

ANALYSIS REPORT ON THE BARRIERS IN UTILIZING EXPERTS FROM THE SOUTH

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BACKGROUND

This report presents a content-analysis of twenty interviews of various officials of UN and donor agencies. The purpose of the interviews was to understand the qualifications that donor agencies seek in identifying expert consultants and the considerations that inform their selection of consultants, and to seek their recommendations for improvements in the capacity and skills of experts, especially those coming from the South, in order to create more opportunities for them in future.

THE PROCESS OF RECRUITING EXPERTS FROM THE SOUTH

This section provides an overview of how experts are recruited. Respondents who took part in this study reported various procedures followed by their respective organizations.

A. Individual Search

Some organizations reported that they tend to recruit experts themselves, notwithstanding the fact that they have human resource units within their respective organizations. Those responsible for the recruitment of experts typically conduct an informal search process. The search is aided by information or recommendations provided by colleagues and other partner organizations or through personal contacts. As three respondents observed:

My role in recruiting experts is within the context of the regional program. I try to facilitate the identification of either expert who has skills that are not available in the region or for external evaluations. Together with the partner organization, I also select the experts.

I'm responsible for the regional programs, which include population censuses, population policies, integration of population, development and all issues related to population development. So, my role is to ensure that the regional projects in PDS do address all these issues. Most importantly that they serve projects at the country level.

We have a personnel department who takes care of the procedures for recruitment, but the choice of the expert would rest on us, who want the expert.

Where the person in charge of recruiting experts has worked for a long time in the same area, s/he may develop personal databases, which are utilized to identify qualified consultants.

... over the years I have been building up a personal database about the people who are available and who we know and trust.

The personal database may often be shared with other like-minded colleagues.

I can advise my colleagues in like-minded organizations when we meet each other and they might tell you that they are organising a mission and are in fact looking for a expert for that kind of job, and ask for a suggestion.

B. Official Unit/Group decision

Five respondents reported involvement of other official unit, such as approval of human resource unit as a part of the recruitment process for experts.

In our system, the human resource unit recruits experts. They are officially in charge of recruiting experts. We recommend them to the human resource unit and then they decide the on the final recruitment.

...the directors are not involved line management which might require experts for their own job. But the managers who work under my direction recruit experts, and this is a process of making consultations with them rather than hiring experts directly.

The recruitment procedure may include a detailed series of steps, including advertisement of the position. The actual procedural steps followed typically depend on the nature and the duration of the assignment. For example, when an expert is required for a short period only, his/her recruitment may be based solely on the approval of the head of the organization.

I can either select a person myself based on the specific task at hand and my knowledge of people available to do such work; or when it is a more comprehensive task, then the rules of this organization require that I wrote out the terms of reference, an post these on the website, and based on the responses received, I either need to make a selection or a short list of candidates to my executive director, and then she has the final word, and in practice she generally endorses the selection. The dividing line between these two is that any short term appointment for six moths or less, I'm more or less at liberty to select them myself, without having to go to a kind of a rather elaborate procedure of advertising. Anything above six moths up to eleven months needs to be done by advertising. That of course applied to all my colleagues.

A similar practice was reported by another respondent:

When we decide we want to hire expert, we would inform a program division director, that will be either internal or external advert, or then get CVs from human resource unit. They will short list and then process for selection.

While the organization determines the specific requirements for an expert, other units, such as financial or legal, assist in completing the recruitment process. The recruitment procedure may lack strict guidelines, but financial contracts do not.

There are basically three units involved in actually approving the consultancy agreement. One is the financial department, the resources, and that is the department from where the request for experts originate. So in terms of the legal procedures, the contractual issues etc. we have got clear guidelines for that but not for choosing a particular expert.

C. Inter-organizational technical assistance

Experts are not recruited strictly from external sources in all cases. One respondent agency reported that it promoted its own personnel first in providing technical support to other country or regional offices where required. To support this initiative, a database is being developed that includes a list of people and description of their core skills. As the respondent noted:

.....at the moment, they are going through a process of setting up a database of skills, identifying what skills are available in house, in the regional office and how those skills can be best used to provide technical assistance to other countries.

Respondents acknowledged the need for external assistance in some cases. For example, if their own staff members are not available or not specifically qualified for a particular assignment, they pursue other options.

D. Contracting Agency

Engagement of recruitment agencies to identify and hire experts is becoming increasingly popular among international donor agencies. Five respondents reported that external agencies provide them with the experts they require. As one respondent described:

We don't recruit experts directly, we set up, we have resource and arrangements that we put on place to access expertise and experts from any source and from any country to do a particular task whether that is for a piece of policy work here in London or to support a piece of work that Governments wants to be done at the country level.

Other organizations followed a similar course. While program plans and terms of reference are typically developed within the organization, the work is contracted to an agency or selected experts to perform:

Generally, the professional staff is responsible for developing our area of work and if that includes looking for support through either an individual expert, or an agency, it would be our responsibility.

Another respondent described a similar procedure, as follows:

So when we have a particular need for particular kind of expert, we go to them for the scope of work. They have along roster of experts. So, that is one thing. Then in the terms of technical assistance in the field for the field activities, it is usually done through our co-operating agencies on which we have about thirty who do technical assistance, wide variety of aspects of family planning, reproductive health and other health. So we do very little of it directly.

Recruitment of external experts raises issues of trust in their capacity to meet the prescribed needs or to provide technical assistance. This requires careful consideration of skills of experts and the corresponding needs of the contracting agency. In this regard, one expert reported:

"We have been trying through what means we have at our disposal, to work with these South Partners, to make sure that they are developing the capacities. As of now, they have not been in a position to compete for these large scopes of work on their own. I think it will be a while before they can compete directly."

Similarly, another respondent described the reasons for recruitment of competent experts as follows.

....we actually have a company who can provide quality assurance on the written product. That is quite important because it adds value to the expert's report, and even if we have got a good expert who is not used to writing, we have a company who can assure the quality of product, so to make sure that the technical input is grafted in

such a way that it is useful to the organization. That saves other processes of actually providing details, and criticisms to the experts; it had already gone through one editorial process before it comes to us and that makes our job much easier, because normally we would provide some feedback, and request some changes. But we don't want that to go with the huge amount of work. What we are trying to do is to minimize the amount of work for ourselves, because generally we are quite busy. We prefer this added value, by the company who will do the work for us.

The qualities required by the employers are further elaborated in a later section.

General characteristics for recruitment

Arbitrary selection lacking systematic procedure

Most organizations reported that they do not have systematic procedures for selecting and recruiting experts, especially those engaged for short-term assignments. Even where experts are routinely hired, selection processes tend to rely on a combination of personal impressions and the specific needs of particular projects. The latter considerations tend to be very context specific, and vary widely from one another.

I'm the reproductive health adviser and I do recruit experts from time to time based on needs and availability of funds. My organization uses experts substantively because it has limited experts on human resources. So, we do depend on external expertise on evaluations, criticisms etc.

Use and promotion of personal network

Use of personal networks is a common feature of expert recruitment. Networks are typically developed through friends and colleagues and then extend to a broader set of contacts. Word of mouth serves as the primary mechanism for assessing the qualifications and fit of experts.

The existing recruitment procedure for experts, or lack thereof, can be justified on the basis that it saves time that would otherwise be necessary in implementing a more systematic procedure. Its shortcomings include difficulty in reaching those who are outside the known networks and personal connections.

Ensure efficiency of experts

Notwithstanding the lack of systematic recruitment procedures, there is little compromise in quality of experts engaged. Successful working relations establish a trust and confidence in quality work delivered and proven experts become regularly engaged by particular organizations. One respondent articulated a view that was consistently affirmed by others:

"If we already have some kind of experience with that person, then we justify by saying that this person did a good job last time and we are happy with the results. It is more about the person himself and his qualification; not where s/he comes from."

Respect to local decisions/needs (decentralised recruitment process)

Two organizations highlighted the importance of recruiting experts who have knowledge of the place in which the project is to be implemented. These experts are often paired with international specialists whose general experience complements their country or local knowledge.

In our organization for example, if we want to have an evaluation or a feasibility study to prepare a project in a specific country, we have the possibility to specify that the expert be a national. For example, we can have a mission in which two experts, for example one is a public health expert and the other one would be, as an example, sociologist with knowledge of his country.

Financial concerns

A few organizations reported that they take financial constraints into considerations in hiring experts. For example, experts who are already working in country may be asked to provide technical assistance in another project, which results in savings in travel, insurance, and other associated expenses.

Conclusions

Respondents reflected an increasing awareness of the issues and challenges inherent in expert recruitment and a desire to address them by making the recruitment process more rigorous. This increased rigor should, among other things, help to ensure greater equity in recruitment practices. As one respondent reported:

But now it (recruiting on the basis of informal connection) is very difficult, because the organization wants equity, you know, because these kind of choices may not always be good, because then you get to favour your friends and some people could try to draw some benefits from these. Now, the management is more severe and more organised and more controlled, and that is why it is more difficult. I don't think I would be in a position to do that now even if I want to do that. It is more difficult, it is always possible to organise in terms of preferences in accordance to a specific profile, but it has become very difficult in these kinds of organizations.

One respondent questioned the need to hire external experts, particularly in the case of short-term assignments. Development of in-house experts to address technical issues was believed to be more cost-effective:

So then you ask yourself why we don't build up our own expertise, rather than paying someone for the job and then losing the expertise again.

It is clear from the interviews that the rising costs of hiring external consultants is a matter of increasing attention. While the need for external experts was inevitable in many cases, cost considerations are taken account of.

ISSUES IN RECRUITING EXPERTS FROM THE SOUTH

All respondents unequivocally agreed on the advantages of having technical assistance from nationals of the countries in which they operate, drawing on their in-depth experiences and knowledge of particular countries. National experts are believed to have better understanding of cultural and social conditions of which they have first-hand knowledge and experiences and to which they may be especially sensitive. As one respondent indicated:

They can relate much better to the problem because more often than not, they have experienced those problems themselves or seen them around them. The other advantage is the need to build a critical mass of qualified people. By using them, you build capacity in the countries for the kind of specialists that we need.

The advantage of having a person working as an expert in his/her country is further demonstrated in the area of sexual health and HIV/AIDS. As one respondent observed:

Many of the issues of this topic are ingrained in the cultural issues and are therefore very sensitive to address to. Unless a person is familiar with the cultural norms of this country and people, it is very difficult to implement a good program. The international experts who don't know the local language and are not familiar with the local issues, find it difficult to carry out the program well and communicate well.

Experts from developing countries have views and experiences different from those of Western counterparts. As a result, they bring a unique perspective of their cultural norms into the global perspective on health. This helps to understand the local issues, which may be difficult to fathom for a person coming from another culture or region.

The question arises whether non-utilisation of experts from the developing countries is a myth or not? The only way to answer this is to determine what percentage of the experts currently engaged by various organizations come from developing countries? An extensive web search provided no statistics.

A. Nationality of experts

There is considerable variation in the expert recruitment policies of various organizations. The policy of some organizations reflects a commitment not only to recruit experts from the South but also to contribute to their capacity building.

For example , we not only support but are also committed to the recruitment national experts. As a matter of fact, in the tough guidelines for the technical assistance program, the first level of expertise is supposed to be the national experts. It is only in the absence of expertise in the country that a technical support team from another country is called upon. As part of the counter programs, as well as one of the primary roles is to identify and step up the capabilities of the national experts to play a role not only in the country but also so that they can become regional or sub regional resource persons as well. It is not only a primary objective but also a commitment of the organization's capacity building, and this is translated through this. NO restriction exists in bringing experts from South.

Some organizations emphasized the importance of “diversity” in hiring experts. This policy ensures opportunities for all nationals to work for these organizations.

While most organizations reported that no discriminatory policies exist with respect to hiring experts from any geographical location, what emerged from the discussion clearly indicates that various institutional requirements exist that influence recruitment decisions in general. International donor agencies increasingly recognize the issue of nationality when it comes to recruiting either their overseas employees or experts. For example, some agencies may give preference to home country nationals, as a condition of funding from their home governments. A one respondent stated:

For example, one organization has experts' trust funds that are provided by various governments of the developed countries,... they all require us to hire

their own nationals. Otherwise there are absolutely no legal or administrative restrictions (in hiring a particular nationality).

The government policy of a receiving country may have constraints or biases regarding the nationality or cultural background of experts recruited from outside, regardless of the qualifications of the expert. As stated by one respondent:

I have worked in a number of countries, and they wouldn't like people to come from X or Y Countries. Some of them were surprising to me, in terms of what they would come up with. There are assumptions being made of the background and experience of the expert. In Asia, in Latin America, I have run into a couple of times when the an African expert was proposed; but they thought that Africa is so far behind, that nothing could be learnt from an African. So there are those kinds of perspectives that I think are problems.

Preferences or conditions of this kind may reflect a bias or misconception that experts from developed country backgrounds are better experienced and educated. Accordingly, many respondents reported having encountered preferences for a particular national among government counterparts in recruiting experts for a project:

For example, when I was working, I wanted to employ some technical assistance, but the ministry didn't really agree at the beginning. I pushed them and in the end they set it and they are really happy. But you know you could have the same thing in Europe, for example a particular government would be happy to be helped by experts coming from some specific countries but not from some others. I suppose that they would probably do the same in your region .I mean this is a common problem.These countries are at the same stage of development as our country, and I don't think that they are able to support us and they think that someone coming from a more developed country would be better.

In other instances, experts coming from the Southern countries face problems in obtaining necessary visas to enter and work in Western countries. Difficulties of this kind may be especially problematic for those who are from countries with which the receiving country has weak political ties. The following comment is typical of those made by several respondents:

They are mainly the fact that we are located in a developed country, so to get visas would be very difficult for someone whom we wanted to come and work. But also for example, if we found somebody from a developing country to go and work in another developing country that is a nightmare of visas and protocol. Just as an example, I'm trying to hire two youth officers from developing countries, they can be called experts, and they can be called staff, people to work in our youth program. But the recruiting country was very liberal on one candidate but not keen on the other. They said that the first one has got all the qualifications and we will give her the work permit. But the other one who was equally qualified, they were asking two thousand questions.

B. Proficiency of experts

The proficiency of an expert is regarded as the most important factor in recruiting experts from the South. Along with expertise, credibility of an expert from the South is also given importance. Credibility tends to develop over the years from the prior work experience of that person or from other reliable sources that can attest to the quality of work of the expert.

Many barriers to recruit experts coming from the South could easily be overcome when the quality of their work and necessary skills are ensured.

To my knowledge, there is no policy that will say that we have to recruit expert from developing country as opposed to those from developed countries. We recruit experts according to their qualifications and whether they meet the terms of reference of the job. The only criterion that is used is whether the expert in question is well qualified and whether they are available at the time you need them.

All respondents reported various qualifications and attributes that they desire in experts. These are presented in detail in the following section:

Academic qualifications

Academic qualifications of experts are considered as an important attribute. Recruitment of an expert from the South is not difficult when prospective candidates hold degrees from reputed Western universities.

Prior work experience

Prior work experience is the second most valuable qualification to work as an expert in any field. This can be institutional or field-based work experience:

Some organizations have guidelines regarding the level of experience of the individual concerned; at what level the expert has worked and in which countries etc.

Experts who amass experience in a particular country are typically given priority. One respondent expressed this consideration as follows:

One obstacle that we have is that we demand professional experience in the country which is not the country of origin, and that is sometimes difficult. In our system, you have to have experience to be chosen as an individual expert, and that experience is minimum three years, among which two years in minimum which is gained in a third country which is not an industrialised country and which is not your country of origin.

Language and report-writing skill

Most respondents noted that English is the standard medium of report writing, and that quality of writing in the English medium is one of the two weakest aspects of the experts from the South. Experts may be very capable in providing verbal technical inputs and advice, but have difficulty communicating in written English. It is also found that experts may have difficulty in completing reports within prescribed time limits.

The main constraint (recruiting an expert from South) would be the language -- producing a report in English. It is literally just a problem with the reporting style and format, which is obviously quite important if we want to minimise our work.

However, one respondent expressed frustration with the fact that the English language working or reporting environments pose obstacles for many qualified experts whose mother language is other than English:

This problem -- that everything has to be done in English, and I know a bunch of great people that I would love to work with here, but I know that the English

thing is a burden for them, both in terms of writing and truly participating in a meeting here. It is like a whole psychological effect. You cannot express well, and so you just step back.

Institutional attachment

Experts from the South who are affiliated with an organization may face fewer policy obstacles in being recruited than those who operate on a freelance basis, with no specific institutional affiliations. For example, it is often easier to secure a visa for those attached to an organization.

It depends if s/he is a private expert or the expert is linked to an institute. When the person is linked to an institute, then my embassy will say that they recognise the expert as an entity with which we can have a contract. If it is a very private expert, they might have more difficulties, not recognisable.

Attachment to an organization may also be viewed as an assurance of the quality of work of an expert.

WAYS TO ENSURE GREATER UTILISATION OF EXPERTS FROM THE SOUTH

There are still obstacles for people from the developing countries to work in international environment, and we should break it. The Southern experts are equally qualified and so should not be deprived of the chance.

While respondents identified many positive qualifications of experts from the South, they also noted their weaknesses. These limitations do not always relate to an individual's qualification. To create more opportunities for experts from the South, respondents identified two major areas for immediate development and improvement:

A. More dissemination of experts

The only problem is the availability of information about Southern experts.

The above point was iterated several times, in several contexts, during the interviews. Finding a solution to this problem was given high priority. Some recommendations for overcoming these problems are presented below:

Development of a database of experts

The first suggestion by the respondents was to make a database of available skilled workers. As one of the respondents asserted:

I think a website would definitely be helpful. People make more and more use of websites. The information will continue to be useful and noticed.

The database should enhance and highlight a person's particular areas of expertise. The summary should be short and precise to begin with, with further details to be provided upon request. In this regard, the directory of South-south partners was highly appreciated.

Some suggested topics for a person's database are:

- Categories by region/country/gender/age group

- Academic background
- Past work experience
- Examples of the type of work
- Publication list, if any
- Availability
- Opinion about his/her quality of work from those who already worked with them
- Opinion about personality of a person

Dissemination of database

Many respondents admitted that they did not know about South-South initiatives and their activities, as mentioned above. This leads to the suggestion of wide dissemination of the organization and its experts.

Some suggested ideas are:

- Develop and maintain a website on South-experts
- Involve appropriate government officials
- Inform all potential employers, donors about the website and remind them to use it from time to time
- Share information with informal groups: friends, colleagues.
- Link-up with other agencies and share the database with them
- Share the database with intermediary recruiting agencies who work for donor agencies

B. Training of experts

Quality of work of experts from the South, as presented in previous section, was of concern for many respondents. In order to overcome this limitation, training of experts from the South emerged as an obvious suggestion. Some respondents opposed the idea of training in Western countries. In stead, it has been suggested that opportunities be created for experts to exchange with counterpart organizations in other countries in the region, which have similar systems that may bring positive impact on learning. This will create a two-way exchange of experiences, in which experts from the South learn from the experience of other countries, as well as share their own experiences and perspectives. As one respondent said, *For example,*

“A developing country would benefit bringing in experts from its neighboring countries who are facing many similar issues and perhaps have a better understanding of the political systems and the civil service structures in which the policies have to be implemented.”

The other benefit of this exchange is to be able to use the local language that people in the sub-continent are familiar with. Working in a familiar language provides better insight.

In the same manner, young people could be given opportunities to work as interns in organizations to gain knowledge and experience. South-South Partners are encouraged to take such initiative with their members and associates.

Some suggested areas for training are:

Technical writing in English

If there is any other agency who can improve the quality of reports that would increase their ability to gain the expertise of the international expert.

Most respondents suggested that experts from the South should improve their written English, especially writing of reports or research proposals. One respondent came out with an idea that, in cases where improvement of English language seems impossible, an editor could be provided to refine the language of final reports.

Technical knowledge

Many experts from the South lack access to information on the most recent technical and theoretical developments in their fields. They should either become members of professional associations through which they receive information, become affiliated with academic institutions or research centers, or take time to browse the Internet in order to stay current.

Desirable personality

To be a good expert, along with expertise, some desirable personalities are expected by the respondents. It was suggested that experts be aware of these. Good interpersonal skill are considered as an important attribute of an expert, as s/he needs to be part of a group/organization of a very different setting in a short period of time for good output of her/his work. Some other desired attributes reported by respondents are modesty, cooperative and collaborative attitude, and a motivation to learn fast and to easily adjust to new working environments.

Respondents were asked to provide recommendations to improve South-south initiative. Other than facilitating those presented above, they were asked to develop some form of unitary payment system for experts, especially to have a ceiling on professional fees. In this context, the fees charged by developing country's experts arose as an important issue for discussion. It was sadly acknowledged that experts from developing countries are often not honoured with fees equal to those charged by experts from the North.

CONCLUSIONS

The benefits that South-south initiatives bring are enormous. Partners of South-south can play a profound role in advocacy or policy implication in generating demands and increasing political support for reproductive and sexual health development.

To me, Partners has a tremendous potential, given your networks, of being a major voice in the international scene, for reinforcing the plan of action in terms of making reproductive health and family planning accessible. The challenge remains to be the access to services and products. What is scary is when you look at the percentage of funding and how they actually define reproductive health; HIV AIDS is a part of reproductive health and then you find a major percentage to be affected by HIV/AIDS.

South-south Initiatives can play a very effective role in countering 'brain drain.' One respondent gave the following example:

So the real advantage of South-South collaboration is that it provides a stream of work that generates income for people who are normally poorly paid, and it maybe a sufficient additional incentive to get them to stay and support the development process in their own country.

However, one respondent expressed doubt whether or not all the objectives of South-south Initiatives will be met given resource constraints. More collaboration with international organizations is suggested. It was also recommended that more advocacy be undertaken within UN organizations so that a South wing can be introduced from where South-south Initiatives can draw support.

Voice was raised against the division of North versus South, which was made so visible by the project on improving experts from the South. At the same time, the very definition of "South" was questioned, especially with respect to those of Southern origin who lived and studied in Western countries or who became nationals of those countries.

It was believed that an expert should be judged by his/her qualifications and skill. At present, lack of appropriate skills and experiences are major constraints to the recruitment of experts from the South, not because they come from the South. Accordingly, it was stated by one respondent that experts from the South should not be recruited only for reasons of equity or affirmative action:

I don't like that; I think we should promote collaboration between North and South, ...but we are thinking about South-South collaboration, which is something else ... people should be recruited on the basis of their qualifications...not where they come from.

Finally, it was noted that more experts are coming from the South today and that there is evidence of growing competition among them. A mix of experts from various regions is deemed more productive. While representation of geographical background is an important issue, equality in representation by gender or area of expertise was also raised as an important consideration.