

## Monitoring and Evaluation (M&E) in South – South Cooperation:

### The need for standardised principles

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#### The justification for a Southern framework on M&E principles

South-South Cooperation is broadly defined as the exchange of resources, technology, skills and technical know-how among countries of the South to promote social, economic, cultural, political and scientific development.

Broadly, the challenge of a universal definition of South-South Cooperation (SSC) and a subsequent monitoring and evaluation framework(s), in their various forms, is as a result of the various contexts, stakeholders and fields SSC finds itself. In part, there is a reluctance to compare SSC to northern efforts that are measured by Official Development Assistance (ODA) because by its very nature, SSC is born out of principles that differentiate it from its predecessors. SSC aims to challenge the current global status quo to ensure a more equitable and inclusive development that fosters self-reliance. The emphasis on technical exchanges to build capacity can be seen in contradiction to the often reactionary responses of the north. Some countries have also argued that monetizing their contributions underestimates their contribution since costs for goods and personnel in the South are lower than in developed countries, leading to a reluctance to measure SSC.

Yet given that a growing culture of South-South cooperation is in part, a reaction to North-South relations, whose history has been, with few exceptions, primarily destructive and exploitative in nature, South-South needs to be both proactive in its engagement with one another and deliberate about establishing a new course of action in international and regional cooperation. Thus, South-South should take a deliberate position on the language and spirit surrounding South-South cooperation.

The balance of cooperation aims to strategically address the development of the South, politically, economically and socially and be proactive in its cooperation, a choice of partners to participate for the purpose of mutually beneficial outcomes. It is an area of potential development in which the South needs to be more involved, intentional and strategic.

As such the South should create a standardised principle in regards to SSC. With time, the language of SSC becomes strongly associated with an expectation and culture of how partnerships should be built, which become standardised practice of SSC. This will ensure an increased commitment to, and focus upon, the importance of inclusive development and good governance and to a changed legacy of international cooperation.

#### Developing a framework for M&E in SSC

Developing a common framework begins at the ideological and historical positioning of SSC. That common framework, culture and expectation of SSC will then contribute towards the objective of measuring and creating a culture of transparency within SSC. Already, a framework exists that can be utilised by the South.

In 2015, experts from the Global South came together for the first ever technical meeting of the Network of Southern Think Tanks. The aim was to begin by measuring the elements of SSC that were clear, measurable and non-controversial. Experts examined documents relating to key political conferences of the South and developed a framework that contained a set of indicators organised in six dimensions to assess SSC and its effectiveness. These dimensions were inclusivity, sustainability, transparency, respect (for all partners / stakeholders), efficiency, effectiveness and are mutually beneficial - ISTREEM.

Case studies were conducted that aimed to assess the effectiveness of indicators. The indicators were subsequently refined to produce the following table.

TABLE 2 INDICATORS TO MEASURE THE QUALITY OF SSC					
DIMENSIONS	INCLUSIVE NATIONAL OWNERSHIP	HORIZONTALITY	SELF-RELIANCE & SUSTAINABILITY	ACCOUNTABILITY & TRANSPARENCY	DEVELOPMENT EFFICIENCY
INDICATORS	Multi-stakeholder partnerships	Mutual benefit	Capacity building	Data management & reporting	Flexibility & adaptation
	People-centred inclusivity	Shared decisions & resources	Knowledge & technology transfer	M&E systems	Time & cost-efficiency
	Demand-driven	Trust & solidarity	Use country systems & human resources	Transparency & access to information	Internal & external coordination
	Non-conditionality	Global political coalitions	Domestic revenue generation	Mutual accountability & joint reviews	Policy coherence for development

*(Besharati Rawhani and Rios, 2017)*

Efforts were also made to quantify these indicators by using a balanced scoring card system.

The efforts to develop the NeST framework, while essentially an academic tool, can be used by policy makers to evaluate the quality of SSC and to ensuring a greater degree of accountability. In addition, the framework can be used to contribute to efforts on providing empirical evidence on how SSC can contribute to the 2030 Agenda for Sustainable Development. As can be seen in the table above, one of the main dimensions is inclusive national ownership. The stress on people-centred inclusivity and participation not only draws attention to the importance of going beyond government-to-government initiatives to those that include civil society, but also speaks to the importance of leaving no one behind in development. In this regard, SSC must involve multi-stakeholder partnerships. More than this, information on SSC must be widely accessible to ensure accountability. SSC initiatives therefore must always be cognisant of how they plan to engage with a wide variety of stakeholders in order to allow for greater coherence and maximisation of SSC initiatives.

Ultimately, the NeST Africa framework that can be seen as measuring the effectiveness of SSC, needs to be used as complementary to efforts to measure the volume of SSC. However to measure the volume of SSC, countries will first have to agree on a definition. M&E is necessary to ensure that SSC initiatives have a tangible impact by enhancing their effectiveness. An M&E framework for measuring the volume of SSC reinforces a culture of planning and managing for results; and fosters value-for-money in resource allocation and use based on evidence-learning. SSC projects should also be accountable to the development partners involved, given the demand-driven nature of SSC.

M&E can therefore be seen as a two-layered approach. Broadly speaking, projects all fall, with varying degrees into a basic monitoring and evaluation framework of two layers of perimeters which are:

ON BRIEF / ON BUDGET / ON TIME which is often the standard M&E approach to projects, and an additional layer of - PROCESS / PERFORMANCE / PRODUCT (*outcome alignment and return on investment*).

### **Way forward**

Any South-South cooperation should adhere to the ISTREEM principles. And thus, project by project – a culture of SSC with a mindfulness of ISTREEM principles becomes the standard for SSC initiatives. A principle and culture, which in turn, facilitates and provides a degree of standardisation to the much needed monitoring and evaluation goals and processes of SSC.

Growing an ISTREEM culture would then contribute towards the South's vision of inclusive development and the deeper layers of its much needed monitoring and evaluation. However, these efforts need to also be complemented by efforts to establish a common definition of south-south cooperation and a mechanism for accounting for the quantity of SSC.

### **Policy recommendations**

Utilise ISTREEM principles to standardise a culture of SSC that differentiates it from NSC

Enhance accountability and transparency through multi-stakeholders frameworks

Develop monitoring and evaluation systems to measure the volume of SSC in order to allow for greater efficiency and effectiveness

Consider developing a system of monitoring and evaluation based on views of project partners that embraces the demand-driven nature of SSC and mutual accountability.

## About NeST Africa

The past decade has generated growing interest and debate on the role of emerging economies and Southern partners in global development. It has also demonstrated tensions in the integration of new development players in the global aid effectiveness regimes, originally spearheaded by the OECD-DAC donors, as witnessed for example in international development cooperation conferences such as Busan HLF4 (2011) and Mexico HLM (2014). Despite some efforts to address knowledge gaps and to develop appropriate platforms for the exchange of knowledge, such as the Delhi Conference of Southern Providers (2013), limited understanding and evidence continues to exist on the role and contribution of Southern partners in global development.

Against this background the Network of Southern Think-Tanks (NeST) was established on the fringes of the Mexico High Level Meeting (HLM) in March 2014. This network of development cooperation experts and academics from the global South was formed in order to generate, systematise, consolidate and share knowledge on South-South Cooperation (SSC) approaches in international development. The executive group of NeST met in Beijing in November 2014 to finalise the governance arrangements, and to draw up the work plan, which included an ambitious agenda of methodology development, empirical research, capacity development, improvement of data and M&E systems, knowledge sharing and policy support to Southern development agencies. While some of the plans of NeST remain global in nature, many of the activities are to be further elaborated and implemented by the various national and regional chapters of the network. In 2015 the South African chapter of NeST was established.

NeST Africa's aim is to generate evidence, understanding and systematised knowledge on South Africa and African development cooperation, and how this relates to approaches of other Southern providers and traditional donors operating on the African continent. This paper is a result of meetings held on 4 April 2018 and from 12-13 June 2018, which brought African stakeholders together to discuss the key priority areas that civil society identify as important for feeding into the discussion on BAPA+40.

Select participants agreed to develop a number of papers on specific thematic areas that would be submitted to the United Nations Office of South-South Cooperation in the lead-up to BAPA+40. These include: 1) definitions 2) monitoring and evaluation 3) civil society's role in BAPA+40 and 4) peace and security.