

### Recommendation

Much more systematic efforts should be made on development of systems for identifying and employing local professionals and replace TAP with nationals where possible.

#### 7.1.4. Third world TAP

What has been said about the local resource base can also be said about TAP from Third World countries, including neighbouring countries. No systematic attempts have been made to replace Nordic TAP with cheaper TAP from Third world countries.

Where Third world professionals work at projects, it is seldom the result of a donor policy.

In Zambia Cold Storage Corporation (ZCSC), assisted by DANIDA, a TAP position as production manager was taken over by a Tanzanian expatriate working on local contract with a foreign exchange topping-up of the salary. But his presence at ZCSC was not the result of Danish assistance. The local contract was made in continuance of a UN engagement.

Tanzania Bureau of Standards, assisted by SIDA, employs an experienced Asian TAP, who has been with the institution before, and is back after some years of UN employment. But he is financed by NORAD's personnel fund for recruitment from Third World countries, and SIDA had not been ready to finance.

We have not been able to make any systematic evaluation of NORAD's fund or of the quality and performance of the few Third world professionals, we have met. But it is obvious, that no serious attempts have been made to find qualified Third world professionals for posts now manned with Nordic TAP within our selected projects.

#### 7.1.5 The Nordic resource base for TAP

The Nordic aid agencies look for qualified personnel in their home countries. Posts are advertised in journals of "vacant positions" and sometimes in daily papers and professional journals. Consultant companies look first for personnel inside their own organization, but they have often to recruit from the open market as well.

The national resource base in the Nordic countries is normally big enough to attract a number of applicants. Half of the posts registered had 10 applicants or more, and only a handful did not attract any applicants.

Differences are however big. FINNIDA can tell about consultant TAP being more expensive in some fields, where a few companies have something like a monopoly situation, and all donor agencies have experienced situations, where they have difficulties in finding suitable candidates. In some evaluation reports and interviews, this is mentioned as a sort of "excuse" thereby reflecting, that candidates are often posted without all wanted qualifications. A candidate without theoretical qualifications if he has a good professional record or vice versa.

The aid agency and consultants are often forced to accept someone with qualifications other than they have originally looked for. In a case we have seen how a person who had been refused was later accepted, when another candidate withdrew. Later it was realised, that he should not have been posted. In other cases ( but very few) TAP have been dismissed and repatriated.

It is our conclusion, that the domestic resource base should be enlarged to provide the employer with a more qualified choice of candidates.

Experience from other developing countries, for example Papua New Guinea and Botswana (Raphaeli, Roumani and Mackellar) indicate, that the best solution is to provide a country with funds and make it possible for the country to recruit internationally for the purpose it wants.

This is drastic medicine, but it is a reason for alarm when Nordic TAP without sufficient qualifications are sometimes recruited, without any prior attempt to identify local professionals.

Where expatriate TAP from industrial countries are needed, the recruitment should be much more open.

As a start it should be possible to enlarge the resource base by recruitment in all Nordic countries.

### Recommendation

We propose that the agencies journals on vacant positions are printed together and contain vacant posts in all aid agencies.

The long-term objective must be to widen the recruitment base further internationally.

This goes also for consultant companies. There are sectors, where some companies in donor countries have a virtual monopoly in development assistance. Even if such assistance implies delivery of equipment from the donor country, it should be possible to create competition and widen the resource base for TAP internationally. Or to give the recipient country a much wider and freer choice.

### 7.2 Recruitment of personnel

The Nordic donor agencies all have a personnel section, which is responsible for finding and recruiting project personnel. Recruitment is generally initiated by field offices and personnel sections and programme sections involved in the final stage.

The responsibility for identifying, recruiting and sending out agency TAP rests with the personnel section. This section also handles the administration of personnel, salary payments, allowances, travelling, leave etc.

The size of the personnel sections vary. FINNIDA has the smallest with 18 persons altogether, as there are relatively few agency recruited persons. The other personnel sections comprise 20-40 persons.

The purpose of the recruitment process is to ascertain that the personnel that are sent out are qualified to do a good job. Predictors of performance are: professional qualifications, educational background, personal characteristics, language proficiency, health and family situation.

Many of these factors can be judged on a routine basis. But it is widely recognized, that other factors are also important, and recruiters see also a need to screen personal aptitudes for the jobs.

Some sort of psychological tests are used. FINNIDA uses an institute for occupational psychology for a one-day test, and SIDA, NORAD and DANIDA occasionally consult psychologists. SIDA has developed a selection system with the help of psychologists, and DANIDA uses a tool called the PAPI system, which is supposed to match job descriptions with personal qualifications.

The tests intend to provide some insight in the applicants personality, including adaptability, flexibility, dedication, patience, resourcefulness, tact, skills in cross-cultural communication etc.

But such qualities are not easily identifiable even through tests, and different TAP positions have different needs. A senior advisor needs another profile than technical gap-filler, and the profile of a trainer is again very different.

The nature of projects differ, and one project can have different needs at different times. As an example, the first marine officer, who played an important role in institutional development of one Tanzanian project in the transport sector, was a rather stubborn person, who would probably not have made it through a psychological test, but who was the right person for the project during its first years.

Tests can be of use, but with uncertainty concerning general selection criteria, we think that it is more important to base selection on persons who have a good experience in working abroad.

The chances that the personnel sections staff will recruit the right candidate increases the more they know about the actual project, its local staff, and the other expatriates. It is very important, that the personnel sections develop their own knowledge of the local scene, and that they have a high status within the agency system. Project personnel should be closely involved in recruitment, but it is also important, that programme officers in the personnel sections have field experience.

### Recommendation

Programme officers in the personnel sections should be given opportunities to visit project sites regularly and follow up how their candidates are doing.

Some consultant companies recruit personnel without any formal screening at all, and in some cases without any involvement of donor agencies. In most contracts, the donor agencies have a formal say, and can refuse to accept candidates. In some cases more than one candidate are presented, but often it is a very formal right of vetoing.

Cases exist, where persons without formal qualifications (e.g. in English language) have been posted without any special prior training, and where instructions, as in the case of Finnish support to Fibreboard Africa Ltd. in Tanzania, had to be given via an interpreter. An ineffective solution criticised by Tanzanians.

Some of the projects, where consultant TAP were posted without any screening, had a high turnover of personnel. Several expatriates have been sent home because they failed, and the experiences point at the need to monitor the quality of consultant TAP more closely.

At the same time it is important to realize that both consultants and agencies find it natural to protect staff and hide problems. Nobody likes to admit failures. And if TAP have been posted, problems have to be serious before action is taken.

#### 7.2.1 Few Women among TAP

Women are a minority in the group of TAP. We have only interviewed few female TAP during our field visits, most of them but not all working with the software components of projects. Although cultural differences and different management traditions can in some cases create specific problems for women, so can they for men. We have not observed any major problems, which can discourage wider recruitment of women. When job descriptions and TAP posts are formulated, it should be taken into account that men and women have different opportunities for reaching the different sexes in the recipient country and to involve them in development activities. But we have not been able to make an more thorough evaluation.

#### 7.2.2 Spouses' job situation

In recent years the demand for jobs for the accompanying spouse has been put on the agenda of the TAP associations repeatedly. Most of the spouses are female. Some figures from Norway are presumably indicative for the other Nordic countries as well. 1985 NORAD employed 254 experts, 92 % male and 8 % female. 89 % of the men were married whereas only 55 % of the women were married. Few men (outside liberal professions) are inclined to accompany their wives without any prospects of employment. This aggravates the skewed sex recruitment and consequently most likely the negligence of the role of African women in technical assistance programmes.

Traditionally the spouses have been involved in philanthropic work on a part time basis. In recent years NORAD, DANIDA and SIDA have introduced the concept "mini projects" for small philanthropic projects financed at the discretion of the field officers.

In Tanzania an "interest group" of spouses has forwarded proposals for improving the situation:

- More positions on local contracts
- hiring spouses for odd jobs and small consultancies
- widening the possibilities for part time jobs
- provide salary grants when the spouse succeed in getting non-paid jobs in the local economy when the type of employment at hand is within donor's priority areas
- contributing with salary grants for the spouse within the project or programme of the husband/wife.

The evaluation mission has not had opportunity to look specifically into this area of concern. The value of healthy family situations is appreciated and the increasing significance of the question of job opportunities for the spouses is acknowledged.

The evaluation mission is not in a position to make any recommendations regarding this issue. The needs and wishes of the accompanying spouses of contracted technical assistance personnel must be weighed against the needs for employment of locals.

A major aim is to reduce the need for expatriate personnel. Provision of jobs for spouses may easily become counter productive to this aim. Still the problem should not be dismissed as being non-essential.

The spouses must not be given false expectations about the employment prospects by the recruitment officers.

### 7.2.3 The role of recipient countries

The recipient countries seldom have any say in the screening and selection of candidates. They do normally have a chance to veto the agencies choice, but the right is only exercised in extreme cases.

In some projects recipient organizations have however received a short-list of candidates. The response was positive and basis for cooperation better through the local involvement in recruitment.

In a few cases seen to be of special importance representatives of recipients have participated in interviews in the Nordic countries. In the case of Rural Development Fund in Kenya a representative of the recipient went in one case to Norway and to Denmark to take part in interviews, but not to Sweden, because SIDA did not see it necessary.

Compared to the total cost of a TAP (close to two millions NoK for a two year period), it is not very costly, but other constraints may exist, and it is not usable in all cases. A closer and earlier cooperation with representatives of the recipient will however often make easier to discuss needs and later problems.

At Tanga Cement we experienced one situation, where the recipient had objected to a TAP candidate. But partly because the management agreement, which was the basis for TAP, was an agreement between the Danish consultant and DANIDA, he was recruited and posted in spite of protests. He was later replaced.

Recipient countries knowledge about their own needs and their judgement of candidates should not be disregarded.

## 7.3 Preparatory training

### 7.3.1 The purpose of training

The training sections of the Nordic agencies have cooperated for many years. In 1969 a programme for training of field personnel was drafted in Uppsala: "the Uppsala statement". This gave a platform to develop the training sections within the aid agencies and to further Nordic cooperation in this field. It is the attitudes of the technical assistance personnel that are the prime concern and the purpose of the training is:

"...strengthen and develop attitudes and skills that facilitate social contacts and adaptation to and performance of tasks in the host country. Attitudes and skills are more important than academic goals. Academic knowledge may be a subsidiary goal but serves in the first place as a support of attitudes and skills."

The Uppsala statement is indeed a child of its times. It represents the late 1960s in its disregard of academic learning. But it contains a number of salient insights. We find that attitudes are given a very general interpretation; "...awareness of problems of development and of the fact that development means a mutual transfer of knowledge" and "awareness of the fact that the host country will as soon as possible replace the field worker with its own personnel."

Among the objectives of the training we would particularly like to mention the following: "(1) Awareness of one's own role as an agent of social change. Knowledge of processes of social change, of oneself in relation to other people, of general development problems, of the host country's particular development problems, and of the project and its place in the development plan of the host country, and of the development of one's own country. (2) Transfer of knowledge. Elementary knowledge of adult education with special emphasis on learning as a process of change. (3) Social contact and cooperation. Knowledge of customs and traditions in the host country. Knowledge of group processes and leadership, especially with regard to the preparation and carrying out of decisions. Self knowledge and knowledge of oneself in regard to other people."

The words were those of the Uppsala statement, we made the selection of 3 out of its 10 objectives. Let us see how the preparatory training has been organized.

All the Nordic aid agencies now offer preparatory courses lasting around two weeks. DANIDA and SIDA have their own training centres with permanent staff, in Hornbaek and Uppsala. NORAD has a semi-permanent centre, the courses are conducted by personnel from its training section. In FINNIDA training has had a weak position - a small unit of 1 programme officer and 2 secretaries have run the courses.

#### The training programmes

The preparatory courses are mandatory for agency recruited personnel, and several of the external organizations also send their personnel to these courses. The courses are conducted by a coordinator who also gives some presentations. The participants will participate in around twenty lectures and will meet equally many resource persons during the two weeks. Typical topics are:

- international cooperation, aid agency policies,
- social and cultural aspects of developing countries,
- specific information on the country they will go to,
- hygiene and health risks,
- the social situation for the expatriate family,
- intercultural communication.

The themes are presented through lectures, but there is usually ample time for discussions. The training centres also have collections of tapes and video films, as well as libraries. The participants should also have time to browse around and look for information on their own. Some sessions are also more self-directive and require an active part in preparing the sessions.

The outcome of the training depends very much on the coordinator. Some sessions are of an academic character and others are very personal. The impression is that the intellectual aspects play a larger role and that the development of attitudes and behaviour (and feed back on these from the coordinator) is sporadic and cautious. Fierce discussions on cultural patterns and value systems do not necessarily enhance a deeper self knowledge.

By and large the participants were positive to the preparatory courses. Some would have liked to have more information about living conditions, others wanted more discussions of the politics and economics of development - but all thought that two weeks were an appropriate duration. During the course there would often be a meeting with former technical assistance personnel. These meetings were highly appreciated and usually led to lively discussions on all aspects of living and working in a developing country. Sometimes attitudes clash as the "idealism" of newly recruited persons is confronted with a more seasoned experience of development work.

SIDA and DANIDA provide extensive project documentation in the libraries of the course centers. It is also possible to find debriefing reports of former technical assistance personnel. Used in a systematic way, this could represent a shortcut on the tricky road of institutional learning. SIDA also invites former expatriates to write case studies from their field work.

#### Potential future developments

Even though the preparatory training has found a suitable form, we would like to give some critical comments on the following aspects: "training of trainees", training of agency personnel, job-related training, and cultural understanding.

The development of skills in training and institution development is hardly approached, let alone cultivated, in the preparatory courses. The focus is on the individual and societal levels, the organizational level receives little attention. One of the most significant handicaps of expatriates is their weak theoretical and practical base on institutional development. The assistance personnel mostly have their professional experience within one specialization in a well structured organization operating within a stable political system and an infrastructure providing personal safety. It is a formidable task to suddenly become an "expert" in an alien culture, where the organization fights financial bankruptcy as well as other social struggles. The easy way out is often to establish a parallel system operating efficiently on a Nordic model and on a sound financial basis.

The point is that technical assistance personnel have a tendency to practice their knowledge and skills regardless of the local environment. They should to a larger extent analyse training needs, plan and implement training programmes - but their ability to do so is limited. Here the preparatory courses have a mission to fill. For the course centers this is not only a question of attitudes but also of learning the relevant skills.

The staff of the aid agencies field offices play a crucial role in drafting and monitoring projects. They are also backstopping, supervising and debriefing personnel - tasks that have a general impact on the effectiveness of technical assistance, and on the aid agencies ability to learn from mistakes (and successes). To work effectively, the programme officers need to be familiar with rules and procedures in bureaucratic systems - and they need to be good at interpersonal communication. They should see themselves as members of a service organization. But most programme officers have little experience of these tasks. All the agencies need to pay more attention to their own staff development through recurrent courses.

We have noted that many technical assistance personnel are recruited because they possess some technical skill. In the developing country they have to attend to a wide variety of tasks and they have to handle problems they have no experience with. As an example, people generally have a fairly vague understanding of labour legislation in their home countries, but they often find themselves engaged in complex problems of a legal nature in their new jobs. Another example, few know anything of the logic behind decision-making in political administrative systems, let alone in African political administrative systems. Nevertheless, they have to operate effectively within such systems.

As for the cross-cultural communication, we would like to point out that information in this field is sporadic. The information appears to be ad hoc and we have found examples of mistaken images of the developing countries presented to the participants. But the subject is difficult and the fact is that there does not exist any good text on the problem of bridging a cultural gap. The course centers do have access to information on traditional African culture but this is material of an anthropological character. This is valuable in its own right, particularly for those working in a rural environment. But many expatriates will work in the modern sector, and here we do not have much information on culture.

Do we find it necessary to extend the preparatory training several weeks? No, even if we suggest that more topics should be included, we would not propose that the preparatory training is prolonged. However, we think it is a mistake to limit the training to one occasion only. The preparatory course should not be the beginning of training, neither should it be the end. Project and country information should start intensively from the very first day of recruitment, and it should continue throughout the assignment. Some of the aid agencies have started short courses or seminars on the duty station. This appears to be a very valuable instrument to exchange information and to reflect on one's experience. Such courses could be of a few days duration each time, and could by preference be arranged on a Nordic basis.

Almost all interviews with TAP have reflected, that they liked the preparatory training given. There have been critical remarks about outdated information or less relevant parts, but a much more outspoken criticism have been given by TAP, who felt, they were not given enough or any preparatory training (especially consultant TAP). Some felt, they were not able to understand relations in the society and that they could have avoided some problems through better training.

Training is a lot of things. For health workers the ten weeks course in tropical medicine, including cultural information, is more important than the official preparatory training. And job related training is - as mentioned - generally very important.

The proof of the importance of training and preparatory courses is in a way a negative one. It is not possible to guarantee a good TAP or project performance just because TAP have had the normal training. But it is clear that a number of individual TAP problems have been related to lack of training, and that lack of training has been one of the problems in a number of projects characterized by lack of integration, by TAP isolation and by unsustainable structures.

Some consultant TAP have felt, they were experienced enough to do without any specific training, but others have complained, that they were not given the same opportunity of doing a good job as agency TAP. Ironically, some of the consultant TAP involved in twinning arrangements with a good continuous backstopping have been given better training than consultant TAP in some projects working much more in isolation.

### 7.3.2. Language training

So far we have spoken about the preparatory courses, but the aid agencies also provide language training. The English courses seem to be highly effective. Former participants are very positive and it seems as if the language upgrading works well. There are of course several cases of expatriates who are not fluent enough to perform their task - and quite often the local authorities complained about the poor English of Nordic personnel. This does not reflect negatively on the courses but rather on the assessment of the skills and needs of individuals. In general, the aid agencies are not critical enough in their demand of language proficiency.

Insufficient knowledge of English is one problem, a much more serious problem (in Tanzania and to some extent in Kenya) is the neglect of Kiswahili. The personnel in local organizations are unanimous in requesting that expatriates learn Kiswahili - it is needed and it would make the expatriates' presence much more valuable. Technical assistance personnel must make every effort to learn the local language, and the aid agencies should encourage them, even if it means adding several weeks of preparation for the job. It is arrogant and insensitive to continue insisting that Kiswahili is not needed when almost 100% of local personnel think it is indeed necessary.

### 7.3.3 Conclusion and recommendation

The ability to adjust to a new situation, to be flexible and open minded, has a lot to do with a natural self confidence.

A combination of superficial recruitment and none or unsatisfactory preparatory training can lead to situations, where a TAP as a result of a certain cultural shock and professional difficulties, closes the mind, reacts without flexibility, hides himself from the local society and becomes a burden to himself and the project.

#### Recommendation

Preparatory training in job related subjects and in general development themes plus necessary language training should be made compulsory for all TAP, but as far as possible adjusted to different needs for different groups.

### 7.4 Starting on the assignment

The first few days on the new job are very important for the entire contribution of technical assistance personnel.

The donor agencies often take the responsibility for meeting people, particularly when it is agency recruited personnel. During the first days they will take the new expatriate to the relevant ministries and the new duty station, they will give the latest information about the project and practical information about housing, customs procedures etc.

#### 7.4.1 Role of field offices, role of consultants

Approximately half of our case studies show, that the agencies were appreciated for their role upon arrival. Most consultant TAP was found in the other half, and this reflects to a certain degree lack of clarity about what can be expected by agency field offices from consultant TAP.

The consultant company is normally paid for such practical support services, but in cases where consultant companies are small or inexperienced, a number of problems arise, and field offices of the agencies are expected to solve them.

In the case of FINNIDA it is clear, that the companies take care of the arriving staff. The system is established and works well. But where the experience with consultant TAP is a new one, frictions can occur.

As an example it can be mentioned that personnel at the DANIDA mission in Dar es Salaam felt, that they had to do work for some arriving consultant TAP, which the consultant companies had been paid for. It could be argued that field offices should be paid by the consultant for such services, but conflicts about such responsibilities should of course not harm TAP.

In some cases a rather cool relations have developed between TAP at a project and the responsible programme officer at the field office, and this can influence relations to new TAP. We have also seen a case, where a field office by many TAP is seen more as a controlling than supporting function. Our

picture is not clear enough to place responsibility and we do not want to identify the office, but the problem is mentioned, because it is important for headquarters to follow and monitor the atmosphere in and around the crucially important field offices.

Different offices have of course different opportunities. FINNIDA has less field staff than the other agencies, and most agencies have smaller offices in Zambia. Such differences can of course influence the service given, but not the general attitude. And our experience is that the size of the staff at field offices is not the main problem in this respect. It has more to do with attitudes and quality, and of course with the expectations of the arriving TAP.

When conflicts have to do with individual TAP, it can be difficult to pinpoint the problem. Some expatriates ask for more assistance than reasonable and small misunderstandings grow. Such problems are not major problems.

It is worse when a "new" TAP explains, that he or she was treated correctly but did not feel welcome.

#### 7.4.2 Overlapping or...

Both agency TAP and consultant TAP normally get the most useful assistance from their new TAP colleagues. There is normally a good exchange of information. And it is easier to be newcomer at a project with other TAP, than to be the first.

Problems arise however often, when there has been "a gap" between the coming and the outgoing TAP. It is very often the idea that there should be overlapping between two TAP doing the same job, and it works sometimes. But in close to one-third of the cases overlapping did not take place. In some cases TAP posts were vacant for months between two postings, and the project idea or TAP positions was lost.

The value and cost of overlapping can be discussed. In projects with more than one TAP, the new TAP can get general information about the project from the outgoing TAP, colleagues, TAP as well as national project staff. Only a short period of operational handing over may then be required, provided the outgoing TAP has prepared an operational handing over report. Such reports should be made a condition before a TAP can leave a job.

However, in more complex projects where institution building has been the main task of the outgoing TAP, who has been the only TAP in the project or programme, a longer period of maybe 2-3 months could be beneficial in order to secure continuity in the work.

When the idea of overlapping is a part of a project, but does not take place, it makes both the start and the whole task for a new TAP difficult.

#### 7.4.3 The local organization

As we have seen the newly arrived expatriate normally meets the most important personnel last, that is the local personnel. And he meets them through the mediation of another expatriate. He is likely to inherit attitudes and opinions from other expatriates, and his own assessment of the situation will be biased. The local staff will place him in the same category as other expatriates, which often means as "one of them" rather than "one of us".

It is important that new expatriates are received and introduced also by other expatriates, but basically we think, that the local organization, where the expatriate will work, should meet him/her, help him/her to settle and introduce him or her to work.

#### 7.4.4 Timing of arrival

Overlapping and lack of overlapping has been mentioned, other serious problems in timing can occur.

It happens that project personnel arrive before other necessary inputs to a project are ready, and while it can be very important for a project or TAP coordinator to arrive "before the project", it is very costly and frustrating, if a number of TAP just have to wait, without being able to do meaningful work.

Often the real cost is higher than the salary they earn during this period. It can leave them inactive and they may have lost their spirit and initiative.



Other timing problems relate to housing. In general we have heard very few complaints about quality of housing, and none seemed substantive. But a real problem can be that TAP families have a long wait for a place to live. The general impression is that it is better to move to the "permanent" house or flat as soon as possible (even if it is not ready), than to live for a long time at hotel.

Some TAP seem to be able to start at their assignment and work relatively effectively already after a few weeks. Others evaluate that it takes them three to six months to adjust to the new environment and to become efficient workers when they are posted abroad for the first time.

An average saying that the "normal TAP" posted for the first time can not do much effective advisory work until after 4-5 months seems to be the best judgement, if it is added that "the delay" is less for TAP specifically working with concrete operational tasks.

A good start can reduce the long period of introduction and adjustment. A wrong start can lead to a situation, where the TAP never get settled and adjust.

#### 7.5 Role and performance of technical assistance personnel

Most of the TAP we have interviewed find they are doing a job of importance. A few have been without meaningful assignments, but the great majority are busy and many find it difficult to get sufficient time to do everything needed. But what is needed, as they see it now, is not always what was expected before they arrived.

And one of the most common observations is that the priorities in the work are very often set by immediate day-to-day problems, and not by job descriptions or formal work plans.

Some are not aware that they have job descriptions at all, and quite a few have outdated descriptions, or descriptions based on assumptions about the job, often far from reality.

Lack of scheduled work plans (including things other than pure operational objectives) and lack of operational manpower development plans often lead to disorganized day to day crisis management priorities.

#### 7.5.1 The most common problems experienced by TAP

When interviewed TAP describe problems which make it difficult for them to perform their tasks or have changed their tasks in relation to what they expected.

The most common problems raised concentrate on:

- the counterpart situation (see also 4.3), including the problem, that persons, who TAP are supposed to work together with, are away on scholarships.
- the fact that TAP for these and other reasons have to fill positions and do the job, where they had expected to have training or advisory functions only.

It is surprising how often TAP feel they are working in something like a transition period. "Just now, the project has some specific and temporary problems, which makes it necessary to find ad hoc solutions."

Common reasons are that

- counterparts are away on scholarships
- counterparts have not yet been appointed or have just been transferred
- time gap between a leaving and coming TAP increases the workload for the remaining TAP
- all sorts of practical problems: break downs, procurement problems, negotiations, paper work etc take time away from other more long-term tasks.

Problems are of course very different for different types of TAP. In positions defined as gap-filler functions it is easier and less complicated just to do the work, whereas project coordinators are often so occupied with negotiations, paperwork and practical management operations, that they have little time to share experiences with local staff and to work with long-term integration.

Some examples can illustrate the character of some the problems:

In The State Mining Corporation in Tanzania the Finnish team of TAP were preoccupied with running one of the mines during the evaluation, because its Tanzanian managers were on training abroad at the time. (Stamico has received Finnish assistance since 1969).

In Mbeqani Fisheries Development Centre in Tanzania (Norwegian support since 1974) a report from 1983 tells about Tanzanians coming home from scholarship studies, and feeling alienation. They were suddenly unknown persons to the expatriate team that had arrived during their studies overseas. The experts had established working relations with the remaining staff, and some returning fellows felt like intruders or outsiders.

At Zambia Cold Storage Corporation in Lusaka a Danida-TAP working as chief and development engineer since 1982 was given his first counterpart five years later. In 1987 this counterpart was on scholarship outside Zambia, and the TAP still performing all duties. There are not any elements of planning for out-phasing of TAP in job descriptions and no overall strategy for training.

At a Provincial Planning Unit in Zambia a Finnish TAP working as government officer (provincial planner) described his work as "ad hoc work, gap-filling and control of funds." He estimated, that he used one third of his working hours on Zambian administration, one third on Finnish administration (FINNIDA plus consultant company) and one third on ad hoc tasks. A work plan exists but was difficult to stick to.

The very competent TAP worked in principle together with Zambian staff, but at the time of the interview one highly qualified Zambian was on scholarship in London, one was in Lusaka for shorter studies, and one was only employed on temporary basis. Only one experienced Zambian planner worked in the unit; he was complaining over his subordinate position, but was not seen as a qualified

counterpart by the TAP or the Zambian system. The TAP feared on the other hand, that the qualified planner on scholarship would never be appointed to take over because he was too young, and because Zambian authorities did not want to promote him "two steps at one time".

The whole Finnish support programme for the development of the province should according to project documents have 6 TAP in three different areas. But due to recruitment difficulties and delays only 3-4 have been posted for long periods. This has also changed the TAP task considerably.

While the programme could have been designed differently with less TAP, it was now often felt by the present TAP, that they have to do two functions at a time, and the burden of administration, control of funds etc, created problems.

At the Industrial Training Programme in Kenya (supported by DANIDA since 1970) TAP felt a pressure to participate in instruction of classes, while their prime objective should be to update and improve training programmes. There are competent instructors available in Kenya, but also a problem of understaffing. TAP understands the pressure, and feel that it can create negative working relations if they refuse to give instructions, but they feel at the same time, that their time could be used better. Some have "solved" the dilemma by refusing to give instructions officially, but do so unofficially.

#### 7.5.2 TAP as trainers

In chapter 4 a number of weaknesses in the training system are outlined. Many TAP find themselves inexperienced and poorly prepared to organise training of local personnel. Very often the unprecise term "on-the-job-training" covers little more than sitting together in the same office or the same department. The most visible token of concern for training is seen in the recommendations for scholarships. However a well thought out plan to integrate the scholarship studies with institution building in the projects is rarely observed.

This is an area, where many TAP could benefit from much more support. Many TAP will be able to work with training systems, but not to develop them.

But purely advisory functions are on the other hand difficult and dangerous. In the case we saw how an advisor after 8 months felt, that he had learnt much more than he had contributed (which can be positive), but also that he still had no operational role, had conducted no training programmes and had performed practically no other functions.

#### Recommendation

Where functions are purely advisory, they still need to be based on concrete tasks specifying the institutional set up, the decision making procedures and the distribution of powers and responsibilities between the TAP and National executives.

It can often be necessary to place TAP for a period as gap-fillers in the system or as executives in managerial positions, but in such cases we have very often seen that neither the donor system nor the recipient system have any clear picture showing when and especially how the positions are being "nationalized".

#### Recommendation

TAP should never be placed in executive positions without a simultaneous plan for the transfer of the positions to the local staff.

#### 7.5.5. Duration of assignment

Two years is a very short period for a TAP working in a foreign country and culture for the first time. And a majority of TAP extend their contract for another period.

It is our observation, that a lot of time is wasted or used on social and cultural adjustment during the first two year period, making the cost of effective working time even much higher than the salaries and total costs of donor agencies show.

It is not unusual to use 3-4 months to get started on the new job and 2-3 months to wind up, leaving 18 months (including normal leave) in a two year period.

In some projects (e.g. DANIDA supported Taita-Taweta district development programme) the time perspective of the first project period (three years) contradicted the TAP's two years assignments.

It is our conclusion that two years assignment should not be considered the norm.

#### Recommendation

For each project and each position the objectives and needs should form the background for the assignment period and TAP contracts should be made accordingly.

Whereas the first assignment should often be longer than two years, it is broadly recommended by TAP to have a formal short-term follow up technical assistance at projects after out-phasing of long-term TAP. The short-term TAP has to be experienced personnel with a good concrete background and prior knowledge of projects. Such short-term assistance as supplementary to continued financial assistance could often make it possible to plan for earlier out-phasing of TAP.

#### Recommendation

Donor agencies should develop systems for use of experienced former TAP on short-term TAP assignments as a part of a systematic follow up on long-term TAP, making it easier to continue with advisory functions after formal out-phasing of TAP, and thereby also easier to withdraw long-term TAP.

#### 7.5.6 Integration between local and foreign staff

The working atmosphere between expatriates and local staff is an important element in the transfer of knowledge. It is obvious that an atmosphere of hostility, envy and misunderstanding is not conducive to a transfer of skills, nor even to an effective job performance.

Very few project settings could be described in such negative words, but that does not mean, that there is a sense of common purpose, mutual respect and fine collaboration. Relationship between local and foreign staff is often friendly enough, but usually each part goes about his own business. If we conclude, that around 20 % of the expatriates in our cases have a good and close professional working relationship with the local staff, we have not exaggerated.

### Recommendation

Systems or schemes for transfer of knowledge interchange are very often lacking and should be developed.

At an old and big TAP project like Rural Road Maintenance in Tanzania with NORAD-TAP all in executive functions, and with support since 1972 the first senior training officer arrived about a year before this evaluation. This does not mean, that the project has been totally without training, but that no systematic effort has been made, and that interested and dedicated TAP have not been given sufficient support. More and earlier training could possibly have reduced the number of TAP many years ago.

In 1985 SIDA assigned a seasoned officer in the agency to become an adviser in the design of programmes for training and institutional learning. The officer travels extensively to be able to participate in the development of training programmes on the project site. His experiences amply demonstrate the need for such services.

NORAD's office of education and fellowships has made knowledge transfer a prime objective for its efforts.

Another problem in the field of training is lack of sufficient knowledge about different formal training opportunities in the country or in neighbouring countries. There have been cases where trainees have been sent to Europe on scholarships, but where the same course could have been given in a neighbouring country. And none of the field offices in Kenya, Tanzania or Zambia have any comprehensive review over most relevant training institutions and possibilities in East and Central Africa.

### Recommendation

It is recommended to create and regularly update a review of training opportunities through cooperation between donors (the Nordic) and recipient countries.

It could become a valuable support for training activities.

### 7.5.3 Conflict between flexibility and lack of planning

Many young TAP have a good professional background, but lack management experience and experience in more formal training.

They have an open and positive attitude. They are prepared to learn by experience, to be flexible in their new job positions and to adjust.

But the combination of poor forward planning and lack of training and manpower development plans on the one hand, and understaffing and acute problems on the other hand can lead to situations, where ad hoc solutions become the main priority, and where TAP never get the time to be challenged by real training and institution building functions.

Some of the observations and recommendations in this area are to be found in 4 and 5. Again it has to be stressed, that there is no perfect recipe for success, but it is obvious that it is much easier to be flexible, if the flexibility can be seen within a comprehensive adjustable work plan including manpower development and gradually out-phasing of TAP.

And with the increase in the number of highly educated nationals it becomes still more important to make certain, that TAP are not just placed as gap-fillers in functions, for which Nationals are available, but where (costly) TAP becomes the alternative to cheap National professionals, because of lack of funds or poor government salaries.

### Recommendation

It should always be the first choice to try to find ways of employing nationals, where they are available. TAP is often seen as the first solution to a problem. It should be the last.

### 7.5.4 Executive versus advisory functions

We have found problems both when TAP "takes over", as in the cases of Tanga Cement, Mbegany Fisheries Development Centre and many others. How should low paid nationals be able to influence decisions and to integrate, when they are without any formal responsibility. They become "onlookers".

Seemingly trivial issues play a role for the organizational climate.

Expatriates have usually much better access to equipment. Vehicles are a particular problem. The use and abuse causes frequent problems and mistrust. It is common that both sides perceive the other as using the cars for illegitimate purposes: expatriates by using it for vacations and locking it, when they go on home-leave, local staff for private transport and family purposes. Often, it seems, that both groups have valid reasons for complaint, but basically the problem arises from the fact, that in countries where access to transport is a privilege, the expatriate have always much easier access. There are cases, where cars included in TAP assistance may be more important than the TAP.

Office equipment and office space is a similar but less frequent observed problem. It is still possible to find projects, where all TAP have both chairs and desks, but where it "unfortunately due to lack of space" has not been possible to find room for local partners, who have to move around and find a chair here and there.

There are also differences in standard of equipment. Personal computers are a useful new tool for many TAP in their work, but if this new tool is not going to be in use, when the TAP has left it can be a wrong standard of equipment, indirectly "telling" local personnel, that they cannot be expected to perform without a PC.

It is also problems like these, which make the "counterparts" weak, and gives the word counterpart a negative connotation in Kenya, Tanzania and Zambia.

#### 7.5.7 TAP in the social environment

The presence of a great number of well paid expatriates have of course an influence on the social life of recipient countries. TAP are a sort of luxury guest workers, with a living standard and consumption patterns very different from the average population.

This is unavoidable, but the overall impact of TAP in the societies is substantial, and not always positive. It should therefore be taken into consideration. The life style of TAP becomes a special problem in countries with a negative economic growth, like Tanzania and Zambia. The average citizen experiences increasing hardship, and TAP are at the same time given more "fringe benefits" to be able to work. More protection and more special treatment. It is important that TAP are prepared for such experiences and prepared to handle situations in a responsible way.

Another factor affecting the status of expatriates pertain to their relation to the secondary economy, the parallel or black market. These problems are most frequent in Tanzania. There is a number of ways in which TAP can utilise the difference between the official and the black market. The most obvious way is through the sale of cars and household goods, but there are numerous others. Some legal, others illegal.

In job situations, where informal and sometimes illegal activities in the recipient system, can be one of the reasons for project failures, it is of course a problem, when/if TAP are involved in different black market activities. Obviously it is not possible to measure exactly the level of such activities, but in the donor society as such, they are clearly visible and well known.

One factor more in relations between expatriate and local staff is important, and that is the size of the TAP community in different projects. It is often important for a new TAP to work in relation to other TAP at a project. It is difficult to be alone in a different environment. But it is dangerous to be too many.

When big projects with a large TAP component becomes "islands of plenty in countries of scarcity" new barriers are created: Between projects and the surrounding society, and inside projects between the big expatriate group, and the local staff.

It is not healthy, if the TAP group is so dominant, that the working language becomes one of the Nordic languages. In such cases the whole Nordic culture follows easy, and Kenyans, Tanzanians or Zambians become strangers in their own countries.

These tendencies have been seen in some of the big projects mentioned in chapter 4, which are also some of the projects, where out-phasing of TAP have been most delayed.

There is no doubt a correlation between too big TAP teams developing or maintaining their own culture, and problems with integration and out-phasing in many projects.

## 7.6 Role of the aid agency

### 7.6.1 The need for a differentiated view of roles.

In the chapters above we have occasionally commented on the role of the aid agency in connection with identifying projects, recruitment, preparatory training, arriving in the country. It is quite clear that activities of the aid agency, or the absence of activities, play a significant role for the effectiveness of technical assistance personnel. This applies equally much for agency implemented projects as for projects implemented by external organizations. As a first step in the discussion we would propose to make a distinction between situations where the agency is actively involved and situations where it is passive.

Some projects are characterized by very frequent contacts between aid agency staff (field office and/or headquarters) and project staff. The extent of contacts can be "measured"; perhaps there are daily meetings of either formal or informal character. The correspondence can also be frequent, letters, telex and telephone conversations several times a week.

One example of a project with close contacts between the aid agency and the project was Norwegian assistance to a saw mill in Tanzania. The programme officer was closely involved in all stages of project implementation, he knew the personnel and their families, and he knew the local management. He was thoroughly familiar with the substantial nature of the project.

Danish assistance to shipping on the Tanzanian lakes was similar. The programme officer took active part in a large number of decisions of an operational nature, not only at the strategic level. The reporting system of that project was also rather tight and it had been subjected to a number of

in-depth evaluations. In both of these cases the aid agency had an in depth knowledge of the projects and managed their development.

Often such tightly managed projects are agency implemented, but not always. Some projects implemented by external organizations are also closely integrated with the aid agency (the Norwegian saw mill project, for example). This could be so for two reasons - one being that the external organization fails to organize the cooperation. But the other reason has to do with the form of the contract, the division of labour between the partners and the reporting system. If the contract requires continuous negotiation and consultation the agency will be involved. If shipments, customs clearances, training programmes, etc. are still channeled through the agency they will also need continuous consultations.

In general the close contacts between aid agency and projects seem to be a precondition for an effective management of technical assistance personnel. It is through a close integration of all aspects of the work that aid agency personnel have a chance to assess how well different experts are doing and what problems they have - and the same regarding local personnel. It is also through a close involvement with the project that they will have a chance to strengthen the performance of weak personnel, and if need be, terminate contracts and send home the expatriates. In general, the various monitoring reports that are used will not be of any help unless the quality of the agencies' integration with the project is good. Furthermore, if the quality of the integration is close and good, the reports are not needed anyway.

### 7.6.2 "Scanning" as a mode of operation.

But we also have several examples of technical assistance where the aid agencies role is much less intense. Some project personnel do not meet aid agency staff at all, or perhaps only some few times every year. The programme officers may not even be informed about how many expatriates work on a project and what they are supposed to do. Perhaps the agency staff have no real knowledge about the nature of project activities - and are not familiar with the management and staff of the local organization. The programme officer's role is to assess the value of the project from a distance, often by relying on secondary information. This role could be called "scanning" as it implies getting information without being closely involved and without direct super

vision. It implies having a "feeling" for how things are going. But it is expected that if something (or someone) fails, the programme officer should not only detect this but should also take action to have the problem solved. Scanning thus means supervision from a distance while being prepared to interfere if the need arises - and that is an extremely difficult role.

"Scanning" is more characteristic of the aid agencies' role in respect of projects implemented by external organizations, but it is also found on some agency implemented projects. Each mode of operation has its problems. We have seen examples where the aid agencies active involvement and tight management has caused major problems for technical assistance personnel and has reduced the value of their jobs significantly. Clumsy and undiplomatic interference in activities that were not understood by agency personnel have in some cases led to disintegration of projects. But it is also possible to enumerate examples of failure to "scan" effectively. Such a failure is seen when projects and personnel continue with serious problems that are never addressed or solved, and when there is no evidence that they were detected by agency personnel.

In one case an expatriate family had several problems with housing, childrens' education and general health - which all reflected that they did not adjust to the situation in the developing country. This was clearly brought to the attention of the agency through the written reports of the family, who requested assistance in different forms. There were also direct contacts. But the agency in question did not react. It seems as if it was paralysed and did not know what to do. Their preparation to act and help the family with their further adjustment was basically non-existent. Even in such examples are rare, they do occur. In our opinion the aid agencies should pay more attention to how they could intervene and help solve problems at an early stage. This is more important than formal reporting systems. As long as nobody acts on the information in reports these are but an exercise in futility.

In a simplified way we have now distinguished four "modalities" of project relations; those of active involvement on agency implemented projects, those of external organization implemented projects, and those of "scanning" on agency implemented and external organization implemented projects. There is of course no general pattern of success or failure in these four modalities. The potential for a meaningful and constructive cooperation is usually there

so is the potential for a dysfunctional relationship. But each "modality" seems to be associated with a trap. Active agency involvement presupposes a high quality and professional competence on behalf of the agency personnel, plus matching personalities. Another precondition is relatively stable personnel, when new programme officers arrive without sufficient knowledge of a project, and when programme officers positions are vacant for long periods - then active involvement becomes an impossibility.

"Scanning" is subject to another trap. It can easily be an excuse for doing nothing and for knowing nothing. It is also difficult to assess whether what is presented as "scanning" is really an activity of high quality or not. It will of course be revealed if signals arrive that require some form of action, then it becomes visible if the aid agency had a real grasp of the events that were "scanned". The activity as such becomes most problematic on external agency implemented projects. If a firm in charge of a project has very few contacts with the agency, and if the local authorities do not cooperate with the agency, it might well be impossible to follow events. It is also possible that the project personnel have a vested interest in keeping the agency ignorant - and there are examples of situations where they were relatively successful in doing so.

#### 7.6.3 Backstopping services.

The role of the aid agency could also be to provide backstopping services to technical assistance personnel. Backstopping could mean a number of things, for example all the services that have to do with the employment contract (paying salaries, insurances, arranging housing, leave, travelling), project services such as purchasing equipment, arranging scholarships and training programmes. But it also includes professional consultations. It might be very important for technical assistance personnel to discuss their job with someone of the same profession - to get inspiration and ideas, to check whether your approach is right or wrong, etc. One of the advantages of external organizations implementing projects are that this aspect is said to be taken care of quite well. But the aid agencies are not as disadvantaged as is commonly believed, very often the programme officers do a very good job in this respect. In fact, our case studies do not indicate any major difference between agency implemented and other projects in this respect!

As our evaluation is not really concerned with the effectiveness of aid agencies as such, we will not pursue the problem any further. The aid agencies, particularly the field offices, have a significant impact on the effectiveness of technical assistance personnel. To exaggerate a little bit we could say that expatriate personnel are instruments in the hands of the programme officers for the service of the recipient countries. If the instrument is handled clumsily it will do harm, but if it is handled with care and precision it will have chances of doing good. But the requirements will vary from project to project, and it will also change over time. Active agency involvement might be useful in preparatory phases, and perhaps in concluding phases of assistance. On the other hand "scanning" could be an appropriate mode during consolidation and diversification of activities.

#### 7.7 The end of an assignment.

When an expatriate has completed a number of years on a project he will return home. By that time he will have gained considerable experience of the project, the country and the process of assistance. The danger is that this knowledge is lost to everyone but himself, and as he or she goes back to the ordinary activities at home even that memory will fade away. The problem for the aid agencies, and also for external organizations, is to document learning, to store the information and to retrieve and make use of it - for new projects, for the same project, for newly recruited technical assistance personnel and for its own personnel.

##### 7.7.1 Written debriefing.

The Nordic aid agencies all have some form of debriefing procedures where the departing expatriate should tell the programme officers (in the field office and at headquarters) of his experience. Usually they also write some form of report which is stored in the archives of the agencies. At times the reports are made available to new personnel - but most often they are forgotten. Why? Well, usually because they are not very good. The information they contain is trivial and if it should happen to be interesting in itself it is presented in a boring and haphazard manner.

When an expatriate leaves the whole family is usually preoccupied with moving, returning to the home country, finding new jobs or returning to the old ones. All these practical problems make it difficult to sit down and make a proper account of years of experience. This experience is perhaps also partly subconscious and it is not easy to put in words. It is hard to account for all the difficulties and problems at work, and in adjusting to a foreign culture in general. Some will also be concerned about presenting themselves in a favourable light so they get new jobs. Thus there are many reasons why the written debriefing - "terminal reports" - are not very interesting and thus are not widely used. But when they are good they have a great potential, as we saw on the Swedish nurse tutor programme in Zambia. The terminal reports on this project held a high quality and were used by the successors.

##### 7.7.2 Debriefing sessions.

There are also debriefing interviews, but they seem to be equally difficult to make interesting. These sessions may well be pleasant for the moment, both for the programme officers and the expatriates. But neither partner learns anything they did not know before - the value of the process lies more on the ceremonial side. It is not to be expected that an hour or so could yield any significant new insights.

The only instances where returning expatriates experience seem to be effectively used are at the course centers (see section 4C above) and in some of the external organizations - particularly those involved in twinning arrangements. One of the chief characteristics of the twinning arrangements is that people go back to the same employer and they continue with the cooperation from there. Often former expatriates will return to the field as short-term consultants. They will receive trainees from the developing country in their own organization. They will have opportunities to meet their successors at work and speak at leisure about their job in Africa. This creates an environment of institutional learning which is very difficult to duplicate.

The aid agencies all try to make use of former technical assistance personnel for various tasks. To some extent they also help returning expatriate with shorter jobs if they are unemployed when returning home, but those are exceptions. But they can be called in for evaluations, for preparation of new



phases on a project etc. The agencies also try to keep updated rosters on the whereabouts of former technical assistance personnel - but the overall impression is that such data banks are not utilized very much.

The sad fact seems to be that the potential for learning from the experience of individuals is seldom realized. Here the project cycle coincides with the individuals assignment, when projects come to an end they are forgotten and it is difficult to find any visible indicators of learning.

#### Summary of findings and recommendation

It has been most relevant to include recommendations after the different relevant sections of the project cycle in this chapter. General findings and recommendations especially relating to section 8.5 should be seen together with findings, observations and recommendations in chapters 4 and 5.

### 8. ALTERNATIVES TO TAP

The alternative ways to achieve the goals of development aid can be looked into at two different levels; the alternative ways to give development aid in general and the alternatives for the TAP in the present general set-up of development cooperation. The former level goes beyond the scope of this evaluation and therefore only the latter level is discussed here.

In the case studies the following alternatives for TAP were identified:

1. Local professionals
2. Seconded staff from the local institutions
3. Volunteers
4. Short-term consultants
5. Implementation by a local institution
6. Twinning arrangement
7. Intensive training locally and abroad

#### 8.1 Local consultants

##### Observations

Among the case studies there were some cases in which local consultants were used in the projects. Local consultants were used for instance as community participation and training officers in some rural water projects. These officers seemed to be very capable in their work and their contribution was highly valued by the TAP. However, it was obvious that there was some friction between them and the ministerial staff. The rather large salary differences must be a strain on the relations between the government employees and local consultants. In addition to this, the implementing foreign agencies have a tendency to give a local consultant better facilities to do the work than to a staff member who has been seconded to the project by the government.

##### Analysis

The use of local consultants in the projects is rather new and therefore the cases so far are few and kind of experimental. When skills and knowledge is transferred to a local consultant it is not transferred to the public sector of the country but to the private sector. Previously it has been seen as the function of the development assistance to develop the public institutions of

the recipient country. However, more recently the governments of the recipient countries have become more aware of the need to develop also the private sector. In Kenya there is already a rather well developed private sector but also in Tanzania the fast development of the private sector is presently the most noticeable feature of the economy.

The fact that there is a considerable difference in the salaries of government employees and local consultants causes problems especially in such projects in which both are represented. It is only human that the government employees would feel bitter when they receive less than a third of the salary of a local consultant who has the same training and is doing a similar job. Altogether the question of salaries for local consultants is a difficult one. Some bilateral donors follow the scales of UN organizations others negotiate each case separately. Some local consultants want to follow the international prices. This is an issue in which cooperation between the donors would be an advantage in order, not to save money, but to make the system as fair to all as possible.

#### Conclusion and recommendation

It is the view of the mission that local consultants could be used more often in all the three countries, but especially in Kenya where there is more local trained manpower available than in the other two countries. This has to be done in agreement and full cooperation with the government of the recipient country in order to avoid the problems mentioned above.

#### 8.2 Seconded staff from the local institutions

##### Observations

Almost all the projects which are implemented more or less independently from the local institutions have some staff which has been seconded to the project by the sectoral ministry. It became evident during the case studies and in the country studies that such assignments are generally not liked by the local officers. An officer who spends several years in a project is away from all his position and consequently from the scheme of service and therefore does not get promotions. Because this is not compensated in the salary they are losing economically while in a project. Projects also require a full time contribution from its employees, which means that the officers working in the

projects do not have as much time for their private business as they would in their regular office. It should be emphasized that the government salaries are insufficient for living and therefore it is a necessity for the government officers to have additional income.

In the Kenya-Finland Primary Health Care Programme the Project Manager has been a local Provincial Public Health Officer during the second phase. This certainly seems to be a good solution since in this kind of programme it is of vital importance that the Project Manager is familiar with the health problems and with the social and cultural environment of the programme area. He also knows the local institutional structure and the administrative procedures which are often the worst stumbling blocks to expatriate project managers. It is worth mentioning that at the beginning of the second phase he arranged a two day workshop for the staff of the project, both expatriate and local, to discuss the contents of the project document. The purpose was to make sure that the whole staff had a common understanding of what they were supposed to try to achieve.

#### Analysis

It is important for any project that it has also local staff which can advise the TAP of the local culture, procedures and practices. If this idea is properly understood and implemented it can save the project from many unnecessary problems. However, the cases in which locally seconded staff is genuinely integrated into the project are rather rare. Also, the seconded staff members often have other duties in addition to the project and they can be called by their superiors in the ministries to meetings and for occasional tasks.

The government officers are used to following the government procedures and intend to continue this while seconded to aid projects. However, especially company implemented projects are often run with a mentality which is typical at private companies which means that procedures are streamlined and decisions made quickly bypassing as much bureaucratic red tape as possible. The ways of the project may thus seem improper to the government officers and this brings tension between them and TAP.

If TAP are not fully aware that in most cases the government officers have been seconded to the projects against their own will, they cannot understand their sometimes negative attitude towards TAP. These feelings can be reduced e.g. by allowing an equal excess for them to the project facilities.

#### Conclusions and recommendations

Before a project requests for more government staff it should fully analyse the problems involved and assess its own ability and willingness to deal with them. The Mission thinks that when government officers are seconded to projects, their loss of promotion opportunities should be compensated by possibilities to get scholarships so that they could acquire higher degrees and thus return to higher positions. Also ways to compensate for the loss of income should be found.

#### 8.3 Volunteers

##### Observations

The organization of the volunteer service varies between the Nordic countries, however, the principles and aims are practically the same.

In Denmark, Finland and Sweden the volunteer service has been organized under an NGO arrangement whereas in Norway it is a part of Norad. The Nordic countries have a total of some 600 volunteers in the field at present.

Usually volunteers work individually in gap-filling positions but occasionally they are placed into development projects although this is not the actual policy of the volunteer agencies. In our case studies there were some volunteers. The volunteers were mainly Nordic but there was also one American volunteer. Quite a few of TAP had previously worked as volunteers. Therefore it seems that volunteer service has been important in creating a resource base for TAP recruitment.

#### Analysis

The volunteers were in positions which could easily have been filled by local professionals provided that funding would have been available for that purpose. The situation is, however, different between the countries and sectors. E.g. in Zambia there may still be a need for expatriates in gap-filling positions in lower professional categories but this is certainly not the case in Kenya.

#### Conclusions and recommendations

It is the view of the Mission that the basic assumption of volunteer service that there is a shortage of skilled manpower at all levels is not valid any more. Also the other aim of volunteer service, to inform people in the home country of the developing countries and their problems through the returning volunteers, is somewhat outdated. Nowadays there are many other ways to acquire information from all over the world. However, the original idea of which the volunteer service has evolved, namely that the youth from different countries meet and work together for some practical project, is always valid. It would be time to create new ideas how this could best be achieved in the present day situation. One such idea might be to organize exchange programmes for young professionals from developed and developing countries, in which two young people would exchange jobs for a year or two.

#### 8.4 Short-term consultants

##### Observations

Short-term consultants are used more in projects implemented by companies than in agency implemented projects. It is simpler for a company than for an aid agency, to send a short-term consultant out for a specific small task. Short-term consultants are commonly used for such jobs as installations, studies, special investigations, training etc. There are also cases in which the same consultant comes regularly, e.g. twice a year, to advise in the work. Such a case was e.g. a consultant who came every six months to supervise the water laboratory in Sumbawanga, Tanzania, in connection with the Norad Rural Water Development Project. Unfortunately in this case, however, the laboratory only received new chemicals when the consultant came and therefore it was difficult to get an assessment of the system as a way to give advisory support.

Within the cooperation between Tanzania and Norway in the petroleum sector there have been several short-term consultants. Besides the Norwegian short-term consultants recruited by Statoil, the Tanzania Petroleum Development Corporation (TPDC) has used many other short-term consultants from different countries and companies. Both parties in the cooperation were satisfied that in this case short-term consultants have been a good solution. Since the technical assistance from Norway is given as a part of a twinning arrangement between the companies it has been easy for the consultants to adjust to the working situation quickly.

#### Analysis

Short-term consultants are used successfully in giving specific technical support for a local institution. The usefulness of such technical assistance depends on the strength of the local institution. Like in the case of the petroleum sector in Tanzania, TPDC is assessed to be one of the best functioning companies in the country and therefore what it needs is not so much assistance in institution building than in actual technical knowledge.

In other cases short-term consultants are used in large projects which have a large TAP component. In such cases the short-term consultants can be seen more as a support to the TAP team than to the local institution. This support may be needed especially at a time when the number of TAP is being reduced.

#### Conclusions and recommendations

The Mission saw short-term consultants as a viable alternative in quite a few of the case studies, however, usually in combination with long-term TAP involvement and use of local consultants. Especially at the time of handing over or reducing TAP in a project, a follow-up by short-term consultants was seen as a practical way to reduce the abruptness of the change. This would also give to the donor agency sufficient confidence on the continuity of the work and thus facilitate an earlier withdrawal of TAP than would otherwise be the case, and, if problems develop, they could be detected at an early stage.

Short-term consultants are the more suitable option the more developed the local institution is.

### 8.5 Implementation by a local institution

#### Observations

Nearly all the development projects are under one ministry or another which is in principal in charge of the implementation. However most projects are implemented rather independently, parallel with related government activities. It could be observed that when a project gets older it has a tendency to become more and more independent. This tendency is counteractive to the aim to hand the project smoothly over to the local institutions.

Among the case studies there were none in which there had not been any TAP component at all at any time. However there were cases in which the TAP component was very small or which had actually been handed over. Such cases were e.g. the Nordic Kibaha Educational Centre and the SIDA Tanzania Food and Nutrition Centre in Tanzania, the SIDA Nurse Tutor Programme in Zambia and the FINNIDA Industrial Minerals Project in Kenya.

It is obvious from these cases that local institutions are capable of implementing projects, however, the time schedules have been adjusted to a slower pace and scale of operation has been reduced.

#### Analysis

What the development projects do is usually not qualitatively different from what the local institutions do. The difference is more in the quantity of work achieved in a unit of time. When the level of activity in a project goes down after the handing over this does not have to be taken as a sign of failure either from the part of the project TAP or the local institution. It is more commonly a sign of unrealistic expectations. In the case of the old projects it can be said that they function at least at the same level of efficiency as local institutions in that country on average. It can be expected that a project which has represented Nordic efficiency level will settle, after handing over, at somewhere near to the average efficiency level in the recipient country.

When old projects are assessed they should not be compared with how they were while they received a lot of assistance and had a lot of TAP but with the institutions of the same environment either in the same country or in the neighbouring countries. This goes also for possible projects which are implemented by the local institutions. When evaluated they should not be compared with projects with TAP but with other similar projects implemented by similar institutions.

#### Conclusions and recommendations

Development assistance could be much more channelled through the local institutions. As a consequence, because of the limited absorption capacity of a local institution, the size of the projects would need to be reduced. This means that aid would be distributed more broadly and it would be difficult for the donor agencies to assess the effects of their aid.

#### 8.6 Twinning arrangement

##### Observations

Twinning arrangement is not only an alternative way to give technical assistance, it is also an alternative for the whole project set-up. In a twinning arrangement two similar institutions, one from the developed country and the other from a developing country, cooperate on a long-term basis. This provides a framework for two way exchange of knowledge, staff and experience as well as for effective institutional learning.

Unfortunately this mode is rather rare and therefore only few cases were in the sample of projects which were studied. Such projects were e.g. the aid to the Bureau of Standards in Tanzania and the FinnIDA Industrial Minerals Project in Kenya and the NORAD assistance to the petroleum sector in Tanzania.

Of all the institutional set-ups for implementing development projects which were surveyed during the case studies the twinning arrangement seems to provide the best possibilities for achieving the institution building training targets. In all the cases the relations of TAP and the local staff had been very good and both parties felt that they had professionally and personally gained of the cooperation. In none of these cases had TAP been in executive positions, they had been strictly advisers. TAP was recruited from

within the institution and therefore they had a good long-term knowledge of the programme. TAP and the local staff felt equals and their social relations were good as well.

A special case of twinning is assistance from movement to movement as in a SIDA sponsored project in Zambia, in which the Swedish Cooperative Centre assists the local cooperative movement.

##### Analysis

Two similar institutions, although operating in different environments, have similar objectives in their respective societies and these objectives have been internalized by the people working in them. There is a good opportunity for accumulation of knowledge and experience since the TAP is drawn from the staff in the institution and they usually return to the institution after their service in the developing country. Profitable long-term training and visiting programmes are easy to plan and implement. People working in similar institutions often have similar professional interests and this makes professional as well as social communication easier.

#### Conclusions and recommendations

Whenever possible the project implementation should be organized as a twinning arrangement. Within the case studies there were several other projects which would have profited if they had had a twinning arrangement rather than a regular project set up. This was especially the case with projects supporting training institutes.

#### 8.7 Intensive training locally and abroad

##### Observations

The possibilities to use training as an alternative for TAP have been approached in two ways in the studied cases. There are projects which give support to local training institutes and thus build up the capacity of local manpower in a certain sector but without being related to a certain project. Secondly practically in all projects training is mentioned as one of the tasks of the project. Further, in quite many projects there are possibilities to arrange scholarships for the local staff.

It could be expected that less TAP would be used in projects in such sectors, which have received substantial assistance for training. However, this is not the case. E.g. in the water sector in Tanzania and Kenya, most of the Nordic projects have a rather strong TAP component even if the training institutes of water sector have been supported as well and substantial scholarship programmes have been run for many years especially by SIDA. The Department of Geology of the University of Dar es Salaam receives development assistance from FINNIDA which includes also scholarships for studies both locally and abroad. However, at the same time the same donor has provided TAP for the State Mining Corporation for many years and there is no indication that the number of TAP is getting any less.

One of the cases, namely the Nurse Tutor Programme in Zambia gave an example of a project in which intensive training is given to a specific group and TAP is effectively replaced by local staff.

#### Analysis

Unless it is identified as a specific purpose of a training programme to reduce the number of a specified group of TAP, a training programme does not have this effect. This is not because the shortage of manpower would be greater than can be satisfied. E.g. the output of water engineers from the University of Nairobi has been about 40 annually since 1970's. This means that a new water engineer could be placed in almost every district every year. However, there are several TAP water engineers in the country working for development projects.

The reason for the fact that support to training does not reflect in the numbers of TAP is that TAP is placed into the projects on other grounds than an identified manpower need in the recipient country. If the training programmes are to reduce the need for TAP these have to be linked to each other either by designing the training programme specifically to help to replace a certain group of TAP by nationals or by basing the recruitment of TAP on a careful assessment of the manpower situation in the recipient country.

#### Conclusions and recommendations

There is no doubt whether intensive training programmes are beneficial to the recipient country, however, they do not help to reduce the number of TAP unless they are specially designed and consistently implemented to that effect.

Intensive training programmes are most useful in cases in which a new kind of activity or new technology is introduced into the country. In other words, when qualitatively something new is started. When it is a question only of expanding the manpower base in some field, support to local training institutes should be given.

#### 8.8 Other alternatives

Expatriates on local contracts, expatriates from other developing countries and topping up of local salaries can be mentioned as other alternatives.

If an expatriate is on local contract the local institution should have a better control over her/him and s/he would be, without question, answerable to her/his local superiors. In these cases the donor agency would pay her/him the difference between the local salary and the regular TAP incomes. Therefore this is not a cheaper solution but somewhat more acceptable to the local officers.

Expatriates from other developing countries, especially from India, are sometimes recruited as TAP instead of TAP from industrialized countries. Their main advantage is that they are cheaper than e.g. Nordic TAP. It is also sometimes assumed that they can be more effective than Nordic TAP because they are used to developing country conditions. We are not convinced that this is the case. In addition Indians are certainly not more accepted by the African population of Kenya, Tanzania and Zambia than the Nordic citizens.

Recruiting expatriates from other countries within the region would, however, provide the local professionals broader possibilities to be exposed to different ideas and opportunities for professional advancement.

Topping up of local salaries and thus motivating the local government officers to be more efficient is a procedure which, if applied, has to be used cautiously in order to avoid creating tensions between the government officials. However, it would seem fair to us, to compensate them for the increased demand on their time and possible loss of promotions while working in an aid project.

#### 8.9 Financial assistance for recruitment of expatriate personnel (consultancy/personnel funds).

NORAD and SIDA have established so-called personnel funds for financial assistance for recruitment of expatriate personnel in most of the main partner countries. SIDA was the first Nordic donor to launch personnel funds from the mid 1970s.

The conditions for assistance have varied to some extent among the donors and in the individual countries. The experts have been hired on local contracts. The donor has covered expenses incurred in the recruitment procedures, travel costs of the expert and his family, house allowance and gratuities after the completion of their contracts. NORAD has specifically targeted the personnel funds to TAP from other Third World countries.

The donors inputs regarding salaries vary; in some cases the donor has fully paid the (local) salaries or topped-up the local salaries or solely reimbursed part of the salary in foreign currency. NORAD's experience in Tanzania may illustrate this way of utilizing the funds. NORAD pays 1/3 of the beneficiaries' salary in foreign currency after the local employer had paid the equivalent amount of money in TSH to the Treasury. The administrative procedure proved to be rather cumbersome and caused delays and frustrations. In 1986 some amendments were made in order to simplify operation. Nevertheless, the agreement was terminated in 1987. Due to the devaluation of the TSH in 1986 much of the incentive effect of the system was lost.

The personnel funds have been criticized for many reasons:

- the funds have not been utilized for hiring new experts. Instead the funds to a large extent have been used to cover salaries of expatriates with a long record of service in the country.

- the funds have not stimulated in-service training through counterpart system as intended.
- the requests have not been forthcoming as expected. The accounts and auditing system have not been provided as agreed upon.
- the administrative work on the part of donors has been high compared to the amount of financial assistance involved.

#### Recommendation

The idea behind establishing the Personnel and Consultancies fund was good. The funds have many interesting elements. To our mind it is a pity that the funds are not utilized in line with initial intentions. We recognize that the problems are large and it seems to be necessary to evaluate the organizational structure and the procedures of operation in their own right, if the funds are to be given a chance to function well.

#### 8.10 General conclusion

Most projects have, besides TAP, a combination of these alternatives. However, it is the view of the Mission that the use of alternatives could be substantially increased. In Kenya especially, local consultants could be used much more, and in Zambia, where there is a more severe shortage of manpower than in the other two countries training programmes should be organized. In Tanzania, where the government has faced most serious economic problems, implementation through local institutions should be increased in order to give them additional resources.

## 9. COST AND EFFICIENCY OF TAP.

### 9.1. The cost of TAP as compared with alternatives

#### 9.1.1 The cost of agency employed TAP

The Nordic agencies have standard figures for the cost of one manyear's work for technical assistance personnel. The figure varies from one country to the other, but hovers around 650.000 SEK. This includes the gross salary to the employee, insurances, travelling, family allowances, housing, etc.

Let us look at one of the figures that go into the average costs for an expatriate manyear. NORAD has calculated the cost for one manyear in Kenya in 1987 to 632 000 NOK. This sum consists of two main components;

1. Salary plus social expenses: NOK 332.000
2. "Distributed costs": NOK 300.000

If we look at the second component, these distributed costs consist of the following;

1. Preparatory courses: NOK 70.000
2. Recruitment: NOK 35.000
3. Travel and freight: NOK 65.000
4. Insurance: NOK 22.000
5. Employers' tax: NOK 35.000
6. School fees: NOK 29.000

There are also a number of minor costs, such as security guards, 3.000 NOK per year. There will be a large difference between an expert with a family compared to an unmarried person. (The cost for having one child in the International School in Nairobi is 100.000 DKR). Also, the longer the persons stay out, the more the costs for recruitment, etc. can be spread.

The average cost for a SIDA expert is slightly more than 600.000 SEK. This cost is calculated as follows:

Basic salary: 7.000 SEK per month in taxable income  
 Social security: 39 % of the taxable income  
 Allowances: 18.000 to 20.000 SEK per month  
 Distributed costs (c.f. NORAD): 300.000 per year

DANIDA calculates that the total cost for an expert (in 1986) was 520.000 DKR, out of which the salary was 260.000 per year. FINNIDA uses a standard figure of 58.000 FMP per mammonth, or 699.000 FMK per year. We can thus see that there is a fairly large discrepancy between the Nordic aid agencies. NORAD and SIDA experts being around 20 % more expensive than the DANIDA experts, and a FINNIDA expert being almost twice as expensive.

The differences are on the one hand illusive, and on the other real. From the recipient countries point of view they are real. The cost represents how much of the total budget for development assistance that goes to payment of experts. For them, a Danish TAP would be cheaper than other Nordic TAP. But the costs are illusive in the sense that the real expenditure on personnel are quite similar. The question is how the costs are treated in the domestic accounts. The taxable income of a SIDA expert is artificially low, but the non-taxable income elements are much higher. In Finland, the experts salary is taxed as for any other Finnish government employee. The cost to the donor community is about the same, but in the case of Denmark the home country bears a larger share of the cost in the form of bypassed earnings (tax).

When calculating the cost for a man year, none of the agencies include its own administrative cost. The standard costs of all the four agencies are thus too low to reflect the real cost. To assess the cost correctly we should also add the salary and office expenditures for the aid agency personnel that administrate technical assistance. If the total 18 manyears of work in NORAD's personnel section are distributed, we should add another 35.000 NOK to the TAP cost in Kenya. But it is not only the personnel section that is involved in backstopping and administrating technical assistance personnel, but also other programme officers. We estimate tha on the average 20 % of the time in a programme officers work (both at headquarters and in the field office) is concerned with personnel matters, which should mean adding another 85.000 NOK to the cost. We thus arrive at a total cost of 747.000 NOK per manyear.



On the average TAP stay 33 months at their jobs. But they do not work effectively all the time. During this period the average persons takes 3 months holiday. It is also generally said that it takes some time to get started on a new job. The personnel officer at Kenya Industrial Estates said he did not expect expatriate staff to be able to work effectively during the first year. This is exaggerated, but there will be a reduced efficiency during the first year of work - it seems to us that the magnitude would be around 4 to 6 months. There will be large variations according to the different personal backgrounds. Furthermore, before returning home the TAP and his family have a lot of practical matters to attend to. It is likely that another 3 to 2 months are taken from the actual job. As we can see, 33 months in the field leads to 24 months of effective work. The cost per man month of effective work is thus in NORAD's case 72.400 (without including administrative overheads). If we include overheads of 115.000 NOK per year, we arrive at an estimated cost of 85.600 NOK per month of effective work.

#### 9.1.2. Costs for consultant TAP

Consulting firms are generally more expensive than agency employed TAP. DANIDA uses average figures for consultant man years of 900.000 per year. But the remuneration of consultants vary even more than of agency TAP. The most expensive consultant TAP cost 1.500.000 NOK per year in 1987. The cheapest were paid approximately the same as agency TAP. The cost for consultants are however also supposed to cover backstopping and administration. The cost should therefore be compared to the agency standard cost plus all the distributed costs for administration and backstopping.

But we should also remember that several consultants do not send their personnel for training. When they employ personnel in their own organization the costs for recruitment are also nil. Thus the costs for the consultant tend to include less services, while at the same time it is more expensive. One of the significant advantages with consultants is that they bring a total package, that is, the agency cost for backstopping and administration would be low. However, that is far from true. Several inexperienced consulting firms need a lot of assistance from the aid agency field offices.

In the initial phases of the SIDA project Tanzania Bureau of Standards there were close contacts between SIDA, TBS and the consultants. As the project has matured, it runs on its own. DANIDA is heavily engaged in backstopping the TANGA cement plant (partly because of contractual relations). On the other hand FINNIDA assistance to Fibreboards Africa runs on its own with hardly any contacts with FINNIDA in Dar-es-Salaam.

In sum, to assess the cost of consultant manyears correctly, we propose to add another 100.000 SEK per year for the services of aid agencies. We thus arrive at a total of 1.000.000 SEK per year. On the whole, consultants do not stay as long in the field as agency personnel. They tend to have a more rapid turnover of personnel. But they are generally more production oriented, and start with production oriented tasks. They lose less time at the beginning and end of projects. On the whole, this is a problem. But it means that they work more manmonths out of their total stay in the countries. If we estimate the average duration of consultants field work to be 24 months, and that 4 months are lost on arrival and departure, and 2 on vacation, we arrive at a total cost of 111.000 SEK per active working month.

#### 9.2. Cost of alternatives to TAP

##### 9.2.1 Cost of short-term consultants

The cost of short-term consultants in Sweden is usually around 15.000 SEK per week. The costs for travelling, hotels and allowances should then be added. We estimate the cost for one manmonth to 60.000 (salary) plus 30.000 (allowances) plus 20.000 (travel), that is 110.000 SEK. Short-term consultants also require backstopping. They will need more time from local authorities, but usually they do not take so much time from the aid agencies. Nevertheless, the amount above should be adjusted for the backstopping time of the agencies, but we cannot say how much it should be.

##### 9.2.2 Cost of training of local manpower

The cost of training will depend on subject, length of the programme and country of studies. A scholarship for one year in Norway amounts to 120.000 NOK. That is one year's academic studies. If the education was in the U.S., the cost would be the double if the student went to an elite university, but

otherwise approximately equal. If the training took place in India, it would be reduced by half. There are good opportunities for advanced studies in other developing countries as well, primarily in Asia but also in the Middle East. For Portuguese and Spanish speaking Africans, Latin American universities provide cheaper (and often very good) programmes. Cost of scholarship on academic programmes usually only reflect living allowances and travel. Many institutions are now changing their policies and charge tuition fees. This will raise the general cost of education for scholarship students.

Further studies on academic programmes are one alternative to TAP, but often various types of shorter programmes are suggested as alternatives - on supplements. Training abroad is always expensive. Industrial training in Sweden costs around 35.000 SEK per manmonth (in-plant technical and managerial training of 6 - 8 months duration). Technical training at schools, e.g. on BITS financed programmes costs 47.000 SEK per participant and month. The international aid organization estimate the cost of scholarships at 2.200 USD (1985), but in Western Europe, USA and Japan, they estimate the average cost to be around 5.000 USD per month. But the costs for different programmes could vary. UNIDO's in plant training programmes on "industrial goods manufacturing" cost 7.700 USD in 1983. A similar course on "diesel engines' maintenance" cost 2.900 USD the same year - per month and participant.

Training in the country is often a viable alternative to training abroad. But this implies bringing short term consultants for training. Considering the cost for travelling, instructors, local support, etc. the average cost per manmonth in such courses have been estimated to be around 25.000 SEK (Forss, 1985).

Naturally, further training at national educational institutions in accordance with personnel planning would be a much cheaper alternative. As an example, Sao Hill saw mill project sends personnel for further training at Tanzanian institutions. Management takes part in shorter course at the Institute of Finance and Management in Dar-es-Salaam, at the Institute of Development Management, at the East and central African Management Institute. The cost of these course are paid in TSH and they are low.

### 9.2.3. Cost of volunteers

The cost of volunteers is now around 300.000 SEK per year, which is approximately half of the cost of the agency standard figure for TAP. 40 % of the cost reflects salary and 60 % distributed costs. But the cost of volunteers should also include the cost of backstopping and administration. This cost is lower than the agency cost for TAP services, but it is nevertheless significant. The average effective working time of volunteers is expected to be the same as for agency TAP. We thus arrive at an average cost of 34.000 SEK per month (not including administrative costs).

### 9.2.4. Cost of third country TAP

It is often suggested that third country nationals would be a cheaper alternative to TAP from the Nordic countries. We do not find any discrepancy between Scandinavian personnel and other Europeans. When we look at the remuneration within the UN system, we find that all its international experts have Nordic wage levels. It can thus be assumed that highly qualified expertise in some professions has a market at Nordic salary levels, irrespective of whether the person is of European, Asian or African background.

The question still remains whether a number of the Nordic TAP could not have been substituted by TAP from other countries. Even though the remuneration of Nordic TAP is similar to the UN system, that does not mean that all would be qualified in an international competition. If we look at the bilateral assistance from the People's Republic of China, the cost of a Chinese expert is equal to the daily allowance of a Swedish expert. Indian TAP on bilateral assistance programmes also cost less than Nordic TAP. All the African countries also recruit manpower directly in Asia, at costs that around a fifth to a tenth of the cost of agency TAP.

### 9.2.5. Cost of local project implementation

It has been discussed whether local project implementation is sometimes an alternative to implementation of a project through TAP. Let us first of all assume that a project can be implemented by the local organizations. The manpower needed would then be paid according to the local salary scales, with

the appropriate overheads. That means that a manager in Tanzania, or a senior technician, would cost around TSH 10.000 per month. Zambian salary levels would be close, and the Kenyan salaries would be the same in KSH, which means they are 5 times higher in foreign currency.

But it has also been argued that it is difficult to attract qualified persons to the public sector with its present salary structure. The projects that have successfully recruited local personnel have also found ways to circumvent such Government policies. Some projects were simply able to pay higher salaries to their employees because they were set up outside the parastatal structure. Others managed to provide fringe-benefits and other types of incentives that could compensate for the lower salaries.

If we are to give an estimate of the cost for implementing projects with local personnel, we would probably have to quadruple the monthly salaries of senior civil servants. We arrive at a total cost of 4.000 SEK per month in Tanzania, 2.000 SEK in Zambia and 12 to 15.000 SEK in Kenya. This would apply to private companies, government institutions and special contracts for local professionals, etc.

#### 9.2.6. Conclusion

We will now put the estimated cost of the different alternatives beside each other for the sake of comparison. The reader should bear in mind that one type of assistance cannot be a real alternative to a manmonth of the other type. But the balance between the different types could be sensed in terms of their total prospects for success.

One manmonth effective work:

Agency TAP: SEK 85.000

Consultant TAP: SEK 111.000

Short-term consultants: SEK 110.000

Scholarship for academic programme: SEK 10.000

" technical course: SEK 50.000

" in-plant training: SEK 35.000

Technical courses in the recipient country: SEK 25.000

Volunteers: SEK 34.000

Third-country experts: SEK 10.000 - 135.000

Local project management: SEK 4.000 - 20.000

#### 9.2.7. Cost to the recipient

If we now look at the cost from the recipient country's point of view the first aspect relates to the direct costs that expatriates necessitate. They need offices, secretarial assistance, etc. to do their jobs. In many cases the government provides housing. Whereas the accounted cost for this is low, the opportunity cost will often be very high. More important is probably the indirect cost in terms of high level manpower time needed to introduce expatriates to their jobs, and in other ways administrate expatriate presence. This takes scarce manpower resources away from other urgent tasks, but as long as the expatriates are wanted and needed there is nothing to say about that. However, we have also seen that many expatriate positions are initiated by the foreign partners, and some expatriates are not wanted. But the costs still have to be borne by the "recipient".

It is difficult to isolate the costs associated with the presence of expatriates from the other costs that are incurred by technical assistance. There is always a local government contribution to the project, and the investments have to be sustained from the current budgets of the governments. The technical assistance personnel are closely associated with the pattern of creating institutions that cannot be maintained without further assistance because they have gone beyond the carrying capacity of the local economies. This has an influence on local spending patterns and the grand result of the priorities cannot even be estimated, nor can of course the opportunity cost be guessed. But they are likely to be large. There are also costs to the recipient country in the form of changing consumption patterns and the influence of foreign life styles. The governments have a political cost to carry because of the presence of technical assistance personnel.

#### 9.3 Efficiency and effectiveness of different categories of TAP

In total, the Nordic countries finance the presence of slightly more than 900 technical assistance personnel in Kenya, Tanzania and Zambia (1987). If we assume that the total cost per manyear is around 1 million SEK, we thus arrive at a total figure of 900 million. The cost per manyear is higher than the standard figures, but considering that these do not include total personnel costs, and considering that many of external organizations incur higher costs, we think it is a reasonable approximation.

If we take the opportunity cost to mean the difference between the real cost of expatriate assistance and the cheapest possible way of achieving the same effect, we would probably arrive at a fairly large share of the above mentioned sum for Nordic technical assistance personnel (900 million SEK). But it is also very clear that such a figure will be extremely uncertain - to the point of being ridiculous even. But let us nevertheless attempt an introductory discussion.

If we first of all base the discussion on our case studies, which represent all sectors of assistance and covered interviews with around 250 expatriates, 350 representatives from the recipient country, and some 50 programme officers in the aid agencies, we have some ground to stand on. In addition, the 50 case studies represent the accumulated activities of around 800 technical assistance personnel.

If we put a name and a price tag on the different problems we find that: (1) on the average 5 % fail radically on their assignment and have to be sent home, (2) another 5 % do not have their contracts extended for the same reason, (3) around a quarter have their working capacity reduced because they do not speak English well enough, (4) around another quarter were in fact not really needed, the posts were identified by aid agencies or other expatriates, (5) the full effectiveness of almost 75 % was hampered because of a lack of other inputs, and the counterpart system failed to lead to a transfer of knowledge. Now, these categories overlap to a large degree. However, they still indicate a fairly low general "achievement ratio". But it hides the excellent performance of several expatriates that bring huge monetary benefits to the organizations they work in, as well as the failures that incur large costs both to the aid agencies, the recipient governments and to the expatriates themselves (not least the social costs).

Before proceeding to a discussion of efficiency and effectiveness we would like to note what is commonly meant by these two concepts. An account of efficiency presupposes knowledge of costs and knowledge of the benefit from an activity. Furthermore, it presupposes that both can be measured on a scale. As a consequence, efficiency is generally treated as a short-term measure of the value of some activity. It is generally agreed that a measure of efficiency needs to be supplemented with other information. That brings us to the concept

"effectiveness". Effectiveness is also as a measure of the value of an activity, the difference is that it is often a discussion in more general terms. Assessing effectiveness means that several objectives are brought into the picture and compared to the costs of an activity. It also means that various side effects are considered. The comments that follow below are concerned with the effectiveness of TAP.

The overall achievement of the objectives of TAP were discussed in section 4 above, but that discussion was not quantified, nor were the relations between non-quantifiable inputs and outputs made explicit.

Our overall conclusion was that the institution building and training objectives are generally not met, but TAP are more effective when it comes to operational objectives. There should not be any need for a more extensive debate concerning this conclusion. The fact that assistance projects continue for several years and that one plan for out-phasing expatriates follows another, is ample evidence of the overall failure to build up local competence and subsequently withdraw. A large number of the technical assistance personnel are also competent and hard-working professionals. Most of them will be at an advantage in getting things done, and in achieving production oriented objectives.

Many technical assistance personnel are advisers at lower organizational levels, and we have seen that they come to take operational responsibilities. If we were to assess the total worth of the expatriates' "gap-filling" and "implementing" activities, where would the results point? As an example, we have an already completed project; SIDA's nurse tutor programme in Zambia. Its objective was to train nurse tutors to increase Zambia's capacity to train its own nurses, and remove the need for expatriate personnel in that sector. By 1985, when the programme was completed, the objective had been reached. Zambia had the number of nurse tutors it needed. SIDA had financed a large number of Swedish tutors in Zambia between 1973 and 1985, to a total cost of around 28 million SEK. Was it worth the cost? Obviously the question cannot be answered. Could it have been done at a lower cost? Obviously, as some of the expatriates were not very effective (even if most were), but that presupposes an organization that makes no mistakes, and that is again an impossibility.

If we look at another example, assistance to the mining industry in Tanzania, we find that another problem. The mining activities have declined considerably, the production of gold went from 500 kgs per year in the late 1960s to between 0 and 15 kgs per year in the mid 1980s. The expatriate team, costing close to 4 million SEK in 1987, have for a number of years concentrated their activities on gold mining. It would seem that the benefits have few chances of outweighing the costs, but on the other hand mining is an activity with long range commitments, and even if there is no evidence of benefits today, there could perhaps be an impact on policies that in turn lead to production in the future.

Danish assistance to the public telephones in Kenya is an example where the cost-benefit ratio appears high. The cost of expatriate personnel is a very minor share of the total project, but has been necessary for the rapid installation of telephone booths. The investments costs were returned before installation was completed. There is a common agreement that the project can now be taken over by the Kenyan organization, so the institutional development and training has also been completed.

These cases cannot be compared, and thus it is not possible to say something general about cost effectiveness - apart from what has already been said. The achievement of project objectives in sectors as different as agriculture, health and industry cannot be compared in monetary terms (neither can failure). Our general observation remains that we think the same impact could have been reached with less TAP, but whether the money could have been more wisely spent on other projects, with other personnel remains open to doubt.

It is a very interesting question if the same effect could have been reached by some other combination of inputs or with other personnel. In general we do not think that TAP from any other country would have done a better job than Nordic TAP. They would have been cheaper (in several cases), but as the problem very often is one of foreign presence by and large, it does not matter much where these foreigners come from. However, if the presence of cheap TAP had meant that more money was allocated for training of indigenous personnel, it is quite possible that the overall impact had been better. If less funds were spent on TAP, resources could also have been used for equipment, consultancy etc. to a higher degree. That would also have led to a better achievement of objectives.

#### 9.4. Towards a framework for technical assistance

If we follow a project from the beginning to the end, we find that from the managerial point of view a number of things can be done differently. The same applies to technical assistance personnel, from recruitment and through the assignment to debriefing, things can be done differently.

Take the example of identifying the need for assistance; that can be done by the recipient organization, by consultants, by the aid agency, by other expatriates. Each way of doing has its cost and benefits. The aid agency and the expatriates will probably act rapidly if they have made the decision. A consultant can bring other opinions, but will work slower. The recipient organization is most likely to be correct in its assessment of the need. Now, if speed happens to be a major criteria for success, and if the need is relatively clear, and if mistakes are not expensive - or could be corrected; we should perhaps argue for the first way of identifying the need for expatriates.

Another example could be training. If the personnel going out already have considerable exposure to the developing country, and to the place they are to work in, they might not need to take part in preparatory training. An effective institutional set-up that emphasizes learning from senior personnel and that is closely integrated with the recipient organization could well compensate for such courses. This type of learning could take place on twinning arrangements, for instance.

We also discussed the various roles of aid agencies in relation to projects, and the distinction could be brought further by separating headquarters and field offices and the roles they might play in relation to personnel. The point we want to make is that there are a very large number of variables that could be handled differently.

Let us call these different solutions design variables. The term indicates that each such solution is chosen from a set of solutions, and another solution could also have been appropriate (perhaps, and depending on the circumstances). The number of design variables will vary, but probably are between 20 and 40 on an ordinary project. The number of possible design alternatives is, for practical reasons, usually limited to a handful. As we

can see, the combinations are very many; if each of the 20 design variables could be designed in 5 alternative ways, we end up with 3.200.000 combinations. The point is purely theoretical, many combinations will be non-sensical.

But the exercise also has practical implications. There is no one correct way of "delivering" assistance. If we think of the project as a process involving several design variables, our minds will perhaps be less constrained by preconceived ideas of correct solutions. The review of our case studies show some "typical" project designs. Some of them seem to work well, others do not. There are also instances where a way of delivering assistance works well in one case, but in other cases not. If we call the way of delivering assistance for a "mode", we have a term that encapsulates the whole process and that includes specific solutions in respect of the design variables.

The prospect for such a mode of reaching the objective of assistance will depend on a number of factors. The first is that different objectives will call for different modes of assistance. An integrated rural development project will usually require another mode of assistance than an industrial project. If training is essential another mode would be appropriate than if gap-filling is the primary target, or if we speak of a senior adviser.

The second is that the project's environment should influence the mode of assistance. National policies and national concerns (even if only reflected in political rhetoric) affect the prospects for a certain mode of assistance to be successful. In Kenya, it would be much more common to seek modes of assistance building on local personnel than in the other countries. In Tanzania, preparatory training that includes political science and Kiswahili would be much more important than in the other countries. In Zambia, long term continuity on senior advisory positions would be a more common "value" of a design variable in a mode of assistance than in the other countries.

The third point we want to raise is that the different design elements need to be consistent with each other. The "values" on the design variables should be in harmony. As an example, a tightly managed industrial development project that operates according to a fixed schedule needs rapid recruitment, strong backstopping and a tight monitoring system. Standardized procedures and a "well-oiled machine" for implementation are essential for cost-effectiveness.

But an institution building project in the public sector needs a more integrative nature of implementation to transfer the "software" - tight planning, bureaucratized routines and strict monitoring might destroy the "spirit" of work.

The Nordic aid agencies are for many reasons rapidly moving away from the traditional approaches to development assistance whereby the aid agency was in charge of all aspects of implementation, from the beginning to the end. Whereas the agencies procedures were to a large degree standardized, we now find a number of external organization that represent different "modes" of delivering assistance. The agencies are also being diversified as the nature of health, agriculture, industry, etc, in fact put different demands on the operations of the sections. As the developing countries progress, they also push the agencies and they necessitate a diversified approach to implementation.

The patterns of implementation that we observe today are the result of ad hoc solutions to the problems of "delivery". But if the aid agencies are to be in control of development cooperation, they need to make rational choices between modes of assistance, and they need a conceptual framework to distinguish between such modes - as well as to discuss when a specific mode of assistance is applicable or not. It goes beyond the present report to develop such a framework, but our case studies have provided the grounds for identifying the need and we would propose that the organization of development assistance over a broad range of projects - is investigated further.

## 10. RECOMMENDATIONS

### Introduction

The chapters above have indicated a number of problems that are associated with the employment of technical assistance personnel. When we now arrive at our recommendations the reader should bear in mind the following assumptions:

1. In spite of the short-comings we think there is still a basic need for technical assistance personnel on development programs. Our recommendations focus on an improvement of the existing systems of cooperation, even if the changes we propose are sometimes drastic.
2. The recommendations are based on our review of projects in Kenya, Tanzania and Zambia. The problems that were identified and that we list here were common to all countries and for all Nordic aid agencies. If the recommendations are discussed in a wider context - which we still believe is possible - it is necessary to take into account the new environment. The general applicability must be qualified.
3. When we list our recommendations we start by a brief observation concerning the problem. For the purpose of the presentation we keep this very brief, but refer the reader to the relevant section of the evaluation. In that section the reader will find a discussion of the magnitude of the problem, its manifestations and, in some cases, the diversity of solutions.

Let us now turn to the recommendations.

### Recommendations

Observation. Development assistance is often designed without sufficient knowledge of the local manpower situation. Technical assistance personnel are found to be a solution before the nature of the problem is really identified.

The recipient countries are seldom fully involved in the decisions on technical assistance personnel - for a number of reasons; the coordinating capacity in respect of manpower and aid is low, the aid agencies follow procedures that do not disclose vital information, particularly on costs, that are a prerequisite for decisions. Chapters 2, 3, 4)

### Recommendations.

- (1) The recipient countries need to strengthen their manpower planning in order to improve their knowledge about the availability of various categories of skilled manpower.
- (2) Manpower surveys will form the basis for identifying priority areas for development of the local manpower resource base and for identifying the role of TAP in the long-term development plans of the countries in question. The evaluation mission recommends that the Nordic donors react positively should the Governments request assistance in this field.
- (3) In order to attract, develop and retain skilled manpower in the public sector Kenya, Tanzania and Zambia need to reform the Civil Service. It is not simply a question of paying higher salaries and fringe benefits. For young professionals job satisfaction is probably equally important, particularly in Kenya where one can exist reasonably well on a government salary. We recommend that the Nordic aid agencies bring up the need for reforms in relation to the discussion of the need for TAP during the annual development assistance consultations with the 3 recipient countries.
- (4) Development assistance should take into account the availability of local manpower. The aid agencies should make sure that every attempt to employ local personnel has been exhausted before they resort to technical assistance personnel. To do so it is necessary to develop real knowledge of local manpower constraints and to identify ways of employing (and keeping) qualified local personnel on development projects.

(5) The desk officers of the Nordic donor agencies cannot be expected to have a thorough knowledge of the local availability of various skill categories. In order to improve the information upon which the institutional framework and personnel component of new development assistance are based, we recommend that the Nordic agencies cooperate by employing a local consultant to develop an information system on the availability of various professional skill categories and the various ways in which they can be attached to donor development programmes as a substitute for TAP.

(6) The Nordic agencies incorporate institution building and manpower/staff development in their project appraisal/project planning manuals to be used by appraisal missions. And that long-term institutional and staff development becomes an integrated part of all project planning documents.

(7) The Nordic agencies incorporate qualified professionals with relevant experience in institution building and staff development in all project appraisal/project planning teams.

(8) Technical assistance personnel should not necessarily be coupled to other forms of assistance, to a project. Financial assistance should not necessarily be linked to personnel assistance. Funds should be given in a long time perspective even if personnel may be needed for shorter time periods.

(9) The Nordic aid agencies should in every way facilitate the work of local authorities and they should respond favourably to initiatives that strengthen the ministries of manpower development, in particular.

(10) The aid agencies should inform the recipient countries on the full cost of technical assistance and should contribute to having decisions regarding foreign personnel taken at the instances where the alternatives in terms of cost-effectiveness are fully appreciated. The local authorities must be responsive to cost signals and by implication should be able to receive, interpret and act on such signals.

Observation. Personnel policies in the aid agencies are one of the main reasons for the choice of a particular form of aid, for example whether it should be implemented by an external organization or by the aid agency. The final choice has not taken the requirements of the activity as a starting point and this has led to poor performance. (Chapters 6 and 7)

### Recommendation

(11) Obviously it is the actual needs of the project setting that should govern the choice of how to implement it. Personnel constraints within the aid agencies should not be an excuse for counterproductive means of implementation. When there is a real need to expand the capacity of the aid organizations, it should be expanded. When it is better to select an external organization this should be done. In neither case should vested interests or fiscal policies be allowed to impede the effectiveness of development cooperation.

(12) If it is not possible to choose the best means of implementation in a particular sector, then the aid agencies should avoid such sectors rather than choose an ineffective means of implementation.

Observation. Few of the technical assistance personnel from the Nordic countries have relevant knowledge and skills in designing and implementing programs for on-the-job training and institution building, even if they are otherwise professionally well qualified. (Chapters 4 and 7)

### Recommendation

(13) It is important to give priority to experience and skills in training and institution building when personnel are recruited, and for the recruiters to discern when such experience is relevant.

(14) The preparatory courses should introduce personnel to training methods and models for institution building. The training should include practical exercises.

(15) The relevant skills often develop over time and we recommend the aid agencies to couple the contracts of personnel to the needs of a project. The first contract should normally not be less than three years, and there is no need for an upper limit on the years of service.

Observation. The recognition and appreciation of the local environment is frequently superficial and inadequate. This is particularly so regarding culture in a wider meaning, including political systems, administrative practices, etc. (Chapter 7)



Recommendation

(16) The preparatory training centers in the Nordic countries should further their cooperation - including country and sector specialization. The centers should develop task specific training programs that include information on legal systems, public administration and management in specific countries.

(17) The training of personnel should continue with shorter courses in the country, focussing on the local environment. These could also be undertaken on a Nordic basis. In Kenya and Tanzania Kiswahili is much more important than most foreigners realize. Competence in Kiswahili should be emphasized.

Observation. In connection with the above observations we must conclude that the recruitment base for technical assistance personnel is too narrow. The aim of funds for technical assistance should be to let recipient countries recruit abroad qualified manpower that is not available domestically. Even more serious, the same applies to the availability of competent external organizations. Given the present trend of rapidly increasing numbers of projects implemented by such organizations, this is a great threat to the effectiveness of aid.

(Chapter 7)

Recommendation

(18) To the largest extent possible the donor agencies should advertise jobs internationally and should encourage applicants of all nationalities. As a minimum, the Nordic area should be seen as one recruitment base.

(19) We recommend that the aid agencies' journals on employment opportunities are merged into one as rapidly as possible, and that consultants also advertise vacant positions there.

(20) When firms, consultants or public institutions are selected on a national basis competition is in effect limited. We recommend the aid agencies; first, to introduce an element of competition by inviting tenders on an international basis, second, to have independent, unbiased external organizations assess the feasibility of the project - and the capacity of the tendering organization to implement it effectively.

Observation. Monitoring and evaluation of technical assistance personnel concentrate on quantifiable, production oriented targets. The training and institution building objectives are neglected. This is more common when external organizations implement projects, but occurs in all assistance. (Chapter 7)

Recommendations

(21) The aid agencies need to educate their staff at all levels in qualitative assessment of project performance. The aid agencies should emphasize such skills (including personnel management) when they recruit new programme officers.

(21) The contracts between aid agencies and external organization must be very specific on training and institution development. These words must not become standard phrases but should be filled with content.

(22) The aid agencies should develop bonus systems that encourage the external organizations to perform well regarding such objectives.

(23) It should be recognized that a number of powerful forces will pull project activities away from institution development and training. These forces must be checked and evaluations should start from the assumption that the problems exist and should proceed to an account of their magnitude and what solutions, if any, that are available.

Observation. The integration between local staff and foreign staff on development projects is often poor. Foreign personnel have divided loyalties. Foreign and local staff have not similar access to office equipment, project facilities etc. There is frequently a considerable amount of distrust between the aid agencies, local authorities and project personnel. (Chapters 5 and 7)

Recommendations

(24) The terms of reference should make technical assistance personnel first and foremost answerable to the local authorities.

(25) In consequence of this the local organization should be fully involved in recruitment and should also set job priorities and engage in active personnel management.

(26) Local and foreign staff should have equal access to services, and these should be determined by the projects' requirements.

(27) There must be a commitment to personnel development which should be physically visible on every site, meaning that foreign and national staff should be working together.

Observation. The life cycle of a project is often characterized by discontinuities. The same mistakes are repeated by personnel, aid agencies and local authorities. (Chapters 3, 4, 6, 7)

#### Recommendations

(28) It is important to plan the arrival and departure of foreign personnel so that their experience is captured and utilized. The local authorities must assume the first responsibility for this, but the aid agencies also need to learn - both for the project at hand and because they represent the link to other projects, in other countries.

(29) External organizations have an even greater need to learn and to make sure that personnel have an opportunity to overlap. By definition, they are not part of the same learning system the aid agencies participate in (they are usually not specialists on development assistance). Instead, they could often act faster and avoid bureaucracy when it comes to recruitment and fielding. But there is still little evidence that this opportunity is used, and their learning is often weak.

(30) Formal debriefing procedures are good but should not be overestimated. It is important that the aid agency personnel policies allow for continuity and on-the-job learning. The programme officers represent the live intelligence and information concerning project implementation, and from the point of view of the Nordic countries, are the keys to successful, dynamic cooperation. The same should apply to the external organizations that to an increasing degree account for project implementation.

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