THE ART OF KNOWLEDGE EXCHANGE
A Primer for Government Officials and Development Practitioners
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In 2009, in the midst of the financial crisis, analysts were concerned that banks in Nepal were dangerously overexposed to inflated real estate and equity markets. Nepal’s Central Bank (NRB) decided to evaluate its commercial banks, but needed outside expertise and assistance for stress-testing its banks and assessing the damages that could result from economic shocks. Standard International Monetary Fund (IMF) models for evaluating banks in developed economies, however, proved too complex and were unsuitable for the circumstances of a small developing country.

Meanwhile, the State Bank of Pakistan (SBP) had been carrying out quarterly stress-testing of banks in Pakistan. Upon hearing about SBP’s capabilities from the World Bank, NRB leadership was eager to learn how to apply Pakistan’s regulatory analysis in Nepal. The World Bank facilitated and funded a knowledge exchange between the two central banks so that NRB staff could learn to use a simplified stress-testing, scenario-based model to evaluate the financial stability of Nepal’s banks, develop regulations to maintain the stability of banking institutions, and establish contingency plans in the case of failure of a Nepalese bank.

This story demonstrates the power of doing development differently. Nepal is very motivated to solve a pressing problem. It actively shops for a solution: the standard model is not suitable, but the Pakistani model is. Pakistan is eager to share its model with Nepal. Nepal adopts and adapts it, and it works.

The World Bank expert involved in this exchange reaches beyond his comfort zone: he does not prepare a loan, nor does he provide the expertise himself. Rather, he brokers the exchange: knowing the demand, he mobilizes the supply and facilitates the learning. As he watches Nepal and Pakistan learn, he also learns and brings this knowledge to the World Bank.

In the changing development landscape, this scenario is increasingly common. The demand for practitioner knowledge and customized transformational learning has moved to the forefront of the development agenda. Government officials and development practitioners want to connect with peers in similar situations and learn the “how-to” of reform processes. There is a growing recognition that developing countries have the knowledge of what works—and what doesn’t—to generate growth.

South-South Knowledge Exchange (SSKE) connects government officials and practitioners to one another so they can learn from each other’s practical experiences. SSKE offers the opportunity of an inclusive global partnership to help countries seeking a new approach or new partner to achieve sustainable development results.

**THE DEMAND FOR A SOUTH-SOUTH KNOWLEDGE EXCHANGE PRIMER**

As countries take a more proactive role in exchanging development knowledge with their peers, there is a growing demand for resources on how to best plan, design, implement, and assess
the effectiveness of these exchanges. In response, the World Bank has developed this guide. Its purpose is to explain the life cycle of South-South Knowledge Exchanges (SSKE) so that countries can better plan and implement knowledge exchanges.

The guide summarizes the lessons learned and good practices observed by countries around the world that have participated in SSKE. Conceived as a primer, the guide offers an overview of SSKE, breaking it into simple steps, with practical tips and lessons learned. As a primer, the guide does not present a “one-size-fits-all” model of capacity development, nor a turnkey framework for a successful knowledge exchange. Rather, it offers government officials and development practitioners a framework with concrete steps and suggestions to use when developing their own unique exchanges.

Development practitioners and policymakers are eager to explore new ideas and approaches, learn from each other, share their own experiences, and build horizontal partnerships based on equity, trust, mutual benefit, and long-term relationships.

WHO IS THIS GUIDE FOR?

Successful knowledge exchanges involve many different partners and stakeholders who fulfill important roles during the exchange. This guide is for government officials and development practitioners at the national or state level, regardless of the specific role they play in an exchange.

As an overview of all the elements to consider during a knowledge exchange, the guide presents information for all, whether you are involved in the planning, implementation, or evaluation of an exchange. It is meant for both primary learners and knowledge providers, regardless of your level of experience with knowledge exchanges.

WHAT’S INSIDE THIS GUIDE?

Identifying the right peers, planning for the exchange, and making it happen can be a major undertaking. This guide takes the guesswork out of the process by explaining the South-South Knowledge Exchange life cycle in simple steps.

The guide will help you to

» define your goals.
» identify appropriate knowledge exchange partners.
» design the knowledge exchange.
» implement the knowledge exchange.
» collect lessons learned and share results.
We found that our peers in other countries face many of the same problems we face. Civil society and professional associations are really empowered and get involved in the process of medical licensing. It really helps make the process transparent and accountable.

Phan Thi Hai
Medical Service Administration, Ministry of Health, Vietnam
II. UNDERSTANDING KNOWLEDGE EXCHANGES

TYPES OF KNOWLEDGE AND KNOWLEDGE SHARING

Let’s start with the concept of knowledge. We can define it as information, facts, data, know-how, and experience. Within this definition, we can distinguish between two types of knowledge, explicit and tacit. Explicit knowledge can be codified and written down to be shared. Academic papers, books, or data are typically considered explicit knowledge; so is this guide.

Tacit knowledge, on the other hand, is non-codified, unarticulated knowledge that you and your peers carry in your heads. It is hard to formalize and communicate because it is rooted in experience, insight, and intuition. Tacit knowledge can be shared best through knowledge exchanges.

This distinction between explicit and tacit knowledge is important. Take a look at the image on the next page. If we think of knowledge as an iceberg, the explicit knowledge is the small portion that shows above the water line. Even with all the books and articles being shared around the world, the majority of knowledge, that is, the tacit knowledge sitting in people’s heads (or underwater, in the metaphor) would be left untouched and therefore unused.

Just as with knowledge itself, we can distinguish two main forms of knowledge sharing. Unidirectional knowledge sharing refers to users accessing explicit, written knowledge materials. Multidirectional knowledge sharing refers to peers directly sharing their experiences and practices.

WHY SOUTH-SOUTH KNOWLEDGE EXCHANGE

Government officials and development practitioners increasingly want more than explicit knowledge and unidirectional knowledge sharing. They want to be directly connected to peers who face similar challenges—to learn from practical experiences the “how-to” of development and policy reforms. This interaction can enrich the analysis and understanding of their own circumstances, opportunities, and constraints.

Lessons drawn from the practical experience of others who have recently addressed similar challenges can improve stakeholder buy-in and create an enabling environment for designing and implementing development initiatives and reforms. Knowledge exchange provides space for learning and strengthens policymakers’ capacity to take charge of their own development processes by identifying, designing, implementing, and evaluating solutions. With this more efficient and effective process, countries witness an overall improvement in performance.

The majority of books and articles published on country development worldwide still come from high-income countries. Documenting and sharing explicit knowledge from SSKEs is a good way to democratize development.
As the demand for tacit knowledge has risen, so has the demand for a more diverse pool of knowledge providers. There is a growing recognition that developing countries have the knowledge of what works—and what doesn’t—to generate growth. Developing countries have become an important source of development knowledge transfer. Thus knowledge exchange constitutes one of the most important forms of South-South and triangular cooperation.

**WHAT IS TRIANGULAR COOPERATION?**

Triangular cooperation involves three partners. It combines the strengths of traditional donors, multilateral institutions, and providers of South-South cooperation to implement knowledge sharing programs in beneficiary countries (primary learners). Triangular cooperation provides access to diverse but complementary intellectual capital.

Multilateral institutions and traditional donors often play the role of brokers, but they can also provide expertise and knowledge, while strengthening the capacity of developing countries as providers of development cooperation.¹

**WHY COUNTRIES PARTNER IN SSKE: INCENTIVES AND BENEFITS**

Knowledge Providers: Countries increasingly want to become primary knowledge providers for many reasons. Here are just some of the benefits.

¹ For more information on triangular cooperation, see http://www.oecd.org/dataoecd/62/54/44652734.pdf.
UNDERSTANDING KNOWLEDGE EXCHANGES

The road to learning by precept is long, but by example short and effective.
- Seneca

» Political benefits: Participating in knowledge exchanges allows countries to establish new relationships with other countries, complementing trade and political dialogue.

» Economic benefits: Participation can lead to future business opportunities as officials gain a better understanding of foreign markets and improve inter-country cooperation. Engaging in SSKE also shows solidarity with other countries and can improve regional integration.

» Increased visibility: Countries become knowledge providers to showcase their successful development experiences and increase their global visibility. More and more middle income countries use knowledge exchanges to present themselves as centers of development and innovation.

» Validated findings and feedback: Knowledge providers often receive valuable feedback during knowledge exchanges and can use the interactions with their peers to validate their previous findings. Knowledge providers can become learners during exchanges and are able to consider their project from various perspectives.

» Increased knowledge stock: Research on learning shows that interacting with others and adapting knowledge to a new environment can add to your knowledge stock and help you internalize your own lessons learned. Sharing knowledge with others involves critically and analytically rethinking the observations you want to share; so you learn in the process.

While we teach, we learn.
- Seneca

WHAT ARE KNOWLEDGE HUBS?

A knowledge hub is a country-led institution or inter-institutional platform. It can be public or private. A hub supports and connects national actors, mainly development practitioners, to external peers and partners who offer or seek development experience and expertise.

In policy terms, a knowledge hub is ideally framed by a strategic approach to knowledge exchange as a tool to achieve development results and strengthen local capacity. In practical terms, it facilitates and coordinates national actors who are willing to engage in knowledge exchange with other Southern countries around relevant development experiences.

A hub provides practical tools for the identification of relevant experiences as well as for the design and implementation of result-based knowledge exchanges. It also facilitates access to funding of knowledge exchange initiatives and engages in partnerships, nationally and internationally, with other knowledge institutions and multilateral organizations.

A number of countries are developing or strengthening their knowledge hubs, including South Africa, Indonesia, Singapore, China, Mexico, and Brazil.
Knowledge recipients and primary learners: Knowledge recipients usually gain the most from demand-driven knowledge exchanges, receiving a variety of benefits.

» Better understanding of their circumstances: Lessons drawn from the practical experience of others can enrich the analysis and understanding of countries’ own circumstances, opportunities, and constraints, allowing for more holistic solutions. Knowledge exchanges enable countries to validate their ideas and seek input and advice.

» Exposure to best practices and success stories: Countries can learn from their partners about approaches and tools that worked well—or failed. They can gain valuable insights into successful and innovative models and examples from other countries and can adapt these to their local contexts for effective capacity development.

» Strengthened endogenous capacity development: Knowledge exchanges can improve stakeholder buy-in and provide space for learning. They also strengthen policymakers’ capacity to lead their own development process.

» Increased cost-effectiveness through proven technologies: Knowledge recipients may gain access to tested and adapted technology, tools, and theories without having to reinvent the wheel. As a result, countries can save significantly on cost and time as knowledge exchanges promote smart use of resources.
III. THE KNOWLEDGE EXCHANGE LIFE CYCLE
– THE SIX ELEMENTS OF A SUCCESSFUL SSKE

Table 1. South South Knowledge Exchange Lifecycle

While every knowledge exchange is different, nearly all comprise certain important elements. (Please note that these elements do not necessarily occur in any defined order.) The brokering stage of the exchange includes matching the supply and demand between the prospective knowledge partners to achieve the defined goal. Exchange organizers secure funding, plan and design the exchange, and decide how to share knowledge among the partners. They implement the exchange and document, evaluate, and share the results and outcomes.

There are six different elements of a knowledge exchange engagement. You need all six for a successful exchange. Each element is critical in its own right.

» Element 1 – Defining your goals
» Element 2 – Brokering: Identifying appropriate knowledge exchange partners
» Element 3 – Financing the knowledge exchange
» Element 4 – Designing the knowledge exchange
» Element 5 – Implementing the knowledge exchange
» Element 6 – Collecting lessons learned and sharing results
1. **Defining your goals:** You need to anchor the knowledge exchange in the development goals and development outcomes your country is trying to achieve. As the knowledge seeker, before beginning any knowledge exchange you should ask yourself the key question, “What positive outcome are we seeking in my country and what do I need to learn to contribute to this change?” Learning goals should align with decision-makers’ priorities and their ability to focus on and implement targeted changes. If you are approaching the exchange as the knowledge provider, you should also ask proposed knowledge seekers this question, so that the initiative can be designed to meet these objectives.

2. **Brokering: Identifying appropriate knowledge exchange partners:** Once you have identified the learning goals, you need to strategically match the demand and supply sides of the knowledge exchange. This means making sure participants have relevant experience to share and are in key positions to effect change. If you are the knowledge seeker, key questions to ask yourself are, “What country is the right match for my learning needs? What country has gone through similar challenges? Who has the knowledge I need?” As a knowledge provider, you should ask, “What experience or knowledge exists in my country that other countries might want to learn from? What is the best mechanism to make this knowledge available to my knowledge exchange partners?”

3. **Financing the knowledge exchange:** Another key element in the SSKE life cycle is funding the exchange. You will need to make sure all relevant resources—sustainable funding, staffing, technology, and implementing institutions—are available to support an ongoing knowledge exchange.

4. **Designing the knowledge exchange:** For this phase you will select an effective learning design and the most suitable instruments and activities to meet the knowledge seeker’s learning goals. These are described in detail.

5. **Implementing the knowledge exchange:** Here is where the real action happens, as knowledge partners meet and exchange experiences. You must—this is critical—use available resources effectively and implement the knowledge exchange instruments through thoughtful project management. Doing so increases exponentially your knowledge exchange’s chances of success.

6. **Collecting lessons learned and sharing results:** After completing the knowledge exchange, you need to promote and maintain continued interactions both between countries and within each participating country to sustain learning. You will need to schedule recurrent interaction, not just a single follow-up session.

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**Knowledge exchanges allow learners to replicate and scale up best practices that worked for other countries. But one of the greatest strengths of SSKE is that it helps countries avoid pitfalls by learning about approaches that did not work. Ask your knowledge exchange partner about common mistakes or ideas that, in the final analysis, were ineffective or costly. With this information, you can be sure not to make the same mistake.**
The Knowledge exchange life cycle

Knowledge exchange actors, roles, and responsibilities

Successful knowledge exchanges involve a variety of partners and stakeholders, who, throughout the life cycle, fulfill important roles and tasks. While every knowledge exchange is different, a number of key roles are central to all exchanges. Note that actors can fulfill more than one role over the course of the exchange.

Most South-South knowledge exchanges connect two or more countries and their institutions, where one is the primary knowledge provider and the other the primary learner. This inter-country partnership is the core of the exchange.

A broker matches and connects the partner countries, while a funder finances the exchange.

The partnering countries usually select the people for the planning and coordinating team that leads the exchange. Members of the team may act as facilitators, running workshops, conferences, and study tours. Alternately, the planning team may hire outside consultants and vendors to handle these tasks.

The foundation of the exchange is its stakeholders, participants, and change agents. Its success depends on having the right individuals, groups, and institutions involved; these should represent a broad group of interests in both partner countries.

Next, you will find lessons and recommendations for creating successful knowledge exchange programs. We have structured the lessons along the life cycle, and explain key concepts using examples from past exchanges.

Defining your goals

Knowledge exchange can be a highly successful tool for mutual learning. But like any good capacity building approach it should be anchored in the broader development context, and national priorities should drive its agenda.

So, what is a development goal? How can SSKE help in achieving this goal? A development goal states the broad objective a country hopes to achieve. It should provide clear economic and social value to targeted beneficiaries.

To achieve its national goals, a country must have the institutional capacity to do so—which means having adequate ownership and interaction between key stakeholders, a solid legal and institutional framework, and the ability to efficiently and effectively deploy resources.

The aim of the SSKE is to strengthen a country’s capacity to advance national goals. The knowledge exchange organizers, therefore, need to engage individuals who can influence these institutions or initiate or drive a change process. This is where the SSKE impact starts. The knowledge exchange affects local agents, increasing their skills, knowledge and motivation; they then effect a change in institutional capacities, which contributes to achieving the development goals. Knowledge exchange, alone, will not enable countries to achieve their development goals, yet should contribute to its achievement.

Before committing to a full-fledged knowledge exchange initiative ask yourself these questions:

» What development goal do I want to contribute to with this knowledge exchange?
» What are the main constraints hindering the achievement of these goals?
» What should change as a result of this knowledge exchange? (capacity objective)
The wise man learns from the mistakes of others.
- Otto von Bismarck

Defining your goal or goals is the first step in the SSKE life cycle—and it is a critical one. Well-articulated goals are imperative for the success of the initiative and for results measurement. With clear goals you will be able to prioritize what is important and what is not, and appropriately guide the other elements of the life cycle.

Table 2. How SSKE Contributes to Development Goals and Institutional Capacity Building

**Development goal**
- This is the major objective the country is trying to achieve; it drives the knowledge exchange.
- The knowledge exchange should bring the country closer to this goal by targeting institutional weaknesses that constrain the goal’s achievement.
- SSKE will not alone achieve the development goal, but should contribute to reaching it.

**Institutional capacity**
- Countries need institutional capacity to achieve their development goals. Without it, they will fail.
- SSKE should target changes at the institutional level.
- SSKE can affect stakeholder ownership, policy efficiency, and organizations’ effectiveness.

**Individuals’ capacity**
- SSKE happens at this level. Individuals’ targeted learning outcomes should be clearly identified.
- Through SSKE, individuals (change agents) may enhance their knowledge and skills, raise awareness, improve consensus and teamwork, strengthen coalitions, enhance their networks, or increase their implementation know-how.
EXAMPLE 1: SUPPORTING ADMINISTRATIVE REFORM OF SOCIAL SECURITY IN VIETNAM

The Government of Vietnam wanted to reform its inadequate social security administration to become modern, fair, and transparent (development goal). The government identified key areas that needed attention: a fragmented legal framework, poor coordination and information sharing between government agencies, lack of knowledge about social security laws and compliance procedures, inadequate professional skills, and inadequate ICT systems (institutional challenge). The Vietnamese officials especially wanted to learn about the business processes, information management systems, and IT solutions that had allowed other countries to reform their systems for administering old age pensions and health insurance (learning needs of individuals).

EXAMPLE 2: DAIRY SECTOR REFORM PROJECT IN TANZANIA

The Government of Tanzania realized that improving the dairy sectors would increase income for small rural households (development goal). Tanzania had established a National Dairy Development Board (NDDB) to strengthen its dairy sectors, but dairy output remained constrained by weak production, processing, and marketing techniques; slow uptake of technology; problems in the dairy regulatory environments; and inconsistencies in the organization of village-based dairy cooperatives (institutional challenges). The Ministries of Agriculture and NDDB officials had limited technical and administrative capacity to overcome these hurdles and guide growth in the sector; they wanted to enhance their knowledge and skills to promote a comprehensive plan and build consensus for dairy sector reform (learning needs of individuals).

IDENTIFYING APPROPRIATE KNOWLEDGE EXCHANGE PARTNERS

A key challenge in creating knowledge exchanges is finding the best match of demand and supply. While all participants in the exchange are to some extent both learners and knowledge providers, in most cases you will have primary knowledge providers and primary learners.

What makes for the most suitable match between knowledge providers and specific learners? At the matchmaking stage, a prerequisite is that exchange practitioners know enough about the participating countries’ needs and comparative advantages. In other words, before a country can set out to find a knowledge exchange partner, its goals need to be clearly defined, as described above. In what area is the learner seeking knowledge, or can the provider identify lessons and experiences to share? In many instances, the roles of the providers and recipients are not very distinct; when this is the case, you can design the knowledge exchange for mutual learning and sharing.
Also, at this stage it is important to be clear about who the change agents are. What are the profiles of the participants you want in the knowledge exchange? Ask yourself, “Which people or groups are most likely to make the change happen? Why are they the best placed to do so?” Consider who can and will initiate and manage the changes needed to address the capacity constraints. These change agents might be from just one institution or a mix of individuals, groups, and institutions.

Consider the following when selecting the participants:

» Who will champion the cause and make the envisioned change happen?
» How does the person’s role or status help him/her contribute to the exchange and its aftermath?
» Are different change agents needed to achieve different outcomes?
» What incentives do participants have to apply their learning as expected?

To identify the right match, or peer, on the knowledge provider side, you need to know the learning needs and participant profiles of the knowledge seeker.

Having the right knowledge providers is key to a successful knowledge exchange. Knowledge providers can be individuals, groups, or institutions hailing from the private, public, or civil sector. They can come from the same region as the knowledge seeker or from somewhere very distant.

In identifying the most appropriate knowledge provider, ask yourself, “Which individuals or groups have the most relevant and transferable knowledge and experience to share? Do they have the resources and capacity to share it?”

**How to select the ideal knowledge provider**

You can use this list of criteria when selecting knowledge exchange partners:

» Demonstrated success in effectively addressing similar development challenges
» Relevant experience in providing knowledge, receiving delegations, and applying the proposed knowledge exchange methods
» Available resources to plan and implement the knowledge exchange in the proposed time frame
» Readiness to deliver, supported by confirmed commitment and a clear distribution of responsibilities
» Prior relationships between knowledge-provider and knowledge-receiving institutions, groups, or individuals
» Understanding of potential logistical issues and risks, such as translation needs and travel challenges
The Knowledge exchange life cycle for Knowledge SeeKerS

To develop an efficient knowledge exchange, first identify your needs and describe your demands.

Be sure to target and engage the appropriate change agents—people or groups best positioned to initiate and manage the changes you want.

Be proactive in discerning your developmental needs and show commitment and ownership for long-term sustainability of learning outcomes.

How to select the ideal learners – change agents

When considering whom to invite (and whom not), work with your knowledge exchange partners and any participants you have already identified. Your participants should be well positioned to leverage their experience. Who is best placed to benefit from the knowledge exchange and act on what they’ve learned?

Change agents play a critical role. They initiate and manage the change process. Seek the champions of the desired result—those who are open to reform and who will drive the desired change.

CHANGE AGENTS – AN EXAMPLE

The change agents relevant to a particular program might or might not be the same as the organization(s) targeted for change. For example, if the goal is to improve parliamentary oversight, the agents of change could include the following:

Parliament itself (or particular employees or groups of employees), in which case the agent of change would also be part of the targeted capacity factor.

Outside parties such as (a) civil society or media organizations that put pressure on Parliament for better accountability and (b) capacity-building organizations that help to enhance skills of Parliament staff to improve the oversight function.

MAKE THE MOST OUT OF YOUR BUDGET

When designing a knowledge exchange, you have a large variety of instruments and activities to choose from. All have their merits and associated costs. In the next section, you will find guidelines on how to pick the most effective tools for your circumstances, budget, and learning goals.
EXAMPLE 1: SUPPORTING ADMINISTRATIVE REFORM OF SOCIAL SECURITY IN VIETNAM

In this knowledge exchange, change agents included key Vietnamese Social Security Administration staff at headquarters and three provincial offices, technical staff from all related technical departments, as well as a wider audience of Vietnamese officials (including the Ministry of Labor and Social Affairs and the Ministry of Finance), civil society, and think tanks. The desired goal was to design and monitor a comprehensive reform program to modernize Vietnam’s social security system; this large undertaking would only be successful if consensus among all the stakeholders could be built.

In terms of knowledge providers, the Government of Vietnam wanted to learn from the experiences of other middle-income countries that had modernized their systems for old age pensions and health insurance. Vietnam was particularly interested in countries that had implemented World Bank projects for social security reform. So, it selected Latvia, Bulgaria, and Turkey as suitable knowledge exchange partners. The Social Security Agencies (SSA) in these countries had managed business process re-engineering and implemented information and communication technology (ICT) upgrades. They also had managed their human resources and established procedures for overseeing and managing social insurance reserves.

EXAMPLE 2: DAIRY SECTOR REFORM PROJECT IN TANZANIA

In Tanzania’s case, the change agents included representatives from Tanzania’s National Dairy Board and the Ministry of Agriculture. These institutions are responsible for dairy policies and sector oversight and are uniquely suited to improve the operational efficiency of the dairy supply chains. Leading dairy producers, processors, and distributors were also included in the exchange as they can push for greater reforms and will eventually also benefit from having a better system. They are proven champions of reform and were selected because of their desire to apply learning and share it with others.

As for the suitable knowledge provider, Tanzania picked India’s National Dairy Development Board and the Gujarat Cooperative Milk Marketing Federation. The Indian National Dairy Board, a preeminent oversight agency, was instrumental in catalyzing the country’s “White Revolution,” which led to an increase in India’s milk production from 20 million to 100 million metric tons in only 40 years, turning India into the largest milk producer in the world. India’s National Dairy Development Board was interested in sharing its experiences analyzing constraints and restructuring dairy operations, and brought a proven track record in undertaking exchanges worldwide. Gujarat Cooperative was picked as it could provide direct linkages to a cooperative that dramatically scaled up its operations, especially through its global brand AMUL. Both organizations had confirmed resources to deliver all exchange activities within the noted time frame.
FINANCING YOUR KNOWLEDGE EXCHANGE

Knowledge exchanges are generally considered a cost-effective capacity development tool: countries learn from each other’s development experiences. Nevertheless, to get the most out of SSKE, just-in-time, adequate, and sustained funding is a prerequisite. You need adequate funding to finance, for example, a study tour or an expert visit; and you need sustained funding to share learning goals with others and to mainstream the lessons learned. Therefore, access to funding mechanisms is highly important for a successful SSKE.

What funding mechanisms are available for South-South knowledge exchanges?

As a South-South knowledge exchange partner, you should secure your own internal funds to co-finance the knowledge sharing initiatives. You will need to advocate for permanent and reliable sources of funding within your country to allow for sustained and flexible knowledge exchanges. However, there are a variety of national, regional, bilateral, and multilateral platforms for South-South funding that you can investigate for support.

Policymakers can increase the chances of receiving adequate funding if the knowledge exchange program is part of a series of other capacity development interventions. You can also link knowledge exchange programs to the policymaking process, instead of creating one-time interventions.

- **National budget**: Linking South-South knowledge exchange to national development goals and priorities can be highly successful and cost-effective for national capacity development. Be sure to first see what national and regional funding mechanisms already exist.

- **Knowledge exchange partners**: A good source of funding can be a knowledge exchange partner (as primary provider or learner). When designing an exchange and choosing partners, see if any of them are willing and able to support the exchange financially. You can also opt for trilateral cooperation agreements that bring in a third party to fund the exchange.

- **Third-party funding**: There are many alternative sources of funding, ranging from multilateral institutions to NGOs and country-led trust funds. You will find a list of additional funding sources on our website, wbi.worldbank.org/sske. Below is an overview of funding sources made available through the World Bank system.

- **World Bank lending**: Since South-South knowledge exchange addresses capacity development constraints, you may work with the World Bank to explore lending type financing options associated with broader development programs supported by the World Bank. South-South knowledge exchanges can also be financed as part of multi-year World Bank development projects and programs.

- **South-South Experience Exchange Facility**: This instrument is a demand-driven multi-donor trust fund to support sharing development experience and knowledge among World Bank client countries. Created in 2008, the Facility is located in the Knowledge Exchange Practice of the World Bank Institute and is the only World Bank financing source that is solely dedicated to supporting South-South knowledge exchange. For more information on eligibility visit www.worldbank.org/seetf.

- **Fee-based services (FBS)**: In approved cases, the World Bank may provide South-South knowledge exchange services on a fee-for-service basis. The World Bank works with countries at their request, providing advice and expertise without providing lending. Countries reimburse the Bank for the costs of its advice. In providing fee-based services, the Bank’s purpose is to expand the options and services available to clients beyond those that it can fully fund through
its administrative budget. For many high- and middle-income countries, World Bank fee-based knowledge and advisory services are becoming increasingly important.

In the example cases of Tanzania and Vietnam cited earlier, knowledge exchanges were funded through the World Bank’s South-South Experience Exchange Facility.

**DESIGNING THE KNOWLEDGE EXCHANGE**

The two most basic elements of a knowledge exchange design are specifying the learning objectives and selecting the learning methods. If you know the overall development goal, the institutional capacity constraints, and participants’ learning objectives, you can design the knowledge exchange. This is when the initiative starts to take shape.

As you design and develop the knowledge exchange, you will refine your participant list, work with your key stakeholders to fine-tune the learning objectives, assemble your instruments and activities, and plan how to measure the results.

It is important to maintain momentum and regularly involve your participants in the planning. By the time the exchange is ready to launch, you and your participants will have a strong sense of the learning objectives and expected outcomes.

When assembling your initiative, follow the steps below.

1. **Consider the operating constraints.**

   *What are the human, environmental, budgetary, and time constraints for the knowledge exchange initiative?* Among the first things to consider at an early design stage are the operating constraints.

2. **Select the knowledge exchange instruments.**

   *Which instrument(s) will work within the operating constraints and help participants achieve the learning goals?*

   Most knowledge exchange initiatives consist of one or more instruments. They can be used alone or in combination. Each instrument has its own strengths and limitations, with some more suitable for particular types of learning than others. Each knowledge exchange instrument should be designed to help achieve the desired capacity outcomes.

   Selecting the instruments for your participants is like considering what menu to prepare for a group of dinner guests. Knowing their tastes, you should have a fairly good idea of what will be appreciated and what will not. Suppose you decide on a hearty soup; it should be enough by itself, but by complementing it with good bread you make a meal. Similarly, you may find that one knowledge exchange instrument will meet your participants’ basic needs, but by adding another instrument you can leave them fully satisfied.
Table 3. Most Commonly Used Knowledge Exchange Instruments—A Brief Overview

<table>
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<tr>
<th>Instrument</th>
<th>Description</th>
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<tr>
<td>Community of Practice (CoP)</td>
<td>A group of people who interact regularly on a common topic of shared interest with the goal of learning from one another. A CoP can be formal, with a detailed mission, structure, funding, etc., or informal—driven by peer-to-peer exchange of knowledge and information.</td>
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<tr>
<td>Conferences and Forums</td>
<td>Opportunities for a large number of stakeholders to engage on a specific topic with a high level of interaction among participants.</td>
</tr>
<tr>
<td>Dialogues</td>
<td>Provide an opportunity to explore participants’ knowledge on a common subject from which new or stronger understanding, meaning, and possibilities can emerge. Dialogues raise awareness, support consensus building, and encourage informed action.</td>
</tr>
<tr>
<td>Expert Visits</td>
<td>An instrument where a subject matter expert (or group) goes to a requesting country, city, or organization to impart knowledge on their area of expertise. The visits allow for in-depth consideration of an issue or problem and the localization of practical knowledge and experience to address it.</td>
</tr>
<tr>
<td>Workshop</td>
<td>An educational seminar or series of meetings emphasizing interaction and exchange of information among participants (usually small number).</td>
</tr>
<tr>
<td>Study Tours</td>
<td>A visit by an individual or a group to one or more countries/areas for knowledge exchange. Study tours provide an opportunity for key stakeholders to learn relevant, good development practice from their peers.</td>
</tr>
<tr>
<td>Twinning Arrangements</td>
<td>A process that pairs an organizational entity in a developing country with a similar but more mature entity in another country.</td>
</tr>
</tbody>
</table>
(3) Select and sequence activities.

In a knowledge exchange, learning commonly takes place through presentations, group discussions, brainstorms, and action planning sessions. Each activity should contribute to the participants’ desired learning objectives. Like the instruments, each activity has its own strengths and limitations, with some more suitable for particular types of learning than others. What activity you choose will depend, in part, on the participants’ profiles, group size, time, logistical constraints, and the resources available.

Returning to the food analogy, think of the activities as the special ingredients that make up your soup. You can add these ingredients to the knowledge exchange instrument in different orders. Sequencing your activities—which should occur first, which next—is another factor to consider as you select activities. Some activities are more suitable for the knowledge-exchange planning phase, while others are more effective for delivery and follow-up.

You will usually choose one delivery mode over another because of one or more of these constraints:

» **Cost**: Video conferencing costs less per participant than face-to-face meetings, but neither mode provides economies of scale. E-learning, on the other hand, takes a lot of preparation, but once it is ready becomes by far the cheapest delivery mode.

» **Access to technology**: Video conferencing, e-learning and other online knowledge exchange activities require access to certain technologies. Most online platforms are free or cost very little. Video conferencing, however, requires special equipment and facilities.

» **Audience characteristics**: High-level people, given their schedules and profiles, are best suited for synchronous delivery modes such as face-to-face sessions and video conferencing. Large or distributed audiences are best reached through asynchronous delivery modes, such as e-learning.

» **Literacy** (including digital literacy): Your participants should feel comfortable with the technology used for delivery if they are to engage effectively in the activity.

» **Language**: Accommodating multiple languages can be challenging. Simultaneous interpretation is easier for presentations and in KE activities where there is more structure. Asynchronous activities allow time for translation.
**Table 4. Most Commonly Used Knowledge Exchange Activities—A Brief Overview**

<table>
<thead>
<tr>
<th>ACTION PLANNING</th>
<th>BRAINSTORMING</th>
<th>DEMONSTRATION</th>
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<tbody>
<tr>
<td><strong>Action Planning</strong> describes how participants will implement the knowledge gained during the exchange. It’s a road map for follow up actions. Usually, a facilitator helps the participants create the action plan.</td>
<td><strong>Brainstorming</strong> is a group problem-solving technique for generating many ideas about a specific topic or issue. A brainstorming session should tap into the wisdom of peers, encourage novelty, and occur in the initial stages of a project or process.</td>
<td><strong>Demonstration</strong> is an activity during which an expert or presenter shows participants how to perform an activity or procedure or introduces a new process or innovation. Ultimately, learners should be able to perform the demonstrated task on their own and apply it in their specific work environment. A discussion frequently follows the demonstration.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>E-DISCUSSION</th>
<th>GROUP DISCUSSION</th>
<th>PANEL OF EXPERTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>E-discussion</strong> is an online dialogue that permits discussion of a topic in an open setting. E-discussions are asynchronous; communication does not have to occur at the same time, so participants can engage when it is convenient for them. E-discussions are managed online through a discussion forum or similar tool.</td>
<td><strong>Group discussion</strong> may be topic-based, case-based, or general; the objective is to solve a problem, make a decision, or create something together.</td>
<td><strong>Panel of experts</strong> is a group of people with specialized knowledge who are invited to discuss a topic/issue before an audience. It requires a coordinator and a moderator. An action plan describes how participants will implement the knowledge gained during the exchange.</td>
</tr>
</tbody>
</table>

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## Table 4. Most Commonly Used Knowledge Exchange Activities—A Brief Overview

<table>
<thead>
<tr>
<th>PRESENTATION</th>
<th>ROLE PLAY</th>
<th>SIMULATION</th>
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<tbody>
<tr>
<td><strong>Presentation</strong> is an oral report, usually a one-way transmission from the presenter to participants. To be sure that the audience stays engaged, you will need to assess the presenter’s communication and delivery skills as well as the presentation format.</td>
<td><strong>Role play</strong> is a highly interactive activity in which participants act out situations and problems and then analyze the situation with the help of other participants and observers. Role play requires an experienced facilitator.</td>
<td><strong>Simulation</strong> presents a realistic situation and invites learners to interact in that setting with objects and/or people (for example, through role play, model building, and computer games). Many simulations take the form of games; the most successful is the real-estate game Monopoly.</td>
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<tr>
<th>SURVEY</th>
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<tr>
<td><strong>Survey</strong> is a way to gather information from participants. Surveys can be used to prompt discussions, surface areas for consensus or stakeholder ownership, and prioritize important next steps from knowledge-exchange activities.</td>
</tr>
</tbody>
</table>
Example 1: Vietnam’s Selection of KE Instruments

Vietnam sought help from the World Bank country staff in Vietnam to plan the exchange. World Bank country staff in Vietnam worked with World Bank staff in the knowledge-providing countries to identify the right sources of knowledge. First, a delegation of eight high level officials from Vietnam’s Social Security (VSS) headquarters and three provincial offices participated in a study tour to Latvia. A separate delegation of 10, consisting of vice ministers and technical staff from payment and IT departments, went on a second study tour to Turkey and Bulgaria to learn about those countries’ social security reform experiences.

Three months after the study visits, VSS staff from all related technical departments as well as a wider audience of Vietnamese officials—including the Ministry of Labor and Social Affairs and the Ministry of Finance, civil society, and think tanks—attended a conference in Vietnam. Officials from the provider countries made presentations outlining their successful, World Bank supported social security reform experiences, focusing on reform project management.

Sequencing of Knowledge Exchange Activities for Conference in Vietnam

Planning: To plan for the conference, Vietnam, Latvia, Turkey, and Bulgaria country teams organized a preliminary brainstorm to define the scope of the conference and held a series of e-discussions to put together the agenda.

Delivery: The conference included a series of presentations by knowledge providing countries on their reform efforts from both political and project management perspectives. Members of the Vietnamese study tour delegation also presented their lessons learned and the action plan they developed through group discussions. In addition, the organizers showcased other country case studies through video presentations.

Follow up: Participants shared lessons learned through a series of presentations and the distribution of back-to-office reports to colleagues and decision-makers.

Example 2: Tanzania’s Selection of KE Instruments

A working group of members from Tanzania and India planned the exchange. A 10-day expert visit to Tanzania by six officials from the Indian National Development Dairy Board and the Gujarat Federation anchored the exchange. Then a delegation of 14 Tanzanian officials from the Ministry of Agriculture, National Development Dairy Board, dairy producers, processors, and distributors visited India to see firsthand how the Indians had implemented reforms in their own country and the results of their work.

Sequencing of Knowledge Exchange Activities for Tanzania’s Study Tour to India

Planning: To plan for the second phase of their knowledge exchange initiative, the study tour, Tanzania and India organized a preliminary videoconference brainstorm to define the scope of the visit. They also organized an e-discussion to prepare a concept note for the visit.

Delivery: The study tour included presentations and field visits aimed at learning about India’s dairy revolution and how it was implemented, from both a political and practical standpoint. In addition, the organizers arranged for group discussions with Indian business leaders to promote future partnerships for improving Tanzania’s dairy sector.

Follow up: A series of presentations to colleagues and decision-makers back home provided an opportunity for the Tanzanians to share lessons learned and propose a way forward.
IMPLEMENTING THE KNOWLEDGE EXCHANGE

By now, you and your partners have agreed on the learning objectives and expected outcomes. You have assessed your operating constraints and designed and assembled your exchange, selecting appropriate instruments and activities.

You feel ready to carry out the activities you have assembled to achieve your targeted outcomes and results. This is it: you are ready for implementation. In implementation, you move from planning to execution, putting your instruments and activities to use. This is the phase when the action happens, and it is important to get it right.

A basic implementation plan should bring together all prior planning aspects into a coherent and unified process. The plan will help your implementation be focused, practical, and cost-effective.

You should bear in mind several key steps when implementing knowledge exchange instruments and activities.

1. Detail all tasks and prioritize them based on your implementation plan, resources, and objectives.
2. Determine roles and responsibilities in your team. List timelines for engagement and deadlines for each task, and explain reporting mechanisms each team member will use.
3. Ensure that participants in the exchange are not preoccupied with other commitments and can focus on the exchange.

We developed detailed implementation guidance sheets for each of the seven instruments and ten activities. The templates walk you through the implementation process step by step. You will find the complete sheets as well as other useful resources (e.g., sample Terms of References and sample programs) in the implementation section of our website: http://wbi.worldbank.org/sske/implementation.

COLLECTING LESSONS LEARNED AND SHARING RESULTS

A knowledge exchange without results is not fruitful. The main purpose of this guide is to help you ensure that your knowledge exchange initiative—and all the work you and others put into it—leads to results.

Once a phase of your knowledge exchange or the overall engagement comes to an end, it is time to assess the learning outcomes and results. Was the knowledge exchange a success? As discussed in detail earlier, you need to be clear about your development goals, institutional challenges, and participants’ learning objectives early on. Now, at the completion of the exchange, you should look back and assess how well you’ve achieved the learning outcomes and what progress you’ve made toward the development goal.

Before you can start this evaluation process, you will need to ensure that the knowledge exchange has been well documented throughout the life cycle. Weak documentation and reporting often lead to the perpetuation of bad practices. And if you haven’t recorded good practices, you will not be able to disseminate them. Always make sure every step of your exchange is well documented.
Once you have the entire documentation ready, you can start with your assessment. You should evaluate both the processes and methods used (e.g., the choice of instruments or selection of participants) and the learning outcomes and results (what you’ve learned, what changes in capacity you see).

To measure the success of a knowledge exchange, it is important that you understand the difference between outputs and outcomes. Outputs are the “hard” products that you can quantify (e.g., number of people trained), deliverables (e.g., policy recommendations created), or milestones (e.g., learning module completed). These aspects serve an important monitoring function; you can use them during the exchange to judge whether a project needs adjustments to achieve results.

Outcomes reflect behavioral and institutional changes resulting from the use and application of acquired knowledge and information. Outcomes, measured through impact and results assessment, demonstrate a country’s increased capacity for achieving certain development goals.

To track progress toward outcomes, you need to monitor results at two levels:

» The level of the change agents: Here you will look at the change agents’ capacity outcomes as a result of the knowledge exchange. Are they more able to take action because of raised awareness, enhanced knowledge and skills, improved consensus and teamwork, stronger coalitions, enhanced networks, or increased implementation know-how?

» The level of institutional capacity: Here you will focus on the areas of strengthening stakeholder ownership, enhancing efficiencies in policy instruments, and improving effectiveness of organizational arrangements.

Each capacity outcome targeted by the knowledge exchange initiative can and should be measured. As such, it is important that you embed indicators and results monitoring in the design and implementation of knowledge exchange programs. You will want to know, and be able to demonstrate, how the exchange has empowered participants to achieve the capacity outcomes they set for themselves, and how their empowerment contributes to the institutional change they seek.

Without high-quality, precise results measurement or effective results tracking, you are less likely to be able to make needed, timely adjustments your knowledge exchange. As implementation proceeds, you need a flexible design structure that allows you to periodically assess how well the program has achieved the outcomes envisioned. This information on progress feeds into timely revisions of the program design and implementation.

Develop a program that allows you to monitor progress toward results at different levels; that way you can, when necessary, adjust the program. This approach also can inform your decisions about the design of later program activities. A well-planned program with a solid results monitoring mechanism will contribute to the growing body of information on what works and what doesn’t in knowledge exchange programs.

In some cases, you might be able to measure changes in capacity indicators when your program ends or shortly thereafter. In other cases, however, changes in capacity indicators or other development results may be expected to occur well after completion of the program activities. For this reason, you may need a medium- to long-term results assessment to accurately measure changes in the capacity indicators and to assess the capacity factors.
### Table 5. The Basics of Measuring Results

<table>
<thead>
<tr>
<th>Measure</th>
<th>Description</th>
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<tbody>
<tr>
<td>Baseline value at the start of the initiative</td>
<td>A quantitative or qualitative statement that explains the value of a measure before the knowledge exchange is implemented or at its beginning. Identifying the baseline value for each measure allows practitioners to later assess any changes in the value that could be attributed to the program.</td>
</tr>
<tr>
<td>Targets or benchmarks for progress at various intervals or stages (e.g., after specific events)</td>
<td>Targeted outcomes can only be confirmed if target value(s) are established at the beginning of the initiative. Express the target value in terms that are comparable to the baseline value. Consider what is feasible given the people involved, the instruments, activities, and delivery modes used, and the available time frame for the exchange. Specify the estimated confirmation date of each capacity outcome. Some capacity outcomes can be assessed during the program (e.g., after a specific event), whereas others might need more time to be confirmed.</td>
</tr>
<tr>
<td>Methods, tools, and roles/ responsibilities for collecting and analyzing the monitoring information</td>
<td>By monitoring changes in the indicators over time, you can analyze the achievement of capacity outcomes. This is why regularly tracking program progress is critical. The data collection methods and the tools should be clarified and responsible agents identified to ensure implementation. Here are some sample monitoring methods and tools: Method: Rapid appraisal, participatory method Data Collection Tools: Surveys, focus groups, structured interviews, network analysis, awareness campaign effectiveness measures/analysis, and monitoring the passing of certain laws for reform.</td>
</tr>
<tr>
<td>Monitoring and evaluation outputs to improve the knowledge exchange initiative</td>
<td>Regularly review the results of activity surveys or feedback sessions with participants. Adjust as necessary to make sure participants are getting the most out of each activity. This will help participants reach their desired capacity outcomes.</td>
</tr>
<tr>
<td>Plans for disseminating the performance information at regular intervals</td>
<td>Develop a clear dissemination and consultation plan with your stakeholders to discuss lessons, findings, and evidence. The documentation of capacity outcomes and results, coupled with the detailed description of project activities, lets you, your clients, and others know what interventions have been effective and under what conditions. This information can be used to ensure better planning in the future.</td>
</tr>
</tbody>
</table>
EXAMPLE 1: VIETNAM’S RESULTS

Vietnamese officials enhanced their knowledge and skills and their implementation know-how. More specifically, delegates learned how each visited country’s Social Security Agency (SSA) had managed business process re-engineering and how it had implemented ICT upgrades. They also learned how each SSA had managed human resources, and learned procedures for overseeing and managing social insurance reserves. As an immediate policy outcome of the exchange, Vietnam has assessed whether to integrate tax and social security revenue collection. The knowledge acquired during the study tour also helped Vietnam’s Social Security Agency to design a comprehensive reform program to modernize its social security system.

EXAMPLE 2: TANZANIA’S RESULTS

Officials in the Ministry of Agriculture, National Dairy Development Board, leading dairy producers, processors, and distributors enhanced knowledge and skills. As such, they have a better understanding of the constraints facing Tanzania’s dairy sector and they have developed effective policies to improve performance based on the Indian model. Knowledge exchange participants reached agreement on a blueprint of potential dairy sector reforms appropriate in Tanzania. Improved consensus and teamwork led to the endorsement and publication of a blueprint for reform.

Sharing knowledge and sustaining results

Disseminating practical lessons learned is critical for future knowledge exchange programming by the development community. Maintaining peer-to-peer interaction is the most effective way to exchange tacit knowledge and sustain horizontal partnerships. Also, knowledge exchange within a country—for example, sharing information among central, regional, and local governments—is an important learning area that has been overlooked in the past. During completion and self-evaluation, you should address the following questions:

» What processes and methods could be improved?
» What were the overall learning outcomes achieved by the knowledge exchange?
» Was progress made toward the development goal? Can that progress be plausibly related to the change process supported by the learning outcomes?
» Do you anticipate any changes that would result after the program’s completion? If yes, establish a timeline for follow-up assessment.
» What key lessons could you share horizontally and vertically?
IV. HOW CAN THE WORLD BANK ASSIST YOU?

As a global development institution that offers financing, knowledge, and connecting services, the World Bank is well placed to provide support to government officials and development practitioners for South-South Knowledge Exchange. The World Bank Institute (WBI) spearheads this agenda in collaboration with the rest of the organization.

Below you will find an overview of the resources, products, and services we are developing to help government officials and development practitioners plan, design, and implement successful results-oriented knowledge exchanges.

**Brokering**: With country offices in 120 countries, the World Bank is well positioned to help identify opportunities for effective peer-to-peer practitioner learning and to offer a regional or global perspective. The Bank can assist in matching knowledge providers to knowledge seekers. Countries and individuals can contact their local World Bank (WB) office for assistance.

The World Bank can play an important strategic role in South-South Knowledge Exchange as a global knowledge connector. It can respond “just-in-time” to requests from countries to learn from other countries and broker knowledge sharing across regions.

**Financing**: We incubate financing mechanisms for SSKE, such as the South-South Experience Exchange Facility. For more information on funding, please refer to Element 3.

**Design**: We offer know-how and toolkits (such as this guide) on planning and designing knowledge exchanges for lasting results.

**Implementation**: We advise and support countries as they develop their capacity to implement SSKE. We are also the home of the secretariat for the Global Development Learning Network (GDLN), a partnership of over 120 recognized global institutions in over 80 countries that provide learning solutions for individuals and organizations working in development.

We support governments as they develop a strategic approach to knowledge sharing and identify what institutional systems would work more effectively in their specific setting to promote efficient participation. We started an initiative with the goal of facilitating exchange between countries interested in developing and/or strengthening their SSKE institutional arrangements.

**Results**: We document the results of SSKE through its online knowledge platforms. We offer an online library of best practices and results stories. SSKE results stories help inspire, raise awareness, and promote field-tested practices and tools that allow change agents to design, implement, and evaluate their own South-South knowledge exchanges. For a database of knowledge exchange result stories, go to [http://wbi.worldbank.org/sske/result-stories](http://wbi.worldbank.org/sske/result-stories).
The most extensive repository of information about knowledge exchanges on the Internet can be found on the World Bank Institute Knowledge Exchange practice's website at http://wbi.worldbank.org/sske. The site contains numerous brochures, reports, videos, and links to significant current global events in South-South cooperation. For specific information, you might want to visit the following publications and web pages:


This document provides a toolkit for designing, implementing, and monitoring knowledge exchange activities. Although it is primarily geared towards World Bank staff members who facilitate mutual learning among countries, it offers a menu of practical options for conducting exchanges. As such, it elaborates on many of the ideas, instruments, and activities presented in this primer.


WBI’s database currently contains over 70 results stories that cover all regions of the global South and spread across different sectors, including agriculture, industry, energy and mining, water and sanitation, finance, health, education, public administration and law, transportation, and communications. These stories address relevant themes, such as climate change, gender, governance and anti-corruption, and fragile states. The results stories serve as both inspiration and information for development practitioners and government officials on how to design and implement successful knowledge exchanges. They also detail pitfalls to avoid.


For more information about the Facility, refer to Element 3.

In addition to the World Bank Institute, several other global organizations promote and work in South-South cooperation and knowledge exchanges. Together they assist the global South in shaping South-South cooperation to encourage growth and development.

» The Special Unit for South-South Cooperation at the United Nations Development Programme (UNDP), website accessible at http://ssc.undp.org/content/ssc.html.

The site contains links to UN publications and events on South-South and Triangular Cooperation, including the South-South GATE (Global Assets and Technology Exchange), a platform for entrepreneurs in developing countries to interact and obtain needed technology, assets, and financing. In addition, the United Nations Environmental Program (UNEP) has its South-South Cooperation Mechanism, which includes South-South Cooperation Case Studies, accessible at http://www.unep.org/south-south-cooperation/.

» The Task Team on South-South Cooperation, accessible at http://bit.ly/oecd-tts

The Task Team explores synergies between South-South Cooperation (SSC) and the effectiveness
agenda through the triple mandates of the Accra Agenda for Action (AAA). These include enriching and adapting the aid effectiveness agenda with SSC practice and ensuring synergies between SSC and North-South cooperation. The website also contains case studies in SSC.


The South-South Opportunity is an online community that includes over 1500 professionals dedicated to South-South cooperation, knowledge exchange and learning for development. The up-to-date content is entirely generated by users through blogs, group discussions, and comments from South-South practitioners.

The following documents provide extensive additional information on knowledge exchanges. They have been compiled from a variety of development sources.


The working paper describes how knowledge sharing, through North-South, South-South, and triangular cooperation, can be scaled up in support of growth and development. A working group consisting of representatives of the Task Team on South-South Cooperation and UNDP, as well as OECD and World Bank Institute developed the paper.


The report concludes that increased access to financial, technical, and medical knowledge is key to sustained economic growth and poverty reduction. It describes how the World Bank is positioning itself as a knowledge bank—not just a lending bank—creating, sharing, and applying knowledge for development.


Based on 31 case studies of South-South and triangular experiences, this Good Practice Paper has informed the G20 development agenda and the Busan Partnership (see below). It provides practical guidance on how to ensure and deepen the effectiveness of knowledge exchanges.


Drawing on specific case studies, the paper explains how to focus on results in knowledge exchange activities, for example by identifying key change agents, building momentum, and clarifying measurement statistics.


The Busan agreement recognizes the role of South-South and triangular cooperation, stating that these approaches can transform developing countries in ways different from traditional North-South cooperation. The agreement promotes ownership of the development agenda by developing countries urges a focus on results, inclusive development partnerships, and transparency and accountability.
**VI. GLOSSARY OF TERMS**

**brokering:** Matching prospective knowledge partners, providers, and recipients of knowledge exchanges to achieve the defined goal.

**capacity-development objective:** The institutional change the knowledge exchange recipients seek to accomplish in their country.

**change agents:** Individuals who can initiate and manage the changes needed to reach the capacity-development objective.

**development goal:** The major, high-level objective the country wants to achieve, such as reducing infant mortality rates or improving business-enabling environments.

**explicit knowledge:** Knowledge that can be codified and written down to be shared, such as academic papers, books, or data. Compare tacit knowledge.

**facilitator:** Someone who ensures that a productive knowledge exchange occurs between the participants by helping them understand their common objectives and plan how to achieve them. The facilitator does not take a particular position in discussions, workshops, study tours, conferences, etc.

**institutional capacity challenges:** The main obstacles in achieving the development goal. They usually result from weak stakeholder ownership, inefficient policy instruments, or ineffective organizational arrangements.

**knowledge exchange:** An event or series of events that connects government officials, private sector professionals, and development practitioners to one another so they can learn from each other’s practical experiences.

**knowledge exchange activity:** A basic ingredient of the knowledge exchange. For a list of activities and their descriptions, refer to page 23.

**knowledge exchange instrument:** The main stand-alone building block of the knowledge exchange. A knowledge exchange may involve one or more instruments. For a list of instruments and their descriptions, refer to page 21.

**knowledge hub:** A country-led institution that supports and connects national actors, mainly development practitioners, to external peers and partners who offer or seek development experience and expertise.

**knowledge providers:** Individuals, groups, or institutions coming from the private or public sector who possess the knowledge and experience to help the knowledge recipients reach their capacity-development objective.

**knowledge recipients:** Individuals or institutions who will learn from the knowledge providers and use these lessons and experiences to reach the capacity-development objective and ultimately the development goal; also called knowledge seekers.

**knowledge seekers:** See knowledge recipients.

**multidirectional knowledge sharing:** a process which allows a group of peers and stakeholders to share knowledge through different activities, which are not linked in a linear fashion, but can
occur in different sequences or even simultaneously. In a multidirectional process, knowledge can flow in all directions, sometimes blurring the differences between knowledge providers and knowledge recipients. This allows participants to share directly their experiences, practices, and tacit knowledge. See unidirectional knowledge sharing.

operating constraints: Limiting factors for the knowledge exchange, including availability of people, funding, time, and technology.

participants: Individuals physically engaged in the knowledge exchange either as knowledge recipients, knowledge providers, or sometimes both simultaneously.

planning and coordinating team: A team of individuals selected by the participating countries or brokering institution to plan and coordinate the knowledge exchange activities.

South-South knowledge exchange: A knowledge exchange that connects two or more countries of the global South.

stakeholder: An individual or an institution whose actions could affect and/or be affected by, either directly and indirectly, the knowledge acquired during the knowledge exchange.

tacit knowledge: Non-codified, unarticulated knowledge that is hard to formalize and communicate because it is rooted in experience, insight, and intuition and thus can be best shared through experience and knowledge exchanges. See explicit knowledge.

triangular cooperation: A type of development cooperation that involves three parties, usually a traditional OECD donor, a provider from the global South, and a beneficiary country. In triangular cooperation, multilateral institutions and traditional donors provide expertise and knowledge or act as brokers between two or more partners of the South.

unidirectional knowledge sharing: a process, usually linear, which allows for knowledge to be passed in one direction. This usually involves explicit knowledge, such as lectures and written materials. See multidirectional knowledge sharing.

WE VALUE YOUR FEEDBACK!

You can find additional resources and links to other national and multilateral actors working in this evolving field on our website, wbi.worldbank.org/sske. The World Bank Institute welcomes your comments and suggestions. We look forward to hearing from you.
The World Bank Institute (WBI) seeks to strengthen the capacity of developing countries to reduce poverty.

We connect individuals, networks, and institutions to help them find solutions to their development challenges. With a focus on the “how” of reform, we facilitate knowledge exchange, foster innovation, and build coalitions for positive change.

To reach more people and to increase our impact, we work with and through global, regional, and country-based institutions as well as global and local networks of development practitioners.

THE ART OF KNOWLEDGE EXCHANGE

A Primer for Government Officials and Development Practitioners

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