

## **On the Agenda: North-South Research Partnerships and Agenda Setting Practices**

*Megan Bradley*

*Co-operation between researchers in the global North and South is critical to the production of new knowledge to inform development policies. However, the agenda-setting process is a formidable obstacle in many development research partnerships. The first section of this article examines how bilateral donor strategies affect collaborative agenda-setting processes. The second section explores researchers' motivations for entering into North-South partnerships; the obstacles that Southern researchers encounter in agenda-setting processes; and the strategies that they employ to ensure that research partnerships respond to their concerns. This analysis suggests that while strong Southern research organisations are best placed to maximize the benefits of collaboration, donors and researchers alike are well advised to recognize the limitations of this approach and use it prudently, because North-South partnerships are not necessarily the best way to advance research agendas rooted in Southern priorities.*

### **Introduction**

In 1972, the delegates to an OECD Conference of Directors of Research and Training Institutes identified two major trends in international research co-operation. First, they applauded a growing commitment to Southern self-reliance. Second, they noted increased interest in 'new forms' of North-South research collaboration, particularly interdisciplinary, mutually beneficial partnerships managed in the South and based on Southern priorities (Amin et al. 1975: 790). Thirty-five years later, North-South partnerships remain a prominent feature on the development research landscape, but donors and researchers are still struggling to come to terms with these 'new forms' of co-operation.

Advocates of North-South research partnerships suggest that they are efficient, intellectually enriching, and conducive to capacity building. Ideally, they are mutually beneficial (Hatton and Schroeder 2007: 157-8). Yet veterans of North-South research partnerships attest to a more complex reality, shaped first and foremost by the fact that partnering is often the only way for Southern researchers to access funding. Alongside the benefits of partnership comes a range of obstacles, from language barriers and complex management structures, to inequitable access to financial resources, libraries, conferences, training, and publishing opportunities. Mismatched expectations, lack of face-to-face interaction and different levels of methodological sophistication can also undermine partnership plans. The agenda-setting process represents a particularly formidable obstacle

for many development research partnerships. The literature on North–South research co-operation often laments the continued domination of collaborative agendas by the interests of Northern donors and scholars, and almost invariably calls for more equitable Southern engagement in agenda-setting processes. Yet the implications of this statement and the obstacles to its realisation are rarely examined in detail.

As a modest response to this gap, the first section of this article examines how bilateral donor strategies affect collaborative agenda-setting processes, focusing on the approaches adopted by the Netherlands and the UK. I argue that donor policies definitively shape agenda-setting processes, chiefly by requiring Southern researchers to form partnerships with Northern counterparts in order to receive support. The Dutch and British experiences demonstrate that while revamping bilateral donors' funding policies can improve Southern researchers' ability to influence North–South research agendas, even innovative funding strategies cannot resolve all of the tensions that characterise collaborative agenda-setting processes. In the light of this analysis of how donor policies affect agenda-setting processes, the second section explores researchers' motivations for entering into North–South partnerships; the obstacles that Southern researchers encounter in agenda-setting processes; and the strategies that they employ to ensure that research partnerships respond to their concerns. This analysis suggests that while strong Southern research organisations are best placed to maximise the benefits of collaboration, many of the organisations entering into partnerships lack a clear sense of their own priorities and other institutional capacities that are critical to successful agenda negotiations. I contend that although North–South partnerships can augment individual and institutional resources and skills, they are not a panacea for all the challenges associated with capacity building and the creation of knowledge to inform development. Given the difficulties confronting collaborative agenda-setting processes, donors and researchers alike are well advised to recognise the limitations of this approach and use it prudently, as North–South partnerships are not necessarily the best way to advance research rooted in Southern priorities.

These arguments are informed by an analysis of donor policies, as well as by the understanding of North–South partnerships and development research funding that I gained while working with the International Development Research Centre's Canadian Partnerships Program.<sup>1</sup> In addition, the article draws on the results of 43 semi-structured interviews on North–South research partnerships that I conducted in Europe, the Middle East, and Southern Africa with donors, NGO representatives, academic officials, and social scientists.<sup>2</sup> The interviews were conducted in English between October 2006 and March 2007, each lasting between 45 minutes and two hours. My analysis of these interviews is informed by the recognition that making accurate generalisations about researchers' experiences is a delicate task. Owing to the highly personalised nature of partnership experiences, there are exceptions to almost every trend.

### *Slippery terminology*

The terms employed in this article demand clarification. First, while the terms 'North' and 'South' usefully underscore how geography and colonial history have structured development and research opportunities, they are clearly not discrete terms, since many actors elude easy categorization as 'Northern' or 'Southern'. For instance, countries like South Africa, Brazil, China, and India are home to both world-class research institutions and under-staffed, ill-equipped research institutions. Individual researchers subvert the North–South 'divide', as many Southern citizens pursue their

education and careers in the North, while in some fields a growing number of Northern researchers are joining Southern institutions.

This article conceives of agenda setting as the process of determining the substantive focus and approach of development research projects, as well as the shape of research-related activities, such as capacity-building initiatives. Effective agenda-setting processes are critical to ensuring that research responds to community needs and equips different actors with the knowledge necessary to tackle pressing development concerns. There are no monolithic research agendas on any issue in the global North or South. Rather, broad regional and national priorities are tempered by factors ranging from institutional mandates and community interests to individuals' political convictions and socio-cultural allegiances (Mouton 2006). Just as there are innumerable research agendas, so there are myriad partnership modalities, including one-to-one co-authorship, training schemes, institutional twinning arrangements, and networks. Partnerships also vary remarkably in their duration, composition, budgets, and the extent to which they focus on capacity building. This article is principally concerned with partnerships linking teams of Northern and Southern researchers which aim to produce new knowledge to support development processes. Although various authors have attributed different meanings to partnership, collaboration, and co-operation, throughout this article these terms are employed interchangeably, reflecting their practical usage by many participants in North–South exchanges.<sup>3</sup>

## A buyer's market: the influence of donor policies on collaborative research agendas

The pervasive influence of donors on North–South partnerships is widely accepted as a foregone conclusion among many experienced researchers. Indeed, according to many Southern researchers, where collaborative research agendas are concerned it is a 'buyer's market'. Research-funding opportunities are limited, and collaboration with Northern institutions is often a prerequisite for support; consequently, many Southern researchers enter into partnerships far removed from their own priorities, simply to generate the income required to stay afloat. While bilateral donors have received the lion's share of the blame for the continued Northern dominance of collaborative research agendas, these agencies operate within a wide range of different 'business models', some of which are more conducive than others to bolstering Southern priorities.<sup>4</sup>

Assessing donors' influence on collaborative research agendas is a complex task, as donor priorities and researchers' interests are constantly interacting and evolving, and it cannot be assumed that donor policies affect all recipients uniformly. At the general level, however, the impact of donors on collaborative research agendas is best understood on a spectrum from direct to indirect influence. Albeit deeply troubling, overt donor interference in shaping or restricting the dissemination of research results appears to be relatively rare. Instead, donors exert considerable indirect influence over agenda-setting processes by identifying their programme priorities and determining the structure of the international research-funding system. Donors influence agenda-setting processes by requiring the studies that they fund to be explicitly 'policy-relevant'; by concertedly supporting multi-disciplinary, multi-stakeholder projects; and by constantly revising their programmatic priorities, which can impede researchers' efforts to embark on long-term investigations. Donors also affect agenda-setting processes through their categorisation of different Southern countries. Botswana, for instance, is defined by most bilateral donors as a Middle-Income Country, rendering local researchers ineligible for many funding streams. Since domestic funding remains scarce, various research institutions in Botswana continue to pursue international support by repositioning themselves as brokers for regional and inter-regional

collaborations. This strategy underlines the fact that researchers do not simply respond to donors' frameworks: they challenge their policies, their priorities, and the assumptions that underpin them.

Most significantly, donors affect agenda-setting processes by making partnership a prerequisite for funding. Using North–South partnerships as a 'default' funding modality not only adds an extra layer to agenda negotiations but also creates a problematic starting point for articulating common research goals. In a context in which partnership is 'forced rather than volunteered' (Hatton and Schroeder 2007: 158), can carefully honed donor strategies mitigate inequities in collaborative agenda-setting processes?

### *Almost an ideology': Dutch support for demand-driven partnerships*

In the early 1990s, the Dutch government launched a programme of 'experiments' in demand-driven research. Demand-led research refers to 'activities in which people are able to bring about their own development, with the objective of building up research systems to unleash the potential of the South' (Nair and Menon 2002: 2). The demand-driven approach aimed to reduce the influence of Dutch academics and policy makers and transfer managerial and substantive responsibility for Dutch-supported programmes to Southern researchers and communities. The policy was manifested in a handful of Multi-annual Multi-disciplinary Research Programmes and projects involving 'symmetrical co-operation' between Southern and Dutch researchers. These projects were supervised by a dedicated group of staff at the Dutch Directorate General for Development Co-operation (DGIS), whom observers describe as having had an 'almost ideological' commitment to the demand-driven policy.

The research agendas guiding these projects were determined through carefully crafted 'demand articulation' processes, often involving civil-society and community representatives. Nonetheless, the proponents of these projects struggled to resolve the dilemmas that arose when Southern stakeholders expressed competing demands for limited support. Advocates of the demand-driven approach stressed that lack of Southern consensus was not an invitation for Northerners to substitute their own priorities, nor could local priorities be ignored by appealing to the pressing nature of global problems of concern to Northern populations. However, champions of the demand-driven approach were forced to recognise that Southern researchers were not always the best allies in advancing locally defined priorities as the basis for development research. Often, researchers in the South 'inhabited ivory towers at least as high as those of their counterparts in the North' (Van de Sande 2006: 3). From its genesis, DGIS's demand-driven policy sparked contention, because it challenged the historical dominance of Dutch scholars and undercut, albeit minimally, their preferential access to development-research funding. In addition, it proved difficult to meld the demand-driven approach with the notion of mutually beneficial partnership. To preclude the possibility of Northern domination of the research agenda, the Southern partners had considerable control over decision-making processes, which at times resulted in the adoption of research questions that were of little interest to the Dutch participants. Furthermore, the collaborative projects had cumbersome managerial and decision-making structures, prompting some Dutch researchers to conclude that the funding was not worth the trouble. The remarkable relevance of the projects' research agendas to the Netherlands' development priorities also generated scepticism about the independence of the demand-articulation processes. However, supporters of the demand-driven approach are confident that the policy resulted in innovative, locally relevant research agendas, suggesting that one sign of the policy's significance was that it ruffled other bilateral donors, who regarded some of the research supported under this model as

excessively radical.

Although ‘demand-driven’ rhetoric has been mainstreamed throughout the Dutch development architecture and the broader donor community, the Netherlands has now adopted a strategy firmly grounded in ‘enlightened self-interest’ and less focused on Southern-led research. This shift is clearly reflected in the title of DGIS’s 2003 development policy statement, *Mutual Interests, Mutual Responsibilities*. Both this policy and the 2005 memorandum *Research in Development* emphasise the value of North–South partnerships, but downplay the importance of advancing locally defined priorities.<sup>5</sup> In 2007, the government further distanced itself from the demand-driven experiments of the 1990s by disbanding the Netherlands Development Assistance Research Council (RAWOO), an organisation historically outspoken in its support for demand-driven research. Taken in total, the Dutch experience demonstrates that even ‘cutting-edge’, carefully constructed donor policies cannot fully resolve the challenges presented by agenda setting in the context of North–South research partnerships.

### *Beyond North and South? British partnership-funding strategies*

In contrast to the Dutch strategy, the British approach to financing research for development is less explicitly based on North–South partnership models. Two events stand out as having significantly shaped the approach to research partnerships embraced by the UK Department for International Development (DFID). The first was the UK government’s affirmation of the key role of science in the achievement of the Millennium Development Goals (MDGs), and its subsequent decision to dramatically increase funding for development research, doubling its 2005/2006 budget of £110 million to £220 million in 2010. This money supports independent British and Southern research teams, as well as international partnerships. The second key event was the passage of the 2002 Development Act, which officially untied all British development aid, with the result that DFID-sponsored partnerships can no longer require the involvement of British researchers. Rather, grants should be awarded on the basis of open competition between researchers worldwide. While the British academic community was initially hostile to this policy, DFID’s efforts to untie aid have gradually garnered support, largely due to researchers’ recognition that tying aid is morally dubious, and their awareness that they need to be prepared to compete in a ‘global market of ideas’ without relying on the British government for preferential treatment. At the same time, DFID is questioning the very significance of the terms ‘North’ and ‘South’ to development-research co-operation. The salience of North and South as categories to structure international research co-operation is called into doubt by the emergence of countries such as Brazil and China as new research powerhouses, and the trans-boundary nature of development challenges such as climate change and migration.

The implications of these changes in terms for ensuring that Southern voices are heard in agenda-setting processes are yet to be seen. Although many applaud the move away from privileging domestic researchers, others are sceptical about the sincerity and sustainability of the policy, noting that UK institutions have not yet been edged out of DFID-funded partnership opportunities. While this may be a testament to the quality of British development research, critics suggest that the close connections between DFID and prominent UK-based research institutions preclude the creation of an even playing field. Should British institutions’ access to funding and influence on DFID-supported research agendas diminish, domestic opposition to the policy may soon increase.

A final concern is that while questioning the relevance of ‘North’ and ‘South’ to contemporary research partnerships may add nuance to DFID’s approach, the drive to ‘globalise’ collaborative agendas runs the risk of detracting from efforts to advance local Southern priorities. Making links between conditions in far-flung communities may result in more sophisticated interpretations of development problems and policy imperatives. However, this type of macro-level analysis may also overshadow the local research agendas that are arguably more likely to contribute directly to resolving the challenges faced by the poorest countries. The extensive experience of the International Development Research Centre (IDRC) suggests that while many Southern researchers are interested in international-level analyses, they are often sceptical about the usefulness of this work and are driven to carry out specific, ground-level studies that can have a direct impact in their own contexts (Scholey 2006: 185; Nhema 2006). This experience may serve as a rejoinder to the suggestion that internationalised, comparative studies are the most fruitful direction for donor-funded development research.

### *The persistent attitude of ‘business as usual’*

The Dutch and British experiences demonstrate that even carefully revised donor strategies cannot resolve all of the obstacles and inequalities that hinder agenda-setting processes. The impacts of revised donor policies are tempered by factors including changes in political climate; the attitudes of domestic researchers; and the resistance of weighty bureaucracies to internalising and acting on new policy initiatives. Efforts to reform donor policies are complicated by unresolved tensions surrounding the rationale for bilateral donors’ support for North–South research partnerships. On the one hand, most donors adopt the rhetoric of the demand-driven approach, suggesting that their goal is to support Southern priorities, as defined by Southerners. On the other hand, there is strong support among donors and Southern researchers alike for the idea that partnerships should be mutually, and even equally, beneficial. Yet balancing the interests of Northern and Southern researchers, institutions, communities, and governments is rarely a simple task. While the prevention and resolution of poverty is surely in the general interest of both the North and South, there is heated debate about the best route to achieve this goal, and it would be a grave oversimplification to suggest that Southern priorities can always be met without a cost to the interests of Northern actors at numerous levels. Confronting the potential dissonance between the concept of mutually beneficial partnerships and the commitment to advancing Southern priorities is an important first step towards ensuring that donor strategies and North–South partnerships are based on coherent, viable principles.

Many Southern researchers stress the need for ‘progressive donors’ who have carefully reflected on the funding strategies to challenge the attitude of ‘business as usual’ in the donor community. First and foremost, this entails a more judicious approach to the use of North–South partnerships as a funding modality. Donor financing must be prefaced by open discussions with Southern researchers and governments, aiming to identify when alternative funding modalities such as core support to Southern institutions are more appropriate. Southern researchers and governments must also press for change in the development-research funding system. The governments of emerging research powerhouses such as India and South Africa are well placed to pressure donors to retune their policies in accordance with Southern agendas, although convincing these governments to take a stand on the issue is a difficult proposition. The question of research collaboration and agenda setting remains a low priority for Southern and Northern governments

alike, despite the pervasive impact that it has on efforts to understand and respond to contemporary development challenges.

## Advancing agendas: Southern motivations and partnership strategies

Given the elusiveness of ‘genuine’ partnerships and the often negative effects of donor policies on collaborative agenda-setting processes, why do Southern researchers continue to engage in partnerships? How do Southern researchers advance their agendas, in spite of restrictive cooperation frameworks and often crippling institutional contexts? My discussions with Southern researchers led me to conclude that a multitude of interconnected, often competing agendas are at stake in North–South partnerships. Partners’ motivations and agenda-setting strategies cannot be understood through one-dimensional analyses that focus only on the interests of researchers, institutions, governments, or community groups. Rather, these different levels of interest constantly intersect, both enriching and confounding agenda-setting processes.

### *Why partner?*

‘Received wisdom’ in the donor community suggests that Northern researchers seek out North–South partnerships principally in order to gain access to data and field-work opportunities, while Southern researchers are primarily looking for funding and the chance to publish in Northern journals. Yet these motives are mediated by a range of other interests, such as the desire to travel and contribute to development. While prospective partners’ motivations vary depending on their mandates, among the researchers interviewed, almost without exception, access to funding emerged as the principal impetus to the formation of partnerships. This is largely a reaction to the structure of the international development research-funding system, in which North–South partnerships are the dominant funding modality. Although some donors certainly accept independent proposals from both Northern and Southern proponents, even prominent Southern institutions often struggle to secure funding when they compete against well-connected Northern organisations. Consequently, partnerships are a key source of funding for many Southern institutions, despite the fact that direct donor support remains their preference. Partnerships may be particularly appealing as a funding avenue for Southern institutions, because their Northern counterparts are often better placed to secure large grants covering salaries and infrastructure. Furthermore, pairing up with influential Northern organisations can improve Southern institutions’ ability to attract independent support in the future. However, many of the Southern researchers interviewed emphasised that preserving their scholarly reputations and integrity was more important than funding, and they cited instances when they turned down partnerships that could have endangered either.

While it is a fallacy to view North–South partnerships simply as exercises in Southern capacity building, access to professional opportunities such as conferences and tailored training programmes often represents an important motivation to partner among Southern institutions. Equally, for Southern organisations seeking to expand regionally or internationally, North–South partnerships represent a valuable source of contacts and advice. In return for these benefits, Southern researchers contribute their own contacts, linguistic abilities, methodological expertise, and knowledge of local conditions, which often translate into nuanced theoretical insight.

In conflict and post-conflict contexts, the decision to partner is often a carefully calibrated political statement. Affiliation with a prominent Northern organisation can lend a degree of added

protection to Southern researchers undertaking sensitive work, while trusted Northern partners can provide valuable external advice and help to remove barriers to the research process by rallying political and diplomatic pressure against officials obstructing fieldwork activities. In some cases, partnerships are pursued because they bolster researchers' political strength and policy influence. This varies according to the partners' policy target. For example, if Southern organisations aim to amend the policies of Northern governments, North–South co-operation often augments Southern researchers' perceived credibility and access to decision makers.

Among donors, researchers, and policy makers alike, partnerships are welcomed as an opportunity to attract (and retain) talented researchers to Southern institutions, and affirm the innovative strategies that Southern and Northern communities develop to respond to problems ranging from climate change to urban renewal. Yet the motivations for partnership are not uniformly benign. For example, in highly competitive milieux, researchers may co-operate with foreign counterparts in order to undercut their domestic rivals' partnership opportunities. Numerous Southern researchers suggest that, for better or worse, many Northern researchers simply do not know what they are looking for when they approach potential Southern partners, confusing muddle-headedness for open-mindedness to Southern ideas and agendas. To be sure, many Southern researchers in the 'partnership market' are equally vague about their own priorities, despite experienced partners' recognition that balancing a clear set of strategic motivations with readiness to learn and adapt is the best preparation for successfully negotiating collaborative research agendas.

### *Parachuting partners and mercenary researchers: agenda-setting obstacles and strategies*

As the systemic problems confounding agenda-setting processes elude easy and prompt resolution, astute Southern strategies are focused largely on limiting risks and hedging bets, with some 'flag bearers' challenging the system at a deeper level by structuring innovative cooperative relationships, or 'opting out' of North–South research partnerships altogether. Southern researchers' approaches to collaborative agenda setting are shaped first and foremost by the structure of the development-research funding system. While most researchers certainly hope that their work makes a real contribution to development, many stress the difficulty of crafting agendas that meet donors' demands for concrete and ideally immediate results in terms of poverty alleviation; such researchers emphasise the need for partnerships that engage in more independent, theoretically demanding research. This is essential to the evolution of stronger research bases in the South, as sustainability in the research sector comes from the ability to make well-argued intellectual contributions to national and international debates, not merely to churn out studies to match prescribed terms of reference. In the most extreme cases, donors completely preclude collaborative agenda negotiations by granting money to a Northern institution for collaborative research on a particular set of questions before a Southern partner is even identified, thus relegating Southern researchers to the role of mere 'mercenaries'. While some researchers stoically accept this type of work as an inevitable part of making a living in cash-strapped Southern organisations, others rail against it as a cardinal example of the presumptuousness that undermines successful collaboration.

The second major factor affecting Southern agenda-setting strategies is the existence of pervasive inequalities between prospective partners in the North and South. To be sure, Southern researchers are not necessarily disadvantaged in agenda negotiations. Many elite Southern

researchers are not only intellectual leaders, but also deft managers and negotiators who use their role as gatekeepers to local research subjects to increase their leverage in the agenda-setting process. Yet organisations' internal constraints often limit the research agenda, as studies are foreshortened by lack of time, staff, and money. These constraints are often particularly severe for Southern organisations, hampering Southern researchers' ability to respond to new issues that arise over the course of the partnership. Well-planned partnerships now budget extra funds to allow researchers to adapt or expand the agenda in response to unforeseen events, discoveries, and political changes.

The third systemic factor shaping Southern agenda-setting strategies is the fact that good partnership practice is rarely rewarded by the academic system. Tenure-review committees often take a disparaging view of the policy-relevant, multi-stakeholder research that emerges from donor-funded North–South research partnerships (RAWOO 2001). Moreover, managing diverse research teams and facilitating equitable yet rigorous agenda-setting processes are specific skills that are under-emphasised in traditional academic training (Ettorre 2000). Because academics are often not expected or prepared to engage in respectful partnerships, harmful collaborative practices persist and are passed down to new generations of researchers.

Beyond these structural challenges, a number of other factors both enrich and complicate the agenda-setting process for Southern researchers. For example, even when partners agree on the broad content of their research agenda, pinning down viable research questions is often difficult, as many partners have been schooled in different academic traditions and theoretical frameworks, depending on their linguistic, cultural, geographic, and religious backgrounds. A growing number of partnerships strive to bring together diverse Northern and Southern actors, betting that multi-stakeholder co-operation will result in richer questions and more perceptive findings. Researchers involved in these initiatives suggest that problematic agenda-setting experiences are attributable not so much to the challenge of melding Northern and Southern interests, but to the difficulty of enabling co-operation between different groups, including academics, activists, policy makers, and corporate leaders.

Inter-personal chemistry and strong character judgement are essential to Southern researchers who attempt to avoid or resolve disagreements over collaborative research agendas. Almost unanimously, researchers stressed that partnerships sink or swim according to the character and commitment of the individuals involved. While many researchers place a premium on sharing their partners' political values, even more critical attributes in a partner are flexibility, modesty, and willingness to learn. Beyond a partnership's stated goals, individual researchers also strive to move forward 'silent agendas', from padding their publication list to increasing the partnership's advocacy role. Astute partners recognise one another's unspoken interests and are able to distance themselves from individuals and institutions whose silent agendas they do not support.

Beyond strong inter-personal relationships, researchers also stress the importance of 'institutional chemistry' to successful agenda-setting processes. While various guides set out criteria for choosing appropriate partners, there is no fail-safe recipe for effective institutional cooperation (KFPE 2005). Yet institutional compatibility is critical, because the individual members of collaborative teams often change during a project's lifetime. Strong institutional compatibility can smooth these transitions. Researchers increase their institutions' stake in North–South partnerships by ensuring that collaborative agendas are negotiated by organisation-wide teams, rather than only by senior management. This approach recognises and responds to the fact that competing agendas may exist even among members of the same organisation; it ensures that the collaborative agenda is backed by the junior staff with responsibility for the day-to-day

implementation of partnership projects.

Individuals and institutions that gain the most from North–South collaboration rarely describe their partners in terms of specific, short-term projects. Rather, they have nurtured long-term inter-personal and inter-organisational relationships that often span multiple projects and remain a source of insight and support even in the absence of donor funding. Investing in long-term partnerships yields considerable returns when it comes to agenda setting, as negotiations are facilitated by the trust that partners have built up, as well as their ability to draw on past lessons to resolve present difficulties. Creating long-term partnerships requires dedication and ingenuity, as neither donor funding systems nor academic promotional frameworks typically reward sustained commitment between partners. Long-term commitment is especially critical in unstable Southern contexts, where ‘parachuting partners’ typically do not remain on the ground long enough to earn the locals’ trust. In fact, parachuting partners can erode local actors’ willingness to trust those Northerners who are committed to long term co-operation. Even between long-standing partners, difficulties can emerge if Southern researchers remain committed to a particular line of research while the Northern partners’ interests change. If Northern researchers decide to move on to new issues, they often ‘take the money with them’, limiting their former partners’ ability to advance the research agenda independently.

### *Strong Southern institutions: the lynchpin of successful agenda setting*

Given the abundant obstacles to equitable agenda setting, the strength of the Southern institution in a North–South partnership stands out as the primary factor affecting the successful negotiation of research agendas that are both mutually beneficial and rooted in Southern priorities. Currently, many partnerships are premised on the assumption that all those involved are well-intended, well-informed, culturally sensitive people, and that these qualities are sufficient for equitable agenda setting. While good intentions and respect facilitate smooth agenda-setting processes, they cannot substitute for the advantages that strong Southern organisations enjoy in partnership negotiations.

In the context of North–South research partnerships, strong organisations are characterized by a realistic awareness of their own strengths and weaknesses; sound administrative systems; and relatively stable finances. Most importantly, they have a clear institutional mandate and agenda.<sup>6</sup> Strong organisations exist in both the North and the South, but articulating and sticking to clear institutional goals is often a pointed challenge for Southern institutions struggling to withstand economic and political instability or stagnation.<sup>7</sup> In many cases, Southern organisations appear to have clear agendas, but upon closer examination the ‘organisational’ agendas turn out to be individuals’ agendas, which have not necessarily been enhanced through collegial debate and do not necessarily enjoy popular support.

Where Southern organisations have clearly defined agendas, they may be pressured by donors and local actors to disregard their chosen mandates. Many strong Southern organisations regularly receive invitations to participate in partnerships that are unrelated to their goals and may detract from their focus and efficacy. Some specialised Southern organisations perceive pressure from donors and other actors to take on activities outside their remit as an affront, reflecting lack of respect for their priorities and identities. As the frustrated director of a prominent Middle Eastern research centre expressed it, ‘It should matter what [our Institute] does. We should be able to say, “This is what we do.”’

Armed with a clear conception of their own agendas, strong Southern organisations apply a range of tools and strategies to increase the likelihood that their partnerships yield the desired

benefits. For example, in many cases, the senior staff of astute Southern organisations actively prepare their colleagues for the challenges associated with agenda setting and mentor them throughout the process. This often proves more effective than the default approach of ‘learning in the saddle’. Many robust Southern organisations also cultivate close connections with grassroots groups, which ensure that their agendas retain local relevance. These institutions then serve as gatekeepers to grassroots populations, a role that they use to increase their leverage in agenda negotiations. By carefully establishing their credibility beforehand, strong Southern organisations have the latitude to challenge assumptions and attitudes prevalent at the grassroots and among policy makers, taking on agendas that are unpopular because they are seen to be donors’ ‘turf’. Equally, reputable Southern organisations are well placed to advance agendas critical of donor governments, because their institutional clout can mitigate the risk of funding being withdrawn in reaction to researchers’ criticisms.

To be sure, innovative, reputable Southern organisations face challenges of their own in collaborative research. Even leading Southern organisations often operate in responsive modes in relation to the creation of new partnerships, waiting for invitations from Northern parties rather than initiating collaborations themselves. Taken in total, however, the attributes discussed above strengthen the hands of Southern parties in agenda negotiations, and limit the cost to them if a partnership does not materialise. Indeed, many leading Southern institutions are proud of their ability to be selective in their partnerships and to pursue their priorities even when they do not garner external support. Among leading Southern research organisations, walking away from unsatisfactory partnerships is virtually a rite of passage. However, the difficulty of turning down partnership opportunities should not be underestimated. The price of refusing or withdrawing from North–South partnerships is often not only financial but also reputational, as organisations that step out of troubling partnerships may be labelled as belligerent or uncooperative, which hinders their ability to secure new collaboration opportunities and influence decision makers in the future. While recognising the validity of these concerns, interviewees questioned whether nascent institutions could ever transform themselves into successful organisations by simply adopting agendas forged in the North and divorced from local priorities.

## Conclusion

The challenges associated with collaborative agenda setting are deeply rooted in the structure of the international donor system, wedded as it is to a model of short-term, project-based collaborative financing. While bilateral donors such as the Netherlands and the UK have met with modest success in challenging the strictures of this model, major hurdles remain. Strong Southern organisations are best placed to navigate these obstacles, but the magnitude of the challenges is illustrated by the fact that some of the most reputable and well-skilled Southern organisations simply avoid the issue, eschewing North–South research partnerships altogether. For the minority of organisations that can rely on the more flexible, direct funding offered by independent donors, the benefits of partnership often cannot outweigh the managerial burdens and complex agenda negotiations that partnerships almost invariably entail. This calls into question the salience of the wide range of guidelines that aim to reform the partnership experience (KFPE 1998, 2005). It is perhaps over-optimistic to hope that careful planning and laudable ideals can avoid the entrenched problems that have complicated international research collaboration for decades.

The cross-cutting, structural nature of barriers to equitable, collaborative agenda setting should not deter researchers, donors, and policy makers from tackling these issues, in order to

ensure that the benefits of North–South partnerships are maximised. Yet this is an inescapably long-term endeavour. Meanwhile, donors and researchers alike are well advised to recognize candidly the limitations of partnership and ensure that a broader range of funding modalities is applied to support the creation and application of knowledge for development. Detailed organisational assessments and negotiations between donors and researchers are essential *before* settling on North–South partnership as a funding modality. In these discussions, Northern parties should be willing to heed Southern researchers’ calls for different forms of support, including greater levels of direct and core funding. This would necessitate extensive reform of those donor agencies that exclusively support North–South partnerships. However, a commitment to respecting Southern perspectives and priorities must encompass not only the substantive research agenda, but also the modalities through which development-research funding is distributed. Northern researchers’ reflections on partnership often stop short of this conclusion, focusing instead on how partnerships may be modified, while retaining their place at the table. This may be in the short-term interests of Northern researchers, but the goal of equitable, collaborative agenda setting would be better served if North–South research partnerships were initiated and financed more judiciously, alongside other approaches to supporting the creation of knowledge for development, including core funding and South–South partnerships.<sup>8</sup>

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## Notes

1. The International Development Research Centre (IDRC) is a Canadian organisation which works closely with Southern researchers engaged in the pursuit of healthier, prosperous, and more equitable societies. The Canadian Partnerships Program regularly supports co-operation between the Canadian development-research community and Southern counterparts. See <http://www.idrc.ca/en/cp/>
2. The interviews were conducted in the following locations: the Netherlands (8), the United Kingdom (5), Botswana (4), South Africa (9), Jordan (8), and Israel and the Palestinian Territories (9). Participants’ names and identifying details have been omitted to preserve confidentiality.
3. There are limitations in any set of terminology. An important shortcoming of my use of the term ‘collaboration’ was pointed out to me by Palestinian researchers who stressed that in their context, ‘collaboration’ denotes support for the Israeli occupation. This is of course not my meaning.
4. To be sure, other members of the donor community, such as independent foundations and the private sector, also shape the creation of collaborative research agendas. Their approaches merit further examination but are beyond the scope of this article.
5. See Wiedenhof and Molenaar (2006) for a discussion of the rationale behind the 2005 policy.
6. Albeit critical, the question of how strong Southern research organisations emerge and evolve is largely outside the scope of this article. Preliminary discussions with Southern researchers suggest that in certain cases North–South partnerships have supported the development of strong Southern research centres, but this is certainly not the only contributing factor. Effective South–South co-operation and concerted leadership from driven, well-trained, and well-connected Southern researchers is also typically essential.
7. Northern institutions and coalitions are also often unsure of their own agendas. Support for North–North co-operation is often even scarcer than funding for North–South exchanges, despite the fact that interaction between diverse Northern communities and institutions is essential to establishing and refining solid advocacy and research agendas. Consequently, Northern researchers from large and heterogeneous countries such as Canada often struggle to appreciate fully the scope of national experiences of issues such as indigenous self-governance and resource management. This limits Northern partners’ ability to contribute to the development of rigorous

North–South research agendas.

8. This is not to suggest that South–South research partnerships are immune from agenda-setting debates. As several Southern researchers suggested to me, all too often these partnerships mimic and even amplify the negative power dynamics associated with North–South research partnerships.

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## The author

**Megan Bradley** is a doctoral candidate in international relations at the University of Oxford. She has worked for the International Development Research Centre (IDRC), and is currently the Cadieux-Léger Fellow in the Department of Foreign Affairs and International Trade Canada (DFAIT). The views expressed in this article are solely those of the author; they do not reflect the positions and policies of IDRC or DFAIT. Contact details: St Antony’s College, University of Oxford, 62 Woodstock Road, Oxford OX2 6JF, UK. [megan.bradley@sant.ox.ac.uk](mailto:megan.bradley@sant.ox.ac.uk)