MID-TERM EVALUATION OF THE MIDDLE EAST REGIONAL TECHNICAL ASSISTANCE CENTER (METAC)

Final report

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Acknowledgements

Summary of evaluation findings and recommendations

This evaluation reviewed the performance of the IMF Middle East Regional Technical Assistance Center (METAC) over the period since its operations began in late 2004. The evaluation focused on the operational and organizational effectiveness of METAC. The main findings were as follows:

Operational effectiveness

The overall finding is that in general, beneficiaries are highly satisfied with the performance of METAC to date and all persons interviewed gave examples of positive experience. There is however, scope for improvement. The lack of any structured system for reporting on results or beneficiary views of the TA provided significantly limits the depth of the conclusions that can be drawn about what has been achieved. On specific issues:

- The process of identifying TA needs has worked reasonably effectively, but could be a more efficient. Strength of ownership depends principally on the beneficiary organisations and the extent to which they effectively manage, prioritise and communicate priorities to the IMF.

- Provision of TA has generally been effective, timely and valued by beneficiaries, despite occasional concerns about the quality of some STEs.

- METAC TA appears to complement effectively other IMF TA, but it is possibly less effectively complementary in relation to TA from other providers.

- METAC has provided important additional value added to IMF activities in relation to providing capacity building, follow up, and implementation support and ad hoc advice on specific issues.

- A strengthening of country ownership has not really happened at the overall programme level, but has been effective within specific technical areas and institutions.

- Cooperation among TA providers has been strengthened in some areas, but this tends to be confined to cooperation on specific technical issues.

- Knowledge and experience sharing between members has not been a significant feature so far, and most beneficiary representatives felt that METAC should, and could, play a more active (or at least a more effective facilitating) role in experience sharing.

Organizational effectiveness

The main findings of the evaluation in relation to METAC's organisational effectiveness can be summarised as follows:

- The quality of METAC's management and organization is generally good, with an effective structure and staffing in the Beirut office.

- Quality of technical resources available is generally good, with a few exceptions where the style and approach of RAs is different and where METAC has not been able to respond to some specific needs particularly because of problems in identifying (and in some cases securing approval for) appropriately skilled STEs.

- The composition of the METAC group of beneficiary countries/territories provides both challenges and opportunities for experience sharing and learning about different solutions to the same problems in different circumstances.

- The effectiveness of METAC processes and procedures is hampered by the lack of standard and documented procedures and the difficulties of applying some HQ procedures (notably the use of the TAIMS system). While the burden of this falls mainly on administrative staff, it also engages a significant amount of advisor and coordinator time that, if freed for alternative uses, could increase METAC's overall effectiveness.

- Coordination between METAC and the Fund headquarters varies between technical areas and depending on whether there is a Resident Representative in the METAC member country.

- There are several ways in which the contribution of the Steering Committee might be made more effective.

- METAC's response to beneficiary needs is generally thought to be good despite the difficulties of working in the region and the complex set of stakeholder relationships and diversity of requirements to which METAC has to respond.

Recommendations

- Continued attention needs to be given to the simplification and streamlining of administrative procedures so as to enable the full potential benefits of METAC's activities to be realised.

- The role and responsibility of Steering Committee members should be clarified and encouragement provided for the SC members from METAC member countries to play a more proactive role in both work planning and country level coordination of METAC activities.

- There is a need for an improved system for the monitoring of the outputs and results of the TA provided to move beyond the current reporting that focuses exclusively on inputs (days provided). This system should include as a minimum a standard evaluation form to be completed by the beneficiary organisation on completion of a METAC activity, and a regular process of follow up and reporting on the longer term results and benefits of the activity.

- As part of the process of providing a basis for improved reporting on results, there should be an institutional and organisational assessment for each beneficiary organization with which METAC works. Usually this will have been developed as part of a wider reform programme or strategy or through ongoing consultations such as those under Article IV. In general this is not an exercise that METAC should itself undertake, but an active attempt should be made to draw on existing documentation and processes to make a systematic assessment of organisational capacity and its implications for the design and implementation of support.

- Terms of reference and other key information for METAC missions should be seen by and agreed with beneficiary organisation and beneficiary organisations should be encouraged to circulate and discuss these more widely as appropriate.

- METAC's website should be used much more actively as a way of sharing information and experience.

- The selection of Resident Advisors (RAs) should take place against a job description, draft terms of reference, and role profile (not just a specification of the area of technical expertise) that should be agreed with the SC. There is scope for exploring whether a more transparent and competitive process for selection could be used, as is already happening in some of the other RTACs and whether there could be a performance review and evaluation role for the METAC Coordinator as a basis for learning about how RAs could be most effective.

- METAC should develop (in close consultation with beneficiaries) a strategy to guide its activities in networking and experience sharing based on METAC's complementary role in relation to other regional organisations and networks.
- METAC should actively seek to assist HQ functional departments in developing a network of STEs with skills and experience that are especially relevant to the region.
- A full office procedures manual should be developed.

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Abbreviations

AFRITAC	African Technical Assistance Centers
AMF	Arab Monetary Fund
BOP	Balance of payments
BTO	Back to Office (report)
CARTAC	Caribbean Technical Assistance Center
CV	Curriculum Vitae
DFID	Department for International Development
DQAF	Data Quality Assessment Framework
ECB	European Central Bank
ESCWA	United Nations Economic and Social Commission for West Asia
EIB	European Investment Bank
EU	European Union
FAD	Fiscal Affairs Department
GST	General Sales Tax
HQ	IMF Headquarters, Washington DC
IIP	International Investment Position
IMF	International Monetary Fund
MDTF	Multi Donor Trust Fund
M&E	Monitoring and Evaluation
MCD	Middle East and Central Asia Department
MCM	Monetary and Capital Markets Department
MEDSTAT	Euro-Mediterranean Statistical Cooperation Program
METAC	Middle East Technical Assistance Centre
OPM	Oxford Policy Management
OTM	Office of Technical Assistance Management
PCBS	Palestine Central Bureau of Statistics

PEM	Public Expenditure Management
PFTAC	Pacific Financial Technical Assistance Center
PFM	Public Finance Management
RA	Resident Advisor
RAP	Resource Allocation Plan
RTAC	Regional Technical Assistance Center
SC	Steering Committee
STA	Statistics Department
STE	Short term expert
TA	Technical assistance
TAIMS	Technical Assistance Information Management System
TIMS	Travel and Information Management System
TOR	Terms of Reference
USAID	United States Agency for International Development
USD	United States Dollars
VAT	Value Added Tax
WB	World Bank
WBG	West Bank and Gaza

Note: "Country" in this report does not always refer to a territorial entity that is a state as understood by international law and practice.

1.   Introduction

The Middle East Region Technical Assistance Center (METAC) was established to provide technical assistance to ten beneficiary countries/territories. METAC was established with an initial duration of three years from November 2004 to November 2007. An external evaluation was foreseen after eighteen months of METAC's operations to assess the Center's activities and performance and formulate recommendations on future actions. The mid-term external evaluation has the objective of reviewing the management and operations of METAC, helping funding agencies and beneficiary countries/territories foster a greater understanding of METAC work, and to promote greater accountability for performance.[1]

METAC was established with the overarching goal of assisting countries in the Middle East region to strengthen their capacity for effective macroeconomic management and to support the region's integration into the world economy. METAC also has the objective of assisting post-conflict countries to restore macroeconomic stability and develop basic institutions for policy-making, operating over an initial three year period from November 2004 to November 2007. As a mid-term review, the evaluation focuses on the organizational and operational effectiveness of METAC in realising the advantages typically associated with Regional Technical Assistance Centers (RTACs) including:

- Better identification of countries' technical assistance (TA) needs
- Rapid and flexible TA delivery
- Continuous and consistent follow-up of TA recommendations
- Closer interaction with beneficiary country authorities
- Strengthened country ownership, and
- Greater partnership with other TA providers and donors.

The evaluation took place between January and March 2007 and involved an initial visit to Washington for discussions with IMF staff, a visit to METAC in Beirut, and visits for interviews with beneficiary organisations in five of the countries that METAC serves (Lebanon, Sudan, Syria, West Bank and Gaza, and Yemen). The Terms of Reference for the evaluation are at Annex A. Emailed questionnaires (see Annex B) and phone interviews were used to obtain information from a selection of people who could not be met through country visits. In addition the consultants reviewed background information and documentation on IMF policies and file information at METAC in Beirut. Comments on a first draft of this report were discussed in Washington and the report has been revised in the light of these comments.

The remainder of the report is structured as follows; Section 2 provides an overview of METAC's operations and activities in the context of the role of RTACs and IMF TA. Section 3 presents the findings of the evaluation in terms of METAC's operational effectiveness, and Section 4 the findings in relation to organisational effectiveness. Section 5 discusses the overall conclusions and recommendations.

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[1] The full terms of reference for the evaluation are in Annex A.

2. Background and overview of METAC's activities

2.1 TA delivery by the IMF and the role of RTACs

During the period since METAC was established in 2004, there has been significant progress in reviewing both the IMF's overall TA performance and in assessing experience with RTACs, and several initiatives have been undertaken as a result.

First, an evaluation of IMF TA conducted by the Independent Evaluation Office (IEO, 2005) made recommendations in three broad areas:

- Developing a medium-term country-focused TA policy framework with a central role for the relevant IMF HQ area department.
- Increasing national authorities' ownership and involvement in capacity building (since TA activities were seen as largely driven by the specific needs of IMF-supported programs and Fund-wide initiatives rather than country specific priorities emanating from Article IV consultations or other national processes).
- Improved tracking of TA implementation including strengthened ex post evaluation.

The Task Force on Technical Assistance that considered the implications of the IEO report made several specific proposals to strengthen IMF TA, including:

1. A pilot process of preparing country TA strategy notes with a view to an extension from an initial five countries to fifty.[2]
1. An enhanced strategic and monitoring role in TA for area department staff.
2. Enhancements to the central TA information system.
3. More systematic involvement of country authorities in the design and implementation of TA.
4. More systematic discussion of technical options and their implications with the authorities before drafting TA reports.

It was noted however that the cost of implementing the proposals would amount to about USD 4.5 million per year and imply (in the absence of new resources) a 6% fall in functional departments' direct TA delivery (a reduction of thirteen person years of TA) while an equivalent of five person years of additional time for surveillance and other outputs would be necessary for area departments.

METAC was the fifth RTAC to be established by the IMF. Mid-term evaluations of the other centers (PFTAC, CARTAC and the first two AFRITACs) took place between 2003 and 2005 and this experience was synthesised in a paper prepared by the Office of Technical Assistance Management (IMF, 2005). This paper drew the following main conclusions from the initial experience:

- The first round of evaluations concluded that the RTACs provided significant benefits to the countries they serve, specifically in helping countries define TA priorities, providing flexible TA and rapid follow-up, and highlighted the positive role of the governance structure in

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[2] Among METAC countries, such a note was prepared on a pilot basis for Egypt.

promoting greater country ownership, although the need for more attention to reporting on results was identified.

- Management and organizational challenges that needed to be addressed included clarifying the responsibilities of stakeholders, harmonizing work planning processes between the Centers and the Fund's functional departments, and improving the mechanisms and resources provided for functional departments to discharge their quality assurance responsibilities.

- The costs of delivery through RTACs were high as a result of their structure and overheads, although in general the benefits appeared to outweigh the costs.

- The heavy reliance on external financing (covering an average of three quarters of direct delivery costs) presented risks.

The paper examined conditions under which an RTAC may be an appropriate form of delivery and noted the need for the development of a comprehensive strategy for the use of the RTAC modality. While such a comprehensive strategy document has not been produced, an Operational Guidance Note for Staff has been produced. This sets out policy guidance and key principles for the operation of RTACs. The general principles relating to the RTACs' operations were defined as:

- RTAC activities are seen as complementary to other forms of Fund TA, and hence an integral part of the Fund's overall TA program.

- RTAC activities should be more closely integrated with the Fund TA program with an appropriate quality control and accountability process.

- Area departments should have a strategic role in defining the overall TA priorities of the RTACs while functional departments should be responsible for the technical aspects of the Centers' work.

The Guidance Note acknowledged the "inherent tensions between Fund control over TA priorities and delivery modalities, and countries' ownership and donor interests". The Guidance Note sets out the broad role and responsibilities of the Center Coordinator and Resident Advisors (RAs). It also specifies the approval process for short-term consultants, and the quality control process, with the relevant functional department exercising responsibility including backstopping RAs, and the elements of the work planning process (with the initial draft of the work plan to be prepared by the Coordinator based on wide consultation, submitted to the area and functional departments for comments and revision, and then sent to the RTAC Steering Committee (SC) for review, discussion and endorsement. The Note also discusses the role of the SC, while noting that the specific responsibilities and operating procedures will be determined for each RTAC.

Many of the issues facing METAC that have emerged in the evaluation are generic ones in relation to making effective the RTAC concept. The particular feature of the control exercised by functional departments over work undertaken in their technical area can pose some difficulties for achieving a consistent approach across the whole of METAC's operations, including at the level of performance reporting. Getting right the balance between having systems that can rigorously ensure quality control and yet provide flexibility for response is a central challenge for the RTAC concept and several findings from the evaluation suggest ways in which (within the existing framework of the RTAC model) changes might be made to improve this balance.

2.2   Overview of METAC's operations

METAC serves ten countries (Afghanistan, Egypt, Iraq, Jordan, Lebanon, Libya, Sudan, Syria, West Bank and Gaza, and Yemen) from its base in Beirut. It began operation in November 2004.

Following the Israeli attacks on Lebanon in July 2006, METAC staff were evacuated and METAC operated from Washington until returning to Beirut in October 2006.

The distribution of METAC's activities

Annex Tables C.1 to C.6 and Table 2.1 provide a summary of the TA provided over each of the last three years (May to April) in person weeks. Figures for 2006/7 were prepared as current best estimates in March 2007.[3] The following observations can be made on the overall pattern of allocation between countries, types of TA, and sectors:

- After the first six months of operation, Libya, Sudan and Syria have been generally the main recipients of METAC, with the Syria the largest recipient overall (17.1% of all TA provided and planned to April 2007) while Iraq[4] and Jordan were the lowest recipients.

- The share of provision by METAC of short-term experts (STEs) has increased substantially over the period of METAC's operation, from 13% in the first six months to 30.5% in 2005/6 and a planned figure of 48% in 2006/7.

- The pattern of allocation by sector varies significantly between countries. For instance 84% of the monetary and financial sector TA in 2006/7 was provided to West Bank and Gaza (WBG), Sudan, Syria and Yemen, while the largest four planned recipients for public expenditure management (Afghanistan, Egypt, Lebanon, and Sudan) received 74% of the total. This reflects differing approaches between IMF HQ Departments in terms of the division of tasks, (where in the case of MCM, the METAC Resident Advisors have been allocated the main responsibility for engagement on banking supervision with particular countries) as well as differences in overall priorities.

Table 2.1   Total METAC TA (person weeks)

	2004/5	2005/6	2006/7	Total	%
Regional	8.0	23.0	12.3	43.3	5.3%
Afghanistan	0.0	6.0	38.5	44.5	5.4%
Egypt	19.0	30.0	29.0	78.0	9.5%
Iraq	6.0	2.0	17.5	25.5	3.1%
Jordan	11.0	3.3	20.0	34.3	4.2%
Lebanon	17.0	29.5	43.0	89.5	11.0%
Libya	1.0	47.0	30.0	78.0	9.5%
Sudan	6.0	38.0	61.0	105.0	12.9%
Syria	19.0	61.0	60.0	140.0	17.1%
West Bank & Gaza	2.0	24.5	49.0	75.5	9.2%
Yemen	17.0	48.5	38.0	103.5	12.7%
Total	106.0	312.8	398.3	817.0	100.0%

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[3] Information on HQ STE for 2006/7 was not available.

[4] It is understood that there has however been additional involvement by METAC in facilitating and supporting initiatives funded by other donors in Iraq.

Financing arrangements

METAC's original financing structure included financial pledges totalling just over USD 9.2 million in addition to financing from the IMF's resources and contributions in kind from the Government of Lebanon (office space and local staff). The financing framework covers the first three years of METAC's operation, to November 2007. The main contributions were pledged from the Government of Lebanon (USD 3 million), the European Union (USD 2.2 million) and the Government of France (USD1.26 million). In addition to the contribution from Lebanon, among beneficiary countries contributions were received from Egypt, Jordan, Libya and Yemen. The evacuation resulted in a financial shortfall of USD 1.5 million, mainly as a result of the resulting delayed contribution from Lebanon and the increased costs involved in operating from Washington. Subsequently (in response to the costs incurred as a result of the evacuation from Beirut) additional pledges were received from Japan, Libya, Saudi Arabia and Syria.

In general, financing arrangements have not proven to be a constraint on METAC's effectiveness. The main problems associated with the current arrangements are, first, uncertainties about the timing of the receipt of pledged payments (which has required reliance on IMF resources to provide bridging finance while awaiting receipt of pledges) and second, the accounting and reporting arrangements that result from the differing requirements of donors and specifically from the restrictions on the use of funds that some donors provide that require then to be earmarked to particular countries or sectors. This has increased the complexity of reporting but has not in practice constrained METAC in its choice of activities.

Information received from financial contributors suggests that there is a high level of satisfaction with METAC's progress and achievements so far, with the objectives underlying the financial contributions regarded as largely achieved and with the level of information and reporting to financial contributors regarded as generally excellent.

3. Operational effectiveness

This section summarises the findings and issues identified in relation to the operations of METAC. Findings are structured in accordance with the issues listed in the ToR for the evaluation.

The overall finding is that in general, beneficiaries are highly satisfied with the performance of METAC to date and all persons interviewed gave examples of positive experience. There is however, scope for improvement. The lack of any structured system for reporting on results or beneficiary views of the TA provided significantly limits the depth of the conclusions that can be drawn about what has been achieved.

To summarise the findings on each main issue:

- The process of identifying TA needs has worked reasonably effectively, but could be a more efficient. There are some ways in which the operations of METAC might be revised to facilitate a strengthening of country ownership, but strength of ownership depends principally on the beneficiary organisations and the extent to which they effectively manage, prioritise and communicate priorities to the IMF.
- Provision of TA has generally been effective, timely and valued by beneficiaries, despite occasional concerns about the quality of some STEs and the inability to provide specialist TA in some technical areas.
- METAC TA appears to complement effectively other IMF TA, but it is possibly less effectively complementary in relation to TA from other providers.
- METAC has provided important additional value added to IMF activities in relation to providing capacity building, follow up, and implementation support and ad hoc advice on specific issues.
- A strengthening of country ownership has not really happened at the overall programme level, but has been effective within specific technical areas and institutions.
- Cooperation among TA providers has been strengthened in some areas, but this tends to be confined to cooperation on specific technical issues.
- Knowledge and experience sharing between members has not been a significant feature so far, and most beneficiary representatives felt that METAC should, and could, play a more active (or at least a more effective facilitating) role in experience sharing. There is clearly both a need and a desire to share experience particularly at operational levels – even if it is challenging in practical terms.

3.1 Identifying TA needs

The identification of TA needs takes place primarily through interactions between HQ departments (functional departments and MCD) and the RAs, and between the RAs and beneficiary organisation representatives including through planning and assessment visits. There is currently no process for developing an overall technical assistance strategy at the country level across the different functional areas.[5] A perception of this process from some beneficiaries is that it in practice be very strongly focused on meeting IMF HQ needs and priorities and that the current system does not explicitly provide for, or request, country level consolidation and prioritisation of needs.

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[5] Such as pilot TA Country Strategy Note for Egypt referred to in the previous section.

There are cases where TA needs are not identified because the RAs do not have access to the most appropriate people with whom to discuss needs. For example, METAC is not active in WBG on public financial management (PFM) issues as they were told that there was no need for TA for the Ministry of Finance. However, in 2005 to early 2006, the previous government and the Multi Donor Trust Fund group were planning to implement significant changes to the budget preparation and integration processes. These reforms were being led by the Ministry of Planning and due to the institutional relationships of METAC, the RA did not meet the relevant people. If these reforms proceed, the TA modality of METAC would mean that the RA could provide very valuable support and implementation advice.

However, in most cases, it seems that country needs are identified and included in the work plan where possible, but this sometimes requires multiple requests through different channels of communication which include relationships with HQ functional departments and Missions or Resident Representatives, as well as METAC staff.

It is not normal practice for the terms of reference for TA missions to be shared beyond the immediate beneficiary organisation. In a number of cases even beneficiaries stated that they did not routinely see or approve the specific ToR for a mission,[6] though there was generally detailed discussion and agreement on tasks. A small number of cases were identified where there appears to have been some discrepancy between the ToR for a mission and beneficiary expectations, particularly in cases where a number of different beneficiary organizations were involved and relative roles may not have been clear. The key to avoiding such problems is better communications.

There is some concern that changes of RA staff and background also consume a considerable amount of resources in relation to identification of needs, since new RAs begin with a programme of review and assessment Missions, which take time to organise in themselves and then lead to delays as needs are factored in to the IMF resource allocation process (RAP). In relation to the departure of one of the two RAs dealing with Banking Supervision, some beneficiary organisations were unclear about how their future requirements in this area were to be met.

However, most beneficiaries agree that once an issue is on the METAC agenda, then the level of support for follow up assistance and the frequency of visits are satisfactory. Particularly positive experiences of this include assistance to support banking supervision reforms in Syria and WBG.

3.2 Provision of TA

Achievements to which METAC has contributed

The evaluation identified numerous success stories and areas where METAC has provided a level and frequency of support that could not have been provided from IMF HQ. Examples from beneficiaries and RAs include:

- Tax audit in Lebanon.
- Budget classification work in Sudan.
- Banking supervision work in (particularly) Syria, West Bank and Gaza and Yemen.

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[6] It is understood that from February 2007, STA's policy is to share terms of reference and "Statement of Mission Tasks" (SMT)

- Value Added Tax (VAT) implementation in Lebanon.
- PFM reform planning and advice in Lebanon.
- Capacity building for the Palestine Central Bureau of Statistics (PCBS) in WBG.
- International Investment Position (IIP) statistics development in Sudan.
- Support to the improvement of national accounts statistics in Sudan (described by the beneficiary organisation as the best TA they had ever received).
- Assisting Jordan to subscribe to the SDDS.
- Support to the Tax Authority in Yemen particularly on the introduction of General Sales Tax.

A consistent concern from beneficiaries, however, especially in the countries where the beneficiary organizations were weakest in terms of existing staff capacity and ability to retain trained staff (such as Sudan and Yemen) was that the sustainability of the progress made was uncertain without complementary training to widen the base of staff capable of understanding and using improved techniques and systems. Twelve out of the fourteen beneficiary organizations (excluding those in Lebanon where this did not appear to be a problem) that provided self- assessments of constraints on their organizational effectiveness identified "inability to attract and retain high quality staff" as a constraint. In this context, the long-term impact of TA may be questionable in the absence of reform processes that are addressing underlying constraints.

Success factors and issues for improving operational effectiveness

The key to success in many areas seems to be the ability to provide sustained support from the same person over an extended period, and the selection of RAs or STEs with a strong understanding of the issues and constraints facing the organizations that they are supporting. This often (though not necessarily in all cases) involves Arabic language skills, but always involves sensitivity to context and strong process skills in addition to the high level of technical knowledge that is routinely demanded of IMF experts.

The role of METAC helps to provide sustained contact and engagement, so that RAs understand the history and context of reform processes and begin each subsequent Mission with a deep level of knowledge of the issues. This helps to support the change management and institutional development process as well as dealing with technical issues. Beneficiaries also note that it is useful that support from METAC reduces much of the burden on them in terms of managing TA, as METAC develop the ToR, identify and contract the experts and undertake supervision of the expert, although the extent of METAC's role here may raise some concerns about ownership (for instance the fact that Mission ToR do not appear to be routinely discussed and agreed with beneficiary organisations).

The evaluation team sought views about the profile of an ideal RA/TA mix of skills and experience in order to make them most effective. In general, beneficiaries are very satisfied with the combination of support available. Most want access to international experience to set goals, benchmarks and standards and develop reform action plans, with the opportunity to use STEs who are specialists in detailed technical areas but combine this technical knowledge with an effective ability to transfer knowledge. The most often identified characteristics were:

- International, regional, and proven practical experience in their technical areas – people who had implemented similar reforms - not just read about them.
- Sensitivity to the culture, norms, political context and pace of change in the region.
- Interested in developing a long term relationship with counterparts.

- Understanding of the complex political, economic and social environments of member countries but with a sufficient degree of independence to provide an external perspective.
- A personality that helped with knowledge sharing, persuading counterparts, actively sponsoring change in-country and establishing trust.[7]
- Being responsive, practical, persistent and realistic in their expectations.
- Arabic-speaking – this is considered to be more important when working with operational staff than senior management of beneficiary organisations.

While the level of technical knowledge and skills required for the role will be that of an IMF staff member, the RA role may require stronger (and potentially more context specific) process and interpersonal skills than for a generic IMF HQ staff role, so there is probably scope to develop clearer and distinct role profiles for potential RA candidates (and to use selection processes that test capacity in these particular skill areas), as well as for selection for the central IMF Roster of approved STEs.

The evaluation sought to identify the conditions which make TA most effective. Possible conditions were; presence of an IMF Resident Representative, existence of a consolidated and agreed reform agenda, existence of an IMF programme or other projects, an effective Steering Committee member, a supportive/ reformist government, capacity of the beneficiary organization (staffing, management, role), or other factors. There was general agreement that the most important factors were a committed or reformist government and having institutions with clearly defined mandates, and staff with the potential and incentives, motivation and authority to adopt recommended reforms.

There is also a country-specific issue in terms of delivery of TA that needs a particular response, which relates to operating in WBG. At the time of the evaluation, TA activity was limited in WBG due to the restrictions on interactions with the Hamas government. METAC is able to continue to work with certain non-government institutions, but there are unique restrictions on access due to the need to get visas and security clearance from the authorities in Israel. This complicates access from Beirut and also means that there are significant problems in mobilising Arabic-speaking consultants. If METAC wants to be able to respond to the needs of WBG, they will need to consider other ways of providing support where the current RAs are unable to travel.

The nature, level and frequency of TA delivery have been affected by differences in the approach of IMF functional departments including:

- Variations in the existence or content of job descriptions and role profiles of RAs – most have only very general role descriptions.
- Differences in the expectations and operating practices of HQ functional departments – some see METAC as operating as an extension of their own activities, others allow more independence and engagement outside core HQ programmes.
- IMF scope of activity differs between different technical areas. For example, Balance of Payments (BOP) statistics is clearly an area in which the IMF has a lead role internationally, whereas the fiscal sector role is less clear and overlaps with other donors and agencies.
- METAC scope of activity differs between countries – HQ wants more direct HQ engagement with some (e.g. Iraq and Afghanistan) than in others.

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[7] One beneficiary described the role of an RA as a "dynamo" who needed to combine technical skills with a drive to get things done.

- The scope of activity also differs between individual RAs. For example, external sector statistics (BOP, IIP, external debt and international reserves) is a very narrow technical area, and the RA can personally respond to most needs, which means that support can be provided quickly. PFM is a very broad field which may require support from other HQ staff or STEs on specific technical areas and this can lead to longer lead times on providing assistance.

- There is an on-going debate about the extent to which METAC staff should provide training. This type of support is high on the list of needs of most beneficiaries and where provided, is usually quoted as a very effective form of support. The ToR for the BOP RA explicitly state that the responsibilities include "to provide training, or arrange for training through both formal courses and seminars and on-the-job training". It seems that not all RAs are given such an explicit mandate to provide training support.

Some beneficiaries note that METAC's role is limited in relation to some of the key priorities (for instance related to the implementation and financing of complex IT systems) and this might limit the effectiveness of the Center in its involvement in broader economic and administrative reform programmes. There are positive examples though of where METAC has played a useful facilitating and advisory role in coordination with other donors who are more directly involved in support in such areas (such as the European Union and USAID).

Timeliness and flexibility of response

In relation to timeliness and speed of response, there are some concerns about delays in, and problems with, the selection and contracting of STEs. All STEs and their proposed Missions must be approved by HQ and the individual must either be on the approved IMF Roster of Experts or otherwise specifically approved. The requirements for registration are quite onerous and often require experts to have skills and experience which are way beyond the technical needs of the specific beneficiary. The approval process is time-consuming in terms of both actual and elapsed time, (sometimes up to six weeks from submission of CVs to contract issue) and proposed experts are sometimes not approved. There are examples where a consultant from the Roster has been used who has subsequently been found not to have the appropriate process and delivery skills (including in some cases relevant language skills) to work effectively. This is inconsistent with METAC aims of providing fast response times and developing a register of regional experts who can be used to support METAC TA. Many beneficiaries stated that they wish the process could be faster and more responsive to their needs and timescales.

There is also evidence that METAC advisors are able to be more flexible in the precise set of issues that they address during regular missions. Issues often arise during METAC Missions that HQ Missions would not be able to address given the specific demands and ToRs of these Missions.

The realities of operating in this region mean that there will always be a number of extraneous obstacles to overcome such as security and travel restrictions, on-going conflicts and overriding political issues. In some cases, security clearances are not received until 48 hours before a Mission is due to begin which creates additional work for METAC support staff and uncertainty for RAs and beneficiaries. It is difficult to draw general conclusions about speed and responsiveness given the short life of METAC and the disruption caused by the war which occurred exactly at the time when activity levels were expected to be high. However the majority of recipients are very positive about the value, timeliness and effectiveness of TA received.

There are some specific examples of problems with the timeliness or availability of support including:

- Institutions in WBG have been waiting two years for a National Accounts Mission
- A number of countries continue to request TA for central bank payment systems, which METAC has not been able to provide (e.g. Syria, Lebanon)
- There is significant demand for TA in all areas of statistics which has not been met as yet although new recruitment should be addressing this.

The impact of evacuation of METAC RAs to Washington in the summer of 2006 is interesting. Most beneficiaries were understanding of the need to evacuate and praised the ability of METAC to either re-schedule or combine Missions to ensure that most planned activities were carried out. The RAs who had previous experience of HQ practices and organisation did not notice a significant difference in their activities and impact (except where immediate Mission plans were changed). Those who did not have an IMF background saw the impact as more negative. The period of the evacuation was short enough that it did not cause significant problems in terms of TA delivery, and so does not provide sufficient evidence to conclude whether TA delivery from HQ could be just as effective.

Resource allocation is currently driven by the HQ Resource Allocation Process (RAP) which now takes place in parallel with the development of the METAC work plan. This means that much of the RAs time is provisionally committed to specific Missions over one year in advance. However, there are examples of rapid changes being made to plans where necessary including:

- Supporting an HQ led, multi-disciplinary Mission to Lebanon in October 2006 to assess immediate TA needs at the end of the war
- Adapting and re-scheduling Missions to all countries as a result of the evacuation to Washington DC.

Beneficiaries note that even when Missions have to be postponed, they are usually re-scheduled rather than being removed from the work plan.

3.3   Complementing other forms of TA

This section looks at two different aspects of complementarity – with other IMF TA and with other donors.

In relation to links with other IMF TA, many beneficiaries used the word "complementary" to describe the type of assistance provided by METAC. Most understand a distinction between HQ-led assessment and Article IV Missions which focus on policy and strategic issues, and the more detailed, specific, implementation support of METAC. Examples quoted include:

- Lebanon PFM – the RA participated in the October 2006 post-war assessment Mission, and has subsequently been providing more detailed support to the Ministry of Finance in articulating a reform programme which will address the IMF recommendations. The beneficiaries appreciate the fact that the Advisor is available to provide detailed and timely feedback on their evolving reform plans and also note that he is providing an essential capacity building role.
- In the banking supervision area in both Syria and WBG, beneficiaries describe the role of HQ in helping them to make policy decisions and develop overall institutional arrangements, whereas the relationship with a former RA provided them with regular and detailed implementation support which was invaluable.

Phrases used to describe this complementarity included:

"METAC provide support on the day-to-day, operational realities of implementing HQ recommendations"

"METAC provides an early warning system where problems with programme implementation might be occurring"

"METAC support helps us to keep the momentum going and provides us with a focal point for progress monitoring, and support to help us explain the benefits of reforms to politicians and colleagues."

The RAs all recognise that their activities should be based on the broad programme direction set out in HQ Missions and the work planning process provides the opportunity for agreement on the focus and purpose of RA Missions.

The situation in relation to other TA is not so clear, and there appear to have been some cases of overlap or duplication. This is partly due to the poor quality of donor coordination and aid planning and management in-country (and hence are beyond the direct control of the IMF). Since METAC has neither the profile nor the resources to engage in detail in donor coordination, there have been examples of RAs and in-country project teams not being fully aware of their respective roles and responsibilities. One example relates to banking supervision work in Syria, where there is currently an EU funded sector support programme. There is no formal mechanism to ensure that activities are coordination, so this depends on the initiative of the individual RA to make time to understand what areas are being covered by other TA providers. This issue could be partly addressed by engaging Steering Committee members more directly in the TA coordination process. One other issue which can undermine the comparative advantage of METAC is the potential for the identification of RAs with IMF HQ priorities and surveillance activities. This occurs when RAs take a prominent role in HQ Missions and is seen as a conflict of interest by some.

As noted above, there is currently no routine process by which METAC mission ToRs are shared with beneficiaries and country Steering Committee members prior to the visit. The circulation of ToRs might help to provide a basis for improved coordination with other activities and TA providers.

3.4   Providing additionality

Making an assessment of the extent to which METAC is providing additionality is difficult for both data and conceptual reasons. Annex tables C.7 to C.9 provide information on the share of total Fund TA going to the METAC countries over the period since it has started operation and how METAC's share of total TA to the countries has increased. It shows that estimated TA to METAC countries as a share of total IMF TA was higher in FY 2007 than FY 2005 in all countries except Afghanistan and Jordan. This provides an indication in strictly quantitative terms that the existence of METAC is likely to have increased TA supply relative to what would have happened in its absence.

Particular activities that could be defined as "additional" to normal modes of IMF TA might include:

- RA Missions focused specifically on implementation support for discrete technical areas.
- Provision of training and on-the- job coaching for beneficiary staff.

- Providing responses to requests for review of documentation or provision of best practice experience from other countries.

- Attending meetings in-country to help counterparts obtain approval for recommendations.

- Providing independent advice and monitoring of performance of other TA providers (e.g. the Egypt PFM projects, Lebanon revenue reform process and the Syria banking sector reforms).

- Development of detailed laws and regulations to support policy implementation.

- Facilitating relationships between member countries or with regional bodies and networks

- Delivery of regional conferences and seminars.

The review of RA work plans and Mission Back to Office Reports (BTOs) demonstrates that they have all engaged in these types of additional activities, so it is clear that METAC does provide additionality, but the exact amount is impossible to measure. Feedback from HQ identifies the fact that METAC also helps to open the doors for HQ engagement. Examples of this are relationships developed for FAD in Yemen, Sudan, Libya and Syria. A review of the ToRs for RA Missions across all the technical areas, demonstrates that a significant amount of time is spent either directly engaged in HQ Missions or collecting information on behalf of HQ. There is also a considerable emphasis on diagnostic reviews, support for reform planning and implementation support for activities primarily led by others (such as other project/ TA teams for VAT implementation, banking sector reforms and PFM projects).

3.5 Strengthening country ownership

There is little evidence of strengthened country ownership of TA in terms of the overall country METAC TA programme, in the sense that there is no structured country level process for participatory inputs into the work planning process. The SC is informed at the time of the termination of a RA contract and is given an opportunity to assess whether the composition of the skills of the panel of RAs is relevant for the beneficiary countries but concerns were expressed by beneficiaries about whether decisions taken on RAs fully reflected needs. Mission ToRs have not been shared with, or approved by, beneficiaries as a matter of routine and some beneficiaries would like a greater role in the approval of specific STEs.

In terms of TA delivered in specific technical areas, the evaluation team received many comments relating to the fact that METAC detailed implementation support enabled them to ensure that plans for reform were properly tailored to local needs, as opposed to the "one size fits all" perception of HQ recommendations. This provides a strong basis for work in specific areas to be more genuinely country owned and country specific. Examples of this include:

- Adapting standard statistical methodologies to environments where there is considerably less transparency in relation to some key statistical measures, by helping beneficiaries to adapt questionnaires to local conditions and evaluate the accuracy of different data sources

- In the banking sector – adapting international standards to local circumstances and advising on how to deal with Islamic and hawala systems within the sector

- In the PFM area – adapting recommendations for budget process reforms to environments where the political economy and democratic systems are different.

Strengthening country ownership appears to work best where long-standing relationships can be developed between the RA and their counterparts, and a high level of trust and credibility is established over time. The RA becomes to trusted counsellor and independent source of advice, rather than the person from the IMF.

3.6   Strengthening cooperation among TA providers and enhancing regional integration and knowledge sharing

This is the one area where beneficiaries consistently said that more action on the part of METAC would be useful and they would like to see more cooperation and experience sharing taking place. Knowledge sharing was frequently referred to as an activity which was undertaken by RAs and STEs within their specific technical areas, and this is highly valued aspect of METAC TA. Many beneficiaries noted that the ability to translate experience to local conditions and needs, and then transfer the knowledge to their staff, was the most important quality for a RA. Some of the RAs and STEs are said to be excellent at this, while others are not so effective.

Although there is a perception that METAC is not very involved in experience sharing, the May – December 2006 Quarterly Report identifies a number of workshops, study tours and country visits that were organised or facilitated by METAC, and a number more had to be postponed or cancelled as a result of the evacuation from Beirut.

There are significant constraints on a broader programme of experience sharing in this region, which are not experienced by other RTACs (e.g. CARTAC), such as travel and security restrictions, cultural and political differences, widely different stages of development and stability, and even language differences.

Despite these constraints, there are examples of successful experience sharing such as the frequently referred to conference on Credit Registers for the banking sector. Almost all the persons interviewed were able to provide ideas for events that could be organised or topics where experience sharing would be useful. There was also a view expressed that this need not be a one-way process as many countries have experience in particular areas that they would be happy to share with others. Beneficiaries are not necessarily saying that METAC should take the lead on all events or topics, but more that they are in a good position to make contacts, connections and facilitate improvements in experience sharing.

METAC has also established good relations with a number of regional institutions including the Arab Monetary Fund (AMF), the Economic and Social Commission for Western Asia (ESCWA), and MEDSTAT.

There were some very positive and practical ideas, which could provide the basis for METAC (sometimes with HQ support), to develop a more comprehensive programme of experience sharing. For example, representatives from the Palestine Central Bureau of Statistics mentioned that it would be useful for member countries to have a collective view about the development and content of Statistics Master Plans. The relevant member institutions could work together to develop a plan for the development, adoption and implementation of such plans, where they could all set their own implementation targets and provide a mutual support network for ideas, advice and problem solving. Another suggestion is that METAC could facilitate the development of guidance notes or implementation manuals in Arabic that could be shared with other members.

Specific suggestions to improve experience sharing in terms of technical areas included;

- Islamic and hawala banking
- E-banking
- Core principles of Central Banks
- Money laundering and anti-corruption policies
- Fiscal policy development

- Public debt management
- Revenue maximisation
- Regional customs and trade facilitation issues
- Tax code reforms
- Implementation of statistical methodologies and frameworks e.g. SNA 93, DQAF.

Specific suggestions to improve experience sharing in terms of mechanisms included;

- Engage the Steering Committee more actively in facilitating experience sharing.
- Establish Technical Committees that could work to agree on issues of mutual interest where experience can be shared either between all METAC members or more specifically between groups of countries that consider themselves to be facing similar challenges.
- Facilitate study tours or site visits to demonstrate the impact of a particular initiative, with candidates for involvement being selected according to clear criteria (rather than allowing countries to nominate a fixed number of candidates).
- Identify a range of issues to be covered and then produce a timetable of events and ask different members to make contributions.
- Use the METAC website as a portal to share information, post questions, and share experience in a much more interactive way.

Regional experience sharing could also be enhanced through the stated METAC aim of building a roster of regional experts. HQ control over the registration of regional experts on the IMF Roster of Experts might constrain this to a certain extent, but METAC could be delegated authority to advertise for and select (with adequate quality control safeguards) its own database of experts. The ToR for the BOP RA actually states that he should "identify, recruit, train and supervises Middle Eastern and other international experts", but this activity was not mentioned by any of the RAs and in fact according to STA guidelines it is HQ that selects and recruits.

4. Organisational effectiveness

This section presents the findings and issues identified in relation to the organizational effectiveness of METAC. Findings are structured in accordance with the issues listed in the Terms of Reference. The main findings of the evaluation in relation to METAC's organisational effectiveness can be summarised as follows:

- The quality of METAC's management and organization is generally good, with an effective structure and staffing in the Beirut office.

- Quality of technical resources available is generally good, with a few exceptions where the style and approach of RAs is different and where METAC has not been able to respond to some specific needs particularly because of problems in identifying (and in some cases securing approval for) appropriately skilled STEs.

- The composition of METAC group of beneficiary countries/territories provides both challenges and opportunities for experience sharing and learning about different solutions to the same problems in different circumstances.

- The effectiveness of METAC processes and procedures is hampered by the lack of standard and documented procedures and the difficulties of applying some HQ procedures (notably the use of the TAIMS system). While the burden of this falls mainly on administrative staff, it also engages a significant amount of advisor and coordinator time that, if freed for alternative uses, could increase METAC's overall effectiveness.

- Coordination between METAC and the Fund headquarters varies between technical areas and depending on whether there is a Resident Representative in the member country

- There are several ways in which the contribution of the Steering Committee might be made more effective.

- METAC's response to beneficiary needs is generally thought to be good despite the difficulties of working in the region and the complex set of stakeholder relationships and diversity of requirements to which METAC has to respond.

4.1 Quality of METAC management and organization

METAC is headed by the Coordinator whose Job Description outlines a complex set of relationships and management activities designed to provide the basis for this critical role. The Coordinator must be the person who brings together and balances a wide range of different stakeholder interests. The background of the current post holder provides an excellent basis for this role as he has worked for the IMF for many years, has experience in both technical areas and the Middle East area department, relevant language skills, and an excellent network of contacts.[8] Many interviewees commented on his effectiveness in the role and see him as critical to the effective management of the Center and its achievements so far. It will be difficult for a successor to match this and hence the process of selecting a successor must be a serious risk factor for the future.

The team of six RAs is supported in Beirut by an Office and Budget Manager, three Administrative Assistants, and a driver/ messenger. The Assistants are each assigned to provide support to two

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[8] One interviewee from a beneficiary organization described the ideal profile of the Coordinator as "someone who knows the region from the outside" – that is with a strong knowledge and understanding of the region but the ability to provide a wider perspective and with some independence from regional personal networks.

of the RAs (though in practice the support requirements of the RAs differ widely depending on personal styles and working practices). The internal management and reporting structure is clearly defined and appropriate.

Relationships with beneficiary countries/territories are managed at senior level through the Steering Committee by the Coordinator and at the technical level by the RAs, whose main contacts are with the relevant institutions. Therefore, at the operational level, beneficiaries really only interact with METAC in relation to specific technical needs. This leaves the Coordinator to deal with overall strategy and TA management issues, and this is challenging task with ten member countries to manage.

The evaluation has found that it is difficult for METAC to engage at country-wide level and that for most beneficiaries, their experience of METAC is quite narrow. This leads to confusion among some beneficiaries about METAC's status and role. As a consequence, METAC does not have a distinctive profile and there is some confusion in the wider stakeholder group in understanding of METAC, as distinct from IMF HQ. The evaluation did identify a number of persons in senior government and donor positions in the region who had not heard of METAC, and many more in beneficiary organisations who felt they would benefit from more information about METAC's operations.

The METAC Monthly and Quarterly Reports contain a variety of information relating to the activities by country and by different types of activity and advisor. The report for the period May to December 2006 reveals that the largest percentage of time spent by country for RAs was "Administration" at 18% of total time, which equates to 170 person days. The second and third largest percentages were for TA support to Sudan and Syria (14% and 11% respectively). TA support for all the other countries was in a range of 5-9% per country. The report for activity by delivery type shows that 55% of time was spent on TA and 10% on back-stopping experts. Short term expert time was divided by technical area as follows: statistics: 33%, central banking: 3%, revenue administration: 11%, PFM: 23% and banking supervision; 30%. The most striking feature of this information is the high level of time recorded to "Administration". It is likely that much of this time relates to Mission and HQ management reporting activities. A streamlining of procedures in this area, if it was possible without compromising quality control, would free resources for TA provision and other more directly productive activities.

4.2   Quality of technical resources available

METAC will soon again have six RAs, as follows:

- Two RAs working with STA; one focusing on external sector statistics and the other on national accounts with shared responsibility for other areas of statistics
- Two RAs working with MCM; one focusing on banking supervision and the other on central bank accounting
- Two RAs working with FAD; one focusing on broad PFM issues and the other on revenue administration.

In line with established RTAC principles, IMF functional departments have discretion over the selection and role played by the RAs. In the case of STA and FAD, but not MCM, RAs have detailed terms of reference. One interesting point is the quite different backgrounds of the RAs, which range from an IMF HQ staff member on leave of absence to a former senior institution official from the region. In the absence of a clear role statement for RAs this leads to differences in the style, approach and emphasis of the different RAs. It also leads to differences in their

interaction with HQ colleagues – some RAs have long-standing professional and working relationships with relevant contact persons at HQ and a broad understanding of the range of skills and experience available. Those who do not have an IMF background are generally less well connected to HQ but may have significant regional contacts and networks.

Each RA also has a nominal, budgeted six months of STEs resource, that they can, in theory use to support their planned activities. This resource should provide the basis for developing a network of regionally based or experienced experts. This is a challenging task as there is a significant shortage in the region of appropriately qualified experts in many of the technical fields in which METAC operates. The extent to which the RAs manage to use STEs varies by technical area and by RA, and can be constrained by the centralised approval and contracting arrangements. Experience to date shows that even though STE support is highly valued by beneficiaries, METAC has under-utilised their budgeted resources. In some areas, use of STEs has been very successful, for example in the area of economic statistics for Lebanon and in banking supervision.

However, there have also been examples where RAs have proposed local experts who have not been approved by HQ as they do not meet the levels of broader experience required for registration on the IMF Roster of Experts. Given the needs and circumstances of the region, it is not always necessary (or even possible) to identify people who meet the usual IMF benchmarks, and the specific skills required for the type of implementation support activity that METAC is well-placed to provide may differ somewhat from a more generic skill set usually required by the IMF. There can also be problems in relation to fee rates as IMF HQ uses a standard set of rates for different types of experts which may not be well aligned with market rates.

Concerns were also expressed by a number of persons interviewed about the impact of the selection process for RAs. In line with RTAC guidelines, IMF functional departments are responsible for the selection of RAs with the SC being consulted about the priorities for the areas that RAs should cover. Suggestions were made that the recruitment process might benefit from being made more open (e.g. in some cases there may be a case for advertising posts) and the specific job description and role profile for a post should be discussed with the SC, not just the broad technical area of expertise. Under the current process, there is no documented set of skills, experiences, needs and competences against which the performance of candidates can be assessed. Most beneficiaries felt that process skills and personality were important for an effective RA and that RA performance (though generally strong) varied in this regard.

It is understood that METAC's selection processes differ in this respect from those of at least some other RTACs (for instance the newly established AFRITAC in Gabon). Specific concerns were raised from a number of beneficiaries about the decision to replace one of the Banking Supervision specialists with a specialist on Central Bank Accounting, since it was not clear to beneficiaries that this met a perceived need within the region and there was a particular concern as to how ongoing needs in the area of banking supervision would be met.

Quality control for the RAs comes through the HQ back-stopping arrangements whereby each RA has a named back-stopper who comments on all their written submissions (Mission ToR and Briefing Papers, Back to Office Reports, and Mission reports). The back-stopper is also consulted when there are specific technical questions from beneficiaries. Most RAs feel that this process is useful and works well and they value the support of their peer group. A review of a range of country and technical area files in the METAC office demonstrates that in most cases there is a very good system and relationship in place. For example, in the PFM area, the files show that the RAs receive very fast responses and issues are resolved quickly and efficiently. However, it appears that the system does not work so well in the MCM area and this has at times created delays in responses to beneficiaries. It is clear that despite a standard requirement for back-stopping to occur, there are not standard criteria that govern how it should operate.

Beneficiaries also raised other concerns including:

- Instances where there have been issues of duplication/ differences of opinion about which TA provider supports which area.

- Differences in assessments of needs between beneficiaries and the IMF (for instance in relation to requests for PFM support from Jordan and Yemen).

- Concerns that some individual RAs have skills that are too general and others are too narrow.

- Problems with relationships with individual RAs, due to their personal style of support and interaction – some are considered not forceful enough, others are too forceful or unrealistic in their expectations.

- Comments that the balance of technical skills is not appropriate to needs. For example, it was suggested by some beneficiaries that there is significant demand for support related to new developments in the banking sector which the current RAs might not be able to meet either due to resource constraints or lack of relevant technical skills and practical international and regional experience.

- Some suggest that RAs could benefit from more experience and country- level knowledge sharing between themselves to understand the overall reform process, influence of key stakeholders and roles of other donors and TA providers.

It is clear that a number of these issues might be matters of personal style – and what works with one beneficiary, may not suit another. However, there are some important messages here about how METAC might need to evolve in order to retain beneficiary support.

A key risk factor for METAC is the continued ability to attract high quality staff to fill RA positions. There are a number of reasons which make such postings unattractive to potential candidates including:

- The volatile security situation in the region.

- The short term contractual terms and conditions – a posting to a TAC would be an interesting career move for many IMF HQ staff, and their role is very focused on undertaking IMF HQ work, but in order to take the position they are required to take leave of absence. So what should be a positive career move in terms of skill development is associated with significant career risks.

- The risk of professional isolation and for IMF staff undertaking postings on special leave, the risk of losing touch with their professional network.

- The lack of professional development opportunities.

4.3 Appropriateness of the composition of METAC group of beneficiary countries/territories

METAC currently has ten member countries which are extremely diverse. The countries can be divided into two main categories on the basis of the TA needs and capacity development challenges that they face:

- Middle income countries with relatively more advanced capacity and a long track record of receiving high levels of technical assistance (Egypt, Jordan, Lebanon).

- Lower income countries with major capacity development needs as a result of long periods of international isolation, poverty or conflict (Afghanistan, Iraq, Libya, Sudan, Syria, WBG, Yemen).

Within the latter group, the scope for the effective delivery of TA differs. Ongoing conflict has significantly constrained METAC delivery in Iraq and to a lesser extent in Afghanistan. Difficulties in obtaining visas for travel through Israel and US sanctions against the Hamas government have hampered delivery for WBG. For Libya and Syria, limited and sometimes faltering progress in wider reform efforts have been the key feature.

This diversity has an impact on the effectiveness of METAC in a number of different ways:

- Some of the countries receive significant HQ priority and attention which means that the scope of METAC engagement is less here than in other countries.

- Access – both in terms of bureaucracy and security clearance can be difficult for some countries (particularly WBG and Libya). This makes it difficult for METAC RAs and STEs to visit and even more difficult to organise regional events.

- The scope for synergies is reduced in terms of the issues being addressed and the planning of RA technical skills required. For example, WBG introduced VAT in 1978, some members are in the process of implementing it now, and some are still thinking about implementation.

- Political relations between the member countries themselves do not always lend themselves to experience sharing though it was also noted that many of the areas in which METAC operates are seen as technical and not therefore politically sensitive.

- There is significant volatility and instability in the region, as was graphically demonstrated in the summer of 2006 when the METAC team had to evacuate to Washington. The impact of this should not be underestimated, as it is clear from the country visits of the evaluation team that security issues and discussions continue to absorb a significant amount of time and energy.

The composition of the member group will continue to be both a challenge and an opportunity. The opportunity comes from the chance to analyse a number of different approaches to the same technical issues and to gain valuable experience to share.

A number of member countries mentioned that METAC could be more effective if it included other countries – particularly the Maghreb countries and some of the Gulf States, as they have some very relevant experience to share and these countries have already been involved in some regional events that METAC has organised. However, this evaluation has demonstrated that having ten member countries is already quite a significant challenge in terms of communication, coordination and meeting beneficiary needs, and there is already use of short-term expertise from this wider region and that any widening of membership would require significant additional resources.

4.4   Effectiveness of METAC processes and procedures

This section looks at the following processes and procedures:

- Work planning and budgeting
- Office and administration systems and procedures
- Management information systems

- Performance measurement and management
- Staff development.

Work planning and budgeting

The work planning and resource allocation process is driven through HQ needs and Missions using the RAP process. The timetable for this process is now aligned with the METAC work plan. Every METAC activity is defined as a "Mission" using the HQ terminology and the standard unit of time is the two week (11 day) in-country Mission.

RAs submit their proposed plans to their HQ departments during the RAP process. Their submissions are based on assessments of member country needs as identified by their own assessment and planning activities and their understanding of HQ priorities. Communications from beneficiaries also take place through the METAC Coordinator, Resident Representatives and their technical back-stoppers. In general there is no country-level mechanism for the consolidation and prioritisation of needs and requests except through the Steering Committee meeting itself.

The METAC work plan is developed in consultation with HQ functional departments and MCD and also includes regional events or conferences and training courses. The draft plan is circulated to the Steering Committee and approved at their next meeting. Members of the Steering Committee have mentioned that they feel that their role is to approve, rather than debate the plan, and they do not feel sufficiently engaged in the process. Where there is the need to amend the work plan, this is possible, but any new proposals are subject to the same HQ approval processes, which takes time.

The recent review of IMF TA noted that there was a need to develop a consistent approach to integrating HQ and RTAC TA support. Each HQ technical department is in the process of developing a set of procedures to achieve this. The evaluation team was given a copy of the STA document, which we believe is the only such document developed so far. This document provides very specific detailed and instructions to manage the relationships between HQ and RTACs. The document states that RTAC activities are complementary to other forms of Fund TA and that their activities should be more closely integrated with the Fund's overall TA programme. In general, this seems to be a positive development, but there will be a need to review and standardise all HQ department versions of the document to provide a consistent basis for TA delivery and to allow for RTAC staff to comment on the content and requirements to ensure that they can be effectively implemented.

There are a number of issues to be addressed in relation to the work planning process

- The process is not country driven or country owned in any sense, other than the fact that requests in specific technical areas may be included in the plan.
- The plan does not allocate 100% of each RA's time, but neither does it explicitly recognise the concept of an unallocated contingency of RA time to allow for emerging country needs and urgent requests – which could demonstrate genuine flexibility and responsiveness.
- The planning process is driven by the concept of the Mission and each country visit (even a day trip to Damascus) should generate the standard set of paperwork and approvals. If the focus of METAC is meant to be on implementation and follow up support, it would be more useful and efficient for the RAs to be able to develop have project plans which cover a set of visits and interactions over a period of time, rather than Mission plans.

Office and administration systems and procedures

The only example of a systems and procedures manual in the METAC office is the Resident Representatives Assignment Handbook. The ToR of the Center Coordinator state that the local office should be administered and managed in accordance with the Handbook. However, the Handbook does not provide sufficient guidance on the establishment of detailed office systems and procedures.

There is no induction process, procedures manual or set of operating instructions for RTAC operations. The first staff to join the METAC team developed their own procedures and practices. Some of these are documented, but many are not, and there is sometimes confusion about which standard HQ regulations and procedures are applicable and which are not. To improve operational efficiency and effectiveness, operational procedures need to be clarified and documented across the whole range of support functions. For example, there is no systematic guidance or information maintained on travel arrangements for different locations which requires RAs and STEs to investigate their own routes and arrangements. The process could be made more efficient (and almost certainly more cost effective) if a set of standard routes, transport providers and arrangements were negotiated and documented. If there were a procedures manual, the process of induction and staff handover could be made more efficient and standards of operations made more consistent.

The procedures manual should include all aspects of office management including; staff/ HR terms and conditions, health and safety requirements, all general office procedures and operations, and travel arrangements (for instance guidance on travel routes and costs). The current office support staff have between them most of the skills and experience needed to prepare such a manual, which could prove to be a useful investment as it could be reviewed and possibly shared with all the other RTACs.

The METAC team have developed a tailor-made filing and document management system which files soft and hard copies of all documents by; country, technical area (filed in date order, by Mission), Mission arrangements files, RA Monthly/Quarterly reports, Steering Committee papers, Archive files (with background information on member countries), Workshop and events files, STEs files (by technical area) and Personal files containing all personal information relating to each RA. Each RA has their own system for ensuring that Assistants get all the relevant documents and have their own specific requirements in relation to what they want to retain. Files appear to be well maintained and easy to reference.

The Administrative staff report that their work load is usually reasonable, now that there are three of them, but some tasks such as helping to organise conferences and external events, report editing and organising Missions for STEs are very time-consuming, creating peaks and troughs in the work load. However, there is the possibility that they could take on some specific extra projects which could help to address some of the issues identified in this evaluation. As an example, they are currently working on developing the METAC website, which could be used to significant effect to improve the sharing of information between member countries and build regional expert information.

There is currently only one person in the office who is trained to use the budget and Mission approval systems (the Office and Budget Manager). There is a risk to operational efficiency if this person is not available for more than a few days, or for times other than planned absences. As a contingency, it would make sense to train one other person to use these systems.

The slowness of the internet connection is a significant constraint on the office's effectiveness.

Management information and document management systems

Information management systems

The METAC RAs must adopt the standard HQ documentation and report writing protocols used by all other IMF staff. METAC also has to use the HQ TIMS (Travel and Information Management System) and the TAIMS system for management of information relating to technical assistance. Both of these systems were designed for HQ needs and are comprehensive systems which collect a very wide range of administrative and management information. Implementation of the TAIMS system in general in the IMF has encountered problems and appears to date not to have achieved its objectives. The evaluation team had a demonstration of the systems and it became clear that given the internet capacities of the METAC office it takes a significant amount of time to upload information and search the various database files to obtain the necessary reference numbers and get information accepted. For METAC, use of these systems is a means to an end – it must be used in order to obtain approvals for Missions and STEs, to enter travel and expense claims for advisors, submit quarterly budget reports, and all standard technical TA documents must be uploaded onto the system.

There are two basic office management systems. The HR system (HRPROD) which includes the travel management system (TIMS) and the Financials system (FINPROD).

HRPROD contains all the basic information on Missions and provides the basis for requesting the necessary HQ approval for Missions for RAs and STEs. The Office Manager has to input information into four different screens. The appointment of STEs is very time consuming in both actual and elapsed time. There is an extra stage of approval information on TIMS, which is submitted to HQ for approval. There can be long delays and they often need to chase HQ for replies. All contracts for STEs are also prepared by the Human Resources Department at HQ, which adds another layer of bureaucracy and potential delay to the process. In some cases, it can take as long as 30-40 days to obtain approval and a contract for a STE particularly when it is necessary to have an expert approved for inclusion on the IMF Roster.

The finance section deals with expense claims. The RAs input expense information, which is then checked and printed for approval and signature by the Coordinator. The Office Manager then has to fax all the paperwork, including receipts to HQ before the claim can be uploaded onto the system. It should take around one month for an RA to be reimbursed, but we understand that it can take up to six weeks.

Documentation requirements for RAs include a series of standard documents including Mission Briefing Notes, Terms of Reference, Mission Evaluation Reports, Back to Office reports and Project Framework Summaries. RAs must complete all documents in the standard format even for very short review visits, and are responsible for ensuring that all relevant departmental guidelines are observed. All such documents must be entered into the TAIMS system against the relevant project identification number. This is a very time consuming process, partly due to the internet capacity in the METAC office. The RAs estimate that they spend between 15 and 25% of their time complying with these standard HQ procedures. Whilst documentation and good record keeping are important, this does seem to be a very high level of resources to use on administrative and reporting activities when one of the comparative advantages is meant to be that they can spend more time on direct TA activities. As the number and scope of RTACs increases it would seem sensible to try and define and implement more flexible and appropriate documentation standards to allow RAs to concentrate on their core functions. One proposal mentioned is the idea of having project based plans, rather than Mission plans.

Time recording system

Each RA completes a monthly time sheet where they record time by technical area, country and activity. The activity categories are; delivery of TA, back-stopping (of STEs), administration, conferences, and "Other". The RAs complete an excel timesheet directly onto the server. The Office Manager then checks the information and inputs the same information into an access database which generates reports for HQ and METAC reporting. Examples of the use of this information are seen in the METAC Monthly reports.

There are a couple of observations to note:

- There is clearly some duplication of effort, with the same information being recorded in two separate systems.

- The activity level descriptions do not distinguish between different types of TA – which might include support for direct HQ activities, planned METAC –type implementation support TA, and responses to ad hoc or urgent requests. If there is a genuine desire to understand how the RTACs provide additionality and a different type of TA modality, it would be useful to have information about different types of TA provided and the balance of resources used between them.

- RAs record and measure their time in hours and can record overtime on their time sheets, whereas STEs record time in days, based on the number of days in the Mission approval and their contract. This does not allow for STEs to record the number of hours that a task takes. If there was a desire to measure and assess the value for money obtained from using different resource mixes, the time recording system cannot provide consistent information to compare RAs with STEs.

- The METAC Monthly Reports contain a variety of information relating to the activities by country and by different types of activity and advisor. The report for the period May to December 2006 reveals that the largest percentage of time spent by country for RAs was "Administration" at 18% of total time, which equates to 170 person days. It is likely that much of this time relates to Mission and HQ management reporting activities. A reduction in this would allow more time for direct TA provision and, for example, the strengthening of results reporting.

The financial systems

The METAC budget is based on two different accounts: IMF02 which covers costs met by METAC donors (expert and local salaries, workshop costs), and IMF01 which covers the IMF-funded portion of the Center's budget (the cost of the Center Coordinator and his staff). They use a standard format and process for budget preparation and the general accounting and financial management procedures are in line with standard accounting practices and most are specific by HQ. The Office/ Budget Manager uses a comprehensive excel spreadsheet for recording all expenses and to generate monthly reports. METAC operates USD and Lebanese Pound bank accounts and the Office/Budget Manager is responsible for all aspects of budget execution and monitoring, cash flow management, bank reconciliations and financial reporting, under the direction of the Coordinator. METAC provides quarterly financial reports and bank reconciliations to HQ.

The only issue of note relates to some of the internal charging mechanisms. HQ uses a standard charging system for short Missions and different types of RTAC activity. Missions of less than 15 days are charged at a standard cost of half a month, and missions of 15-31 days are charged as a full month, based on a standard cost formula. There are examples where METAC resources have been given to HQ for allocation, but METAC has had difficulty obtaining information about how these resources were used.

Reports

There are five main types of reporting:

- A monthly or quarterly report by each RA
- A consolidated METAC quarterly report
- Reports to the Steering Committee
- Steering Committee minutes
- The METAC work plan

All of these reports provide summaries of METAC activities. They provide interesting information about the countries visited and the purposes of the visits, but they focus almost entirely on inputs related information such as who went were and for how many days. Summary reports are presented to the Steering Committee and are available through METAC's website (which is password protected). In general, there is a lack of background information about METAC that can be given to potential beneficiaries or stakeholders. There was a METAC information leaflet that was produced when the Center first opened but this is now out of date. Our evaluation team actually received a number of requests for further information from people who should be informed about METAC, and it was widely noted that more information should be provided especially through active use of the website.

Performance measurement and management

There is very little emphasis on performance measurement and management in METAC. The main areas in which performance are measured are in relation to:

- Budget execution and spend against different budget line items
- Use of resources against the work plan in terms of numbers of Missions completed.

Measuring METAC's outputs and results

As noted above, reporting tends to focus on who went where, and for how many days. There is no formal process for beneficiaries to provide feedback about their perceptions of the quality of TA provided or the value of particular interventions or advisors. There is a rigorous review of the use of resources and the quality of specific technical interventions (through the system of backstopping), but little emphasis on results and outcomes.

As with other RTACs, METAC does not have a results- or impact-based performance management framework and there are no performance indicators to provide a basis for the planning process. The review of documentation relating to specific Missions demonstrates that they tend to be based on very general statements of objectives, usually in terms of activities to be undertaken, rather than results of outcomes to be achieved. Commonly used language includes expressions such as "review progress in relation to earlier recommendations", "meet with beneficiary representatives, and private banks", "discuss future TA needs".   This makes it very difficult to evaluate whether METAC is effective either in providing a more flexible and responsive approach to TA in the region, in general, or whether individual RAs and STEs are performing effectively.

There is a need for a greater emphasis on results and outcomes throughout METAC's reporting systems. This kind of information could provide much more meaningful and measurable information for performance review processes. These measures do need to be adapted to regional circumstances. For example, a standard indicator for statistics is "publication of information" but

this is problematic in this region, so a more appropriate and realistic measure should be identified. The results-based approach could also be adopted for the development of the work plan and to provide a basis for Steering Committee members to become more actively engaged in the process of planning and performance management.

RAs are evaluated by their respective technical departments at the end of their posting. There is no formal process for the Coordinator to be involved in performance review, or for him to see the results of the evaluation (although this does happen for RAs working in FAD and STA). This seems to neglect an excellent opportunity to get feedback from RAs at the end of their posting to learn lessons about RTAC operations and success factors. Since RAs come from different professional and technical backgrounds, it would be very useful to learn how well they felt they adapted to the RTAC approach and what made them more or less effective. They could also provide useful information about how to attract other high quality candidates to the role. Some kind of formal evaluation, led by the Coordinator should be introduced in the future.

STEs are evaluated by the relevant RA using a process which is part of the TAIMS system. The system prompts the RA to provide evaluation information at the end of each mission.

There is also no system for costing different activities to assess their value for money. It is clear that the regional base provides scope for more cost-effective delivery of TA, but it is difficult to validate and justify this assertion without detailed financial information both by activity type and in relation to outputs and the results of the TA provided.

Staff performance appraisal

There is no standard system for staff performance appraisal. However, all staff are on one year contracts, and as mentioned above, RAs are evaluated by their functional departments at the end of the contract. There is also no formal system for evaluating office support staff or guidelines for this process. Several different approaches have been tried so far, but staff stated that they would like results based evaluation and performance standards. It has now been agreed that they will define a framework for documenting their role activities which will be used as a basis for preparing target and standards based work plans and performance appraisal processes.

Staff development

The RAs are outside the standard IMF staff development processes and peer group contacts enjoyed by HQ staff. It has been mentioned that there is a risk of isolation and lack of skills and professional update during time spent in RTACs. This factor (in addition to the short term contractual relationships of RAs) could be a significant deterrent to future RA candidates.

There is also no structured staff development process for support staff, who may benefit from direct exposure to HQ systems and procedures and training on other aspects of work in the office, such as the role of the Office/Budget Manager. However, training programs have been organized at the HQ for the RTAC Budget Manager, and OTM staff have visited the RTACs to provide training. METAC is fortunate that it can attract high quality and competent support staff from the local market, who have the potential to provide support to particular value-added projects such as the development of a procedures manual, website development, creation of information materials and assisting efforts in regional information and experience sharing.

4.5   Coordination between METAC and IMF headquarters

One consistent theme arising from the evaluation related to the mandate and objectives of METAC and the relationship with HQ Departments. Understanding of the mandate varied between the following descriptions:

- METAC is part of IMF HQ, works on behalf of HQ agendas and has little autonomy or discretion to adapt to local circumstances
- METAC complements HQ by providing resources to give detailed, regionally-focussed support to the implementation of HQ recommendations
- METAC is a regional center which supports country-level needs and priorities within the framework and technical areas of the IMF role.

It is noticeable that METAC does not have a clearly identified profile or image, and that perceptions of what can be requested in terms of support vary both within and between countries. To a large degree, this is a natural result of the different relationships that METAC advisors have with their HQ functional departments. FAD is at one end of the spectrum – seeing METAC as a local office to provide support according to HQ programmes and priorities. The PFM advisor does not engage in any TA support until HQ has developed a strategy and approach for the country. At the other end of the spectrum, STA delegates significant autonomy for the delivery of TA to RAs.

These differences may not necessarily make a difference in terms of the effectiveness of TA delivery in specific areas, but may reduce the efficiency with which country needs are identified and addressed, as beneficiaries do not always clearly understand what kinds of support they can request and where it might come from.

Although the principles for the operation of RTACs have now been set out in the Operational Guidance Note, there is no standard set of operating procedures for RTACs and many systems had to be developed from scratch.

Many related issues are covered in earlier parts of this report including work planning processes, back-stopping arrangements and the development of TA integration procedures. Other observations are summarised below:

- The definition of the relationship between RTACs and HQ and agreed role is not standard – for example, are they out-posted HQ staff or autonomous regional units? This impacts on the extent to which METAC is distinct from HQ in different areas.
- There is not a consistent definition of roles and responsibilities of RAs in relation to HQ staff between technical areas. This might not matter within specific technical areas, but may create confusion if a country-level planning process is put in place.
- There are no universal performance standards and indicators, timescales for back-stopping/ technical review, which leads to variations in performance.
- There is no definition of the nature of the relationship with METAC and the Resident Representative in-country. This evaluation has concluded that delivery and relationship building with beneficiaries is more effective where there is a Resident Representative who is interested in, and engaged with the issues being addressed, but this seems to be a matter of personal style rather than IMF practice.
- The role of the METAC Coordinator may be particularly important in countries where there is no IMF Resident Representative, since the absence of a Resident Representative may make the process of getting an overview of institutional constraints and priorities across functional areas more difficult.

- There are differences in access to information and other HQ experts depending on the background and contacts of the individual RA. An RA who was an HQ member of staff is well informed about the skills available in HQ due to previous working relationships and has access to technical and other guidance documentation. An RA who has not previously worked at HQ has no formal process for accessing circulation of technical materials or knowing for themselves which of the HQ staff might be able to provide support on specific issues

- The channels of communication are complex and numerous. Many beneficiaries mentioned that they make sure they communicate their needs to as many contacts as they have, just to be certain that the message gets through.

- There may also be complications and tensions in relationships where there is a Resident Advisor in country for a particular technical area. Again, the nature of the relationship between the METAC RA and the in country advisor may be different between different HQ departments, depending on their needs, priorities and working practices.

- Whether the potential synergies are actually realised is not clear and one beneficiary asked why Article 4 Missions still take so long when METAC is on the ground and can provide regular progress reports and review of implementation?

4.6   The Steering Committee

The evaluation found a general agreement that the Steering Committee could be more effective in providing strategic guidance to METAC activities and that its role could be augmented in several respects, including playing a greater role in assessing METAC's performance. Currently, the role of the Committee is not clearly defined (although a loose definition of the role and responsibilities of the SC was provided in the initial METAC project document and in correspondence from the Deputy Managing Director to member countries), and members are not given any guidance on their role. This is left for individual countries and members to interpret. The Committee does not currently provide comprehensive country level representation and views, and members are given limited opportunities to engage actively in the management or review of METAC activities outside the framework of the six-monthly SC meeting. Attendance at these meetings has become more difficult for member countries when the meeting is held outside the region.

SC members tend only to represent the views of their own organisation and often do not have the ability to represent other technical areas. There are also no formal mechanisms for involving a wider stakeholder group in the development of issues to be addressed by the Committee. There is no performance framework against which they can assess performance and their meetings are too infrequent to allow for detailed debate on regional issues. The reports that are provided to the Committee provide a good overview of the activities METAC is undertaking but it was felt by some members that reports would be more useful if they contained information about planned Missions, the planned outcomes of those Missions, and evaluations of visits undertaken during the previous period. Most members do not share the reports with their colleagues, as they believe that they would not be of interest.

There may be significant scope to improve the effectiveness of the Steering Committee by considering the proposals and ideas summarised below, most have which were provided by SC members for beneficiary countries and from beneficiary organizations:

- Defining the role, expectations and Terms of Reference of the Committee.
- Providing guidance on how to select the SC member and how they should perform their role, particularly in relation to in-country communication and coordination.

- Establish in-country working groups, facilitated by METAC staff to discuss TA needs and regional experience sharing issues and produce information on TA needs.

- Amend and extend the work planning process to include an initial phase where information requests are sent to beneficiary countries as a basis for work plan development.

- Establish regional technical committees which can advise on issues of mutual interest and help to develop a coordinated experience sharing and capacity building plan and set performance targets for progress.

- Enhance reporting arrangements and the relevance of information provided and provide Mission plans and high level information on objectives and planned results.

- Ensure that SC members receive Mission ToR dates and activity information well in advance of all visits.

- Involve the SC in decision-making outside the scope of SC meetings, allowing some decisions to be reviewed by circulation.

- Consider the scope for potentially less frequent but longer, issues based meetings which engage members in proper discussions about technical issues, together with RAs.

Action in most of these areas would require additional resources and, most fundamentally, a strengthened and more coherent approach from METAC member countries and beneficiary organisations in improving the presentation of needs and priorities and a more active process of engagement with METAC.

4.7   Responding to beneficiary needs

This issue has been addressed to a large extent in earlier sections, but a summary of the most significant points is given below:

- The current Steering Committee arrangements are intended to allow members to engage deeply in the work planning and the direction of METAC resources. This is indeed how it is intended that the SC should operate according to the 2006 Operational Guidance Note, but it may be queried whether there would not be benefits in terms of increased coherence and wider beneficiary ownership from a more active role.

- Work planning is very strongly led by HQ priorities and Mission planning – there are cases where what are perceived as needs from the country perspective are not met, since the HQ department does not approve Missions to countries that they do not see as focus areas. For example, requests for PFM Missions to Yemen and Jordan have not been approved.

- There are problems relating to the process for selection and appointment of RAs and the length of time it can take to select, approve and contract STEs.

- Member countries need to take a more coordinated and consultative approach to identification and prioritisation of needs.

- Despite the deficiencies of the planning processes, it seems that the majority of beneficiaries are satisfied that their needs are met and there are many examples of METAC responding to changing needs and priorities.

The evaluation asked beneficiaries what were the most significant constraints on the operations of their organisation. Possible constraints were; lack of clarity of role and mandate of the organisation, current levels of financial resources, management and internal organisational factors, inability to attract and retain high quality staff and inadequate technical skills of staff. The most regularly quoted response related to the skills of staff. Many of the member countries have access to well-educated persons, but they lack experience of modern economic management and PFM

systems. This leads to the conclusion that one of the most important elements of the METAC comparative advantage is the ability to provide training and capacity building support to beneficiaries. There is some concern about the extent to which IMF should be involved in training and some resistance to this becoming a specific focus of METAC activities. However, it is clear that this is something that beneficiaries, need, want and value. There also appeared to be an unmet need for METAC to operate more actively in facilitating the sharing of experience and networking.

5.   Conclusions and recommendations

5.1   Overall assessment

On the basis of the findings of this evaluation, we conclude that METAC is successfully fulfilling its core role in allowing more sustained follow up and engagement and in providing greater responsiveness within the region. Significant progress has been made in fulfilling this function, but a number of factors have constrained this progress.

The majority of beneficiaries consulted so far have expressed a high level of satisfaction with the support provided to date and strong support for the continued operation of METAC. They particularly value the proximity, ease of communications and more regular and continuous (long term) support. However, there remains an unmet demand for METAC to play a greater role in the sharing of regional experience and in the building of networks, and, at least in countries which face the greatest capacity constraints. The effectiveness of advisory work undertaken by METAC is seen as requiring much greater attention to complementary training and capacity development activities. Many beneficiaries also felt they lacked sufficient information about METAC's activities, resources and mandate. There is scope for investigating the extent to which the benefits of responsiveness and understanding of local context can be improved through streamlining administrative procedures, providing some specific areas of delegated authority, provided this can be done without comprising quality and effective coordination with HQ.

METAC also needs a performance management framework based on the needs and priorities defined through the Steering Committee which focuses on outputs and results, rather than inputs. For example, a greater share of the responsibility for reporting results should be with the beneficiary organisations and member countries, rather than with METAC itself, since stronger country ownership and control over decisions (like staffing) requires stronger country accountability.

This evaluation has demonstrated that the RTAC concept is sound and has a useful, but specific, application to the region. Obviously and highly valued benefits of METAC relate to the regional base, in particular the ability to develop a deep understanding of the culture and needs of the region and to provide Arabic speaking advisors. The majority of all persons consulted as part of this evaluation noted advantages arising from the regional center including:

- Understanding the complexities of reform in the region.
- Understanding the unique circumstances and challenges faced by many of the member countries.
- The advantage of being able to provide regular support and feedback on implementation issues.
- Ability to provide advisors more quickly and efficiently than from HQ.
- Scope to develop long-term, trusted and efficient working relationships with Resident Advisors, which is essential in a region where progress can be slow and complex.
- Ability of METAC advisors to assist counterparts in sponsoring HQ recommendations with their colleagues – bringing the authority of the IMF into the region. This has been useful in the development of a PFM strategy and assisting in communicating the Statistics Master Plan in Lebanon, and in obtaining local acceptance of revenue administration recommendations arising from an HQ mission to Sudan.
- Benefits of being in the same time zone and geographic proximity

- Ability to facilitate improved experience sharing and relationships throughout the region
- Scope for more regular face to face contact in an environment where e mail is not as widely used, reliable or trusted as in other regions
- Suitability of the model to many technical areas of IMF interest which involve multiple agencies and departments and require improved coordination. For example, statistics and PFM.

The regional base is of particular relevance to a region where situations and circumstances can change significantly in a very short space of time. A regionally based organization is well placed to identify, understand and respond to these changes quickly and effectively. It is likely that the pattern and location of work will change quite radically over the medium term. However, the other side of this issue is that the development status, priorities and needs of the METAC members are vastly different and their needs might be difficult to accommodate using a very small number of technical specialists.

Table 5.1 provides a summary of the assessment of the effectiveness of METAC in relation to its main areas of activity.

Table 5.1   Effectiveness of METAC activities

Activity	Effectiveness
Providing a programme of TA linked to overall IMF programme objectives	Effective, but resource constrained in terms of overall level of resources and skills available in METAC
Providing continuation or follow-up support on specific issues led by IMF HQ teams	Very effective and highly valued by beneficiaries
Providing short, ad hoc assistance for urgent/ specific needs	Potentially effective but constrained by the narrow range of IMF areas of interest and speed of response if skills required are not available in the RA team
Undertaking capacity building amongst beneficiaries	Often effective and highly valued by beneficiaries, but effectiveness is highly dependent on the ability of RAs and STEs to transfer knowledge (which depends on their non-technical skills)
Supporting donor coordination at country level	Only effective in relation to specific areas of technical focus, but is certainly an area that requires attention and has been of great benefit (evidence of this in FAD area)
Building a pool of regional experts for use by beneficiaries	This is a highly valued activity that could be developed in a more systematic way
Sharing lessons and experience across the region	This is an activity which beneficiaries believe is very valuable, where possible, and where it is felt METAC should play a more active role based on its unique closeness of engagement with organisations and

Activity	Effectiveness
	countries facing similar challenges.
Building regional networks and institutions	METAC is uniquely placed to play at least a facilitating and supportive role

We understand that the location of METAC in Beirut is not currently under review, and in terms of operational efficiency there are strong reasons for staying there, including the very high level of commitment to METAC in terms of financing and the provision of facilities and support from the Government of Lebanon. Given the current security rating, this is however an expensive location in which to employ Resident Advisors (since they receive significant additional allowances based on IMF scales). Given the volatility of the region and the significant costs of evacuation, it would seem sensible purely from the point of view of good management practice to have some kind of a contingency plan in place in case METAC was forced to locate elsewhere.

5.2   Recommendations

In order to build on METAC's achievements to date and to overcome some of the constraints that have been identified in the evaluation, the following recommended actions are proposed. It should be noted that in order to achieve improvements in some areas such as information flow and strengthened ownership and improved planning, the onus for action falls on beneficiary organisations (and SC members to the extent that they can coordinate across beneficiaries in each country):

- Continued attention needs to be given to the simplification of streamlining of administrative procedures so as to enable the full potential benefits of METAC's activities to be realised. The continuing challenge is to balance the responsibilities of the functional departments for quality control with enabling METAC to provide the flexibility and to free time which is currently used for administrative tasks for other purposes.

- The role and responsibility of Steering Committee members should be clarified and encouragement provided for the SC members from METAC member countries to play a more active role in the sharing of information between beneficiary organisations, the determination and communication of priorities, and the development of effective ways to assess and monitor performance.

- There is a need for an improved system for the monitoring of the outputs and results of the TA provided to move beyond the current reporting that focuses exclusively on inputs (days provided). This system should include as a minimum a standard evaluation form to be completed by the beneficiary organisation on completion of a METAC activity, and a regular process of follow up and reporting on the longer term results of the activity. Some of this may already be done through existing processes like Article IV consultations, but the information needs to be collated and presented. The scope for Steering Committee members to take more active responsibility for coordinating reports at the national level on results achieved should be explored. At the same time, the monthly/quarterly reports prepared by RAs should pay more attention to reporting (in a more standardised framework) on the follow up on the outputs and results of earlier METAC activities, rather than reporting just on inputs provided over the period. In principle, TAIMS if working effectively and with an adequately fast communications connection may provide many

elements of this system, though a full assessment of this was outside the scope of this evaluation.

- As part of the process of providing a basis for improved reporting on results, there should be an institutional and organisational assessment for each beneficiary organization with which METAC works. The implications of this should be assessed in the planning of activities and modes of engagement, particularly in relation to the issues such the capacity of the organisation to attract and retain appropriately qualified staff. This will, for example, include an assessment of the capacity of the organisation to attract and retain staff, and the quality of its skills base. Usually this will have been developed as part of a wider reform programme or strategy or through ongoing consultations such as those under Article IV. In general this is not an exercise that METAC should itself undertake, but an active attempt should be made to draw on existing documentation and processes to make a systematic assessment of organisational capacity and its implications for the design of support.

- Terms of reference and other key information for Missions should be seen by and agreed with beneficiary organisation and beneficiary organisations should be encouraged to circulate and discuss these more widely as appropriate.[9]

- METAC's website should be used much more actively as a way of sharing information and experience. Many issues on which beneficiaries felt they did not have sufficient information could be addressed through more proactive use of the website. This could include posting information on relevant experiences, and some system of sharing (by agreement with the IMF and beneficiary organizations) information on reports progress and lessons from ongoing reform programmes.

- The selection of Resident Advisors should take place against a job description, draft terms of reference, and role profile (not just a specification of the area of technical expertise) that should be agreed with the SC. There is scope for exploring whether a more transparent and competitive process for selection could be used, as is already happening in some of the other RTACs. This would increase ownership and, it is hoped, help to ensure that a wider set of candidates are considered with a more rigorous assessment being made of their ability to perform the mix of activities called for from an RA.

- METAC should develop (in close consultation with beneficiaries) a strategy to guide its activities in networking and experience sharing. This should establish METAC's complementary role in relation to other regional organisations and networks and develop approaches for most effectively achieving networking and experience-sharing in each of the technical areas in which METAC works.

- METAC should actively seek to assist HQ functional departments in developing a network of STEs with skills and experience that are especially relevant to the region. This could involve advertising (through media and the METAC website) for experts with appropriate profiles.

- A full office procedures manual should be developed to include procedures related to staff/ HR terms and conditions, health and safety requirements, all general office procedures and operations, and travel arrangements (for instance guidance on travel costs) and METAC's internet communication should be upgraded.

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[9] The conclusion of the Task Force on IMF TA of July 2005 (SM/05/269) suggests that sharing TORs with the authorities can enhance country ownership and recommends departments to strengthen the dialogue with country authorities in the process of drafting TORs.

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Annex A: Terms of reference

Middle East Regional Technical Assistance Center (METAC): Terms of Reference for the Mid-Term Evaluation

1. Background

The Middle East Regional Technical Assistance Center (METAC) was established in October 2005 in Beirut (Lebanon) with the overarching goal to assist countries and territories in the Middle East region in strengthening their capacity for effective macroeconomic management and to support the region's integration in the world economy. METAC has also the objective of assisting post-conflict countries to restore macro-economic stability and develop basic institutions for policy-making.

METAC was established to provide technical assistance to ten beneficiary countries/territories[10]: over an initial three year period from November 2004 to November 2007. METAC operations are funded by contributions from the host country, the IMF, and eleven bilateral and multilateral donors, including five of the METAC beneficiary countries. The total budget of METAC over the initial three year funding cycle, including the IMF contribution and the host country in kind contribution is equivalent to USD 16.5 million[11].

METAC operations are guided by a rolling annual work plan which is developed on the basis of beneficiary countries/territories needs, is complementary to other forms of Fund TA, and is an integral part of the Fund's overall TA program. METAC is guided by a Steering Committee, acting as an advisory body, and composed of representatives of the authorities of the countries/territories served by the Center, the donors and the Fund. It has met semi-annually to review progress in the implementation of the work plan, discuss and endorse the work plan for the period ahead and discuss strategic directions for the Center.

METAC assistance to beneficiary countries/territories is provided by a number of resident advisors and short term experts. The focus of METAC assistance reflects the expertise of the METAC resident advisors and is based on the countries/territories needs, and Fund TA priorities for the region. TA in areas not covered by the resident advisors can be provided by METAC with appropriate backstopping from the IMF headquarters.

2. Purpose of the evaluation

METAC has been established with an initial duration of three years from November 2004 to November 2007. Since the setting up of METAC, an external evaluation was foreseen after eighteen months of operations to assess the Center's activities and performance and formulate recommendations on future actions. The mid-term external evaluation has the objective of reviewing the management and operations of METAC, helping funding agencies and beneficiary countries/territories foster a greater understanding of METAC work, and promote greater accountability for performance. The evaluation will offer valuable feedback on METAC overall

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[10] Afghanistan, Egypt, Jordan, Iraq, Lebanon, Libya, Sudan, Syria, West Bank and Gaza, and Yemen

[11] Budget Revision "A" agreed at the December 2005 Steering Committee Meeting. Donors contribution amounts of USD 9.5 million.

performance and achievements, and provide the Fund a useful input for the assessment of its management and organization.

The evaluation will look at METAC activities and review its effectiveness as a TA delivery vehicle. In view of the fact that METAC has only been in existence for eighteen months, the evaluation will focus on the organizational and operational effectiveness of METAC with a focus on assessing METAC ability to achieve the advantages typically associated with the Regional Technical Assistance Centers (RTAC) delivery modality: better identification of countries TA needs, rapid and flexible TA delivery, continuous and consistent follow-up of TA recommendations, closer interaction with beneficiary countries/territories authorities, strengthened countries' ownership, and greater partnership with other TA providers and donors. In view of the possible extension of METAC activities beyond the first three year duration, it is important for the evaluation to look at METAC's achievements and lessons learned and provide recommendations for improvement.

3. Issues to be addressed by the evaluation

The evaluation will assess to what extent METAC has contributed to promote economic reforms and institution building in its core areas of expertise, and its ability to achieve its more specific objectives. METAC performance will be assessed against the benefits that are characteristic of the RTAC delivery modality. The evaluation will look at METAC operational and organizational effectiveness in achieving its objectives. The primary issues to be assessed will include the following:

Operational effectiveness of METAC

- METAC effectiveness in identifying TA needs and providing focused and effective TA to its beneficiary countries/territories and regular and consistent follow-up of TA recommendations. This would include the evaluation of a representative sample of METAC TA activities for each focus area of METAC assistance.
- The effectiveness of METAC in providing timely and flexible TA, and to rapidly adapt its plans to beneficiary countries/territories emerging needs.
- How effective METAC activities have complemented other forms of Fund TA, how well METAC work plan is closely integrated into the Fund overall TA program, and consistent with reform strategies recommended by the Fund.
- The ability of METAC to provide additionality to TA delivered by the Fund headquarters and to what extent the establishment of METAC has lead to an increase in the TA provided by the Fund to beneficiary countries/territories.
- To what extent METAC has been able to strengthen countries ownership of TA delivered.
- METAC contribution to strengthened cooperation among national and multinational TA providers and to enhance regional integration and knowledge sharing among beneficiary countries/territories on common issues and fostering peer reviews.

Organizational effectiveness of METAC

- The overall quality of METAC management and organization (this could include its ability to strengthen the relationship with beneficiary countries/territories and implementing the work plan), as well as the overall effectiveness of the METAC office in performing its responsibilities.
- The appropriateness of METAC composition of the team of resident advisor, the suitability of resources allocation among TA delivery modalities, and the ability of effectively using

resources for short term experts and regional seminars. This could also include METAC effectiveness in identifying regional experts.

- The appropriateness of the composition of METAC group of beneficiary countries/territories.

- The effectiveness of METAC work procedures in drafting the work plan and in allocating resources for its implementation. This would include a review of the work procedures including the needs assessment, the gathering of information and the drafting of the work plan.

- The effectiveness of coordination between METAC and the Fund headquarters. This would review the effectiveness of coordination of TA programming, monitoring, and delivery, and the quality and timeliness of information sharing on TA policies and priorities. It would also include the ability of METAC to coordinate with Fund mission teams and Resident Representatives.

- The role played by the Steering Committee in providing strategic guidance to METAC activities and the appropriateness of the METAC governance structure.

- METAC ability to adjust to beneficiary countries/territories emerging needs and implement the Steering Committee recommendations accordingly.

The review should record and report on any significant lessons that can be drawn from the METAC experience, highlighting its success and failure, and will provide recommendations for improvement. The evaluation team will take note of the suggestions received during the course of the review on the direction of METAC operational modalities and areas of work. In its review of METAC performance, the evaluation team will give due consideration to the results of the IMF Review of the Regional Technical Assistance Centres (Board Paper of June 30, 2005) and the recent set of operational guidelines clarifying the role of RTACs' stakeholders.

4. The evaluation process

METAC evaluation process will include the review of all relevant documentation, gathering of information through a number of meetings with a broad cross-section of representatives of METAC stakeholders and telephone interviews, and the drafting of the evaluation report. Meetings will be organized in Washington and in the METAC beneficiary countries/territories to provide the evaluation team with a wide range of feedbacks. The evaluation process is composed of the following steps:

a. The evaluation team will receive all relevant METAC documentation as well as RTAC background information to build up their overall knowledge of the RTAC delivery modality and METAC objectives and organization.

b. A first set of meetings will be organized at the IMF headquarters in Washington to allow the evaluation team to familiarize itself with the RTAC delivery modality, discuss with the relevant IMF departments the integration of METAC's activities into the Fund TA program and the monitoring and backstopping process, and to go over the work performed so far in the various areas of operations.

c. During their mission to Washington, the members of the evaluation team will prepare their work plan in coordination with the relevant departments and the METAC coordinator.

d. The evaluation team will carry out a field mission to Lebanon and to other selected METAC beneficiary countries/territories to meet with the METAC Steering Committee Chairman, the METAC coordinator, resident advisors, and representatives of beneficiary countries/territories, donors, and other TA providers.

e. Telephone interviews with selected beneficiary countries and donors representatives that could not be met during the field visit will follow the field mission to complete the information gathering.

f. The review team will prepare a draft evaluation report presenting the main findings, lessons, and recommendations, accompanied by the summary of the information gathered during key meetings. The draft report will be prepared in English and submitted electronically and in hard copy format to the Chairman of the Steering Committee, the Center coordinator, the IMF Office of Technical Assistance Management (OTM), the Middle East and Central Asia Department (MCD), and the IMF functional departments.

g. The evaluation team will consider the comments provided on the draft report at their discretion and will draft a final report which, subject to the approval of the Steering Committee, will be posted on the Center's website.

Annex B: Questionnaires used

B.1 Questions for Beneficiary Representatives

1. Background to your organisation

1.1 Which of the following factors constrain the effectiveness of your organisation?

Lack of clarity of role and mandate of the organisation   Yes/ No

Current levels of financial resources   Yes/ No

Management and internal organisational factors   Yes/ No

Inability to attract and retain high quality staff   Yes/ No

Inadequate technical skills of staff   Yes/ No

Please circle the appropriate answer.

1.2   How are the technical assistance (TA) needs of your organisation identified?

1.3   Is there an overall plan covering the needs and priorities for TA to the organisation? Provide details.

1.4   Which agencies/donors (in addition to the IMF) are providing TA to the organisation?

1.5   How are the activities of TA providers coordinated and managed within the organisation?

2   METAC and other IMF activities

2.1   What do you think is the role of METAC? How does it relate to other forms of TA provided by the IMF?

2.2   Has METAC helped in the sharing of experience? Please give examples.

3   Assessment of TA provided to your organisation

3.1   Please briefly describe the areas where METAC has provided assistance

3.2   Is your organisation consulted about the selection of experts?

3.3   Has METAC TA been responsive to the concerns and priorities of the organisation?

3.4   Has METAC TA been effective in achieving its objectives? What have been the main successes? In what respects has METAC TA failed to achieve its objectives?

3.5   What factors have affected its success? How could success have been improved?

3.6   Does the organisation receive useful and timely reports on METAC and other IMF TA?

4   Role and future

4.1   What levels and types of requirements for TA from METAC and the IMF do you anticipate you will need over the next two years? Please provide any relevant planning documents

4.2   How could METAC's contribution to the sharing of regional experience be made more effective?

4.3   How could the relevance, effectiveness, and impact of IMF TA (including METAC) be improved?

B.2   Issues for discussion with Steering Committee Members

1. **METAC role and mandate**
   - Is the role and mandate clearly stated and understood?
   - Is the distinction between METAC and IMF Headquarters clear and well defined?
   - What do you think should be the core functions of METAC?
2. **Steering Committee role and operations**
   - Describe your understanding of the role of the Committee?
   - Describe your understanding of the operations of the Committee?
   - How were you appointed?
   - Who do you report to about METAC issues?
   - How do you share Steering Committee information and issues with your country colleagues and officials?
   - How effective do you think the Committee is?
   - Does the Committee meet frequently enough?
   - Do you have any suggestions for how the performance of the Committee could be improved?
3. **Work planning arrangements**
   - Describe your understanding of the work planning process?
   - How do you identify technical assistance needs and priorities for the country you represent?
   - Do you feel that METAC resources are allocated effectively and fairly?
4. **Information and reporting**
   - Describe the information and reports that you receive?
   - Please comment on how you use this information and whether it is useful?
   - Can you think of any ways in which reporting information could be improved?
5. **Performance and results**
   - How is the performance of METAC measured?
   - Have the recipients been satisfied with the technical assistance they have received?
   - How does METAC technical assistance compare to assistance provided by other agencies?
   - Are there any areas where support could be improved?
6. **The future**
   - What are the key strengths of METAC that it should seek to build on over the next 2-3 years?
   - Do you think that METAC should do more, or less of the following activities?
     i) Providing short, ad hoc assistance for urgent/ specific needs?

     ii) Providing continuation or follow-up support on specific issues?

     iii) Building a specific profile for METAC (as opposed to IMF)

iv) Providing assistance in-country with overall reform programme/PRSP planning?

v) Supporting donor coordination at country level?

vi) Undertaking capacity building amongst beneficiaries?

vii) Sharing lessons and experience across the region?

viii) Building regional networks and institutions?

▪ How should METAC be funded in the future?

7. Any other issues?

B.3 Questions for METAC Financial Contributors

A.   What were the objectives of your country/agency in providing financial support to METAC?

B.   What factors determined the level of funds that have been pledged and disbursed by your country/agency?

C.   To what extent does your country/agency consider that its objectives in providing financial support to METAC have been achieved?

1   Completely Achieved
2   Largely Achieved
3   Partly Achieved
4   Not Achieved

Answer (select appropriate number):

> *Please provide any further comments on the extent to which objectives have been achieved here:*

D.   Does your country/agency consider that it has been provided with sufficient information on METAC's activities, including financial reporting?

1   Information and reporting completely satisfactory
2   Information and reporting largely satisfactory
3   Information and reporting partly satisfactory
4   Information and reporting not satisfactory

Answer (select appropriate number):

> *Please provide any further comments on information and reporting here:*

E.	Does your country/agency consider that the governance arrangements (including the Steering Committee) for METAC have operated effectively?

1	Entirely effective
2	Largely effective
3	Partly effective
4	Not effective

Answer (select appropriate number):

> *Please provide any further comments on governance arrangements here:*

F.	Are there any changes or improvements in the operation of METAC that would affect the decision of your country/agency to provide further financial support to METAC?

G.	Please provide below any other comments or observations that you wish to bring to the attention of the evaluators.

## B.4	Issues for discussion with IMF resident representatives

1. Role and mandate

- Is the role and mandate clearly stated and understood?
- Is the distinction between METAC and IMF Headquarters clear and well defined?
- What do you think should be the core functions of METAC?

2. Reporting and information

- Describe the information and reports that you receive?
- Please comment on how you use this information and whether it is useful?
- Can you think of any ways in which reporting information could be improved?

3. Performance and relationships

1. Are coordination and liaison effective?
2. Has the METAC programme added value to your work?
3. Have they operated within the agreed reform programme and in-line with your objectives for the country?
4. Have they been flexible and responsive to needs and requests – yours and country beneficiaries?
5. Have they provided appropriate skills and expertise?
6. Can you comment on the quality and impact of TA provided?
7. Have they displaced other TA or development partners?
8. Have you seen evidence of experience sharing?
9. Can you provide examples of positive or negative METAC interventions?
10. How is the performance of METAC measured?
11. Have the recipients been satisfied with the technical assistance they have received?

12. What could be done to improve effectiveness or support?

4. The future

- What are the key strengths of METAC that it should seek to build on over the next 2-3 years?
- Do you think that METAC should do more, or less of the following activities?
  i) Providing short, ad hoc assistance for urgent/ specific needs?

  ii) Providing continuation or follow-up support on specific issues?

  iii) Building a specific profile for METAC (as opposed to IMF)

  iv) Providing assistance in-country with overall reform programme/PRSP planning?

  v) Supporting donor coordination at country level?

  vi) Undertaking capacity building amongst beneficiaries?

  vii) Sharing lessons and experience across the region?

  viii) Building regional networks and institutions?

5. Any other issues?

B.5   Issues for discussion with Resident Advisors

Approach

This set of questions aims to cover the core areas of the evaluation framework.

In each case, they are intended to provide a focus for the discussion. Please try to provide specific examples to illustrate the general points.

The questions will be discussed initially in individual interviews. We may ask for an opportunity to follow up on some of the issues in a group session.

Please feel free to expand on any of the issues identified or to raise any additional issues.

1. METAC – role, systems and management

1.1 How are your roles and responsibilities defined? Is there scope for improvement in the role? (E.g. content, level and formality of agreement)

1.2 Work planning and budget processes?

- How does the process work?
- What is your role in this process?
- How do you ensure that beneficiary needs are effectively identified and prioritized?

- How are other (non-IMF) TA activities taken into account?

1.3 What information do you need to support work planning activities and it is readily available?

1.4 How do you allocate your resources between competing requests? Is the process efficient?

1.5 How do you share experience, information etc with other METAC staff?

- Are you informed of critical issues affecting your activities?
- Which methods of information sharing are most effective?
- Do you have any suggestions for improvements?

1.6 What types of IMF/METAC reports and management information are available to you? How could they be improved to provide a stronger basis for planning and evaluating your activities?

1.7 How does the Steering Committee operate?

- Does it provide clear and effective guidance and direction?

1.8 Do you have any comments on your role, status, terms and conditions etc?

1.9 Please try to estimate the % of time you spend on the following activities;

- Providing specialist technical assistance in your area of expertise
- Backstopping short-term experts
- Internal (METAC) liaison, processes and systems
- Internal (IMF) liaison, processes and systems
- Providing general support for donor coordination, reform planning to existing contacts/ beneficiaries
- Building relations with beneficiaries to support future work planning
- Building relations with donors and fund raising
- Building local and regional capacity and networks

2. Human resources

2.1 Does METAC have the appropriate number of resident technical staff, with the relevant skills? Are you constrained by the resources available (including resources for short-term experts)?

2.2 What services and assistance do the METAC support staff provide?

- Are the effective?
- Are they reliable?
- Are there too many or too few?
- Is there anything you would change about their role and activities?

2.3 What are the arrangements for the use of short term experts?

- How are the identified?

- How are they appointed?
- How are they directed, supervised and appraised?
- Are there any improvements that could be made to the process?

3. Relations with IMF HQ

3.1 Describe how the communication, reporting and working arrangements operate?

3.2 What support and feedback do you get from HQ department colleagues in terms of technical/ back-stopping assistance?

- Are there any issues with the timeliness, quality and applicability of their responses?

3.3 Do you ever seek assistance from HQ staff/ consultants for specific in-country technical interventions?

3.4 How do you ensure that METAC activities are integrated with HQ activities in area and technical departments? Can you suggest any ways to improve integration?

3.5 How do you agree on the priorities and focus of METAC with your HQ colleagues?

3.6 How do relations with Country Resident Representatives work? (where applicable)

3.7 How do relations with long-term advisors based in country? (where applicable)

4. Relations with beneficiaries

4.1 What is your understanding of your role and mandate in this area, and the roles of METAC vs IMF HQ? How are roles and responsibilities divided?

4.2 Do you spend time building relationships and contacts with potential beneficiaries? How do you do it and how much of your time is spent on this kind of activity?

4.3 How would you describe the reputation of METAC among key beneficiaries?

4.4 Do you think beneficiaries understand the role of METAC and IMF HQ?

4.5 Are there any practical changes to working arrangements that could improve relations?

5. Experience and results

5.1 Have all your activities been in line with the agreed work plan?

5.2 Which of your activities have directly supported an agreed reform agenda/ broader government programme?

5.3 How much time do you have available to deal with specific ad-hoc/urgent requests and changing needs?

- How many such requests have you received?
- What happened – did METAC respond?

5.4 How is METAC's added value delivered?

- Describe a successful intervention?
- Have you been able to be responsive and flexible in the type of support provided?
- Provide examples of how and when delivery from METAC has been preferable to/ more effective than support provided from Washington

5.5 Do you have examples of effective follow up or sustainable implementation of recommendations?

5.6 What kinds of activity or support can be provided most effectively from here, rather than Washington?

5.7 How did the evacuation from Lebanon during the summer of 2006 impact on your activities and efficiency?

5.8 Provide details of progress to date in identifying and using a pool of regional experts/ consultants?

5.9 Which elements of the overall TAC/METAC mandate are most relevant and effective in practice?

Please provide examples for your responses to each element..

- Creating better understanding throughout IMF of beneficiary needs and issues?
- Ability to respond quickly to specific needs?
- Ability to provide continuation/ follow-up support on specific issues?
- Providing support to HQ planning and reporting activities?
- Providing support to IMF HQ strategic goals?
- Providing assistance in-country with overall reform programme/PRSP planning?
- Supporting donor coordination at country level?
- Undertaking capacity building amongst beneficiaries?
- Sharing lessons across the region?
- Building regional networks and institutions?

5.10 How would you improve the relevance or effectiveness of each?

5.11 How do you think the medium term needs of beneficiaries will change?

- Does METAC they have the relevant skills and experience for the anticipated medium term needs of beneficiaries?
- How can METAC respond most effectively to unpredictable changes in needs, priorities and circumstances of beneficiaries?

5.12 What are the conditions that make METAC TA most effective – to what extent do the following have an impact. Is the impact positive or negative?

- Presence of an IMF Resident Representative?
- Existence of a PRSP or other consolidated and agreed reform agenda?
- Existence of an IMF programme or other projects?
- Effective/powerful Steering Committee member?
- Supportive/ reformist government?
- Capacity of the beneficiary organization (staffing, management, role)?
- Other factors?

5.13 Describe the perfect Resident Advisor – skills, experience, background?

5.14 Are you provided with the relevant support for your own skills development/ capacity building needs?

6. Looking forward

6.1 In the next 2-3 years, which member countries:

- Need most METAC support?
- Will request most support?
- Are likely to make most effective use of that support? (Please give reasons)

6.2 Are there any common regional issues that come within the METAC mandate?

6.3 Do you have any ideas for regional events, conferences, training?

7. Any other suggestions to improve efficiency and effectiveness

Topics might include:

1. Changes to the planning and budgeting framework

2. Arrangements for funding METAC in the future

3. Performance management and reporting systems

B.6   Issues for discussion with METAC support staff

1. Role and functions

- What are your role and functions?
- Do you have an accurate job description?
- Is there a clearly defined set of duties?
- Is your work load reasonable and predictable?
- How do you resolve any conflicts about tasks and priorities?
- Are your reporting arrangements clearly defined?

2. Training and personal development

- Did you get an adequate induction into working arrangements and IMF procedures?
- Do you receive regular feedback and performance appraisal?
- Do you have any particular training needs?

3. Systems and processes

- Which systems and processes do you use?
- Please describe how they work?

- Can you think of any ways in which internal systems and processes could be improved?
- Who is responsible for information management?
- Do you have adequate and appropriate equipment and facilities?

4. Communications and reporting arrangements

- Describe any reporting and communications processes that you are involved in?
- Do you feel adequately informed about METAC activities and priorities?
- Do you have any suggestions for improving the quality of communications and reporting or any ideas about how to improve efficiency and performance?

5. Any other issues/ general discussion?

- What is your view of the role and effectiveness of METAC?
- Any other issues you would like to raise?

Annex C: Allocation of METAC TA

Table C.1   Allocation of TA by country and type, 2004/5

	RA Beirut	RA Mission	STE	HQ STE	Total	Total METAC	% Total	% METAC
Regional	5.0	3.0	0.0	0.0	8.0	8.0	4.1%	7.5%
Afghanistan	0.0	0.0	0.0	0.0	0.0	0.0	0.0%	0.0%
Egypt	6.0	11.0	2.0	28.0	47.0	19.0	24.4%	17.9%
Iraq	5.0	1.0	0.0	11.0	17.0	6.0	8.8%	5.7%
Jordan	5.0	6.0	0.0	40.0	51.0	11.0	26.4%	10.4%
Lebanon	10.0	1.0	6.0	0.0	17.0	17.0	8.8%	16.0%
Libya	0.0	1.0	0.0	0.0	1.0	1.0	0.5%	0.9%
Sudan	2.0	4.0	0.0	0.0	6.0	6.0	3.1%	5.7%
Syria	9.0	10.0	0.0	8.0	27.0	19.0	14.0%	17.9%
West Bank & Gaza	1.0	1.0	0.0	0.0	2.0	2.0	1.0%	1.9%
Yemen	4.0	7.0	6.0	0.0	17.0	17.0	8.8%	16.0%
Total	47.0	45.0	14.0	87.0	193.0	106.0	100.0%	100.0%

Table C.2   Allocation of TA by country and sector, 2004/5 (METAC only)

	Monetary and Financial Sector	Public Expend M'gment	Bop Stats	Real Sector Stats	Revenue Admin	Total
Regional	0.0	0.0	0.0	8.0	0.0	8.0
Afghanistan	0.0	0.0	0.0	0.0	0.0	0.0
Egypt	3.0	6.0	0.0	6.0	4.0	19.0
Iraq	1.0	2.0	0.0	3.0	0.0	6.0
Jordan	0.0	2.0	2.0	5.0	2.0	11.0
Lebanon	0.0	3.0	0.0	3.0	11.0	17.0
Libya	0.0	1.0	0.0	0.0	1.0	2.0
Sudan	2.0	2.0	0.0	0.0	2.0	6.0
Syria	10.0	2.0	0.0	4.0	3.0	19.0
West Bank & Gaza	2.0	0.0	0.0	0.0	0.0	2.0
Yemen	2.0	1.0	0.0	1.0	13.0	17.0
Total	20.0	19.0	2.0	30.0	36.0	107.0

Table C.3   Allocation of TA by country and type, 2005/6

	RA Beirut	RA Mission	STE	HQ STE	Total	Total METAC	% Total	% METAC
Regional	11.0	6.0	6.0	8.0	31.0	23.0	6.1%	7.4%
Afghanistan	2.0	4.0	0.0	56.0	62.0	6.0	12.1%	1.9%
Egypt	11.5	9.0	9.5	66.0	96.0	30.0	18.8%	9.6%
Iraq	1.0	1.0	0.0	0.0	2.0	2.0	0.4%	0.6%
Jordan	1.0	2.3	0.0	10.0	13.3	3.3	2.6%	1.0%
Lebanon	16.5	4.0	9.0	10.0	39.5	29.5	7.7%	9.4%
Libya	20.0	21.0	6.0	24.0	71.0	47.0	13.9%	15.0%
Sudan	13.0	11.0	14.0	0.0	38.0	38.0	7.4%	12.2%
Syria	20.8	23.3	17.0	11.5	72.5	61.0	14.2%	19.5%
West Bank & Gaza	6.0	7.5	11.0	7.0	31.5	24.5	6.2%	7.8%
Yemen	15.0	10.5	23.0	6.0	54.5	48.5	10.7%	15.5%
Total	117.8	99.5	95.5	198.5	511.3	312.8	100.0%	100.0%

Table C.4   Allocation of TA by country and sector, 2005/6 (METAC only)

	Monetary and Financial Sector	Public Expend M'gment	Bop Stats[12]	Real Sector Stats	Revenue Admin	Total
Regional	4.0	0.0	1.0	18.0	0.0	23.0
Afghanistan	0.0	3.0	0.0	1.0	2.0	6.0
Egypt	0.0	8.0	0.0	7.0	15.0	30.0
Iraq	2.0	0.0	0.0	0.0	0.0	2.0
Jordan	1.0	0.0	0.0	1.3	1.0	3.3
Lebanon	6.5	2.0	4.0	8.0	9.0	29.5
Libya	27.0	3.0	0.0	15.0	2.0	47.0
Sudan	9.0	15.0	1.0	4.0	9.0	38.0
Syria	26.0	8.0	0.0	22.0	5.0	61.0
West Bank & Gaza	21.0	0.0	0.0	0.0	3.5	24.5
Yemen	19.5	9.0	0.0	8.0	12.0	48.5
Total	116.0	48.0	6.0	84.3	58.5	312.8

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[12] Includes one week regional and one week on Sudan classified as "monetary and financial statistics."

Table C.5   Allocation of TA by country and type, 2006/7[13]

	RA Beirut	RA Mission	STE	Total METAC	% METAC
Regional	8.0	1.8	2.5	12.3	3.1%
Afghanistan	11.5	9.0	18.0	38.5	9.7%
Egypt	8.5	7.5	13.0	29.0	7.3%
Iraq	7.5	3.0	7.0	17.5	4.4%
Jordan	6.0	8.0	6.0	20.0	5.0%
Lebanon	21.0	0.0	22.0	43.0	10.8%
Libya	11.5	10.5	8.0	30.0	7.5%
Sudan	15.0	12.0	34.0	61.0	15.3%
Syria	12.5	20.5	27.0	60.0	15.1%
West Bank & Gaza	11.0	6.0	32.0	49.0	12.3%
Yemen	9.0	9.0	20.0	38.0	9.5%
Total	121.5	87.3	189.5	398.3	100.0%

Table C.6   Allocation of TA by country and sector, 2006/7 (METAC only)

	Monetary and Financial Sector	Public Expend M'gment	Bop Stats	Real Sector Stats	Revenue Admin	Total
Regional	0.0	0.0	8.3	2.0	2.0	12.3
Afghanistan	5.0	17.0	3.0	6.5	7.0	38.5
Egypt	0.0	10.0	5.0	12.0	2.0	29.0
Iraq	1.5	3.0	3.0	10.0	0.0	17.5
Jordan	0.0	2.0	3.0	10.0	5.0	20.0
Lebanon	2.0	10.0	0.0	30.0	1.0	43.0
Libya	9.5	0.0	3.5	14.0	3.0	30.0
Sudan	22.0	12.0	3.0	17.0	7.0	61.0
Syria	26.5	8.0	3.0	15.0	7.5	60.0
West Bank & Gaza	29.5	0.0	3.5	16.0	0.0	49.0
Yemen	16.0	4.0	0.0	12.0	6.0	38.0
Total	112.0	66.0	35.3	144.5	40.5	398.3

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[13] Information on revised projected HQ STE for 2006/7 not available.

Table C.7   RAP Allocations for METAC-Eligible Countries, FY 2005

	FAD	MCM	STA	LEG	Total
METAC as % total IMF TA	1.22	0.65	0.13	-	2.01
METAC as Percent of Total TA to MCD countries	(10.9)	(5.2)	(2.8)	(-)	(6.8)
Percentage of total Fund TA (including METAC)					
Afghanistan	0.95	0.70	0.74	0.15	2.55
Egypt	1.05	0.26	0.09	0.17	1.57
Jordan	1.60	-	0.14	-	1.74
Lebanon	0.43	0.35	-	0.04	0.82
Libya	-	0.12	-	-	0.12
Sudan	0.15	0.22	-	-	0.37
Syria	0.45	1.32	0.28	0.11	2.16
WBG	-	0.20	0.16	-	0.36
Yemen	0.04	0.16	0.17	-	0.36

Table C.8   RAP Allocations for METAC-Eligible Countries, FY 2006

	FAD	MFD	STA	LEG	Total
METAC as % total IMF TA	1.46	1.58	0.32	-	3.36
METAC as Percent of Total TA to MCD countries	(12.5)	(10.9)	(5.8)	-	(10.3)
Percentage of total Fund TA (including METAC)					
Afghanistan	1.18	1.36	1.04	-	3.58
Egypt	2.39	0.78	0.24	0.25	3.65
Iraq	-	0.60	0.42	0.01	1.04
Jordan	0.23	-	0.09	-	0.32
Lebanon	0.53	0.24	0.17	0.08	1.01
Libya	0.65	0.28	0.33	-	1.25
Sudan	0.28	0.82	0.20	-	1.30
Syria	0.43	1.30	0.27	0.02	2.01
WBG	0.14	0.91	0.04	0.03	1.12
Yemen	0.48	0.36	0.18	-	1.02

Table C.9   RAP Allocations for METAC-Eligible Countries, FY 2007

	FAD	MCM/MCD	STA	LEG	Total
METAC as % total IMF TA	2.02	1.23	1.20	-	4.44
METAC as Percent of Total TA to MCD countries	(21.2)	(12.4)	(14.3)	(-)	(15.4)
Percentage of total Fund TA (including METAC)					
Afghanistan	0.48	0.48	1.10	0.06	2.12
Egypt	0.78	0.54	0.39	0.03	1.74
Iraq	0.15	0.28	0.53	0.01	0.97
Jordan	0.22	-	0.17	0.02	0.40
Lebanon	0.66	0.02	0.26	-	0.94
Libya	0.09	0.03	1.16	-	1.28
Sudan	0.53	1.18	0.42	-	2.13
Syria	0.23	1.89	0.35	0.14	2.59
WBG	-	0.41	0.26	0.05	0.73
Yemen	0.09	0.08	0.18	0.02	0.37

Annex D: Persons met / interviewed

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