

# Mainstreaming South-South & Triangular Cooperation

## Considerations for technical cooperation design, implementation and documentation

*This note provides guidance for the formulation, activities, monitoring and evaluation of UNOSSC South-South projects. It aims to support teams wishing to explore one or more topics in the mainstreaming of South-South cooperation. The following questions can serve as a checklist through the project cycle, covering a spectrum of recurrent considerations. Project teams are invited to focus on the topic(s) relevant to their area(s) of concern.*

### Typology of technical cooperation among developing countries (including with Triangular funding)

Cooperation may range from people-to-people to institutional	Capacity development (people's skills)	<ul style="list-style-type: none"> <li>Participate in:               <ul style="list-style-type: none"> <li>training workshops, courses;</li> <li>scholarships abroad;</li> <li>study tours and learning visits;</li> <li>practical training, shadowing, internships, apprenticeships, mentorships, fellowships;</li> <li>development of training curricula.</li> </ul> </li> </ul> <p><a href="#">Examples: Cameroon Solar Mamas trained by the Barefoot College; Eswatini learns about rainwater harvesting; EMPOWER fellowship for Southern women scientists</a></p>	Knowledge-sharing	<ul style="list-style-type: none"> <li>Review materials on good practices by countries facing similar challenges <b>and</b>, source models or ideas that it applied in its activities;</li> <li>Participate in forums, webinars, etc., <b>and</b> apply recommendations or practices introduced by other Southern actors.</li> </ul> <p><a href="#">Examples: Learning for Weather Resilience Building in the Caribbean; South-South learning enables Moldova to improve its statistical systems</a></p>
	Technical assistance	<ul style="list-style-type: none"> <li>Receive experts seconded or posted abroad;</li> <li>Benefit from advisory or consulting services;</li> <li>Access support with or technical inputs to feasibility studies, policy/intervention design, installation of equipment, adoption and uptake of technologies, monitoring, maintenance, assessments, etc.;</li> <li>Deliver outputs through facilitated dialogues with other Southern experts.</li> </ul> <p><a href="#">Examples: Senegal's Flying Labs train The Gambia's pilot drones for flood monitoring; Trinidad and Tobago learns from Rwanda's experience introducing health robots</a></p>	Network-building	<ul style="list-style-type: none"> <li>Develop or enable access to networks for recurrent collaboration (academic, scientific gender, etc.);</li> <li>Develop or facilitate access to value chain, business development, commercial or professional networks;</li> <li>Build coalitions across developing-country actors for collective action/bargaining on issues, agendas or political interests;</li> <li>Twinning (cities, schools, contributions, etc.)</li> </ul> <p><a href="#">Examples: South-South Cities Cluster; Global South-South Development Center; South-South Global Thinkers</a></p>
	Sharing of technology/equipment	<ul style="list-style-type: none"> <li>Acquire technologies, intellectual property, products derived from technological advancements (e.g., vaccines, improved seeds), or protocols and know-how for the replication of technology(ies);</li> <li>Acquire equipment, machinery and/or industrial products.</li> </ul> <p><a href="#">Examples: Technology transfers on the Water-Energy-Food Nexus for the Lower Mekong Basin; Solar-pump water distribution in Mali; Zambia, Nigeria and Ghana improve their small hydropower capacities</a></p>	Capacity development (institutions)	<ul style="list-style-type: none"> <li>Institutional framework, technical resources, advice on policy or constitutive instruments, or other assistance to establish public institutions, programmes or policies as well as civil society entities, institutes, training centres, laboratories, etc.</li> </ul> <p><a href="#">Examples: Establishing an Agricultural Research Center in Comoros; Center of Excellence in Information Technology in Papua New Guinea</a></p>

<p><b>Establishment of joint/common systems</b></p> <ul style="list-style-type: none"> <li>• Develop a joint early warning system consultation platform, service delivery system;</li> <li>• Enable integration, or establishment of a common policy, structure, protocol, instrument, etc.</li> </ul> <p><u>Examples: <a href="#">Climate Early Warning for 7 Pacific Island Countries</a>; <a href="#">g7+ platform</a></u></p>	<p><b>Joint production</b></p> <ul style="list-style-type: none"> <li>• Engage in joint research, co-production, joint venture or entrepreneurial engagement, co-publication, resulting in a common product;</li> <li>• Create a demonstration site for multi-country usage.</li> </ul> <p><u>Examples: <a href="#">Perez-Guerrero Trust Fund research and joint production grants</a></u></p>
<p><b>Policy Cooperation and enabling environment facilitation</b></p> <ul style="list-style-type: none"> <li>• Policy dialogues, policy coordination and supra-national policy development;</li> <li>• Integration efforts, such as regional or sub-regional agreements, economic integration frameworks, and transboundary stability plans.</li> <li>• Conduct exercises to match needs and capacities;</li> <li>• Promotional and sensitization activities to raise awareness of cooperation opportunities and benefits and promote new ones;</li> <li>• Outreach, resource mobilization, partnership building or operational support to implementation for South-South cooperation.</li> </ul> <p><u>Examples: <a href="#">African Union Campaign (AUC) to End Child Marriage</a>; <a href="#">11 Pacific Island Nations Outreach for a Sustainable Energy Transition</a></u></p>	

*Typologies are, by definition, an oversimplification into archetypes to enable categorization across spectrums. These typologies are hence not mutually exclusive, but often overlap and complement each other.*

## Guidance questions

### Type of technical cooperation and nature of the activity

- From the typology outlined above, or other additional forms, what type(s) of South-South technical cooperation did the project facilitate? Describe the activity, and the stakeholders engaged and their nationalities and institutional affiliations.
- Why did the project find it meaningful to incorporate a South-South exchange or replicate a solution from another developing country to achieve its intended results? What motivation or benefit drove the decision to use this element of South-South cooperation?

### Application of key South-South cooperation principles in project design, implementation

- **Annex 1** comprises evaluation questions on the application of South-South cooperation principles: national ownership and leadership, mutual benefit, equality, and horizontality, non-conditionality, complementarity, solidarity, respect for national sovereignty and non-interference, voluntary, cost-effectiveness, context-appropriate, and driven by practical results.
- To what extent did the project apply these South-South cooperation principles? What relevant actions or approaches did the project take that exemplify the practical application of these South-South cooperation principles? What lessons emerged?

### Discourse, narrative and mind-set

- Did the project instrumentalized a language and narrative that outlined cooperation among peers, avoiding assistentialist terminology; such donor-recipient categorizations, aid, assistance, or patriarchal language and frameworks?

## Relevance of Southern knowledge and its particular applicability or transferability to address the development challenge at hand

- Why was the knowledge sourced from another developing country particularly relevant to meet the development challenge being addressed by the project?
- How were the technical cooperation partners and/or technology identified and/or selected (*could be market-based or by design of the project*)?
- Were geographical proximity or similarity(ies), languages, level of development and/or context relevant factors that influenced the selection?
- Were there characteristics of the cooperating partner(s)/practice/technology that made a significant difference in making the application/transfer impactful?

## Methodology of an impactful South-to-South transfer

- What methodology was used to facilitate the technical assistance/exchange/transfer? Why was this methodology particularly relevant to the objectives of this project? Was the methodology particularly relevant to effectuating a transfer in the developing-country context?
- Were there singularities and/or specificities in the way in which the practice/ knowledge/ technology was transferred that are integral to how the knowledge was produced and developed? If so, which ones?
- What could have been done by the project or by particular stakeholders to increase the ease, applicability and impact of the South-to-South transfer?

## Participation, horizontal engagement and mutual learning

- Did the project make any particular effort or accommodation to ensure that there was meaningful participation by actors from other Southern countries? Specifically, what did the project do to make that participation impactful?
- Was the transfer in only one direction or was it a horizontal exchange/learning among peers where knowledge flowed in both directions? Was there mutual benefit? If so, what were those mutual gains?
- Did the transfer result in feedback, enhancements and/or mutual learning in areas for improvement or expansion of the practice/technology?

## Contextualization, adaptation and innovation

- Was the Southern knowledge/expertise/technology immediately applicable or did the country context present differences, challenges or particularities? What were the commonalities and the differences?
- Was the Southern knowledge/practice/technology **adapted** in order to be responsive to the new country context? In which way and through which process(es)? Was the adaptation defined through a participatory process or who/what guided it? What was the role of local communities?
- Did the introduction (in general) or its adaptation (specifically) of the knowledge/practice/technology to the new country context result in or call for any innovations? Which innovations?
- If the South-South technical cooperation generated an innovation, does this innovation have any implication for the systemic uptake of the transfer within the country or for further transferability across other Southern countries?

- Did the project engage in a single or a phased approach to implement the cooperation/transfer (e.g., small pilot project to guide broader roll-out)? Why did it use that approach? Were there relevant lessons from its use, course-correcting design decisions, feedback, etc.?
- Were there efforts (consultations, feasibility studies, etc.) to test the relevance and applicability of the practice from another Southern country for its use in this project? What did those efforts entail and what were their findings? Did they yield any specific recommendations guiding project implementation?

#### **Reach, transformational impact and sustainability of the Southern knowledge acquired**

- Was the transfer circumscribed (impacting a narrow audience, specific group, etc.) or did it have a systemic transformational impact (across a broader population segment, key institutions, etc.)? If the latter, does the Southern knowledge or technology(ies) have any inherent characteristics that in the local context may facilitate systemic change and broader uptake of the knowledge transferred?
- What strategy was used to ensure the sustainability of the impact of the knowledge/expertise/technology transferred? Did the characteristics of the practice/technology developed in another Southern country have any particular features that contributed to its sustainability? Which ones? Are any of those features impacting sustainability linked to the developing-country context in which the practice/technology/expertise had been developed? How?
- Did network- or coalition-building lead to medium- or long-term cooperation structures, agreements, forums and/or institutions or to greater integration with long-term impact? Please elaborate on how and why.

#### **Success factors and lessons**

- What worked well in this South-South technical cooperation? Which factors contributed to that success?
- What did not work very well? What were the challenges that led to those weaknesses? How were they addressed? Did the project draw lessons about what could be done differently?
- What lessons were learned from previous South-South Cooperation initiatives [if any] that contributed to the success of this project?

#### **South-South partnership brokerage and facilitation**

- How was the South-South partnership brokered? Did it receive facilitation support from a third party(ies) and in which form(s)?
- What were key considerations to ensure the compatibility and suitability of the partnership match?
- Did enabling the partnership with another Southern entity present specific challenges? What was necessary to ensure that the partnership moved forward to deliver results?

#### **Ownership, appropriation, Southern solidarity and creation of goodwill**

- Was the practice/knowledge/technology appropriated locally? How? Who (which stakeholders) acquired possession or ownership or appropriated it as a tool to further advance development impact? Did it have any implications for those stakeholders in terms of their Southern networks or medium- and/or long-term linkage(s) with other developing countries?

- What is the Government's perception of this South-South technical cooperation? What does it appreciate the most about it? Are there things that it does not appreciate about this specific exchange/cooperation/technology?
- Did this experience lead stakeholders to have a greater appetite for learning from Southern-grown knowledge or practices? How was this appetite manifested?

#### **Mutual benefit and structures for linkages beyond cooperation**

- Did the project create access to markets for either of the cooperation partners? Which partner and how?
- Did the project enhance one partner's knowledge of the other partner's market(s) or opportunities?
- Did the project develop the human capital for cross-border operations?
- Did the project enable value-chain integration or production bases in the cooperating partner?

#### **Unintended positive or negative consequences**

- Would/did the transfer/adoption of a particular technology(ies)/practice(s) generate dependency on the availability of materials, spare parts, etc. from a Southern supplier or expertise from the providing institution, etc.? How did the project deal with this issue and what are the long-term implications?
- Did the application of Southern knowledge/practices/expertise generate any unintended positive or negative consequences? What were they and does this have further ramifications?

#### **Structural difficulties and complexities in undertaking South-South cooperation**

- Were there sufficient available Southern capacities to design and implement a South-South cooperation response to the development challenged being addressed or, for example, was the technological solution closely linked to products or expertise available nearly exclusively in developed countries at the time?
- Were there structural factors that discouraged, limited or impeded the carrying out of particular South-South activities? Which ones? Did the project take any measure(s) that mitigated them or decision(s) to work within those structural limitations (e.g., lack of subregional infrastructure, far more expensive costs to travel/host events in a particular subregion than to convene in the North)?

#### **Enabling environment for South-South cooperation**

- Did the legal, regulatory, administrative and institutional environments in the country present any challenges to the South-South exchange? Which ones?
- Did (would) having a dedicated national institution, strategic framework, policies or guidelines for South-South cooperation make (have made) any difference?

#### **Preferential rate for South-South cooperation**

- Did the project/United Nations entity accord preferential indirect support rates for South-South cooperation (i.e., reduced rates established by an [Executive Board](#) of a United Nations for Southern contributors)?

### **Southern-friendly sourcing strategies**

- Did the project give preference to local suppliers from developing countries when sourcing goods and services? Beyond supporting the local economy, did such engagements foster knowledge transfer and capacity building within the region?
- Did the project identify and support local industries that align with the project's objectives? Beyond sourcing materials and services from these industries, did it provide technical assistance, or promote their products in international markets?
- Did the project involve local communities in the project implementation process, benefiting the community in terms of employment, skills development, and infrastructure development?
- Did project's recruitment encouraged qualified applicants from developing countries, also favoring gender, minority, disability and other vulnerable categories?
- Did the project engage Junior Professional Officers or United Nations Volunteers with recruitments preferential to nationals from Southern countries?
- Did the project procurement engage in any strategy to even the playing field/overcome legacy structures that could be biased against equal participation by Southern vendors?

### **Impact on building South-South capacities and awareness of United Nations country team and the Government**

- Did the project, and the cooperation involved, have any impact on the United Nations country team or Government structures, preparedness and engagements for South-South cooperation? (For example: did they help to broaden the United Nations country team partnership approach? Did they particularly build capacities for/interest in brokering Southern networks? Did they compile best practices for offers of cooperation or develop rosters with expertise for technical cooperation? Did they help to refine the service offer on South-South cooperation? Did they produce guidance or training tools on South-South cooperation? Did they contribute to defining/expanding the tracking and reporting system for South-South cooperation? Did they contribute to shaping future United Nations Sustainable Development Cooperation Frameworks with explicit South-South cooperation elements?). Please elaborate.

### **Application of key South-South cooperation principles in project evaluation**

- Did the project evaluation include a review for South-South elements as set out in the annex?
- Were the United Nations entity evaluation processes, templates, providers and values inclusive of the Southern perspective, notably for meaningful Southern contextualization and appraisal of results, challenges, partnerships and management decisions? Did they enable effective capturing of the South-South cooperation dimensions, Southern capacity-building priorities, and the benefits of the project and their relevance and impact for the strengthening of Southern networks?

**ANNEX. AN ANALYTICAL FRAMEWORK ON MAINSTREAMING  
SOUTH-SOUTH COOPERATION PRINCIPLES AT THE PROJECT LEVEL**

<p style="text-align: center;"><b>National leadership and ownership</b></p>	<ul style="list-style-type: none"> <li>• <b>Project objectives should be clearly aligned with the priorities of the country concerned.</b> <ol style="list-style-type: none"> <li>1. Was the project sourced through a demand-driven approach?</li> <li>2. Does the project follow the Government's stated priorities?</li> </ol> </li> <li>• <b>National entities in the beneficiary countries are strongly encouraged to participate in the project implementation and to do so with a longer-term perspective.</b> <ol style="list-style-type: none"> <li>1. Is the Government engaged?</li> <li>2. How does the Government demonstrate its ownership of the project?</li> <li>3. Did the Government provide a financial or in-kind counterpart to the project?</li> <li>4. Does the Government provide continuous strategic direction to the project formulation and implementation?</li> <li>5. Have the directions provided by the Government guided the activities and outcomes of the project?</li> <li>6. Has there been a buy-in process or was there no need to sell the project and buy support?</li> <li>7. Is there high-level representation from the beneficiary country at project milestone events?</li> </ol> </li> <li>• <b>Projects should seek to improve or create sustainable activities to continue in a longer-term perspective.</b> <ol style="list-style-type: none"> <li>1. Does the project employ Government implementation and/or monitoring systems?</li> <li>2. Is the Government involved in the sustainability strategy for the project outcome(s)?</li> </ol> </li> </ul>
<p style="text-align: center;"><b>Mutual benefit</b></p>	<ul style="list-style-type: none"> <li>• <b>Projects are encouraged to use mutual exchange between developing countries, in particular the exchange of good practices in advancing the attainment of the Sustainable Development Goals.</b> <ol style="list-style-type: none"> <li>1. Does the project support mutual benefits through sharing of knowledge and experiences, training and technology transfer?</li> <li>2. Are there mutual gains? What does the contributing Southern partner gain from the cooperation?</li> <li>3. Does the cooperation create market access, facilitate value-chain inclusion or enhance human capital or production bases for the contributing partner(s)?</li> </ol> </li> <li>• <b>Projects are encouraged to utilize the capacities and expertise available in contributing Southern countries.</b> <ol style="list-style-type: none"> <li>1. Does the cooperation make use of contributing Southern-country capacities? How?</li> </ol> </li> <li>• <b>Activities should have clearly identifiable development impact attributable to the South-South trust fund support.</b> <ol style="list-style-type: none"> <li>1. Does the South-South cooperation enhance the position and visibility of these Southern partners as emerging players in the global arena?</li> </ol> </li> </ul>
<p style="text-align: center;"><b>Equality and Horizontality</b></p>	<ul style="list-style-type: none"> <li>• <b>Project should contribute to the beneficiary country's attainment of the Sustainable Development Goals.</b></li> <li>• <b>Projects are encouraged to use mutual exchange between developing countries, in particular the exchange of good practices in sustainable development.</b></li> <li>• <b>Projects should identify and strengthen local capacities, with preference given to capacities provided through cooperation.</b> <ol style="list-style-type: none"> <li>1. Is there a preference for using local capacities and strengthening them?</li> <li>2. Are local actors deemed to be the best situated to understand their singularities and conditions and to propose the course of action?</li> <li>3. Do partners cooperate as peers, that is, consider each other as equals and their relationship as horizontal (non-hierarchical)?</li> <li>4. Are partners free to express their concerns? Do they discuss and negotiate on equal footing?</li> </ol> </li> </ul>
<p style="text-align: center;"><b>Non-conditionality</b></p>	<ul style="list-style-type: none"> <li>• <b>No conditions are established to receive South-South trust fund support</b> <ol style="list-style-type: none"> <li>1. Has the South-South Trust Fund established any conditions required for the cooperation to take place?</li> <li>2. If there are supervening events affecting the governance of the partner country, does the cooperation stay on course?</li> </ol> </li> </ul>
<p style="text-align: center;"><b>Complementarity</b></p>	<ul style="list-style-type: none"> <li>• <b>Project objectives should be clearly aligned with the priorities of the country concerned.</b></li> <li>• <b>Projects are encouraged to make use of new ways of approaching development issues, where appropriate, with emphasis on the replication of innovative experiences already implemented in other developing countries, in particular experiences in the contributing Southern countries.</b> <ol style="list-style-type: none"> <li>1. Is the cooperation complementary to North-South cooperation by fulfilling all of the following: <ol style="list-style-type: none"> <li>(a) it is not a substitute for North-South cooperation but acts side-by-side;</li> <li>(b) it is not the same as North-South cooperation but different and distinct;</li> <li>(c) it adds value, complements and/or supports other forms of contributions.</li> </ol> </li> </ol> </li> </ul>

<p><b>Solidarity</b></p>	<ul style="list-style-type: none"> <li>• <b>The motivation for the cooperation is based on mutual affinities and the desire to support each other to address development challenges.</b> <ol style="list-style-type: none"> <li>1. Did the project provide support on gratis or concessional terms: grants, concessional loans, fielding of non-costed experts, volunteer or concessional-rate expertise, technologies or products?</li> <li>2. Is the intended outcome of the cooperation to empower the partnering country to attain its development goals?</li> </ol> </li> </ul>
<p><b>Respect for national sovereignty and non-interference</b></p>	<ul style="list-style-type: none"> <li>• <b>The project should not counter or undermine the official positions or activities of the partnering Government.</b> <ol style="list-style-type: none"> <li>1. Did the project outputs or activities, the statements of project officials or the communication engagements of the project undo or seek to challenge the sovereign decisions of the national, regional and/or local governments?</li> </ol> </li> <li>• <b>Projects should not influence political processes in the host country.</b> <ol style="list-style-type: none"> <li>1. Have project activities supported a particular political party or grouping?</li> <li>2. Has the project engaged in activities that denounced governments or political candidates?</li> </ol> </li> </ul>
<p><b>Voluntary</b></p>	<ul style="list-style-type: none"> <li>• <b>The project should be demand-driven and should advance with the consent of the partnering Government and with no infringements to its free will.</b> <ol style="list-style-type: none"> <li>1. Did any inducements or constraints limit the partnering Government's full consent to the project or to specific elements of it?</li> </ol> </li> </ul>
<p><b>Cost-effectiveness</b></p>	<ul style="list-style-type: none"> <li>• <b>The project receives value for money for the sustainable development results that it delivers.</b> <ol style="list-style-type: none"> <li>1. Were the project's resource allocation and its management efficient and impactful?</li> <li>2. Could the project have achieved the same or greater results at a lower financial cost?</li> </ol> </li> <li>• <b>The project management, technologies, modalities and contractual arrangements are cost-conscious and are tailored to achieve impact.</b> <ol style="list-style-type: none"> <li>1. Were the technologies, inputs and contracts cost-correlated to the impact attained?</li> <li>2. Was there high reliance on expensive technologies and/or expertise? Were these essential or would less costly methods and experts have been available?</li> <li>3. Was the project costing focused exclusively on outputs or did it include enabling local/Southern capacity development and socioeconomic opportunities as part of the cost-effectiveness of its results?</li> </ol> </li> </ul>
<p><b>Context-appropriate</b></p>	<ul style="list-style-type: none"> <li>• <b>The project's approaches, technologies, methods and activities are well contextualized and responsive to local realities and culture.</b> <ol style="list-style-type: none"> <li>1. Were the approaches to the project design and implementation well embedded in the local context?</li> <li>2. Did the methods selected by the project directly address feasibility, specificities and sustainability within the local economic, financial and cultural realities?</li> </ol> </li> </ul>
<p><b>Driven by practical results</b></p>	<ul style="list-style-type: none"> <li>• <b>The project should yield highly tangible results that do not remain abstract and/or intermedia, but translate directly into people-centred impact and planet-friendly progress.</b> <ol style="list-style-type: none"> <li>1. What kind of outputs did the project yield?</li> <li>2. What is the practical, tangible, directly perceptible impact of the accomplishments of the project?</li> </ol> </li> </ul>

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