



national treasury

Department:
National Treasury
REPUBLIC OF SOUTH AFRICA

Belgian – South African Study and Consultancy Fund

SAF0901711



Final report

Table of contents

ACRONYMS.....	3
INTERVENTION FORM.....	4
GLOBAL APPRECIATION	5
PART 1 : RESULTS ACHIEVED AND LESSONS LEARNED.....	7
1 ASSESSING THE INTERVENTION STRATEGY	7
1.1 CONTEXT	7
1.2 IMPORTANT CHANGES IN INTERVENTION STRATEGY	7
2 RESULTS ACHIEVED.....	8
ANALYSIS OF RESULTS / STUDIES- EXPERTISE	8
3 SUSTAINABILITY.....	25
3.1 WHAT IS THE ECONOMIC AND FINANCIAL VIABILITY OF THE RESULTS OF THE INTERVENTION?	25
3.2 WHAT IS THE LEVEL OF OWNERSHIP OF THE INTERVENTION BY TARGET GROUPS AND WILL IT CONTINUE AFTER THE END OF EXTERNAL SUPPORT?	25
3.3 WHAT WAS THE LEVEL OF POLICY SUPPORT PROVIDED AND THE DEGREE OF INTERACTION BETWEEN INTERVENTION AND POLICY LEVEL?	25
3.4 HOW WELL HAS THE INTERVENTION CONTRIBUTED TO INSTITUTIONAL AND MANAGEMENT CAPACITY?.....	25
4 LEARNING	26
4.1 LESSONS LEARNED.....	26
4.2 RECOMMENDATIONS	26
PART 2: SYNTHESIS OF (OPERATIONAL) MONITORING	28
1 FOLLOW-UP OF DECISIONS BY THE JLCB	28
2 EXPENSES.....	29
3 PUBLIC PROCUREMENT.....	34
4 PUBLIC AGREEMENTS	34
5 EQUIPMENT.....	34
6 ORIGINAL LOGICAL FRAMEWORK FROM TFF :	34
7 COMPLETE MONITORING MATRIX.....	34
8 TOOLS AND PRODUCTS.....	35

Acronyms

Enabel	Belgian Development Agency
JLCB	Joint Local Consultative Body
M&E	Monitoring and Evaluation
NT	National Treasury
DPSA	Department of Public Service Administration
DRDLR	Department of Rural Development and Land Reform
NDOH	National Department of Health
NHI	National Health Insurance
HST	Health Systems Trust
GDoH	Gauteng Department of Health
DHET	Department of Higher Education and Training
DST	Department of Science and Technology
FET	Further Education and Training
PEFA	Public Expenditure and Financial Accountability
PFMA	Public Finance Management Act
MFMA	Municipal Finance Management Act
OAG	Office of the Accountant General
IGR	Intergovernmental Relations
SCOA	Standard Chart of Accounts
DCMIS	Development Cooperation Management Information System

Intervention form

Intervention name	Belgian – South African Study and Consultancy Fund
Intervention Code	SAFo901711
Location	South African
Budget	€ 2.092.207,33 + € 869.884,67 = € 2.962.092,00
Partner Institution	South African National Treasury
Date intervention start /Opening steering committee	16th April 2010
End date Specific Agreement	15 th April 2018
Target groups	Multi-sector
Impact ¹	
Outcome	Strengthen the capacity of public institutions of South Africa, on the one hand in support of the prioritised sectors of the Belgian cooperation and the preparation of a new indicative program of cooperation, and on the other hand through the implementation of the Paris Declaration on harmonisation and alignment of aid.
Total budget of the intervention	€ 2.962.092,00
Period covered by the report	16 th April 2010 to 15 th April 2018

¹ Impact is a synonym for global objective, Outcome is a synonym for specific objective, output is a synonym for result

Global appreciation

The Belgian Study Fund has provided rapid and innovative support to the development sector. The spread of research, exploration and complimentary work funded over the years contributed directly to macro programmes and the relatively small investments enabled testing, formulation outside of the mainstream compliance needs, and became stepping stones for value-addition.

The National Treasury: Office of the Accountant General (OAG) has developed a capacity development strategy for public finance management improvement. A number of donor partners contribute to this strategy and the European Union is still investing in this strategy with others such as Switzerland, Germany and DFID (UK). Enabel supported a number of studies and short-term, targeted interventions which contributed directly to the implementation of this strategy. These include development of training for hospital chief executive offices on financial management; developing training material for asset, revenue and financial management for the public sector to improve performance and planning at local government levels.

The National Treasury: Intergovernmental Relations unit (IGR) received considerable support as well and the globally recognised Public Expenditure and Financial Accountability (PEFA) framework has been applied in South Africa in 2014. The Study Fund supported provincial PEFA assessments and funded explicitly the feedback workshops, ensuring knowledge sharing and optimal participation of provincial stakeholders.

The Study Fund supported the health sector and the North West province was funded to audit the capacity and capability to create quality health data and so improve patient outcomes. The Gauteng Health department was assisted to develop a medical device assessment and audit tool.

Although the lion's share of support went to South African priority sectors, the Study Fund co-funded the SADCs Financial Inclusion Forum in 2015. This regional initiative promoted inclusive growth with an emphasis on youth and women as beneficiaries.

The Fund invested in an exchange between South African public finance management practitioners at national and provincial levels (through National Treasury) with two of Belgium's universities – Vrije University and University of Antwerp. The first intake of thirty (30) officials in 2017 was approved by the Minister of Finance as this exchange had the intention to contribute to the Continuous Professional Development (CPD) strategy of the sector. A second intake is currently in progress and the investment from the Study Fund provided a good curriculum baseline and cost-structure which will now be further refined. The second intake already illustrates a demand and supply approach and the National Treasury unit leading this exchange, IGR, will invest in the strengthening of local universities' participation in training components. The Study Fund was instrumental in funding this pilot and Treasury is committed to utilising the remaining sources of funding from Belgian to continue this exchange programme.

Study Funds are generally designed to explore, test and even modernise thinking and approaches. The investments into initiatives such as: Dynamic reporting for the department of Public Service and Administration; Assessing the effectiveness of cooperative (as a banking and saving instrument) funded by the public sector; and Gender-based responsive budgeting in the Free State; marks the Belgian funded Study

Fund as highly relevant.

The responsiveness to such a wide array of requests and needs illustrated the mature partnership between the Belgian Government, Enabel as the implementing agency, and South Africa. The exit of Belgian from bilateral development cooperation in SA is indeed a loss, however the investment in research, evaluations, training and pilots through this Study Fund has contributed significantly to a better understanding, new knowledge and an upskilled public sector.

Enabel execution official

National execution official



Ravi Reddy



Nathalie Vereen

PART 1 : Results achieved and lessons learned

1 Assessing the intervention strategy

1.1 Context

The project was signed in April 2010 for a total budget of € 2,092,207.33. The Objective of this programme was to strengthen the capacity of public institutions of South Africa, on the one hand in support of the prioritised sectors of the Belgian cooperation and the preparation of a new indicative program of cooperation, and on the other hand through the implementation of the Paris Declaration on harmonisation and alignment of aid.

At a partner committee meeting held in Brussels on 10 May 2012 it was decided to terminate the Consolidation phase of the Capacity Building project signed between South African Minister of Health and the Belgian Ambassador in South Africa. National Treasury submitted a formal letter on the 25th June 2012 to the Development Counsellor at the Embassy of Belgium to officially request for the re-allocation of this project balance to the Study and Consultancy Fund which amounted to €1,995,001.28.

However due to the slow progress made in the Study and Consultancy Fund during 2011-2013 the balance from the Health project was not officially allocated to the Study and Consultancy Fund.

In March 2014, a new request was put forward by the Development Counsellor to the National Treasury suggesting a re-allocation of € 1.100.000 from the balance of the Health project to the 2014 Scholarship Programme and the remaining balance of € 895,001.28 to be transferred to the Study and Consultancy Fund in accordance with the recommendations made by the evaluation team. This allocation was accepted by the National Treasury on 12 March 2014 and by the Partner Committee on 25 November 2014. This was then formalised through an exchange of letters.

From 2010 to 2017 a total number of 40 studies and consultancies were approved and implemented. This brought the implementation rate up to 74,51% in seven years of implementation.

1.2 Important changes in intervention strategy

The key changes to the management of the fund from 2010 until 2013 were related to a low number of proposals considered for approval. Most of the proposals received had lacked in quality leading to the rejection of some of the studies.

During 2014, the Study and Consultancy Fund had made tremendous progress approving 14 additional studies and committing a total of 93% of the overall budget. The remaining budget was earmarked for proposals from Department of Land Reform, however due to internal delays in policy changes this could not be taken up by the Department.

Based on the excellent progress made within one year, the Steering Committee proposed an extension and the subsequent replenishment of the fund from the Consolidation phase of the Health Capacity Building project.

In view of motivating the request for extension and a budget increase the Steering Committee endorsed a programme evaluation. In addition, the Steering Committee endorsed an audit with the purpose of reviewing the financial compliance of the Fund as well as to make

recommendations on how to further improve the current processes and procedures to ensure a more efficient level of implementation. The audit took place in October 2014 in accordance with the Framework contract established by BTC/ Enabel. The recommendations from both were implemented successfully.

BTC/ Enabel developed templates for proposals, which helped in guiding the beneficiary institutions with their submissions. Furthermore BTC/ Enabel developed a detailed procedure manual and procurement check list, which were approved by the Steering Committee.

These measures were taken by the project management which contributed to improve the implementation rate.

2 Results achieved

Analysis of results / studies- expertise

Title of study	Z_01_01 – FET Study in support of a Monitoring and Evaluation System for FET Colleges
<i>Description of Intervention</i>	The DHET, with technical support from a team of specialists, had driven a process to enhance the capacity of colleges to conduct more effective enrolment planning, budgeting and target setting. This intervention outlines the next phase of support aimed at laying the foundation for sustained monitoring and evaluation (M&E) in the FET College subsystem.
<i>Results achieved/ Not achieved</i>	JET Education Services was contracted through this funding to conduct a FET Study which provided the basis for the design of the FET College M&E system. This forms the first phase in a proposed three-year programme of support aimed at laying the foundation for sustainable growth and development in the FET College Sub-system. The conclusion of the study was that the move towards a systemic M&E system is in line with international trends, especially in those countries with well-established FET systems. In addition, it is evident that there is no neat fit of any particular system within the South African context. However, this proposed framework draws from different country approaches but will require rigorous testing to ensure it is accessible and user-friendly for colleges and other stakeholders. By virtue of the history of South Africa's colleges and the current capacity challenges that colleges face, the process of introducing the framework and indicators will require intensive support both with DHET and the colleges to entrench the system. The next challenge is ensuring the system gets optimally utilised. If managed carefully, then within a year college should already be able to demonstrate a different mind-set around data monitoring and reporting, and should therefore have increasing ownership of the system so that it can be used as an effective management tool. An Information system for the FET sector (FETMIS) will have to be developed in line with the M&E framework in terms of performance indicators that are to be measured. An easy to use, interactive system should allow colleges to upload the data at college level which should then be aggregated at systems level. Down the line, this system should be housed with an institutional form which can engage with the broader FET system and ensure information is used optimally.
Title of study	Z_02_01 – Seminar on LEAN Methodology to the Public Sector
<i>Description of Intervention</i>	The National Department of Health, Office of Standards Compliance, had identified an opportunity for a seminar for the discussion with International Experts on the key Quality Improvement Methodology known as "LEAN". This methodology was introduced in 2008 in two public hospitals in Western Cape and North West and then in 2010 was supported by the Belgium funding in 18 hospitals across the country.
<i>Results achieved/ Not</i>	The seminar took place at the Department of Health on the 11th October 2010. Three international speakers from Netherlands, Sweden and USA, introduced the participants to a number of case studies of improvement without significant

<i>achieved</i>	<p>investment. Local speakers such as representatives from Western Cape Province and CEOs from public hospitals brought to the table their experiences with Lean projects implemented in the past years.</p> <p>The seminar enjoyed the presence of over 100 participants making this event very successful through increasing awareness of similar events and provided the platform for exchange of experiences. All participants were engaged in discussions and valuable insights in undertaking improvement initiatives were provided by the international speakers.</p> <p>The seminar also created the opportunity of further engagement with provincial counterparts who were unaware of the current Belgium funded project implemented in 18 hospitals across the country, for which Lean methodology was being used.</p>
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Title of study	Z_03_01 – SCOA: Seminars on Municipal Management Reform and Standard Chart of Accounts.
<i>Description of Intervention</i>	<p>National Treasury experiences challenges in streamlining systems applicable to financial data management. To address this National Treasury has drafted a SCOA for local government with associated maintenance and verification processes which was at an advance stage. The Municipalities and its direct stakeholders have to be intensely consulted in order to streamline data requirements to contribute to effective and efficient running of Local Governments with better accountability.</p> <p>The primary objective on the intervention is to achieve an acceptable level of quality from the collection of Local Government (Municipality and Municipal Entities) data. This will require a classification framework specific to Local Government that has, during the design phase, considered the needs of key sector stakeholders as identified during the project.</p>
<i>Results achieved/ Not achieved</i>	<p>Abacus Advisory was contracted for the assignment. The municipalities selected for participation welcomed the initiative and mobilised the bigger workforce to be addressed on pertinent issues relating to the SCOA. They were available to participate in work groups meetings and to share their perspectives, information needs and concerns.</p> <p>During these working sessions a great deal in mapping the accounts to the detail presented in the SCOA were done and thus also identified accounts lacking from the structure. The segmental structure was accepted by the municipalities but concern expressed on the cost implication to revise/change systems to accommodate the proposed segments.</p> <p>Active participation by National Departments to share their particular information needs should be more strongly solicited by the National Treasury. Finally, a discussion relating to the architecture of financial management information should be reviewed concomitantly with the design of a SCOA for Local Government.</p>

Title of study	Z_04_01 – ASSET MANAGEMENT : Seminar on Financial Management Reforms
<i>Description of Intervention</i>	As part of the financial management reforms National Treasury has developed an Asset Management guide towards implementation of Standard 17 of GRAP to improve the effective functioning of asset management. This intervention funds the implementation of the guide through a seminar.
<i>Results achieved/ Not achieved</i>	<p>A two day seminar was held which addressed:</p> <ul style="list-style-type: none"> • The policy imperatives around proper infrastructure and assets • The implementation strategy • Applicability of the relevant standards • Practical examples around planning, budgeting, maintenance, monitoring, recording and reporting. • Auditing of assets <p>The seminar was attended by Provincial and Municipal officials representing the 9 Provinces and 283 Municipalities. The objective was achieved and there was constructive sharing of knowledge, information, experiences and practical skills throughout the sessions.</p>

Title of study	Z_05_01 – BA-PHALABORWA
<i>Description of Intervention</i>	Preparation of feasible solutions for a comprehensive poverty reduction, improved service delivery and integrated development programme for Ba-Phalaborwa Municipality. The objective of this intervention is to develop a development implementation programme for the Municipality with specific attention given to the land reform process and sustainable, economic viable solutions for the new landowners.
<i>Results achieved/ Not achieved</i>	<p>NRM Consulting was contracted to conduct the study with the following results:</p> <ul style="list-style-type: none"> • Prepared a comprehensive development implementation programme based on the IDP and other relevant reports available (such as the Local Economic Development Strategy, 2007; Market Research and Findings 2010; Informal Economic Survey 2007; Spatial Development Framework, 2009; Township Regeneration Strategy 2010). • Identified potential high impact economic and infrastructural projects that could be implemented to alleviate poverty and improve service delivery in the area and developed an appropriate funding model and strategy detailing various funding options. • Provided a detailed implementation plan for the research project.
Title of study	Z_06_01 – Plaas: External review of Plaas teaching programme
<i>Description of Intervention</i>	The post graduate training programme was initiated in 2001 with the aim to provide training in Land and Agrarian issues to policy makers, planners, managers and field workers who work in land reform and rural development. After 10 years there was a need to evaluate the purpose and objectives of the teaching programme; to evaluate whether the curriculum is still aligned with the students' needs; and to evaluate the target groups.
<i>Results achieved/ Not achieved</i>	<p>Two consultants were contracted to deliver the following:</p> <ul style="list-style-type: none"> • Conducted a needs assessment to determine the relevance of the teaching programme to all spheres of Government for departments such as Rural Development & Land Reform, Agriculture, Forestry & Fisheries and Human Settlements and also for local and international NGOs. • Conduct an evaluation of the programme. • Workshop with Plaas staff to realign their strategic direction and for curriculum development
Title of study	Z_07_01 - SALGA Free State: Feasibility study for Finance Capacity Building Programme in Free State
<i>Description of Intervention</i>	The study was organised for and by the SALGA Free State after they discovered widespread capacity constraints on municipal financial management in the province. The broad programme principle is to enhance the capacity of both municipal officials and councillors responsible for finances.
<i>Results achieved/ Not achieved</i>	<p>A contract was awarded to Akhile Management and Consulting to provide training to new councillors and administrative staff in the following fields:</p> <ul style="list-style-type: none"> • Financial Management – budgeting, safeguarding, monitoring (financial reporting) and auditing; • The budgeting cycle and community participation; • Sources of municipal income; • Tariffs and municipal services • Property rates • Managing money flow • Ward Committee role • Service delivery budget implementation plan

Title of study	Z_08_01 – Establishment of the Presidential State Owned Enterprises Review Committee
<i>Description of Intervention</i>	The State Owned Enterprises (SOE) Review Committee was established in 2010 with the objective of reviewing and strengthening the role of the SOEs in a developmental state. The budget of the Review committee had a shortfall and one of the areas was for Research projects. As part of the review the committee has identified the importance of selecting case studies to provide an in-depth qualitative assessment of the SOEs. One of the case studies conceptualised is on Procurement which will assist in responding on the “Compliance of SOEs to the Governments development and transformation agenda”.
<i>Results achieved/ Not achieved</i>	Africa Vukani Holdings (Pty) Ltd, was appointed by the Presidential Review Committee (PRC) to conduct workshops with SOE’s Supply Chain Management (SCM) units. The purpose of these workshops was to establish and unpack the SOE’s SCM and preferential procurement practices, to what extent is the procurement spend of commercial enterprises used to address the transformation agenda and socio economic objectives of government.

Title of study	Z_09_01 – Technical Assistance for the Free State Department of Police, Roads and Transport
<i>Description of Intervention</i>	The purpose of the program was to ultimately strengthen the finance management capacities and capabilities in the department of Police, Roads and Transport through supporting the implementation of the PFMA and to subsequently initiate the professionalization and capacity-building processes.
<i>Results achieved/ Not achieved</i>	A technical assistant was contracted to: <ul style="list-style-type: none"> • To review and build on the finance reform foundation. • To improve the financial management capacity and capability of provincial treasuries. • To provide technical support, advise and assist the Provincial Treasury with their capacity to provide technical support, advise and assist provincial departments • To provide capacity building and training workshops to provincial treasury. • To propose alternative service delivery models.

Title of study	Z_10_01 – Technical Assistance for the Gauteng Department of Health
<i>Description of Intervention</i>	The purpose of the program was to raise the GDoH financial management performance and accounting practices on a sustainable basis by providing advice and spearheading the implementation of the necessary structure, development of policies for critical discipline in the department such as and not limited to contract management, risk management and internal controls. The purpose of the program was to strengthen the finance management capacities and capabilities at the GDoH through supporting the implementation of the PFMA and from there initiate the professionalization and capacity-building process in the GDoH.
<i>Results achieved/ Not achieved</i>	A technical assistant was contracted to: <ul style="list-style-type: none"> • To build on the finance reform foundation. • To improve the financial management capacity and capability of the GDoH. • To provide technical support, advise and assist the GDoH with the implementation of financial management turnaround strategy • To provide capacity building and training workshops to provincial treasury

Title of study	Z_11_01 - Consultancy for the establishment of a Competency Framework & Capacity Building curriculum for the Nelson Mandela Bay District Municipality – Spontaneous Management Consulting
<i>Description of Intervention</i>	To establish a competency framework and capacity building curriculum for MURP key stakeholders at a political, strategic, project management and administrative level with particular focus on the following areas: <ul style="list-style-type: none"> • Investment in economic and social infrastructure • Human resource development • Enterprise development • The enhancement of the development capacity of local government • Poverty alleviation • Strengthening of the criminal justice system
<i>Results achieved/ Not achieved</i>	The expertise have contributed to establishing a competency framework and capacity building curriculum for MURP, key stakeholders at a political, strategic, project management and administrative level.

Title of study	Z_12_01 - Feasibility Study for the development of a Sustainable Agricultural Development Projects for Nkangala District Municipality DARDLA Mpumalanga
<i>Description of Intervention</i>	The consultants were required to develop feasibility and sustainability mechanisms that would allow the testing and implementation of sustainable agricultural initiatives in support of emerging black farmers and to maintain a balanced approach between household food production for food security and commercial production, in order to promote overall rural development. This included ensuring that agricultural advisors/ extension officers were able to support farmers in a manner that would allow them to compete with and stand on equal footing with farmers all over the world.
<i>Results achieved/ Not achieved</i>	The overall objective of this expertise was to create sustainable profitable, large scale agri-businesses to utilize the large areas of redistributed land, provide additional employment to the local communities, provide capacity and skills to train the local small holders and enable the relevant local educational institutions to transfer knowledge more effectively. The expert has delivered in accordance with the approved TOR and was approved by all concerned. Recommendation and all identified aspects have been put forward in the final report. Since the Study Fund makes no provision for further follow up once a report is presented it is difficult to say whether this has been taken forward by DARDLA in ensuring sustainable farming.

Title of study	Z_13_01 - Development Of Implementation Guidelines For The Standards Of Generally Recognised Accounting Practice (GRAP)
<i>Description of Intervention</i>	The Office of the Accountant-General (OAG) within the National Treasury is responsible for the development of implementation guidelines for the Standards of GRAP. These guidelines are to be used by public sector entities that are required by law to prepare financial statements in terms of these standards. To date the OAG has developed a core set of implementation guides covering the standards that have been promulgated for implementation by the Minister of Finance. The purpose of this project is to develop implementation guidelines on the remaining set of GRAP standards.
<i>Results achieved/ Not achieved</i>	Altimax was contracted to provide the OAG with detailed implementation guidance for the following standards: <ul style="list-style-type: none"> • GRAP 6 – Consolidated and separate financial statements • GRAP 7 – Associates • GRAP 8 – Joint ventures • GRAP 20 – Related Party Transactions • GRAP 18 – Segments Reporting • GRAP 105 – Transfers of Functions between Entities under Common Control • GRAP 106 – Transfers of Functions between Entities Not Under Common Control • GRAP 107 – Mergers

Title of study	Z_14_01 - Risk Management for the South African Health sector National Treasury, Chief Directorate: Capacity Building – Health Systems Trust (HST)
<i>Description of Intervention</i>	<p>The expertise was required to identify and develop systems that would strengthen the risk management strategies of the Health Sector, with Eastern Cape Department of Health as the pilot. Health, disease and well-being are complex states that are influenced by a range of factors such as gender, socio-economic development, health care access, physical environment and inequity. However, the Health Sector does not have a reliable and validated evidence base of the various risk factors that undermine the objective of providing quality health care. This is a serious gap given the following 10 point strategic objectives of the National Department of Health, aimed at creating a well-functioning health system capable of producing improved health outcomes.</p> <ul style="list-style-type: none"> • Provision of strategic leadership and creation of a social compact for better health outcomes; • Implementation of National Health Insurance (NHI); • Improving the Quality of Health Services; • Overhauling the health care system and improve its management; • Improving Human Resources Management, Planning and Development; • Revitalization of infrastructure; • Accelerated implementation of HIV & AIDS and Sexually Transmitted Infections National Strategic Plan 2007-11 and increase focus on TB and other communicable diseases; • Mass mobilisation for better health for the population; • Review of the Drug Policy; and • Strengthening Research and Development
<i>Results achieved/ Not achieved</i>	<p>The experts have successfully maintained the delivery deadlines and achievement of milestones as set out in the ToR. The expertise contributed to development of the risk determination framework which will be used to identify the categories of staff. HST has further refined the data collection tools in accordance with requests from NT to include criteria to guide the risk rating process. The Risk determination and risk rating tools were piloted at Tshwane Municipality in Pretoria.</p> <p>All activities and findings were documented in a report containing the EC DoH risk profile and risk indicators pertaining to health programme objectives.</p> <p>Training workshops for skills transfer convened and a soft copy report disseminated and final training session conducted.</p>

Title of study	Z_15_01 - Supporting South Africa's National Health Insurance Reform – HST
<i>Description of Intervention</i>	<p>The intervention was organised by the National Treasury's Chief Directorate for Health and Social Development working with the National Department of Health for the purpose of determining more precise benchmarks and/or norms and standards for particular areas of expenditure regarding the implementation of the National Health Insurance (NHI).</p>
<i>Results achieved/ Not achieved</i>	<p>The results have been produced in accordance with the TOR. A final report was produced for the selected Non-Negotiable Goods and Services where the following were reported on:</p> <ul style="list-style-type: none"> • Quantify the last 3 years' expenditure per province • Define benchmarks for each of the non-negotiables. • Quantify per province and per level of care the required budget, according to the benchmarks, for the next 2 years • Compare existing Medium Term Expenditure Framework (MTEF) budgets with suggested MTEF budgets.

Title of study	B_01_01 - Workshop on Future Development Cooperation between South Africa and Belgium
<i>Description of Intervention</i>	The objective of this activity was to finance consultancies to investigate instruments for South Africa- Belgium future development cooperation. The South Africa- Belgium Workshop on Future Development Cooperation was held on 12 June 2013.
<i>Results achieved/ Not achieved</i>	The consultants have provided their input and participated in the discussions as foreseen. The consultants were appointed to provide inputs at the South Africa- Belgium Workshop on Future Development Cooperation, as follows: <ul style="list-style-type: none"> • Dr. Siphamandla Zondi for his inputs based on his experience in Official Development Assistance. • Ms. Matshidiso Kgothatso Serote for her inputs based on her experience in Official Development Assistance. • Ms. Hermine Engel who prepared the report for the South Africa- Belgium Workshop.

Title of study	B_02_01 - Seed Funding for the appointment of a Provincial HR Specialist at the KwaZulu Natal Provincial Treasury
<i>Description of Intervention</i>	This study was approved for KwaZulu Natal Provincial Treasury in support to conducting an analysis of the remuneration of the public service and identify whether this is in line with the productivity expectations. The study was limited to 2 Departments (Education and Health) and it aimed at producing recommendations that will enable the Provincial Treasury to budget better and appropriately for HR line items.
<i>Results achieved/ Not achieved</i>	The consultants provided a comprehensive report on the analysis which included the following: <ul style="list-style-type: none"> • Staff establishment analysis • Citizens needs and the departments mandate • Organisational assessment The final recommendation was that in order to improve service delivery and control cost, Health must target critical hires to increase delivery capacity, amend the organisation structure to improve clinical management, strengthen performance management to slow pay progression, target outsourcing saves and expand revenue optimisation to offset expenditure.

Title of study:	B_03_01 - Matching citizens' expectations: Applied Policy Research Project
<i>Description of Intervention</i>	This study was approved for the Department of Co-operative Governance and Traditional Affairs (COGTA). The study focused on matching citizen's expectations of service delivery with local government capacity to deliver. It aimed to generate research and evidence based data which will be of assistance in identifying factors that inhibit effective citizen participation and service delivery.
<i>Results achieved/ Not achieved</i>	A comprehensive report was submitted which concluded that it is clear that the problems which give rise to service delivery protests are not attributable solely to the ineffectiveness of the participatory systems in place in municipalities, although they certainly do have an influence on the way in which citizens interact with local government. In particular, it is evident that many of the factors which give rise to citizen dissatisfaction are shaped either by broader socio-economic forces (such as unemployment and in-migration), by the form of the state, or by broader socio-political forces which put different constituents against each other.

Title of study	B_04_01 - Technical Expert to assist with the Establishment of a Technical Policy Unit, DOH EC Province
<i>Description of Intervention</i>	This study was approved for the Eastern Cape Provincial Department of Health to provide assistance in establishing a technical policy unit possibly based at Walter Sisulu University. This Unit is expected, once established, to provide timely and strategic technical assistance on evidence-based policy development and implementation. The study aimed to conduct an assessment of current skills and recommend a mix of skills required for the establishment of such unit.

<i>Results achieved/ Not achieved</i>	The expert provided a detailed assessment which included a proposed phased approach which caters for immediate, medium and long term interventions which include the need for more detailed work in the design of fully fledged TSUP that would be multi-stakeholder collaborative platform for Information, Evidence and Knowledge (IEK) responding to the health needs of the province within a national framework.
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Title of study	B_05_01 - Evaluate the Routine Health Information System (RHIS) in the North West Province
<i>Description of Intervention</i>	This study was approved for the North West Provincial Department of Health. The department's Health Information Systems (HIS) general performance, along with the Auditor General's disclaimer opinion on the HIS motivated the development of a study proposal to appropriately study the department's RHIS, with the aim to inform targeted corrective measures and to ensure an effective RHIS which would enhance and support service delivery. The objective of the study was to provide better understanding of the existing capacity and to integrate data collection, processing, reporting, and use of information management at all levels of public health systems to improve patient outcomes. The focus will be on quality, affordability, accessibility and sustainability of processes and systems.
<i>Results achieved/ Not achieved</i>	The research was conducted in Kenneth Kaunda District (DKK) and Bojanala Platinum District (Bojanala District) in the North West Province (NWP) with the following outputs: <ul style="list-style-type: none"> Assessed the input factors, including technical, organisational and behavioural factors that influenced the DHIS in these two districts. Assessed the process factors (e.g. collection, transmission, processing, analysis, display, quality checking of data and feedback) and the compliance with current standard operating procedures of the DHIS. Identified current and future utilisation of routine health information (RHI) for managerial and patient care decisions, aimed at improving the performance of the entire system.

Title of study	B_06_01 - Develop SOPs for Local Government in key internal control cycles
<i>Description of Intervention</i>	The study was approved for the Accountant-General within the National Treasury. The purpose was to establish a basic, foundation for good financial management through developing SOPs for Local Government in key internal control cycles.
<i>Results achieved/ Not achieved</i>	Five of the critical internal control cycles in the Local Government sphere were developed. These included Revenue Management, Asset Management, Expenditure Management, Liability Management and Funding Management. The developed SOPs were tested in 5 pilot Municipalities to ensure that they aligned to the day to day activities of the Finance department. This proved to be successful.

Title of study:	B_07_01 - Emerging Voices for Global Health 2014
<i>Description of Intervention</i>	This grant was approved for the National Department of Health to provide support for the Third Global Symposium on Health Systems Research, which was held in Cape Town from 30 September – 3 October 2014, with associated satellite sessions held on 29-30 September and the Emerging Voices programme. The symposium had the following objectives: <ul style="list-style-type: none"> Share cutting-edge research, addressing the development of people-centred health systems (including both conceptual work and the findings of primary and secondary research); Identify and discuss approaches to research, strengthening the rigour of this research; Build the capacities of researchers, policy-makers, practitioners, activists and civil society organisations to conduct and use health systems research related to the theme; Strengthen learning communities and knowledge-translation platforms working to support people-centred health systems across disciplines, sectors and countries and, particularly, bridging practitioner, activist and researcher communities.

Results achieved/ Not achieved	<p>The theme of the symposium was the science and practice of people-centred health systems, chosen to enable participants to address current and critical concerns of relevance across countries in all parts of the world. Over 1800 researchers, policy-makers, funders, implementers and other stakeholders, from all regions and all socio-economic levels, worked together on the challenge of how to make health systems more responsive to the needs of individuals, families and communities.</p> <p>The Symposium represents the first international event held in Africa specifically focussed on health systems research (HSR). Plenary and concurrent sessions presented new research, innovative research methods, experience of capacity development in this field, and experience of bringing researchers and policy makers together to learn from each other. Posters were also presented, and a marketplace allowed organisations to share experience and information in other formats. Social media and other multi-media interactions were also used to enrich aspects of the Symposium and encourage active and lively debate before, during and after the Symposium. Post-Symposium webinars will also support continued debate on the themes and issues raised amongst the global HSR community.</p> <p>The Emerging Voices programme specifically recognises the importance of actively engaging young researchers from the Global South to raise their voice in scientific debates. The Emerging Voices initiative began in 2009, originally as an initiative from the Institute of Tropical Medicine (ITM) Antwerp, Belgium. In 2014, however, it was a joint venture involving the School of Public Health of the University of Western Cape, South Africa; the University of Cape Town, South Africa; Peking University Health Science Centre, China and the Institute of Public Health, Bengaluru (India). The Emerging Voices training uses a blended learning approach, a combination of distance learning and intensive face-to-face coaching, leading to participation with oral presentation in a scientific conference, communication on social media, induction into a community of scholarship and practice and publication in a scientific journal.</p>
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Title of study:	B_10_01 – NHI Study Tour to different countries
Description of Intervention	The study was approved for the Chief Directorate Health and Social Development within the National Treasury. The study was organised with the objective to build capacity and conduct knowledge exchange activities for the Chief Directorate Health and Social Development, in their preparation for and implementation of the National Health Insurance Scheme.
Results achieved/ Not achieved	<p>It has been reported that so far a substantial number of significant research projects were undertaken with leading global organisations and experts with a number of significant products, including several articles for publication. Useful collaborative links and good working relationships have been built with a range of leading international partners based on practical work on joint projects and meetings. The visits and learning from other institutions and partner resulted in documented funding trends in each country, amongst others looking at levels of health funding in public and private sectors and in total, in absolute terms and as a proportion of GDP, along with fiscal indicators including country GDP, revenue and expenditure to GDP ratios, health as a share of the total budget. For each country possibilities for forward growth were modelled.</p> <p>Two papers were drafted for publication from the Thai work (in addition to background papers).</p> <p>The first is a collaborative opinion piece with around six leading Thai co-authors from different institutions and our own Department of Health. This deals with lessons from the Thai UC system for the SA NHI.</p> <p>The second is a longer review of the lessons from the Thai health system for SA. This has been drafted but is being tightened up for publication.</p> <p>There has been a lot of interest in this work and a detailed presentation (attached as an annexure) has been made to several audiences including the World Health Organisation (Geneva) and the Global Fund.</p>

Title of study:	B_11_01 - E-Health Concept Note for the Gauteng Province
Description of Intervention	This proposal was approved for the Gauteng Department of Health.

	<p>The main objective was to analyse and assess current data management processes (collection, transmission, processing, analysis, display, quality checking of data, sharing and exchange and feedback) in order to plan and implement appropriate interventions to improve the system.</p> <p>Produce a concept note based on the assessment results to serve as a starting point in implementing the e-health in Gauteng Province in accordance with the e-health Strategy.</p>
<i>Results achieved/ Not achieved</i>	The tender procedure was not initiated despite the approval of the study being received in July 2014. There were changes made to the senior management and no further engagements could be established with the Province in this regard and the funding was subsequently cancelled.

Title of study:	B_12_01 - Development of a Medical Device Assessment and Audit Tool for the Gauteng Health Department
<i>Description of Intervention</i>	<p>This proposal was approved for the Gauteng Department of Health.</p> <p>The overall objective of this project was to evaluate the Gauteng Health Department's existing medical device audit and procurement processes for appropriate and effective medical devices aimed at achieving positive health outcomes.</p>
<i>Results achieved/ Not achieved</i>	<p>The development of the Medical Device Audit and Procurement tool was successfully delivered in an efficient and succinct manner with collaboration from various stakeholders at all levels of Government. This medical device tool can be utilised to track and link device acquisition to established disease management protocols and cost-saving strategies. This tool can also be used to inform the purchase of medical devices founded on evidence based evaluation. It is replicable in all Provinces and can be customised to their needs.</p> <p>National Treasury facilitated further meetings with the Department of Health to strategize on rolling out the application Nationally.</p>

Title of study:	B_13_01 - Public Financial Management Workshops and Seminars
<i>Description of Intervention</i>	<p>This study was approved for the Accountant-General Office within the National Treasury.</p> <p>The main objective is to facilitate the enhancement of financial management skills for finance staff in the Provincial Departments and to support the implementation of the capacity development learning solutions developed by National Treasury in order to improve financial management in the Gauteng province and to ensure the public sector has a sufficient cadre of qualified financial and supply chain management officials. There have been concerted efforts to improve service delivery in the public sector and there is a high premium placed on developing the capacity of public servants, amongst others, human capital development is innovative and contributes to raising service standards.</p> <p>A key objective of the short learning programmes is to make a contribution to the development and empowerment of a corps of competent and committed high-performance employees.</p>
<i>Results achieved/ Not achieved</i>	<p>The project rolled out of high quality non-accredited and accredited learning programmes in financial management and supply chain management in the public sector. These programmes are at the centre of human capital development and included:</p> <ul style="list-style-type: none"> • Strategic and Annual Performance Planning • Finance for Non-Financial Managers • Asset Management • Standard Chart of Accounts (SCOA)

Title of study:	B_14_01 - Tracer Study of BTC funded SA candidates in Maritime Courses
<i>Description of Intervention</i>	This study was approved for the Transport Education and Training Authority (TETA) consequent to courses delivered by APEC under the Belgian scholarship programme.

	The main objective was to conduct an assessment of current existing delivery model (including benefits, impact and improvements) and formulate recommendations for restructuring of the model if deemed necessary.
<i>Results achieved/ Not achieved</i>	<p>The research/ assessment resulted in tracing the returning students and those who studied locally to understand the perceived effectiveness and impact of the APEC training on both students and their workplace.</p> <p>The research found that the APEC courses is viewed as valuable as it exposes people from different countries to the way international port systems work with specific reference to the Belgium system. It also allows for benchmarking between systems at the country of origin and that of Belgium. It has been emphasised, however, that although the knowledge acquired is valuable, it may in some cases, not be relevant or applicable to the local environment due to different processes, systems and legislation. It has been therefore recommended that the APEC programme be customised for the SA environment. This would entail development of course content, utilising local infrastructure to expose the candidates to the practical aspects, and getting relevant expertise both local and international to provide lectures.</p>

Title of study:	B_15_01 - E-Health Concept Note for the Northern Cape Province
<i>Description of Intervention</i>	<p>This proposal was approved for the Northern Cape Department of Health. Same as the Gauteng proposal, the main objective is to analyse and assess current data management processes (collection, transmission, processing, analysis, display, quality checking of data, sharing and exchange and feedback) in order to plan and implement appropriate interventions to improve the system.</p> <p>Produce a concept note based on the assessment results to serve as a starting point in implementing the e-health in Northern Cape Province in accordance with the e-health Strategy.</p> <p>The proposal was approved for an additional province, despite the indication on Gauteng proposal that this can be replicable in other provinces, based on the following reasons:</p> <p>The Northern Cape is very rural with very little urbanisation. They also have scares human and facility resources. Distances between the different tiers of hospital services are vast, so in terms of their e-health strategy they will be looking more at solutions that facilitate information and communication sharing in that environment. They also would rely on more of the lower level health worker than Gauteng due to the poor human resource situation and rely more on community-based facilities than Gauteng. They have one "centre of excellence" or given their limited resources they will have to rely on a single provincial hospital for all major referrals. They share this profile with the North West, Mpumalanga and Limpopo (all have one or two centers for referral). In contrast Gauteng and Western Cape have a different profile. Facilities are much closer together in Gauteng and Western Cape and they are much better equipped and staffed. They have a different challenge of information management and disbursement. These provinces are significantly urban and have significant hospital based services and therefore will require different solutions to the more rural based ones.</p> <p>The two studies will produce both rural and urban settings and offer the opportunity to present and share findings with their other provincial counterparts as well as at the technical committee of the National Health Council to stimulate replicability.</p>
<i>Results achieved/ Not achieved</i>	The tender procedure hasn't been initiated despite the approval of the study being received in July 2014. There were changes made to the senior management and no further engagements could be established with the Province in this regard and the funding was subsequently cancelled.

Title of study:	B_16_01 - Produce the audiovisual material and distribute to all departments to increase the OMF footprint within the current DPSA personnel and budget constraints
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<i>Description of Intervention</i>	<p>The study was approved for the Department of Public Service and Administration (DPSA).</p> <p>The main objective was the production and distribution of a set of audio-visual materials that would elucidate the content of the Operations Management Framework (OMF) and would be a much more cost efficient way of sharing the OMF with national and provincial departments.</p>
<i>Results achieved/ Not achieved</i>	<p>The final product was delivered in the following formats:</p> <ul style="list-style-type: none"> • Uncompressed Raw data files on additional marked memory sticks. • Web stream-able format in MP4 format. • 500 branded memory sticks with compressed version of the multimedia educational package.

Title of study:	B_17_01 - Brucellosis Research Workshop
<i>Description of Intervention</i>	<p>There has been an increase in bovine brucellosis in South Africa. The reasons for this increase was unclear and was prone to a mixture of changes in risk factors (increase in cattle density, and/or movement, altered trading patterns), together with differing efficacy of surveillance and control (diagnostics tests, vaccination, control measures). Information from some provinces suggested that the increase was particularly high amongst non-commercial or small holder farms.</p> <p>In order to optimise the research programme, a workshop was proposed to identify key questions of brucellosis policy and programme managers that should be addressed to curb the rise in the disease. This workshop would include international and local experts, researchers, programme managers and industry representatives.</p>
<i>Results achieved/ Not achieved</i>	<p>The 3 day workshop was held in May 2015. Professors from South Africa, Portugal, Zimbabwe and Northern Ireland provided presentations and open discussions on the various elements of brucellosis control.</p> <p>Approximately eighty research ideas emanated from the workshop. These were collated and then issued to local and international experts to identify those that will be most cost-effective and with the potential to have the greatest impact on reducing bovine brucellosis. These would then be submitted to DAFF for comment and agreement before identifying potential funders to finance the research.</p>

Title of study	B_18_01 - Financial Inclusion Forum
<i>Description of Intervention</i>	<p>Although financial inclusion was increasingly being recognised as being key to dealing with poverty and equality in the SADC region, there was no regional approach to addressing this development challenge. Whereas other sectors within the SADC regional integration agenda benefit from regional forums to exchange ideas, develop common regional approaches and learn from each other, financial inclusion programmes were developing in isolated pockets across the region. Without regional forums and approaches, these isolated programs lacked the support to grow and sustain their initiatives.</p> <p>The overall aim of the Forum was to promote financial inclusion in the SADC region for the purpose of inclusive economic growth and poverty alleviation. It would also take stock of the various policy initiatives at country level to promote financial inclusion and the impact on the livelihood of the most vulnerable sections of the population.</p>
<i>Results achieved/ Not achieved</i>	<p>The forum achieved the following outcomes:</p> <ul style="list-style-type: none"> • A platform for stakeholders to engage on the state of financial inclusion in the SADC region and initiatives required to promote greater inclusion and responsible finance. • A deepening of stakeholder appreciation and understanding of financial inclusion and the role it can play in inclusive economic growth and poverty alleviation • An opportunity for stakeholders to network around financial inclusion opportunities and challenges and to develop a community of practice in the region • Discussion and decision on the need for an ongoing networking and a forum to share experiences, develop capacity for financial inclusion programming

	<p>and build a SADC wide momentum for this important agenda.</p> <ul style="list-style-type: none"> Developed a regional approach to financial inclusion supported by FMT that can be presented at international forum such as the AFI Global Policy Forum.
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Title of study	B_19_01 - Workshop on Multilingualism
<i>Description of Intervention</i>	The Centre for Multilingualism and Diversities Research (CMDR) at the University of the Western Cape organized a two day post-graduate workshop entitled "Multilingualism in Transformative contexts: education, translation and the media" on the 24th and 25th March 2015. The workshop brought together young MA and PhD scholars and established scholars in the field of Multilingual Education and Interaction
<i>Results achieved/ Not achieved</i>	<p>The outputs of the workshop included:</p> <ul style="list-style-type: none"> The MA and PhD showcased their ongoing multilingual research. A wide range of papers on teaching, translation and multilingualism were covered. Scholars were presented with ongoing research on multilingual diversity in the classroom, identity performances of multilingual teachers and students, translation in the teaching of isiXhosa, German and Afrikaans. Presenters showcased papers on multilingual professions, multimodality and linguistic landscapes and dealt with the politics of language policy and planning. The immediate background to the event – over and above the bringing together of a wide faculty and international collegiate to hone research skills, explored synergies across approaches and sub-disciplines with respect to the question of how multilingual representations of identity travel across media and modes.

Title of study	B_21_01 - IT Sharepoint Web And Database Expert Services
<i>Description of Intervention</i>	<p>The study was approved for IDC.</p> <p>The main objective was to review and upgrade the DCMIS based on Microsoft SharePoint Products and Technologies for improved management and integrated reporting and accountability of ODA in South Africa.</p>
<i>Results achieved/ Not achieved</i>	<p>A consultant was contracted to revise and upgrade the DCMIS in line with the IDC and ODA stakeholder requirements.</p> <p>Videoring equipment was procured.</p>

Title of study	B_22_01 - PFM Exchange Programs
<i>Description of Intervention</i>	<p>As the heartbeat of provincial and municipal finance, Intergovernmental Relations [IGR] branch, wanted to forge new partnerships with Belgium universities and to lever on existing SA ones to develop a PFM Training Program to support PFM practitioners in treasuries within the context of enhancing state capacity to fulfil its role in managing public finances in South Africa.</p> <p>This training was targeting officials in middle and senior level managers with a Bachelors' Degree and or equivalent qualification with substantial public sector experience in budget analysis. This project was inspired by long standing programmes offered by National Treasury on Essentials of Budget Formulation and Budget Examination and Analysis Courses being offered every year for national and across provincial departments.</p>
<i>Results achieved/ Not achieved</i>	<p>With the assistance of Enabel Brussels, Vrije University and University of Antwerp were identified and showed interest in the programme. Officials from National Treasury travelled to Brussels to discuss the collaboration and the design of the training programme. This was finalised during a workshop in South Africa presented by VUB and UA. Soon after 30 participants attended the first training in Brussels in October 2017. The programme was successful and National Treasury agreed to explore funding further training via the same model.</p>

Title of study	B_23_01 - DPSA Dynamic HR Reports
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<i>Description of Intervention</i>	<p>The Transversal Systems and Data Integrity Directorate in DPSA is responsible for producing strategic reports on Human resources in the Public service. These reports assists:</p> <ul style="list-style-type: none"> • Policy owners in making of policies as well as monitoring the implementation thereof. • National and Provincial departments to plan, manage and report on their Human Resources effectively. • Governance and oversight bodies to monitor the status of human resources in the Public service. • Research institutions conducting research in the Public service. <p>There is a growing need for reliable and consolidated human resource information, but the requirements of the various stakeholders can be very diverse. It is important to provide relevant information based on the specific subject area that is being focused on. This results in numerous adhoc requests to meet the specific needs of various and diverse stakeholders.</p> <p>The only way to address the growing need efficiently is to implement new technology which will enable dynamic reporting by users. This will relieve people from spending most of their time on developing reports and allow for more in-depth analysis and improvement of the quality of the data in the Public service transversal systems and the information derived from it.</p>
<i>Results achieved/ Not achieved</i>	<p>SAS consultants were contracted to:</p> <ul style="list-style-type: none"> • Review existing HR reports and stakeholder needs. • Design dynamic reports • Design data structures to support the new dynamic report design. • Develop supportive data structures and processes to maintain the structure. • Develop dynamic reports using the SAS Visual Analytics. • Handover a new process to existing staff to maintain going forward. <p>The assignment could not be implemented in the time frame due to problems experienced with the performance of the DPSA SAS Visual Analytics server. This was investigated by a SAS Architect and he recommended that a full health check be done on the server. Based on the outcome of the health check the SAS software was upgraded to a later version of the software, but this did not resolve the problems. SAS Institute has then suggested doing a total new installation of the SAS software on the server to resolve all issues.</p>

Title of study	B_24_01 - Competency Framework
<i>Description of Intervention</i>	<p>South Africa has a severe skills shortage in public financial management, particularly in the public procurement field. Research completed by the South African Institute of Chartered Accountants (SAICA), illustrated that there were 22 030 public and private sector auditing and accounting vacancies in 2008. It also demonstrated that the supply of graduates and professionals entering the market is inadequate to keep up with increased demand. Hence Practitioners responsible for the implementation of PFM policies are furthermore hampered by the lack of operational guidance on how to implement and put departmental policies into practice. More specifically, most PFM functional areas do not have sets of formal learning solutions and standard operating procedures (SOPs) that would provide clarity on how to execute a specific task or react to a specific set of circumstances or situation or process.</p> <p>To counter these negative factors, financial skills development in the public sector were prioritised to be implemented by a number of changes in the training and educational environment. The Human Resource Development Strategy for South Africa 2010-2030, the National Skills Development Strategy III and the Human Resource Planning Strategic Framework Vision 2015 set the parameters for comprehensive capacity development within the public sector.</p>
<i>Results achieved/ Not achieved</i>	<p>A service provider was contracted to:</p> <ul style="list-style-type: none"> • Analysis of the strategic and annual performance legislations, frameworks, guidelines and research and international practises to inform the development of the competency framework; • Analysis of DPME strategic planning assessment reports; • Analysis of planning capability in the national and provincial spheres; • Analysis of existing organisational structures in national and provincial

	<p>government departments;</p> <ul style="list-style-type: none"> Analyse existing occupational profiles and job descriptions for all planning experts from national and provincial departments; Provide assistance in the establish committee of planning experts to review the draft framework; Develop the competency framework and technical competency dictionaries; Present the competency framework and technical competency dictionaries. <p>The assignment could not be finalised within the time frame of the fund and National Treasury took responsibility to complete the contract with internal funding.</p>
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Title of study	B_25_01 - PEFA Outcome Review
<i>Description of Intervention</i>	The workshop was intended to critically assess the Public Financial Management strengths and weaknesses within the provincial sphere and come up with appropriate reforms. The following was reflected on: (i) interpretation of consolidated PEFA results; (ii) make a comparison between Financial Management Capability Maturity Model and PEFA Methodology in informing and guiding the Government's PFM capacity development programme, and (iii) develop short, medium and long term intervention strategies to strengthen PFM systems.
<i>Results achieved/ Not achieved</i>	<p>The outcome of the review workshop held in November 2016:</p> <ul style="list-style-type: none"> Assessed the PEFA assessment in order identify areas for intervention in the provincial sphere. Integrated the findings into respective ISSPs of provinces. Found transversal intervention for common weakness to maximise the return on investment. Shared expertise and knowledge of the best practices in various critical dimensions. Capacitated the NT officials to undertake the quasi PEFA assessment based on latest framework in collaboration with Provincial Treasuries. Devised strategies to strengthen aggregate Public Financial Management in provinces.

Title of study	B_26_01 - PFM Accelerated Training
<i>Description of Intervention</i>	The aim of the intervention was to develop and pilot new health sector public financial management learning programmes in line with health and financial management frameworks and guidelines and to support financial management in the health sector through relevant education, training, and development solutions in national and provincial departments.
<i>Results achieved/ Not achieved</i>	<p>The expected outputs were to:</p> <ul style="list-style-type: none"> Development of asset and inventory management learning material. Development of revenue management learning material. Development of PFM Hospital CEOs learning programme. Pilot the learning programmes. <p>The assignment could not be finalised within the time frame of the fund and National Treasury took responsibility to complete the contract with internal funding.</p>

Title of study	B_27_01 - Compensation of Employees
<i>Description of Intervention</i>	The purpose of this project was to commission a study on management practices of personnel budgets in social and economic sector departments with the objective of determining an overall strategy to effectively and scientifically manage the reduction of personnel costs in 3 provinces, namely Limpopo, Eastern Cape and Free State in order to provide adequately for it and other competing service delivery imperatives within the context of transformational and responsive public administration in South Africa. This is an important step aimed at supporting provincial government's efforts within the context of government fiscal consolidation and thereby improve the ability of provincial government to implement strategically the service delivery imperatives in social and economic sector departments with greater consistency, efficiency and

	effectiveness.
<i>Results achieved/ Not achieved</i>	<p>The expected results were:</p> <ul style="list-style-type: none"> • Ideal organizational structure per the social and economic sector departments [Education, Health, Social Development, Agriculture, Economic Development, Transport and Public Works linked to the Service Delivery Models (SDM) and their relevant entities; • Assessments and verification of current cost structure, including the cost of implementation of OSD, re-grading where applicable, including performance incentives etc. • Propose measures to reduce current costs for considerations by the provincial executive; and • Put forth any other lawful and or acceptable measures or benchmarked HR best practices that the province may consider to improve service delivery without incurring higher wage bill, exploring the options of offering severance packages to pave way for employment of young people. <p>Due to delays in tender procedure provincial department the timeframe until the end of the fund was too short and the funding was withdrawn.</p>

Title of study	B_28_01 - Effectiveness of funding of Cooperatives
<i>Description of Intervention</i>	<p>The purpose of this project was to conduct an assessment study on the effectiveness of funding of Cooperatives in the following departments (Social Development, Department of Economic Development, Environmental Affairs & Tourism and Department of Rural Development and Agrarian Reform).</p> <p>This evaluation was an earnest attempt by the province to understand various funding levels, deliverables as result of investments, and the actual return on investment as well as exploring meaningful measures that can be taken by ECPG to achieve maximum impact in growing the cooperative sector in order to advance economic transformation imperative within the context of inclusive growth.</p>
<i>Results achieved/ Not achieved</i>	<p>A consultant was contracted to:</p> <ul style="list-style-type: none"> • Assess and analysis the approach, model and methodology used to deploy resources in cooperatives. • Assess and analysis the institutional mechanisms (structure, management, administration, and processes) have on the efficiency and effectiveness of delivering the programme outcomes. • Analysis and assess the extent of Cooperatives support and development for sustainability. • To check what worked well and what challenges were experienced with Cooperative support approach/ model and implementation. • Assess and analysis the significant return on investment from Cooperatives against the cost of delivering the programme in terms of economic growth and empowerment; as well as skills development and Job creation. • Compare Cooperatives performance to similar programmes nationally and internationally. • Recommend mechanisms to ensure sustainable impact of the type of cooperatives required to make a meaningful contribution in the economic growth of the Province.

Title of study:	B_29_01 - Gender Based Budgeting
<i>Description of Intervention</i>	<p>The purpose of this project was to commission a research study that will evaluate the responsiveness of the provincial fiscal allocation (and expenditures) on development of women in the province. The planned study is basically aimed at assessing gender sensitivity of our provincial budgets over the last twenty years. It is thus about interrogating the fairness or equity in the distribution of provincial resources. The findings of this study, whether positive or not, are important in the realization of broader policy imperatives. The findings are therefore expected to assist in enhancing priority setting, not only for the Free State province, but for all other provinces. The study can therefore be regarded as a pilot work that could further be undertaken by other provinces.</p>

<i>Results achieved/ Not achieved</i>	<p>The consultants are expected to clearly achieve the following:</p> <ul style="list-style-type: none"> • Indicate whether the distribution of resources of the past twenty financial years have been sensitive to gender needs. • Indicate whether there has been equity or fairness in the construct of our provincial fiscal distribution. • Present steps to be taken to correct or enhance equity in the distribution of resources. • Proposal of best practices with regard to gender budgeting (do benchmarking with countries that have successfully implemented the approach). • Proposed policy briefs for inclusion of gender based perspective in budgeting process. <p>The tender process was delayed. The planning of the deliverables went beyond the end dated of the Study Fund specific agreement. The full contract could therefore not be funded. However the provincial treasury had agreed that they would source funding to pay for the balance of the contract.</p>
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3 Sustainability

3.1 What is the economic and financial viability of the results of the intervention?

All approved initiatives are aligned to the GoSA priorities. Since they are pilot initiatives the Government does not always have funding available and external seed funding is used. However, if the pilots prove to be successful then the Government is able to scale it up with its internal budget. The sustainability of the initiatives was assessed in all approved proposals.

3.2 What is the level of ownership of the intervention by target groups and will it continue after the end of external support?

The initiatives funded by the program are considered on a high level of importance to the Beneficiary Institutions meeting their objectives of the National Development Plan. They therefore took full ownership of the intervention. The beneficiary institutions were fully aware that the Belgian funds were to be used for seed funding and that funding for further implementation would have to be sourced through their internal funding. The GoSA fully supports successful interventions which limits the risks of these interventions not continuing after.

3.3 What was the level of policy support provided and the degree of interaction between intervention and policy level?

The Study Fund responded a varied and diverse set of needs and requests for intervention. It funded high-level Presidential reviews (SOE review) and the national health insurance conceptualization/baseline work; and it supported provincial and local government interventions (e.g. financial inclusion and community based cooperatives, skills development interventions to provide basic services) which provided direct inputs to communities.

The spread of interventions was well aligned to policy priorities. Considering the investment in creating evidence to support conceptual formulation, reviews and knowledge created towards improvement of developmental challenges such as universal health care (Outcome 2) public finance management (Outcomes 4, 7, 9 and 12), economic development (Outcome 4, 5) and gender equality (Outcome 4 and 12) the SF investment could be deemed as policy relevant.

3.4 How well has the intervention contributed to institutional and management capacity?

The Study Fund modality allowed for the SA policy environment to conceptualise needs and receive support in the form of technical assistance in an uncomplicated manner. This was helpful as many public institutions would not have been able to comply with hugely administrative needs to receive funding.

The Public Expenditure and Financial Accountability (PEFA) framework provincial workshops provided provincial treasuries and stakeholders to participate in the feedback loop of the such assessments which have a direct impact on their capacity and capabilities to create an enabling environment for good governance and economic development.

The Public Finance Management training initiative which had a second intake during the duration of the SF has and will contribute to the institutional capacity of national and provincial treasury officials; expose them to international practices and systems to replicate and apply in the

SA context; and allow for the sharing of good practices between SA and Belgian sector experts and practitioners within the sector.

A lack of institutional capacity also led to a few de-commitments such as the two e-Health initiatives at provincial level.

4 Learning

4.1 Lessons Learned

There were a few lessons learned in the execution of the Programme:

- The modality of the Study and Consultancy fund is not a typical project implementation. The successful collaboration between Enabel and National Treasury and the ownership shared between both parties from the onset ensured a good execution of the programme. The success of this collaboration caught the attention of other donors and subsequently drew their attention that working out of the normal can be productive.
- Although the objectives of projects are aligned to the priorities of Government it does not necessarily mean that Government will fund such initiatives. The projects were pilot (seed funding) initiatives and Government will only adopt those which have proven to be successful and beneficial to roll out. The use of this official development assistance towards exploration, risk-taking investment, and learning experiences have been strategically applied to make the business cases (such as Cooperative banking models) for replication or not.
- The fragmentation and lack of coordination of programmes in some sectors create challenges around optimal use of investments into new technologies, implementation in general. Another potential risk is double dipping (intentional or not) due to the poor sharing of information amongst development partners supporting similar focal areas or development goals.

4.2 Recommendations

Recommendations can be relevant for:

- Country strategies
- Sector strategies
- A next intervention (intermediate or advanced)
- The exit-strategy

Recommendation	Source	Target audience
Some projects could not be fully implemented through the Study Fund budget due to delays in tender procedure which required an extension beyond the Specific Agreement. The relevant Departments have thus co-funded. These projects should be followed up to ensure completion.	Quarterly Reports	National Treasury

Lengthy procurement procedure impacts negatively on the disbursement rate. Since the initiatives are mainly pilot funding, the project should be implemented outside the processes of the local authorities.	Quarterly Reports	National Treasury/ Enabel
Marketing of the fund needs to be improved to broaden the reach of the funding.	Quarterly Reports	National Treasury/ Enabel
M&E should be strengthened to ensure better outcome results of the studies.	Quarterly Reports	National Treasury/ Enabel
Communication of the projects and results should be broadened to ensure more awareness.	Quarterly Reports	National Treasury/ Enabel

PART 2: Synthesis of (operational) monitoring

1 Follow-up of decisions by the JLCB

Decision			Action		Status
N°	Decision	Identification period (mm.yy)	Source*	Actor	
1	Management response and plan of action on the audit and evaluation report, and approved the response through Steering Committee	2015/06/02	JLCB minutes	NT and BTC	CLOSED
2	Amend the shortfalls in the procedure manual and guidelines	2015/06/02	JLCB minutes	NT and BTC	CLOSED
3	Monitoring and evaluation	2015/06/02	JLCB minutes	NT and BTC	CLOSED
4	Interest on Bilateral programmes and Programmes of the Embassy capitalised in the RDP	2016/09/30	Stufo management meeting	Embassy, NT and BTC	CLOSED
5	Final closure of the Study Fund.	2018/04/14	JLCB minutes	Embassy, NT and BTC	CLOSED

2 Expenses

Budget vs Actuals (Year to Month) of SAF0901711

Project Title :

Creation of a Belgo South African Fund for Transfer of Know-How, Studies and Consultancies

Budget Version:

E09

Currency :

EUR

YTM :

Year to month : 31/03/2019

Report includes all closed transactions until the end date of the chosen closing

	Status	Fin Mode	Amount	Start to 2018	Expenses 2019	Total	Balance	% Exec
A FONDS NON-ALLOUÉS			7 38.510,00	-10.475,89	-11.689,53	-28.165,42	766.675,42	-4%
01 Fonds non-alloués			7 38.510,00	-10.475,89	-11.689,53	-28.165,42	766.675,42	-4%
01 Fonds non-alloués		COGES	7 38.510,00	-10.475,89	-11.689,53	-28.165,42	766.675,42	-4%
B ALLOCATED FUNDS			1 559 270,00	1 559 270,65	-142 718,89	1 416 551,76	142 718,24	91%
01 IDC - Workshop			2 918,00	2 918,42	0,00	2 918,42	-0,42	100%
01 Workshop on Future Development Cooperation between		COGES	2 918,00	2 918,42	0,00	2 918,42	-0,42	100%
02 KwaZulu Natal Provincial Treasury			48 482,00	48 482,22	0,00	48 482,22	-0,22	100%
01 Seed Funding for the appointment of a Provincial HR		COGES	48 482,00	48 482,22	0,00	48 482,22	-0,22	100%
03 Generate evidence based data on identifying factors			35 262,00	35 262,37	0,00	35 262,37	-0,37	100%
01 Matching citizens' expectations: Applied Policy Research		COGES	35 262,00	35 262,37	0,00	35 262,37	-0,37	100%
04 Establishment of a Technical Unit that provides timely			30 560,00	30 559,92	0,00	30 559,92	0,08	100%
01 Technical Expert to assist with the Establishment of a		COGES	30 560,00	30 559,92	0,00	30 559,92	0,08	100%
05 Assess data quality and performance of the DHIS and			67 910,00	67 910,17	0,00	67 910,17	-0,17	100%
01 Evaluate the Routine Health Information System (RHIS) in		COGES	67 910,00	67 910,17	0,00	67 910,17	-0,17	100%
06 Development of Standing Operating Procedures for			166 901,00	166 901,29	-19 180,89	147 720,40	19 180,60	89%
01 Develop SOPs for Local Government in key internal control		COGES	166 901,00	166 901,29	-19 180,89	147 720,40	19 180,60	89%
07 The third global symposium on health systems research,			179 340,00	179 340,32	0,00	179 340,32	-0,32	100%
01 Emerging Voices for Global Health 2014		COGES	179 340,00	179 340,32	0,00	179 340,32	-0,32	100%
08 Evaluation of the Study Fund			11 679,00	11 679,63	0,00	11 679,63	0,37	100%
01 Technical Evaluation of the Study Fund		COGES	11 680,00	11 679,63	0,00	11 679,63	0,37	100%
02 Final Technical evaluation of the Study Fund		COGES	0,00	0,00	0,00	0,00	0,00	?
09 Financial Evaluation of the Study Fund			8 700,00	8 700,00	0,00	8 700,00	0,00	100%

REGIE

COGEST

TOTAL

909 393,97

2 052 668,03

-154 408,42

2 207 106,45

-154 408,42

2 052 668,03

909 393,97

69%

69%

Budget vs Actuals (Year to Month) of SAF0901711 Printed on: Monday 20 mai 2019

page: 1



Budget vs Actuals (Year to Month) of SAF0901711

Project Title : Creation of a Belgo South African Fund for Transfer of Know-How, Studies and Consultancies

Budget Version: E09

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YtM : Report includes all closed transactions until the end date of the chosen closing

Year to month : 31/03/2019

	Status	Fin Mode	Amount	Start to 2018	Expenses 2019	Total	Balance	% Exeo
01 Financial Audits		COGES	8.700,00	8.700,00	0,00	8.700,00	0,00	100%
10 Capacity building and knowledge exchange in relation to								
01 Study Tour to different countries		COGES	21.835,74	21.835,74	0,00	21.835,74	0,26	100%
11 Analyse and assess current data management processes								
01 E-Health Concept Note for the Gauteng Province		COGES	21.835,74	21.835,74	0,00	21.835,74	0,26	100%
12 Evaluate the Gauteng Health Department's existing								
01 Development of a Medical Device Assessment and Audit		COGES	0,00	0,00	0,00	0,00	0,00	?
13 Capacity development learning solutions developed by								
01 Public Financial Management Workshops and Seminars		COGES	61.406,72	61.406,72	0,00	61.406,72	0,28	100%
14 Analysis of existing delivery model, impact and benefits								
01 Tracer Study of BTC funded SA candidates in Maritime		COGES	61.406,72	61.406,72	0,00	61.406,72	0,28	100%
15 Analyse and assess current data management processes								
01 E-Health Concept Note for the Northern Cape Province		COGES	116.104,46	116.104,46	0,00	116.104,46	-0,46	100%
16 Develop Audio Visual Programme for Operations								
01 Produce the audiovisual material and distribute to all		COGES	116.104,46	116.104,46	0,00	116.104,46	-0,46	100%
17 Policy Research Workshop UP and DAFF								
01 Brucellosis Research Workshop		COGES	67.807,91	67.807,91	0,00	67.807,91	0,09	100%
18 Promote financial inclusion in the SADC region for the								
01 Financial Inclusion Forum		COGES	67.807,91	67.807,91	0,00	67.807,91	0,09	100%
19 Explore, create, cultivate and consolidate research								
01 Workshop on Multilingualism in Transformative Spaces		COGES	0,00	0,00	0,00	0,00	0,00	?
20 Tracer Study on Scholarships Programme								
			0,00	0,00	0,00	0,00	0,00	?
REGIE								
COGEST			2.962.092,00	2.207.106,45	-154.408,42	2.052.688,03	909.393,97	69%
TOTAL			2.962.092,00	2.207.106,45	-154.408,42	2.052.688,03	909.393,97	69%



Budget vs Actuals (Year to Month) of SAF0901711 Printed on maandag 20 mei 2019

Page 2

Budget vs Actuals (Year to Month) of SAF0901711

Project Title : Creation of a Belgo South African Fund for Transfer of Know-How, Studies and Consultancies

Budget Version: E09

Currency : EUR

Year to month : 31/03/2019

Report includes all closed transactions until the end date of the chosen closing

	Status	Fin Mode	Amount	Start to 2018	Expenses 2019	Total	Balance	% Exec
01 Evaluation of scholarship programme in South Africa		COGES	0,00	0,00	0,00	0,00	0,00	?
21 Development Cooperation Management Information			73.211,00	73.211,49	0,00	73.211,49	-0,49	100%
01 IT Sharepoint Web & Database Expert Service		COGES	73.211,00	73.211,49	0,00	73.211,49	-0,49	100%
22 PFM Exchange Programs for Continuous Professional			180.908,00	180.907,45	0,00	180.907,45	0,55	100%
01 Belgium Study Tour		COGES	12.009,00	12.008,57	0,00	12.008,57	0,43	100%
02 Develop and Pilot PFM Programme for National Treasury		COGES	168.899,00	168.898,88	0,00	168.898,88	0,12	100%
23 DPSA Dynamic HR Reports			8.574,00	8.573,56	0,00	8.573,56	0,44	100%
01 Resource to Develop Dynamic HR Reports		COGES	8.574,00	8.573,56	0,00	8.573,56	0,44	100%
24 Competency Framework for Strategic & Annual			175.910,00	175.909,83	-86.464,40	89.445,53	86.464,47	51%
01 Development of Competency Framework in the Public		COGES	175.910,00	175.909,83	-86.464,40	89.445,53	86.464,47	51%
25 PEFA Outcome Review			23.849,00	23.848,83	-11.683,26	12.165,57	11.683,43	51%
01 PEFA Outcome Review Conference/ Workshop		COGES	23.849,00	23.848,83	-11.683,26	12.165,57	11.683,43	51%
26 PFM Accelerated Training			84.351,00	84.350,83	-25.390,34	58.960,49	25.390,51	70%
01 Development and Pilot PFM Management Accelerated		COGES	84.351,00	84.350,83	-25.390,34	58.960,49	25.390,51	70%
27 Compensation of Employees Project - Limpopo Province			0,00	0,00	0,00	0,00	0,00	?
01 Assessment Study on Personnel Management Practices		COGES	0,00	0,00	0,00	0,00	0,00	?
28 Effectiveness of funding of Cooperatives			26.141,00	26.140,80	0,00	26.140,80	0,20	100%
01 Evaluation of at least 30 Cooperatives in the Eastern Cape		COGES	26.141,00	26.140,80	0,00	26.140,80	0,20	100%
29 Gender Based Budgeting Free State Provincial Budgets			36.149,00	36.149,41	0,00	36.149,41	-0,41	100%
01 Evaluate the responsiveness of Provincial fiscal allocation		COGES	36.149,00	36.149,41	0,00	36.149,41	-0,41	100%
Z ALLOCATED FUNDS			664.312,00	664.311,69	0,00	664.311,69	0,31	100%
01 Department of Higher Education & Training			32.750,00	32.749,66	0,00	32.749,66	0,34	100%
REGIE								
COGEST			2.962.092,00	2.207.106,45	-154.408,42	2.052.698,03	909.393,97	69%
TOTAL			2.962.092,00	2.207.106,45	-154.408,42	2.052.698,03	909.393,97	69%



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	Status	Fin Mode	Amount	Start to 2018	Expenses 2019	Total	Balance	% Exec
01 FET College Lecturer Development		COGES	32.750,00	32.749,66	0,00	32.749,66	0,34	100%
02 National Department of Health			7.353,00	7.353,09	0,00	7.353,09	-0,09	100%
01 Seminar-Lean Methodology to Public Sector		COGES	7.353,00	7.353,09	0,00	7.353,09	-0,09	100%
03 National Treasury - SCOA			73.722,00	73.721,72	0,00	73.721,72	0,28	100%
01 Development of Standard chart of accounts for Local		COGES	73.722,00	73.721,72	0,00	73.721,72	0,28	100%
04 National Treasury - GRAP			63.610,00	63.610,38	0,00	63.610,38	-0,38	100%
01 Seminar - Municipal Mngmnt Reform		COGES	63.610,00	63.610,38	0,00	63.610,38	-0,38	100%
05 Ba-Phalaborwa Municipality			47.032,00	47.031,79	0,00	47.031,79	0,21	100%
01 Feasible Solution on Poverty reduction, improved service		COGES	47.032,00	47.031,79	0,00	47.031,79	0,21	100%
06 University of Western Cape			27.704,00	27.703,54	0,00	27.703,54	0,46	100%
01 External review of Plaas Teaching Programme		COGES	27.704,00	27.703,54	0,00	27.703,54	0,46	100%
07 South African Local Government Association - SALGA			29.084,00	29.084,35	0,00	29.084,35	-0,35	100%
01 Feasibility study on Roll out of Finance Capacity Building		COGES	29.084,00	29.084,35	0,00	29.084,35	-0,35	100%
08 Presidential SOE Review Committee			38.032,00	38.031,84	0,00	38.031,84	0,16	100%
01 Establishment of the Presidential State owned Enterprises		COGES	38.032,00	38.031,84	0,00	38.031,84	0,16	100%
09 Free State Provincial Treasury			61.659,00	61.659,34	0,00	61.659,34	-0,34	100%
01 Technical Assistance for the Public Sector Financial		COGES	61.659,00	61.659,34	0,00	61.659,34	-0,34	100%
10 Gauteng Provincial Treasury			59.336,89	59.336,89	0,00	59.336,89	0,11	100%
01 Technical Assistance to strengthen PFM Capabilities at		COGES	59.336,89	59.336,89	0,00	59.336,89	0,11	100%
11 NMBM			37.870,74	37.870,74	0,00	37.870,74	0,26	100%
01 Establishment of a Competency Framework & Capacity		COGES	37.870,74	37.870,74	0,00	37.870,74	0,26	100%
12 DARDLA-MPU			46.407,37	46.407,37	0,00	46.407,37	-0,37	100%
REGIE								
COGEST			2.962.092,00	2.207.106,45	-154.408,42	2.052.698,03	909.393,97	69%
TOTAL			2.962.092,00	2.207.106,45	-154.408,42	2.052.698,03	909.393,97	69%



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	Status	Fin Mode	Amount	Start to 2018	Expenses 2018	Total	Balance	% Exec
01 Feasibility Study for the Dev of a Sustainable Agric Dev		COGES	46.407,00	46.407,37	0,00	46.407,37	-0,37	100%
13 GRAP_National Treasury								
01 Expert in the Development of Implementation Guidelines		COGES	54.849,00	54.849,58	0,00	54.849,58	0,42	100%
14 National Treasury- Health sector								
01 Expert in Risk Management for the South African Health		COGES	54.711,00	54.711,42	0,00	54.711,42	-0,42	100%
15 National Health Insurance Reform								
01 Supporting South Africa's National Health Insurance		COGES	30.191,00	30.190,98	0,00	30.190,98	0,02	100%
99 Conversion rate adjustment								
99 Conversion rate adjustment		COGES	0,00	0,00	0,00	0,00	0,00	?
99 Conversion rate adjustment		COGES	0,00	0,00	0,00	0,00	0,00	?

REGIE
 COGEST
 TOTAL

2.062.092,00
 2.062.092,00
 2.052.668,03

2.207.106,45
 2.207.106,45
 2.052.668,03

-154.408,42
 -154.408,42
 908.393,87

68%
 69%
 69%



3 Public procurement

The Study and Consultancy Fund followed the South African tender procedure with the inclusion of Enabel at certain stages of the process:

- The South African beneficiary institution prepared the ToR according to the South African tender regulations and submitted to National Treasury for approval.
- After approval, National Treasury requested the endorsement of the ToR from Enabel.
- Tender was launched by the Beneficiary Institution and evaluated by the Bid Adjudication Committee (BAC).
- Enabel was permitted to attend the evaluation meetings as an observer.
- After the approval by the BAC, National Treasury and Enabel had to give its no-objection to the awarding of the tender.
- For all tenders above 85.000eur Enabel had to receive the advice of an external tender adviser before giving a no-objection.
- Tender was then awarded to the approved bidder.

4 Public agreements

Not Applicable

5 Equipment

List equipment acquired during the intervention

Equipment type	Cost		Delivery Date	Remarks
	budget	real		
Canon EOS 750D 18-55 DC Lens 75-300mm DC Lens and Li-Ion Rechargeable battery pack LP-E17	7.500,00EUR	6.160,85EUR	06/11/2018	Equipment handed over to National Treasury
Photography lighting			06/11/2018	
APPLE 21.5 IMAC 2.3G I5 2017		1.235,14EUR	06/11/2018	

6 Original Logical Framework from TFF :

Not Applicable

7 Complete Monitoring Matrix

Not Applicable

8 Tools and products

In this annex, mention any material on the effects of the intervention or any experiences gained with the application of specific methods or tools.

- (Scientific) Publications
- Capitalisation reports
- Audio-visual material
- Other resources
- M&E approach/system
- Methods

Medical Device Assessment and Audit Tool for the Health Department
Audio-visual Programme on an Operations Management Framework for the Public Service
Development Cooperation Management Information System
Public Finance Management learning programme for National and Provincial Treasuries
Dynamic Human Resource reports

