, private capital and philanthropy, and more partners from non-OECD countries, then the evaluation community will need to reshape the membership and configuration of professional evaluation networks, associations, and platforms to respond with new partnerships, new services, and new approaches.

Can we diversify membership beyond traditional evaluation players to include new alliances between market-based evaluation experts, impact investors, blended capital, and development evaluation specialists? Can we introduce new functions and skills such as foresight, AI, and predictive analytics?

Here it may be worthwhile to revisit an early effort funded by The Rockefeller Foundation to bring together the development evaluation community with the impact investing and blended finance community. The convening "Convergence" (https://impactconvergence.org/) was hosted by AEA in 2016 to bring private capital players together with the development evaluation community. Up to that point—and perhaps still—these worlds interacted very little even though they share common impact aspirations.

Proposition 3: Create New Geographic Alliances and Partners

Can we reconfigure our global evaluation architecture to reflect new players and geographies in a reconfigured global development system beyond OECD, the UN, the World Bank, and other multilaterals?

Our current evaluation networks and forums largely reflect the agendas of UN agencies and multilateral institutions, the World Bank, and government. With the rise of new development investment partners from non-OECD countries, including China and Gulf States, the configuration and membership of our evaluation architecture needs to change if it is to remain relevant in a changing global order.

Could a reconfiguration of demand-side commissioners help break the dominance of large players in the current market, fostering more innovation, more diversity of players, and more innovative forward-looking solutions to better respond to the polycrises and the emerging shape of global development?

New global players such as WINGS, the Global Philanthropy Forum, and others are already leading in forming new alliances with emerging evaluation players from Asia and the Gulf countries, including the Arab Philanthropy Forum, Asia Venture Philanthropy Network (AVPN), China, and new players from emerging economies.

Proposition 4: Strengthen Regional and Local Evaluation Markets

Can we strengthen the evaluation ecosystem in emerging economies and Global Majority regions to grow small and medium-sized evaluation firms to support new bilateral and private-sector agreements that will be delivered locally?

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The IKEA Foundation study on localization (Nwankwo et al., 2025) highlights the need to strengthen the ecosystem infrastructure so that local efforts can survive, grow and scale, and eventually replace many INGO structures that continue to act as barriers for the growth of local firms and organizations. This is also true of the evaluation market. Small firms generally do not have the supportive ecosystem to grow and scale their services to compete with larger firms, INGOs, or management consulting firms that have historically held the advantage in the past.

Can we influence global procurement and accreditation practices to overcome barriers to entry for local and regional firms, and in a way that drives more diversity of approaches and Global Majority capacity, ownership, and innovation?

Global management consulting firms are already positioning themselves to play a role in the new reconfiguration of development with private sector and governments as strategy advisors, in monitoring and evaluation, and in supporting executives. It will be important to engage them early as partners so that they do not dominate regional evaluation markets. The evaluation field brings important skills and capacities that management firms do not have, and vice versa; they have important strategy skills that evaluation needs. If well pitched, mutually beneficial alliances should be possible.

Proposition 5: Explore and Promote Mergers, Coalitions, and New Combinations of Players and Skills

Can we explore new ways—formal, informal, short and long term—of creating different combinations of expertise, skills, and partners well beyond the conventional?

The supply side of the US evaluation market is shrinking dramatically after the disbanding of USAID and decreasing purchasing by US philanthropy. Many firms that relied heavily on USAID contracts have closed, are severely downsizing their services, or are looking at mergers with other organizations or firms. Similarly, with declining bilateral ODA budgets in European countries, international evaluation funds are likely to be reduced.

This could force greater synergies, new collaborations, and mergers among service providers leading to a reconfigured market and set of service offerings. More diverse (financially as well as in skills and capacities), more localized, and better-coordinated NGO and for-profit sectors could have positive consequences in the long run. In the Global North some NGOs are already moving in this direction. For example, in 2025 Save the Children started to collaborate more extensively with MercyCorps and CARE to increase their coordinated and collective "surge capacity" to respond to disasters in a quick, effective, and efficient manner.

Can we think similarly around how to build more flexible and collaborative evaluation capacity in both the Global North and Global Majority countries?

Proposition 6: Reconfigure the Roles of Intermediaries in Evaluation

Can we support new Global Majority players to become intermediaries and Global North intermediaries to play new roles that shift power dynamics, resources, and capacity to new market entrants in Global Majority regions?

While intermediaries and regranters remain valued partners for funders of development and evaluation (particularly philanthropy), there is growing consensus that Global North intermediary models need to evolve and in some cases exit. Many Global Majority organizations which often see Global North intermediaries as barriers to their growth suggest that rather than acting primarily as implementers, intermediaries should serve as enablers, resource mobilizers, catalysts, and connectors—building local capacity and embedding decision-making closer to communities.

This will require funders to purposefully evolve the roles of their intermediaries and regranters to focus on creating the next generation of intermediaries in Global Majority countries. In many cases, this may involve phasing out the use of international Global North intermediaries.

Navigating Change

Playing the short game is not, and will not be, without its challenges for some years to come. Any credible reconfiguration of development and the evaluation market will have to navigate inevitable tensions and ethical dilemmas arising from the current geopolitical dynamics. A few of these tensions and challenges are highlighted by Kumar (2026):

- **Transactional realities versus moral purpose:** Transactional deals are inherently short term. While a shift to private-sector

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investment will undoubtedly have some benefits for recipient countries (e.g., infrastructure and energy) as well as donor countries (e.g., supply chain), critical questions arise: Are investments targeting where they are most needed for human development? Who is ultimately left out? Evaluation must be prepared to look at and address these questions in a very politically savvy way.

- **National interest versus global public goods:** A longstanding principle in global development is that development finance should generate a global public good as well as a local benefit. At a minimum, sharing data and knowledge about what works and what does not is essential. Will private-sector investment agreements be willing and able to create those global goods, given proprietary data and business models? And if not, how will we respond? This is already a live issue as new development agreements become public.
- **Market-driven growth versus protection of the poorest:** This is a well-known tension in the market-based solutions and development community. Can (or under what conditions can) markets improve the lives of the poorest? Does a rising tide really lift all boats? Does trickle-down economics work? Transparent theories of change and robust baseline data will be required to track whether market-driven growth improves the lives and livelihoods of the poorest and most vulnerable. Will these market agreements include such theories of change, funds for baseline studies, and impact monitoring and evaluation?

Where to from Here? Our Hopes

Our evaluation profession is inextricably tied to the emerging shape and dynamics of global development. It is ours to respond and reshape our future. There is no going back to the broken global development system as it was. As Amitav Acharya (2025) observes:

> Amid the gloom that marks much thinking about world order today, it is useful to recognize that it is not ending but changing. Short of a nuclear catastrophe, a new international order will emerge on the back of the old, with important differences to correct its failings, but also with continuities. (para. 27)

The new world order is already taking shape through emerging economic and trade alliances (von der Leyen, 2026), new partnerships, global initiatives like the Future of Development Cooperation Coalition[4] and the Accra Reset (Ofosu, 2025), and other reconfigurations of power and finance. Many Global Majority NGOs, civil society players, and philanthropies (Nwankwo et al., 2025) are urging global finance institutions and philanthropy not to rush to fill gaps or tinker with old models, but to view the current geopolitical disruption as an opportunity to reimagine and transform international cooperation, development finance, and evaluation in ways that address long-overdue power imbalances.

Our evaluation profession has much to offer the new configurations of global development if we are open to playing the short game, embracing change, recognizing our failures, and reimagining new roles, expanded capabilities, and partnerships in a reconstituted and dynamic marketplace.

Are we up to the task? Will we rise to the challenge?

Time will tell.

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[4] The coalition is an independent and time-bound group that will cocreate a new approach through intensive consultations with a broad range of actors. Supported by nearly 20 countries and backed by eight philanthropic organizations, the coalition will bring diverse experience and perspectives from across governments, the private sector, civil society, academia, and philanthropy. https://devcoalition.org/

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