



Ministry of Foreign Affairs

Final Evaluation Transition Facility

Commissioned by the Netherlands Enterprise Agency

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Final Evaluation Transition Facility

Final Report



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Acronyms

ASEAN	Association of Southeast Asian Nations
B2B	Business to Business
B2G	Business to Government
BEE	Black Economic Empowerment
BRICS	Brazil, Russia, India, China, South Africa
BZ	Ministry of Foreign Affairs of the Netherlands
CAGR	Compound annual growth rate
CBS	Statistics Netherlands
CSR	Corporate Social Responsibility
CVC	Cauca Valley Corporation
DDE	Department of Sustainable Economic Development, Ministry for Foreign Affairs
DHI	Demonstration Projects, Feasibility Studies and Knowledge Acquisition Projects
DHK	Instrument for demonstration projects, feasibility studies and knowledge acquisition
DIO	International Enterprise Department, Ministry of Foreign Affairs
EQ	Evaluation Question
EU	European Union
BZK	Ministry of the Interior and Kingdom Relations
FDI	Foreign Direct Investment
FMO	Dutch Entrepreneurial Development Bank

G2G	Government to Government
GDP	Gross Domestic Product
IFC	International Finance Corporation
ILO	International Labour Organization
IOB	Policy and Operations Evaluation Department of the Ministry of Foreign Affairs
KPIs	Key Performance Indicators
M&E	Monitoring and Evaluation
EZK	Ministry of Economic Affairs and Climate Policy
MTR	Mid Term Review
NL	Netherlands
ODA	Official Development Assistance
PDF	Partnership Development Facility
PIB	Partners for International Business
PSI	Private Sector Investment Programme
RVO	Netherlands Enterprise Agency
SMEs	Small and Medium-sized Enterprises
STC	Not an acronym: name of a company
STP	Sustainable Trade Partnership
TF	Transition Facility
ToC	Theory of Change
ToR	Terms of Reference

WRR	Netherlands Scientific Council for Government Policy
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EXECUTIVE SUMMARY

This is the final report of the evaluation commissioned to provide insights into the process, concept and design of the Transition Facility (TF). The evaluation assesses which TF components provided the conditions for a transition from aid to trade relations between the Netherlands and three middle-income countries – Colombia, South Africa and Vietnam – including the extent of the transition, as well as understanding the effectiveness of the transition approach. The evaluation also provides relevant policy findings on the transition from aid to trade, and whether expectations were met and practical challenges were addressed.

In 2011, the Dutch government initiated the TF to guide the transition from development cooperation to a mutually beneficial economic relationship between the Netherlands and three selected countries graduating from development cooperation: Colombia, South Africa and Vietnam. The TF was established in the context of the global financial crisis and to foster a broader approach to development aid, predominated by trade and the realisation that cooperation should be based on “Less pretention, more ambition”, as the Netherlands Scientific Council for Government Policy (WRR) put it in 2010.¹

The ultimate vision to fully transform the bilateral relationship was supported by the two main TF objectives:

- 1) enabling the shift from a bilateral development relation towards mutually-beneficial economic cooperation (non-official development assistance (ODA) objective); and
- 2) improving the business climate in sectors with opportunities for Dutch enterprises (ODA objective).

The Ministry of Foreign Affairs of the Netherlands and the Ministry of Economic Affairs and Climate Policy established the TF jointly, with management delegated to RVO and the Embassies in Colombia, South Africa, and Vietnam. In 2011, the TF was the first programme where RVO and the Embassies jointly managed a programme, generating lessons learnt for similar joint management structures. As the TF embodied a new approach, it initially needed time to establish new procedures and innovative ways of working that were not immediately available.

A Transition Desk was established at RVO providing multiple channels of access to TF financing. It also had the function of conducting flexible discussions on project ideas with applicants and coming to a joint funding decision between RVO and the relevant Embassy.

The TF combined on-demand support to Dutch companies and partner countries and proactive government-action for connecting markets between the NL and partner countries. It has used a wide array of instruments for channelling both ODA and non-ODA funds.

¹ Peter van Lieshout, Robert Went and Monique Kremer, *Less Pretention, More Ambition* (Amsterdam University Press 2011). The Netherlands Scientific Council for Government Policy is an advisory body to the Dutch Government and determine its programme of work in consultation with the Prime Minister. Its reports are proposals for policy, rather than policy itself.

The approach resulted in a portfolio of 407 interventions in nineteen sectors, with the five most prominent sectors of support being water, agro-food, transport and logistics, renewable energy, and agro-horticulture. The total budget allocation was EUR 41 million for a period of four years. The total budget used was EUR 34 million, with the difference explained by project activities that were not implemented due to changes in circumstances.

The TF provided support for activities to individual applicants and consortia constituted by Dutch companies, Dutch government entities, NGOs, and local companies and government entities.

Evaluation approach and methodology

The evaluation applied a theory- and evidence-based approach, applying outcome harvesting and contribution analysis on a sample of nineteen projects and comparing findings across countries and sectors. It has triangulated this main evidence source with a survey directed to all TF applicants, the findings of the MTR (including the MTR sample of projects), a portfolio analysis, and desk review of evaluations of programmes by the Dutch government that had similar approaches.

Inherent limitations in the approach warrant caution in interpreting results, namely the challenges in understanding the role of the TF amid the complexity of the global economy and country-level political, social, and economic factors, as well as reaching TF stakeholders, given the time that had passed since the projects had ended.

Key findings

The understanding and trajectories of the transition differed among policy-makers and target countries, also evolving over time. Shifting objectives are more difficult to achieve than ones that remain stable over time. The concept of a transition from aid to trade no longer appeared in the 2018 policy note “Investeren in Perspectief: goed voor de wereld, goed voor Nederland” that indicated how the government was tackling international challenges and opportunities in the interest of the Netherlands.² No additional countries were identified for transition policy since the TF ended. However, discussions on whether a transition policy would be beneficial for countries like South Africa, Vietnam, Colombia, and also Indonesia, Ghana, and others continues in BZ, without earmarked funding or strong political drive supporting it.

The three TF target countries also went through the transition process in different ways. Substantial progress was made in Colombia, but the transition was not considered complete. In South Africa, transition was not achieved, and the deadline to achieve this transition for the Embassy was formally extended for an additional two years. Vietnam formally concluded the Transition Facility early triggered by the end of the Multi-Annual Strategic Plan (2008-2011), although some felt that this was too abrupt and early.

² Ministerie van Buitenlandse Handel en Ontwikkelingssamenwerking, 'Investeren In Perspectief - Goed Voor De Wereld, Goed Voor Nederland' (2018) <<https://www.rijksoverheid.nl/documenten/beleidsnota-s/2018/05/18/pdf-beleidsnota-investeren-in-perspectief>> accessed 4 June 2020.

A substantial minority of individual TF projects from the evaluation sample promoted commercial success for individual companies. Most of the projects that promoted commercial success were in Colombia. Companies were also able to use TF support to expand into other markets in the region. Considering the time lag involved and the unequivocal TF success in building local partnerships, some of the supported projects may still contribute to increased trade in the future.

The main achievement of the TF was to expand collaboration between Dutch and counterpart actors. Collaboration came in the form of market interactions with potential clients, local companies providing services to Dutch companies, and counterpart government and knowledge institutions. Market entry and building local partnerships had value in itself, even for projects that did not yet achieve commercial success, presumably with a view to future commercial success or as a springboard into other markets.

While traditional development aid substantially declined, the TF contributed to some broader development outcomes, including through its support to companies. There is anecdotal evidence of the effects of company operations on improving livelihoods through job creation and a better working environment. Dutch companies also contributed to strengthening the policy framework and counterpart government capacity in key sectors. However, while compliance with corporate social responsibility (CSR) standards was formally included as a project design requirement and some TF projects focused on strengthening compliance in markets, their implementation was not monitored over time. The Dutch Government now regards compliance with CSR standards as an important part of its policy for development, but this was not so at the time the TF was established.

The TF influence on the broader business environment was more limited. The TF did not sufficiently target nor did it allocate enough resources to business climate reform. This reduced the ability of the TF to support the target countries in attracting foreign investment and supporting commercial successes at a significant scale across the economy. This also hampered access of non-TF beneficiaries from the Netherlands to the target market.

Overall, reduced development assistance was not matched by increased trade or investment from the Netherlands to the TF target countries. The TF did not alter overall trade trends, whether total trade or trade in key prioritised sectors such as horticulture or services, nor did the relative market position of the Netherlands improve in comparison with other EU and non-EU trading partners. Moreover, the likelihood of individual TF users engaging in trade did not improve in comparison with unsuccessful applicants. Ultimately the TF may not have been sufficiently large or long term to have led to sustainable increased trade.

EQ 1: What context-specific criteria and conditions appeared to be critical in each of the three TF countries in the transition from a bilateral (development) relationship to a more mutual trade and investment relationship?

Global trade trends and the national context were the most important factors influencing the outcomes of the TF. Whether global trade contraction, trade relations between China and the United States, the price of oil or more domestic variables such as trade agreements, trade relations with other countries, phytosanitary measures, currency fluctuations, refugee flows or changes in government, these externalities were major determinants along the transition path of each of the countries. The economic advances in Vietnam brought the TF to an early close. The economic and political conditions in South Africa proved particularly challenging for TF projects. The mixed conditions in Colombia – with strong economic growth in an economy that mainly produces commodities – resulted in a mixed transition.

The most critical market factor influencing the transition was the demand for the goods and services offered by Dutch firms. The demand for Dutch know-how and technology was a critical condition for market entry and commercial success. This demand existed particularly in Colombia, for private investment in the horticulture or logistics sector, but most notably also from the government in the water and transportation sector. Of the three countries, Colombia offered the Dutch companies most opportunity to successfully bid for public procurement contracts, among the sample of projects reviewed. At the same time, the added value and appropriateness of Dutch innovation and technology was also a major factor in the failure of some projects, in the case of less appropriate or affordable solutions.

The most successful projects tended to comprise multiple constellations of partners (e.g. B2B, G2B, B2G).

The TF did not have the scope, strategic approach, and budget size to address the most pressing market barriers facing Dutch companies in the TF projects, such as access to finance and infrastructure, but rather tended to address market information, technology, and skills gaps. strategic approach?

Market presence and local partnerships were also a critical condition for the commercial success of individual projects. Most projects in the sample strengthened local partnerships. B2B relations were the most common type of relationship fostered, with less support provided for G2G efforts. The most successful projects had multiple constellations of partners, ranging from B2B, G2G, B2G and K2K relationships.

EQ 2: What mix of components/instruments under the TF proved to be most effective and why?

Although specific outcome targets were identified for TF (as if it were a stand-alone instrument), all directly involved stakeholders refer to it as ‘a facilitating mechanism, an approach to apply existing instruments in a flexible and better focussed manner’.³ The novelty of this approach

³ MTR reference

included : the elaboration of intervention strategies; the availability of financial resources and manpower to initiate sector specific interventions; the coordination and joint decision-making between the embassies and the Netherlands Enterprise Agency; the collaboration at policy level between the Ministry of Economic Affairs and the Ministry of Foreign Affairs to tune their approaches and practical implementation features, as well as the operationalisation of the Transition Desk.

The fact that the TF supported a large number of isolated interventions with relatively small budgets reduced its effectiveness and made it more difficult to explore the mix of components and instruments. Most project applicants implemented only one project. Initial studies – the most common type of intervention – were not followed up by the implementation of project ideas, also due to budget limitations. For the total budget allocated for all TF projects (41 million) the average budget per project is 100,712. For the total budget used for all TF projects (34 million) the average budget per project was 83,578 EUR. Only two out of over 400 projects had budgets over EUR 1 million.

While the countries did have multi-annual country strategies, including prioritised sectors, these were not always followed. All of the target countries had clear sector priorities and followed market opportunities as identified during the inception of the TF. However, only Vietnam applied the 80:20 rule, with 80 percent of interventions specifically targeting the priority sectors defined for each country .

Clustering projects by policy and cooperation themes was an emerging strategy, with particular success demonstrated in the transportation, water and logistics sector in Colombia. In our sample, the successful cluster in water, logistics, and transport in Colombia employed at least policy dialogue, studies, training, conferences, trade missions and technical assistance to the government and private companies and resulted in a few public contracts. More than any specific instrument, the success of the cluster was largely due to the high profile of Dutch expertise that was applied, as well as the openness and eagerness of the Colombian counterparts to engage in cooperation with the Netherlands.

The TF employed a proactive approach that involved embassy and RVO efforts along with demands coming from Dutch business and partner governments in identifying business opportunities through initial sector market research and exploration. Individual projects, driven by the private sector followed up on identified opportunities. Project identification and design was more ad hoc and diverse than the planned cluster approach. Weak thematic and policy connections across projects emerging in clusters were at least as effective across the sample, as more formal sequencing.

While the dual management process that assigned joint responsibility for project identification to RVO and the Embassies was initially challenging, collegial decision-making improved through implementation; although challenges persisted in South Africa. In the end, the effectiveness of

flexibility and collegiality of project identification was one of the main attributes and positive lessons learnt from the TF.

EQ3: What projects continued, what companies increased their trade relations, and did they experience an improved trade-enabling environment and increased market access? How and to what extent did TF facilitate this?

While about half of the projects continued their activities after the end of TF support, additional financing –especially Dutch grants – were frequently required. Together with gaining market information and access, especially through local partnerships, this may suggest that the commercial success sought may still come. However, ultimately the TF may not have been sufficiently large or long term to have transformed the bilateral relationship and resulted in sustainable increased trade. The TF has not, for example, connected to other large programmes of the Dutch government for providing guarantees and finance to businesses. Coordination with other donors was also not always evident on TF interventions.

Recommendations

The evaluation has conducted a sense-making discussion together with the staff at BZ and RVO involved in the evaluation. From the discussion, thematic clusters have emerged for grouping the findings and recommendations around their learning and evidence needs. Following on this, the evaluation presents in the following table recommendations grouped, against the supporting conclusions, around the following clusters:

1. The TF approach to working together across Ministries and Agencies of the Dutch Government, especially the Transition Desk
2. The contextual success factors for the Transition
3. Establishing synergies between the objectives of supporting Dutch companies and generating development results, especially in the field of a better business climate
4. Strengthening the governance and strategic focus of cross-government programmes
5. Strengthening the monitoring and evaluation of complex programmes.

Conclusion	Recommendation	Responsibility
1. Internal success factors of the TF: networks and Transition Desk		
The TF project identification and facilitation process was initially contentious due to both parties adapting to the new dual management structure	1. In future cross-government programmes, replicate approaches such as the Transition Desk that facilitate a smoother collaboration between BZ, Embassies, and also other Ministries , especially the Ministries in charge of top sectors, such as the Ministry of Economic Affairs and Climate	Relevant for all cross-government (inter-Ministry / inter-agency) programmes

<p>and roles and responsibilities, although collegial decision-making improved during implementation.</p>	<p>Change for programmes supporting Dutch companies abroad. From the start, incorporate a change management approach with the aim of smoothing collaboration between Ministries, RVO and embassies in future cross-government programmes, clearly defining roles, responsibilities, governance, and procedures.</p>	
<p>Flexibility and collegiality in project identification was considered one of the most important lessons learnt from the TF, with the TF also allowing involvement of other Ministries and Dutch government agencies in TF projects</p>		
<p>The collaboration across Ministries did not succeed as expected, as the TF was relocated inside BZ and the majority of financing sources of the TF was ODA</p>		
<p>The absence of delegated budget at the Embassy level is not a barrier for involving the Embassies in decision making on programmes funded with central-level budget.</p>		
<p>2. Success factors: contextual factors and how the TF has responded to them</p>		
<p>TF influence on the commercial success of individual companies and broader trade and investment trends was limited. The main TF achievement was</p>	<ol style="list-style-type: none"> 2. Set more realistic objectives at the programme level, with achievable and measurable targets that are regularly monitored. 3. Explore coordination with complementary investments (e.g. multilateral development banks, other donors) to access funding to 	<p>Relevant for future programmes working on transition from development</p>

<p>obtaining market presence and building strong local partners, particularly B2B and B2G relationships.</p> <p>Due to its limited scope and size, the TF could not always address the most pressing market barriers, and was not sustainable over time.</p> <p>While about half of the projects continued after the end of TF support, additional finance – including Dutch grants – was frequently required.</p>	<p>ensure that all relevant market conditions (e.g. access to finance, infrastructure) are in place for business success in a given sector.</p> <p>4. Continue building the relationships successfully established in the countries after the formal end of the transition. Strengthen G2G relationships through economic diplomacy, as well as capacity-building support where required.</p>	<p>cooperation to trade</p>
<p>The transition is not a linear process. Countries can experience set-backs in their development processes (economic crises, political crises, etc...).</p>	<p>5. Ensure the opportunity to quickly adapt transition programmes, in case of substantial changes in the enabling factors and barriers to expanding Dutch trade in particular countries, ensuring that there is a pathway back to development cooperation as well as a pathway forward to trade and investment.</p>	
<p>Global trade trends and the national context were the most important factors influencing the transition. The most critical market factor influencing the transition – especially for individual projects – was the demand for the goods and services offered by Dutch firms, particularly know-how and</p>	<p>6. Reform the project identification requirements of future and current programmes involving Dutch business in economic diplomacy to be more mindful of contextual opportunities and challenges that could affect project proposals. Ensure that market analysis and discussions with local partners are conducted (include in project fiche). The project identification should discuss and assess market demand for Dutch goods and services adequately, making sure that the Dutch technology and services are suited to the markets, and whether the Dutch company understands the partner</p>	<p>Embassies/RVO/TF Beneficiaries</p> <p>Relevant for future and current programmes involving Dutch business in economic diplomacy</p>

<p>technology, and linking with local partners.</p>	<p>government well (in case the project requires them to work with the public sector).</p>	
<p>3. Synergies between aid and trade agenda</p>		
<p>Programme can be realistically designed to achieve the objective of supporting Dutch enterprises and achieving development outcomes, such as the outcome of supporting the business environment.</p> <p>The TF had strong potential to contribute to broader, development outcomes in the targeted countries, with half of the project sample demonstrating related results (e.g. the provision of public goods, benefits to small-scale farmers and more responsible business practices). However, as related data was not gathered, it was not possible to assess the indirect influence of supported companies' success on the broader economy and community.</p>	<p>7. Establish a transition policy, if possible, for countries that graduate from development assistance, without forcing the transition for reasons connected only to Dutch politics. Establish programmes that are able to respond to reversals in country conditions (economic or political crisis).</p> <p>8. In programmes with a double objective, the development outcomes would have to be more clearly incorporated into programme objectives, with related KPIs and monitoring during implementation, than was the case in the TF. The focus of programmes with a double objective of supporting Dutch business and delivering development outcome should then be on those Dutch firms that can deliver value for business environment and are at the forefront of doing business not just sustainably but actually producing environmental and social benefits, rather than on Dutch firm generally.</p> <p>9. In addition to prescribing adherence to CSR standards, actual company implementation and performance on environmental and social standards would need to be tracked over time; for example, through related company plans and grievance mechanisms, potentially through agreements with third-party neutral entities (for example, NGOs).</p>	<p>Relevant for BZ policy on synergy between objectives of supporting Dutch business and delivering development outcomes</p> <p>BZ/Embassies</p> <p>Embassies/RVO/TF Beneficiaries</p>
<p>Despite its relevance for both attracting foreign investment and supporting commercial successes at scale across the economy, business</p>		

<p>climate reform was not sufficiently targeted and was allocated few resources.</p>		
<p>Promoting CSR and environmentally and socially responsible business practices was a requirement in the design of individual projects, but it was not universally applied, resulting in mixed performance across projects on these criteria.</p>		
<p>4. Strategic focus of the TF</p>		
<p>While the TF was guided by overarching sector priorities and market opportunities, the efficiency of a large number of isolated interventions with relatively small budgets reduced TF effectiveness.</p>	<p>10. Establish a robust Inter-Ministerial and Inter-agency governance structure for cross-government programmes that is above operational level. Governance should be at a level where strategic choices can be taken and synergy created, including planning for the long term, adapting the programme to action and changes in circumstances, connecting with other donors in other countries, other Ministries in the Dutch government, and across objectives and countries.</p> <p>11. At the strategic level, strengthen coordination with other donors. Before transitioning, assess the remaining international offer of aid funds from other countries, understand whether other countries will follow the transition, and what risks moving first in the transition may pose. Working in coordination with complementary investments (e.g. multilateral development banks) to ensure</p>	<p>Embassies/RVO/TF Beneficiaries</p>
<p>The Netherlands government and three TF target countries had very different understandings of transition and very different development trajectories of the transition.</p>		
<p>Clustering projects across policy and cooperation themes was an emerging strategy, with a more ad-hoc and diverse approach</p>		

<p>than a proactive, formal sequencing of interventions.</p> <p>This approach was particularly successful in the transportation, water and logistics sector in Colombia.</p>	<p>that all relevant market conditions are in place for business success in a given sector.</p> <p>12. Without jeopardising access of SMEs, select fewer but longer-term, more strategic, larger-scale commitment (e.g. higher budget caps) projects to address systemic market barriers and increase business impact. Projects that could be prioritised to achieve this are ones that build connections or strong consortia between Dutch companies. Alongside a stronger strategic governance and focus, maintain the flexibility of promoting emerging clusters, but define better systems and procedures for monitoring in real-time their establishment, evolution and performance.</p>	
<p>5. Monitoring and evaluation</p>		
<p>The monitoring and evaluation of the transition was not as strong as it could be due to the absence of baseline, annual review, constant monitoring of key indicators, and annual strategic discussions informed by the accumulating evidence.</p>	<p>13. Introduce innovative and robust M&E instruments that are linked to decision-making at the strategic level. Missing M&E elements are: 1) setting a baseline, 2) establishing M&E instruments and procedures at the outset that allow collecting qualitative and quantitative data and information on the contribution factors at play, 3) conduct annual monitoring 4) and have annual discussions on progress and lesson learnt.</p>	<p>Relevant for all cross-government (inter-Ministry / inter-agency) programmes, RVO and Embassies</p>

1 Introduction

This is the final report of the evaluation commissioned to provide insights into the process, concept and design of the TF. The evaluation seeks to validate which TF components have been effective at supporting the transition from aid to trade relations between the Netherlands and three middle-income countries, including their extent and contexts. It also provides relevant policy findings on the transition from aid to trade, as well as whether expectations and practical challenges were met through the TF implementation path. Furthermore, the evaluation provides input for the next IOB evaluation of the Dutch international economic policy, planned for 2020.

The evaluation report is organised around the main evaluation questions and sub-questions, as well as the TF Theory of Change (ToC). Chapter 2 contains the purpose, methodology, and related limitations. Chapter 3 contains background information on the TF, including the TF ToC. Chapter 4 presents the extent of progress of selected, individual TF projects as well as the broader economy in the shift towards mutually-beneficial economic cooperation. Chapters 5 and 6 present the findings on the enabling factors and barriers for the transition. Chapter 7 presents the findings on the mix of components and instruments that were associated with success, as well as the organisational challenges and solutions adopted by the TF. Chapter 8 covers sustainability, before chapter 9 presents the conclusions, and finally chapter 10 offers recommendations.

2 Purpose, scope, and methodology

2.1 Purpose and scope of the evaluation

The main purpose of the evaluation was to understand whether, under what conditions and how the TF concept, components, instrument types and sequencing contributed to transforming the bilateral aid-based relationship to a market-based relationship.

The evaluation focus was on understanding the TF achievements and their enabling factors and barriers, both contextual and internal to the combinations and types of TF interventions.

The evaluation's learning orientation aims to serve the learning needs of the Ministry of Foreign Affairs (BZ) and the Netherlands Enterprise Agency (RVO) on current and future similar programmes, e.g. private sector development (PSD) and business development (BD), as well as policy evaluations that serve broader economic sector policy.

The evaluation team has selected three comparable sectors (horticulture, transportation & logistics and water) in the three countries of Colombia, South Africa and Vietnam, with an emphasis on the portfolio since 2016. It has, however, included in the triangulation approach the findings of the TF mid-term review.⁴

2.2 Methodology

The evaluation applies a theory-based approach, rooted in evidence, using comparison and contribution analysis to answer the three core evaluation questions (EQs) in Box 1.

Box 1 Evaluation questions

EQ 1: What (success) criteria and conditions appeared to be critical in the transition from a bilateral (development) relationship to a more mutual trade and investment relationship in the three TF countries?

EQ 2: What mix of components/instruments under the TF proved to be most effective and why?

EQ 3: To what extent was the support provided by the TF sustainable?

Theory-based evaluation: The evaluation builds on the ToC prepared for the TF MTR, but modifies it to focus more on TF's flexibility and the complexity of the internal change process in

⁴ ERBS BV, 'Mid-Term Evaluation Of The Transition Facility' (2017) <<https://www.rvo.nl/sites/default/files/2017/07/Tussentijdse-terugblik-transitiefaciliteit.pdf>> accessed 4 June 2020.

the Dutch Government, which required an internal re-organisation in the Dutch government, and the influence of many contextual factors, and was not linear.

The evaluation structures the report and maps the EQs to the TF logic to identify the outcomes and pathways of change that it tested and interpreted through evidence gathering. The ToC also contributes to the structure of this report, as each of the chapters related to a different outcome and set of assumptions of the ToC.

Evidence-based: The TF had identified an initial set of outcome indicators (Box 2), although these were not systematically applied during implementation and targets for success were only set in a few cases, notably in Vietnam. Due to the lack of data gathering on performance against targets, the evaluation team has complemented this data with qualitative evidence gathered through an outcome harvesting approach that had been calibrated on the ToC and with the mid-term review. Outcome harvesting is a method that explores triangulate signs of change, supported by multiple sources, that are relevant for the programme ToC by way of establishing relevant outcome areas to guide the harvest. During inception, the evaluators have defined outcome areas broad enough to accommodate unexpected and unintended signs of change, but also clear enough to guide the evaluators in collecting data. The outcome areas chosen for the evaluation have been:

1. Trade and investment benefits to Dutch or local companies
2. Market functioning in the sector, including solving of trade barriers
3. Business climate for the sector
4. Number of Dutch companies active in the sector
5. The effectiveness with which the Netherlands engages in economic diplomacy
6. Improved relationship and network with the partner country
7. Any other sign of change that the respondent finds relevant.

The data collection has been guided by dedicated tools for key informant interviews (annex 3), questionnaire for the survey (annex 6), a standard summary data analysis tool at the level of case studies (Table 1) and a standard set of analytical questions to guide contribution analysis (see annex 5).

Box 2 TF outcome indicators

1. Amount of private co-investment generated
2. Number of companies planning to invest or trade in the TF countries (local/Dutch, male/female)
3. Visible participation and cooperation of Dutch companies other than TF applicants (in priority sectors)
4. Reference to/request for NL knowledge and expertise from TF countries
5. Increase in assignments obtained by Dutch companies outside of the TF
 - a. Number of assignments
 - b. Size in euros (multiplier had been estimated in advance at DHK)
6. Number of new companies that have become active (+ type of activity and degree of concreteness). Norm: at least 80
7. Number of clusters of companies from the top sectors that have become active. Norm: at least 4
8. What laws, regulations or policy plans were improved and adopted?
9. Did economic institutions and actors become stronger?
 - a. Number of strengthened (farmer/workers/entrepreneurs/traders) organisations
 - b. Number of members of supported organisations
10. Number and type of knowledge transfer activities
11. Local beneficiaries appreciate the knowledge transfer
12. Volume and number of contracted projects and forms of cooperation by TF applicants in the TF countries after the TF period (questions in number, nature and form)

Comparative approach: The evaluation team selected a sample of nineteen projects for in-depth review. The sampling was guided by the evaluation questions and theory of change, ensuring that the selected sample would allow the evaluators to explore the role of country-level, sector-level, and temporal intervening factors.

The final sample selection targeted projects from two sectors that had a relevant number of post-2016 projects in all three countries, including projects belonging to a cluster. The final selection comprised 1) horticulture (three projects) and 2) transportation and logistics (nine projects). The sector sample was expanded to include the water sector in Colombia (five projects) due to the policy importance of this sector, even though the water sector did not have projects in all three countries post-2016. Likewise, the Holland House (one project) in Colombia was included due to its innovative nature.

The initial sample of projects was revised together with the embassies and the RVO to replace cases where project applicants and leaders could not be reached, or the applicant company no longer existed. Aggregate results were presented from the sample of nineteen projects, with detailed examples for further clarification. The quantification of qualitative data relied on the number of projects that had achieved commercial success, development outcomes and increased

cooperation, among others. A five-point Likert scale⁵ was applied to assess the presence of market barriers and the role of different actors in the facilitation of projects. This allowed for a more systematic comparison across countries, sectors, types of market barriers and actors. \

We have obtained an extra sample of 20 projects from the desk review of the MTR. The MTR included in the annex an overview of the case studies it has conducted. We have reviewed the list, excluded from this extra sample the projects that we had already selected for the final evaluation sample, and, to the extent possible, coded the information available for the MTR case studies according to the same analytical framework used for the final evaluation sample.

The MTR case studies has allowed us to replicate and therefore triangulate the outcome harvesting and, partially, the contribution analysis conducted for the final evaluation sample, given that they reported information on project outcomes and on the main contributing factors, albeit inconsistently for the latter category. However the MTR case studies have not allowed us to replicate other parts of the analysis, in particular the analysis of contribution to solving trade barriers, because they had not collected comparable information. We present the findings from the MTR-sample of case studies in the relevant sections of the report, at the end of the main discussion of the finding arising from the final evaluation sample.

Contribution analysis: The evaluation team opted for a contribution analysis approach. Seeking clear attribution to a single mechanism is difficult and not in the RVO's interest, given the complexity of the global economy and the multiple, interdependent, and complex external factors influencing the outcome of transition. Therefore, the evaluation did not systematically identify a counterfactual, although some work has been attempted using Statistics Netherlands (CBS) data, comparing successful and unsuccessful applicants.

Contribution analysis was applied at the level of each project and the overall TF, defining the changes achieved against the main areas in the ToC and exploring the main contribution mechanisms, whether within or beyond the influence of the RVO, embassies, and project applicants. This analysis was then tested against the TF ToC to draw final conclusions on the extent of progress, as well as which pathways and (combinations of) instruments were more effective than others.

⁵ High=5, medium=4, low=3, none=2, not applicable=1.

Mixed methods: During inception, a desk and portfolio review was conducted based on the TF strategic documents and interviews with the TF architects. During implementation, data was collected through 101 semi-structured qualitative interviews in the Netherlands with Dutch applicants, RVO staff, and BZ staff, and in the three countries with embassies and project consortium partners and counterparts. Qualitative data was analysed using outcome harvesting and contribution analysis.⁶ An electronic perception survey (e-survey) was added for triangulation, targeting the entire population of project applicants. The evaluation also included a [Box 3 CBS approach to provide differential trends before and after the transition](#) quantitative analysis of bilateral trends in trade and investment and ODA using longitudinal data. The evaluation took place between October 2019 and April 2020, with country visits to Colombia in December, South Africa in January and Vietnam in February.

Separately from the evaluation work, the RVO commissioned CBS to analyse the performance of successful and unsuccessful TF applicants. CBS's approach to this analysis was to combine all applicants into a common timeline, where time was relative to the year in which the application was approved or rejected, which was considered year "t". Accordingly, "t" might have been 2013 for applicant x and 2015 for applicant y, but both (and all other applicants) were reported against year "t". Trends were then established relative to year "t", with CBS reporting from two years before (t-2) to two years after (t+2) year "t".

2.3 Limitations of the approach

Appropriate caution should be exercised when interpreting these evaluation findings and considering the recommendations in view of limitation in data availability and in the analytical approach.

The process used to identify participants and solicit their input did not completely eliminate selection bias. Due to necessities of time, budget, and the lapse in time between TF completion and the evaluation, identifying participants significantly relied on their responsiveness and references from other stakeholders. Those who chose to participate in the evaluation were likely self-selected, having the most stake – positive or negative – in providing feedback. This suggests that the opinions collected may be more strongly positive or negative than the average across all participants. This is true for the information collected via both interviews and the e-survey.

The evaluation team were not always able to reach key stakeholders. The evaluation team sought to triangulate findings across multiple projects, stakeholder types, and TF countries, although due to the lapse in time since TF completion, personnel had changed positions and the stakeholders reached were not always the most central players in the TF design or implementation. This limited the ability to generalise from the information collected.

⁶ Details on these approaches were included in the inception report. could this be put into an Annex?.

The external data used in the analysis also had limitations. Data availability on trade in services is generally weak, which is an issue because the e-survey of TF applicants suggested that the majority of Dutch companies supported by the TF provided services rather than goods. The Netherlands either has not reported trade in services to COMTRADE and the World Trade Organisation (WTO), or the reporting was mischaracterised. Data is only available until 2012 for Colombia and Vietnam and sub-category data for South Africa was generally unavailable. Furthermore, due to limitations in collection and reporting, consistent data sources could not be used across TF countries. For example, understanding trends in trade in services required the use of one data source for South Africa (WTO), but there was no up-to-date source at all for Vietnam or Colombia. While the trends observed may be internally consistent within countries, comparison across countries is limited by differences in data collection and definitions across sources.

Isolating the influence of the TF-funded interventions from the interventions funded by other Dutch actors was a challenge. The sample of nineteen projects for in-depth review also included interventions with small budgets that might have been part of broader strands of work. These may have been funded – in part or whole – by the TF, private companies, counterpart governments, and other entities of the Dutch government. The rationale for including this type of project was clear since this constituted a substantial part of the TF portfolio, although it created challenges in understanding what changes can be linked to the TF in terms of contribution.

There was a substantial time lag between interventions and trade benefits. The sample of nineteen projects included projects funded after 2016 and some initiated during 2018. A lag existed between the time when the support ended and when a Dutch company may have started exporting to or working in a new market. For this reason, the possibility of future results cannot be foreclosed.

No aggregated information or monitoring of performance against indicators was available. As mentioned, the TF did not report aggregate results from its portfolio of projects against targets, thus making it difficult to assess overall progress.⁷

Generalising from the project-level data to changes in the bilateral relationship between countries was also challenging. The predominant amount of data was gathered at the project level, with less primary data available at the country level. The attribution challenge was also substantial, between limited, single interventions and policy-level change.

Difficulties were faced in defining, identifying and isolating clustered and sequenced interventions. During the inception, the RVO provided a useful overview of what interventions

⁷ This is in line with limitations encountered on the availability of monitoring data in earlier RVO evaluations of the 2G@there and Partners for International Business (PIB) programmes.

might be connected in a cluster. Nevertheless, the emerging character of the cluster resulted in uncertainty about the boundary of the clusters.

The e-survey response rate was low. The response rate to the e-survey was low at around 25%, which appeared to have been partly driven by the fact that the email addresses of project applicants were no longer functional. When excluding the number of respondents who did not open/receive the email, the response rate was around one-third or 33%.

External trends in the global economic outlook fundamentally affected the relationship between TF support and its impact on increasing trade and investment at the country level. The TF coincided with a period of economic cool-down in Europe after the financial crisis of 2008, a moment when key commodity prices were particularly low and operated in a space where other countries also had instruments in place to promote their own trade internationally. For these reasons, it is necessary to exercise due care when interpreting overall trade data.

There was a Colombia bias in the data. The evaluation generated more data for Colombia than for South Africa and Vietnam. As a result, the evaluation's findings reflect the Colombian experience to a stronger extent than in the other TF countries. This was due to the particularly strong networks of the Colombian consultant contracted for this evaluation, who had previously been a high-ranking staff member in the Colombian Ministry of Commerce. In this context, it is notable to observe that the results in Colombia were also more substantial than in the other countries, thus suggesting that over-representing Colombia in the dataset may result in overstating TF effectiveness.

3 Background

3.1 Transition to aid and trade as Dutch policy

3.1.1 Policy framework

In this section, we present the policy framework as reconstructed exhaustively in the MTR and add further policy discussions intervened after the establishment of the TF.⁸

In 2010, amidst of ‘the financial crisis,’ a new government took office in the Netherlands. The section on foreign policy of the Agreement of the Government coalition highlighted the importance of economic diplomacy and the involvement of the Dutch private sector in upcoming markets as vehicle for economic growth and development.⁹

It also envisaged a reduction of the number of partner countries for bilateral aid, reasoning that concentration on less countries would be more effective regarding in-depth knowledge of the political, economic, social and cultural structures of the (remaining) countries and that it would reduce the operational costs.

This approach (partly) followed the recommendations made by the Scientific Council for Government Policy (2010).¹⁰

The vice-minister for Foreign Affairs, charged with Development Co-operation and European Affairs, issued a Starting Note on Development Co-operation, in which the intention to reduce the number of partner countries from 33 to 15 was combined with a further concentration on a limited number of sectors of ‘Dutch excellence’ (i.e. water management, agriculture and horticulture, health, energy, climate and security).¹¹

The Note argued that the Netherlands own economic interests would prevail and support to the private sector would focus on those areas where the Netherlands could make a difference. This ‘fundamental revision’ ‘from aid to investment’ implied that economic development would prevail rather than social development. The Note stressed that ‘encouragement of entrepreneurship as

⁸ ERBS (2017) Mid-Term Review of the Transition Facility.

⁹ Vrijheid en Verantwoordelijkheid. Regeerakkoord VVD-CDA. 2010

¹⁰ Peter van Lieshout, Robert Went and Monique Kremer, Less Pretention, More Ambition (Amsterdam University Press 2011). The Netherlands Scientific Council for Government Policy is an advisory body to the Dutch Government and determine its programme of work in consultation with the Prime Minister. Its reports are proposals for policy, rather than policy itself.

¹¹ Basisbrief Ontwikkelingssamenwerking (2010). November 2010; Staatssecretaris van Buitenlandse Zaken, Ministerie van Buitenlandse Zaken (2011). Focusbrief ontwikkelingssamenwerking. 18 maart 2011.

working modality' would be central within an enabling business climate. This policy implied that 'the relation with these countries would be shaped in the form of a transition facility that will be launched in collaboration with the Ministry of Economic Affairs'. The Note described 'transition' by 'that the relationship between the Netherlands and [...] countries is changing from a development aid relationship to a situation that is mutually beneficial'.

The subsequent Focusbrief (White Paper) listed four focal areas in which Dutch knowledge and expertise are known worldwide: security and rule of law; food security, water and sexual and reproductive health care. With the focal areas food security and water the explicit linkage with the Dutch 'top sectors'¹⁴ was established.¹² Economic diplomacy was supposed to focus on the nine top-sectors of the Dutch private sector and industry; this would also apply for TF.

In parallel, the Ministry of Economic Affairs, Agriculture and Innovation submitted the policy note 'Foreign Markets, Dutch Opportunities' to Parliament.¹³ This document shared the focus on economic diplomacy ('more economic diplomacy and less subsidies') and proposed a strategy for international economic relations consisting of four components:

1. International Excellence: the public sector creates space for international entrepreneurs;
2. Further liberalisation of trade and investment relations and the strengthening of the internal European market;
3. The enhancement of the number of international SME-starters;
4. Increase and affirmation of investments by international top companies.

The roles of government / the public sector and the private sector parties would be agreed upon with the branch organisations. While government would support the top-sectors with tailor-made missions, the international starters from SMEs would be supported in a flexible manner, including financial means from development co-operation funds.¹⁴

The countries of main attention however, were different: China, India, Brazil and Vietnam. The document indicated further that top sector business could contribute to solving development problems in areas such as food security and water, while the role of the Embassies would be on organisation and promotion of Dutch economic interests, such as international trade, scientific-technological collaboration, environment, agriculture, transport and logistics (2011:8). According

¹² The 9 'top sectors' are: Agriculture & Food; Chemical Industries; Creative Industry; Energy; High Technology; Horticulture; Life Sciences & Health; Logistics; and Water

¹³ Ministerie van Economische Zaken, Landbouw en Innovatie. Directoraat-generaal Internationale Betrekkingen. Buitenlandse Markten, Nederlandse Kans. 24 juni 2011.

¹⁴ Each top-sector defines its own research agenda. The 'Topconsortia voor Kennis en Innovatie (TKI's)' implement these agenda's. A TKI-programme encompasses fundamental research, industrial research, experimental development and internationalisation. The Ministry of Economic Affairs supports with subsidies these TKI programmes ('TKI Toeslag').

to the Note, the implementation of the new economic strategy would be shaped around seven modules: (i) information; (ii) advice; (iii) financing, guarantees and insurance; (iv) joint promotion and matchmaking; (v) economic diplomacy; (vi) knowledge intensive collaboration and (vii) acquisition.

In November 2012, a new government established the Ministry for International Trade and Development Co-operation, in which the Foreign Economic Relations Directorate (previously with the Ministry of Economic Affairs) and development co-operation (formerly the [vice-] Ministry for Development Co-operation) were merged (late 2012).

In April 2013, this ministry issued the White Paper A world to gain: a new agenda for Aid, Trade and Investment.¹⁵ This policy document stated that ‘we are shifting from an aid to a trade relationship with ever more countries (‘from an aid portfolio to an aid and trade agenda’), ‘opening our markets to each other’... and ‘at international level, we are pursuing three important aims. First, to eradicate poverty (‘getting to zero’) in a single generation, second, sustainable inclusive growth all over the world and third, success for Dutch companies abroad’. The latter was stressed by ‘we encourage trade and investment mainly in our own interest. The paper grouped the international relationships into three: aid relationships (including conflict-affected and post-conflict countries, fragile states and countries with insufficient institutional capacity to reduce poverty effectively without external assistance, focused at 15 partner countries, transitional relationships (low- and middle-income countries ‘with burgeoning economies’ with which the relationship is based on both aid and trade, hence those countries eligible for funding in support of private sector development, i.e. Bangladesh, Benin, Ethiopia, Ghana, Indonesia, Kenya, Mozambique and Uganda) and trade relationships (primarily based on trade and investment. Colombia, Vietnam and South Africa are all three among the countries listed within the third category (2013:23) and not among the countries listed for a transitional relationship.

Three major agreements between the Ministry of Economic Affairs and the Ministry of Foreign Affairs shaped the implementation strategy of the Transition Facility.

The first agreement was about the countries eligible for support by TF. TF approach could serve only those countries with a Netherlands’ embassy, because it was considered impractical to intensify economic relations with countries without a full-scale representation.¹⁶ The Ministry of Foreign Affairs referred to countries where the bilateral development co-operation would be

¹⁵ A World to Gain: A New Agenda for Aid, Trade and Investment. Ministry of Foreign Affairs of the Netherlands, 2013.

¹⁶ The Netherlands closed its bilateral co-operation with 19 countries. In 5 of these 19 countries (Bolivia, Burkina Faso, Guatemala, Nicaragua and Zambia) the embassy was closed as well.

phased out for reasons of ‘graduation’ (from development country to [lower-] middle-income country), while the Ministry of Economic Affairs preferred to focus on countries with clear prospects for Dutch business and trade, evidenced by interest of the private sector in the ‘subsidy arrangement International Excellence.’¹⁷ The two ministries agreed to ‘pilot’ TF in Colombia, South Africa and Vietnam, with the option that more countries (for example Egypt) would become eligible later. While the policy documents suggest that TF would expand over time, the budget was ensured for a four years period only.¹⁸

A second agreement concerned the financial engineering of using both non-ODA allocations of the Ministry of Economic Affairs and ODA allocations of the Ministry of Foreign Affairs in one programme. Since Embassies deal with ODA resources only (Ministry of Foreign Affairs) they had no direct access to the non-ODA component of the resources (with feelings of discontent at the side of the South African embassy).

A third agreement was that TF would be open to all companies registered with the Dutch Chamber of Commerce, without specific requirements regarding size or ownership. This was in line with the policy document ‘Foreign Markets, Dutch Opportunities’. During the first year (2012) there was no ceiling for the ODA subsidy, but such a limit was introduced in 2013. The ceiling made TF less attractive to large firms and the facility became predominantly geared towards SMEs. The criterion of being a SME applied from the start onwards for the Demonstration, Feasibility and Knowledge (DHK) modality (as previously in use by the Ministry of Economic Affairs).

The MTR review concludes that the establishment of TF coincided with a gradual change in the international paradigm regarding development co-operation. By coincidence this took place in an environment of dealing with the consequences of the financial crisis, expressed by the tendency to reduce public spending alongside the strive for serving national economic interests.

¹⁷ Regeling van de Staatssecretaris van Economische Zaken van 13 december 2009, nr. WJZ/9178621, houdende vaststelling van subsidie-instrumenten op het terrein van internationaal excelleren (Subsidieregeling Internationaal Excelleren).

¹⁸ The policy introduced in 2013 mainstreamed the agenda for aid, trade and investment. This implies that Dutch private entities interested in doing business with counterparts in Colombia, Vietnam and South Africa can make use of both the Private Sector Development and Economic Development instruments open to that end, under equal conditions as those interested in doing business with other eligible countries. The three countries are eligible for i.e. the subsidy scheme for demonstration projects, feasibility studies and investment preparation – DHI; Sustainable Water Fund – FDW; Dutch Good Growth Fund – DGGF; Development Related Infrastructure Investment Vehicle – DRIVE; and the match-making facility.

The MTR also concludes that the TF was designed from a Dutch perspective only. It is neither the result of consultations or agreements between the Netherlands and previous partners in bilateral development co-operation, nor the result of requests from the private sector in the target countries to assist in addressing deficiencies in the local business climate or the local business Impact Intensification of bilateral economic relations.

The relevance of the concept of the transition in the Dutch policy framework has shifted over time. In the ‘A World to Gain’ policy report of 2013, Dutch policy firmly pursued the trade and transition agenda. In this policy document, the TF is specifically mentioned as a key instrument to build upon the aid relationship with the selected countries, and strengthen a new trade and investment relationship.¹⁹ However, in the policy report “Investeren in Perspectief: goed voor de wereld, goed voor Nederland” of 2018, the concept of a transition from aid to trade no longer appears, and in practice the domains of trade and development have been increasingly separated again. No additional countries were identified for transition since the TF ended. Instead, according to perceptions in the RVO, the Dutch government is now giving more priority to instruments focused on CSR and PSD in middle-income countries.

3.1.2 Approach, portfolio and instruments

The Ministry of Foreign Affairs of the Netherlands and the Ministry of Economic Affairs and Climate Policy established the Transition Facility jointly, with management delegated to RVO and the Embassies in Colombia, South Africa, and Vietnam. A Transition Desk was established at RVO through which the TF could be accessed through multiple channels, which also had the function of conducting flexible discussions on project ideas with applicants and coming to a joint funding decision between RVO and the relevant Embassy.

The TF has combined on-demand support to Dutch companies and partner countries and proactive government-action for connecting markets between the NL and partner countries. It has funded a wide array of instruments, using ODA and non-ODA funds.

The TF supported 407 interventions in nineteen sectors, with the five most prominent sectors of support being water, agro-food, transport and logistics, renewable energy and agro-horticulture. The total budget used EUR 34 million from the total budget allocation of EUR 41 million. The difference arises from the fact that projects would submit a request and were allocated the budget but did not always end up spending the entire budget (because project activities were cancelled, did not happen, or the RVO could decide not to disburse the entire budget if the project did not proceed well). For the total budget used for all TF projects (EUR 34 million), the

¹⁹ A World to Gain: A New Agenda for Aid, Trade and Investment. Ministry of Foreign Affairs of the Netherlands, 2013.

average budget per project is EUR 83,578. For the total budget allocated for all TF projects (EUR 41 million), the average budget per project is EUR 100,712.

Although specific outcome targets were identified for TF (as if it were a stand-alone instrument), all directly involved stakeholders refer to it as ‘a facilitating mechanism, an approach to apply existing instruments in a flexible and better focussed manner’.²⁰ The novelty of this approach is found in: the elaboration of intervention strategies; the availability of financial resources and manpower to initiate sector specific interventions; the coordination and joint decision-making between the embassies and the Netherlands Enterprise Agency; the collaboration at policy level between the Ministry of Economic Affairs and the Ministry of Foreign Affairs to tune their approaches and practical implementation features, as well as the operationalisation of the Transition Desk.

The TF array of potential interventions extended from development cooperation to economic diplomacy and remained flexible for innovation. For non-ODA instruments, the TF distinguished between grant instruments (demonstration projects, feasibility studies, and advice), and non-grant instruments (trade missions, trade fairs, PPPs, G2G, and Holland Branding). For ODA instruments, the TF worked with the BZ’s existing private sector instruments, bilateral agreements, contribution agreements and direct contracts.

The TF also extended to other Dutch cooperation instruments. 2g@there – which ran from 2007 until 2011 – influenced the conceptualisation of TF because at that time it was the most flexible instrument available for supporting Dutch companies. The 2g@there programme’s aim was to increase the Dutch access to foreign markets. Clusters of Dutch companies and knowledge institutes could apply for support via subsidies, economic diplomacy, and policy cooperation. The participants in 2g@there saw the added value of the programme in increased brand awareness and a larger international network. They did not note progress in the removal of trade barriers.²¹

The instruments available to the TF were:²²

1. Demonstration studies to demonstrate a product or technology in one of the target countries, thus convincing potential clients.
2. Feasibility studies, a subsidy for a study into the technical or commercial feasibility of a project in one of the target countries.

²⁰ ERBS (2017) Mid-Term Review of the Transition Facility.

²¹ PwC, 'Evaluatie 2G@There 2007 – 2011 Eindrapport' (2012)

<https://www.parlementairemonitor.nl/9353000/1/j4nvgs5kjg27kof_j9vvij5epmj1ey0/vixyltxguqzu/f=/blg159167.pdf> accessed 4 June 2020.

²² According to the policy note ‘Foreign Markets, Dutch Opportunities’ (2011) to Parliament, the implementation of the new economic strategy would be shaped around seven modules: (i) information; (ii) advice; (iii) financing, guarantees and insurance; (iv) joint promotion and matchmaking; (v) economic diplomacy; (vi) knowledge intensive collaboration and (vii) acquisition (2011:12).

3. Advice.
4. Trade fairs and trade missions: the government supports presentations at international exhibitions and provide you with the right information.
5. Seminars.
6. G2G support.
7. Fact-finding, as assistance to the design of a project.

TF made elaborate use of the DHK/DHI instrument for feasibility and demonstration studies. This instrument was formally introduced in 2013, but in essence it comprised a collection of earlier instruments to obtain market information, demonstrate (new) products and connect to new trade partners. DHK/DHI initially only focused on the TF countries, but later included other emerging economies and fragile states.²³

3.1.3 Theory of change

The TF theory of change (ToC) is a programme-level mid-range theory that is covered by the general policy-level ToC that guides RVO policy for trade, relevant for all the instruments that RVO executes.²⁴

The policy-level TOC recognises two ultimate outcomes: improved exports by Dutch companies and contribution to the Sustainable Development Goals. This policy-level ToC establishes four intermediate outcomes on the way to its ultimate outcomes: 1) new export strategies, 2) new financing for exports, 3) new investments for enabling exports, and 4) new contracts for Dutch companies and recognises the pathways of additional information and connections for Dutch entrepreneurs, improving the image of the Netherlands abroad, and removing trade barriers to a level playing field for Dutch entrepreneurs.

The TF had not set a programme ToC in 2010-2011, because at the time the ToC approach was still novel and not commonly used by the Dutch government. Additionally, interviews with staff at the BZ who had participated in the design of the TF revealed that important elements of the combination of development cooperation and trade support emerged through practice during implementation rather than being outlined in a document at TF inception. The policy-level ToC has also informed the reconstruction of the TF ToC.

The evaluation team has reconstructed an *ex-post* version of the ToC in line with standard evaluation practice to emphasize the further thinking in the RVO and BZ on the relationship between key objectives and outcomes and what had been special, innovative, and important in the programme. The reconstructed ToC was shared and discussed with the RVO and BZ stakeholders, including Embassies, during two inception phase meetings. This version of the ToC

²³ Technopolis, 'Mid-Term Evaluatie RVO'S DHK/DHI-Instrument' (2018)

<<https://www.rijksoverheid.nl/documenten/rapporten/2018/02/01/buiten-gebaande-paden-%E2%80%93-mid-term-evaluatie-rvos-dhk-dhi-instrument>> accessed 4 June 2020.

²⁴ RVO, 'Beleidsdoel DGBEB/DIO'.

was utilised to guide the evaluation, but does not change any of the original TF design thinking by the BZ, RVO and embassies.

The revised ToC attempts to display how valuable and central flexibility and creative change were in project identification for the RVO and the embassies, as well as the complexity of interactions and interdependence between different pathways, outcomes, and objectives. This is the reason why the graphical presentation of the ToC does not follow the usual standard format with pre-set pathways from activities to outputs and outcomes that cannot be realistically expected to work in the same way across sectors and countries. Instead, the discussion maintains the TOC's focus on the assumption underlying change and contextual factors influencing change which are discussed at length in chapter 5.

Compared with the MTR ToC, the ToC presented here:

- breaks down the role of different market barriers and further specifies the business climate (these were combined in the MTR under business climate);
- incorporates the business climate as the second objective of the TF, rather than as an impact beyond any attributable influence;
- brings back the vision on increased trade and investment and reduced ODA from the perspective of both individual companies as well as the broader economy;
- refers to CSR and environmental and social standards;
- further specifies and explores the assumptions, notably between the TF instruments, interventions and the market, as well as the broader domestic and international context.

The ToC was guided by a vision to fully transform the bilateral relationship between the Netherlands and the partner country from an aid-based to a trade-based, mutually-beneficial arrangement, driven by the market and private sector investment.²⁵ The fact that the TF sought to catalyse a mutually-beneficial bilateral relationship implies that trade generated through market interactions between supply and demand would have broader development benefits at the country level, such as decent jobs, although the TF did not systematically target or measure these benefits.

The TF vision was driven by two main objectives: 1) enabling the shift from a bilateral development relation towards a mutually-beneficial economic cooperation (non-ODA objective); and 2) improving the business climate in sectors with opportunities for Dutch enterprises (ODA objective).²⁶

The evaluators reconstructed three main pathways that would lead to the two objectives, albeit which closely interact and influence each other:

²⁵ Transition Facility Implementation Framework, 2011.

²⁶ TF Results Chain 2015 and inception interviews.

1. Strengthening market interactions in terms of the supply and demand dynamics between Dutch companies and local partners, through overcoming market barriers (e.g. lack of skills and technology).
2. Improving the business climate and related regulatory reform.
3. Adopting environmental and social standards, including broader developmental benefits (e.g. job creation).

The main driver along these pathways was market dynamics, although the TF also promoted compliance with environmental and social standards of individual projects.

A core function of the TF was to facilitate relationships (e.g. between the private sector companies, government(s), and research institutes), which was the point of departure for all of the pathways outlined above.

The critical contextual assumptions include the following notions:

- Global economic and trade conditions remain conducive.
- Political support exists for a private sector reform agenda in target countries, including priority sectors.
- Business climate is reformed in priority sectors and attracts foreign investment.
- Demand for Dutch products and services – including technology and know-how – exists or is catalysed.
- Key market barriers are addressed by the TF or complementary investments.
- The compliance and implementation of environmental and social standards is monitored.
- Partnerships are fostered with relevant stakeholders, including government.
- There is a sufficient size of investment (or clustering of Dutch investments/coordination of investments with other donors).

These pathways and assumptions are explored in chapters 4, 5 and 6 of this report and constitute the high-end part of the ToC.

However, prior to achieving this change, the Dutch government had to manage an internal change process to gear-up its systems, working procedures, and staff for the new objective. This process is explored in the bottom half of the ToC in Figure 1.

How to read Figure 1 and Figure 2

Figure 1 presents the TOC connecting the TF logic to the TF vision. The bottom half presents the change management process of the Dutch government in gearing up for the TF. The middle of the picture presents the idea that the key connecting factors between outputs and outcomes lie in increasing cooperation among market, public, and knowledge actors. The top part of the picture aims to convey the key idea that change at the outcome level was complex, because of the presence of many contextual factors, often different in each country and sector, and because the presence of steps in between the objectives and the vision. The evaluation has identified corporate social responsibility as a key step in between the TF objectives and the vision of a mutually beneficial relationship. The picture places CSR on the side and means that CSR was not an official TF objective, even if applicants had to pledge to comply with international CSR frameworks.

Figure 2 expands on the role of contextual factors, which Figure 1 does not show for reasons of space. It presents the contributory factors that the evaluation has found to be connected to a successful transition, and which the report describes at length in chapters 5, 6, and 7.

TRANSITION FACILITY - THEORY OF CHANGE

VISION Transformation of the bilateral relationship between the Netherlands and the partner country from an aid-based to a trade-based, mutually beneficial arrangement

3 MUTUALLY INFLUENCING PATHWAYS OF CHANGE



Corporate social responsibility norms, including environmental and social standards are implemented

Enabling the shift from a bilateral development relation towards a mutually beneficial economic co-operation

Pathways shaped by contextual factors



Increased collaboration, also through economic diplomacy:

- Focus on relationship
- Mobilising aid network
- Coming together on the Dutch side

- G2g
- B2B
- B2G
- K2K

FLEXIBLE SUPPORT

Transition desk to mix and match interventions
Pro-active role for Dutch government



FOCUSSED SUPPORT

- Limited to 3 countries
- Priority sectors (80:20 rule)
- Project selection criteria
- Dedicated advisors
- Clustering & sequencing of interventions

INSTRUMENTS ODA & Non-ODA

Figure 1 Reconstruction of the TF ToC

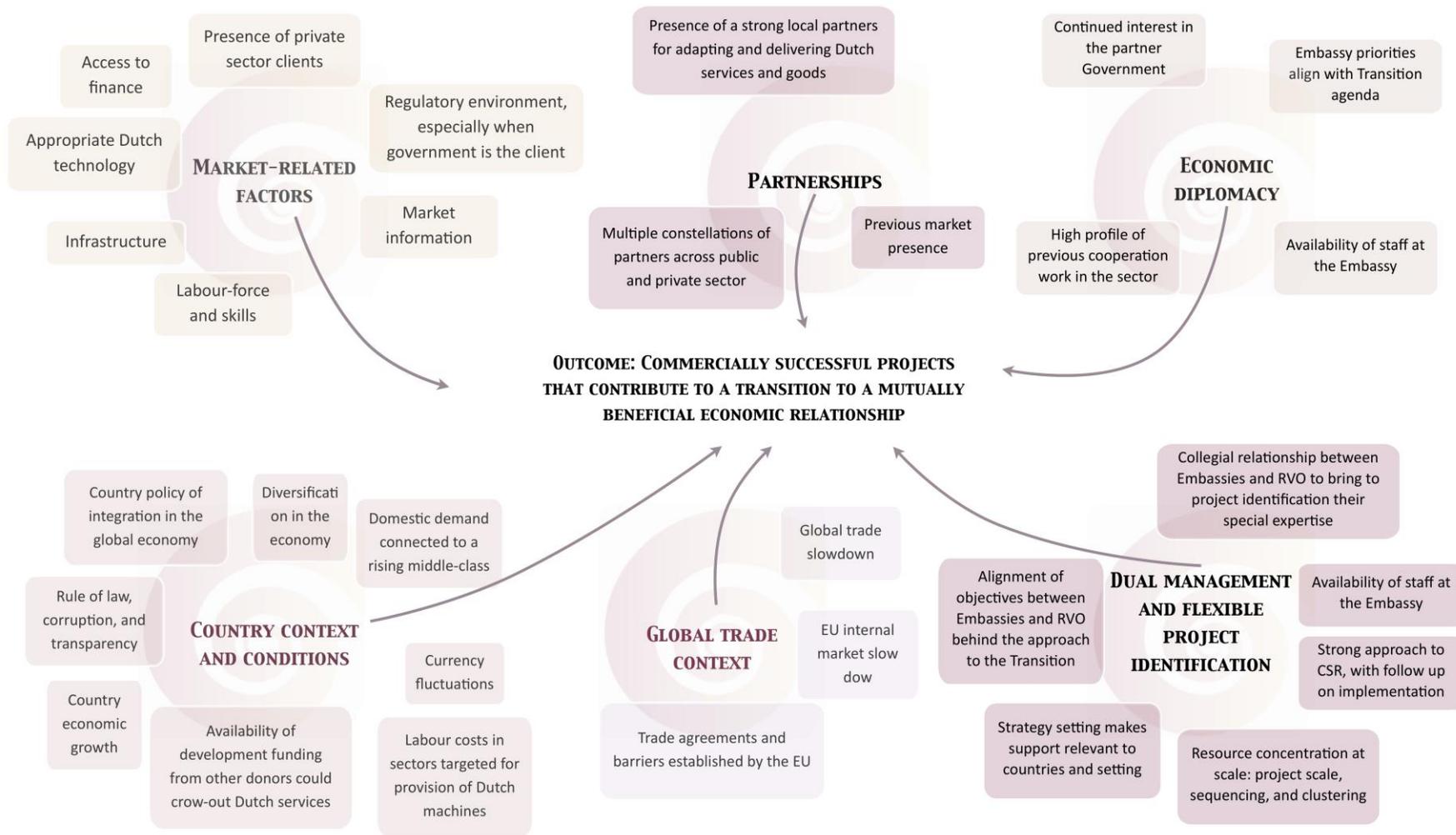


Figure 2 Contextual factors relevant for a successful transition

The transition has required a substantial shift in modalities and mentalities of support in the Dutch government. In the embassies, the transition has meant reducing and – in the long term – phasing out cooperation projects and intensifying trade-related activities. It has also implied changing the make-up of staff, expanding the economic cooperation section and closing down or downsizing the cooperation affairs section.²⁷

Embassy managers found that the skills for these two lines of work were often found in different people, because economic diplomacy requires skills in identifying and grasping market opportunities, whereas development cooperation requires structured thinking to ensure that public funds are used for the public good.

For the RVO, this change required moving from providing support based on programme requirements – sometimes established by law – to working together with embassies and focusing holistically on a country, discussing what type of support could be tailored to the needs of the applicants.²⁸

These TF key insights have been replicated in other Dutch programmes, such as the Partners for International Business (PIB) and PSD Apps (see section 8).²⁹ The evaluations of the PIB and PSD apps programmes suggest some lessons learned in the implementation of a flexible approach in those programmes. The PIB programme expanded flexibility, in comparison to the former 2g@there programme, to adapt size and timing of activities to new developments and insights, but the evaluation found that RVO especially could have been more flexible in adjusting budgets and activities in order to respond to market opportunities.³⁰ The evaluation of PSD Apps suggests that the PSD apps has achieved flexibility through its broad scope and light administrative requirements.³¹ The same evaluation, however, suggests that the PSD Apps has not been able to combine the flexibility with a robust monitoring and evaluation of its impact, which is said to be due to too ambitious indicators for such a broad pallet of interventions.³²

Interviews with BZ staff involved in initial programme design suggested that in hindsight the Dutch government was searching for common project design and implementation procedures across ODA and non-ODA instruments. Development cooperation and economic cooperation are fields in which procedures for intervention identification and design differ.³³ Development cooperation tends to have a much more structured design process and requirements for the use of what are typically larger amounts of funds. At the beginning of the TF, economic cooperation did not have (strong) procedures for designing and implementing projects because it normally

²⁷ Interviews with the Dutch stakeholders (embassy staff and Ministry of Foreign Affairs).

²⁸ Interviews with RVO staff.

²⁹ Interviews with RVO staff

³⁰ PWC (2017) Beleidsevaluatie PIB – 2016 Eindrapport.

³¹ Technopolis (2018b) Mid-term Review of PSD apps programme: Final Report.

³² Technopolis (2018b) Mid-term Review of PSD apps programme: Final Report.

³³ Interviews with staff at the Ministry of Foreign Affairs.

focused on facilitating relationships and connecting partners across networks rather than spending public money on projects and programmes.

The characteristics of the organisational change that the BZ, RVO, and the embassies underwent in establishing the TF were:

- Absence of a prescribed way of providing and structuring assistance that allows the entrepreneurship and creativity of TF staff and private sector to emerge.
- Sequential build-up of interventions, based on experience from initial initiatives (cocktail of different modalities), placed in a logical sequence (for example, starting with a study, followed by an outgoing mission, and then providing a follow-up subsidy).
- Establishment of a Transition Desk, where the RVO tasked advisers with dedicating their time to the three TF countries.
- Responding to countries' conditions with country-specific priorities and processes.
- Proactive initiation of projects by the embassy and the RVO, along with funding initiatives introduced by businesses.
- Dual management structure by the embassies and RVO, under the joint supervision of the ministries of Foreign Affairs (BZ) and Economic Affairs and Climate (EZK).

The key assumptions underlying the correct functioning of this organisational model are:

- strategic identification and prioritisation of priority sectors and projects;
- sufficient knowledge of the target market;
- increasing coherence among individual projects (e.g. clustering);
- allocation of sufficient funding in respect to needs;
- close coordination and collaboration between embassies and the RVO; and
- sufficient human resources to manage TF portfolio and projects.

The TF unique value proposition related to EQ 2 is covered in chapter 7.

4 TF Effectiveness: Transition trajectories from aid to trade

Exploring the progress in the transition between the Netherlands and the three partner countries is a requisite to answer the two evaluation questions exploring the enabling barriers external and internal to the transition.

In its simplest terms, transition relates to progression from an ODA-based to a trade-based relationship, using market-oriented modalities. **However, according to all key Dutch government stakeholders, the TF should not be assessed against the ultimate vision of increased trade, but rather against various milestones on the pathway towards this vision.** Definitions and understandings of what the transition meant in practical terms – namely the signs and implications of a successful transition – differed among different actors in the Netherlands and the three countries.

This chapter presents the different understandings of the transition to ground the progress achieved.

It subsequently presents data on the progress of the sampled projects, exploring commercial success, improvements in the business climate, and the contribution to broader developmental outcomes, such as public goods (e.g. ports), as well as more sustainable business practices that many stakeholders and applicants considered essential to the TF story.

Finally, although it was not necessarily the explicit expected aim of the TF, the chapter assesses the TF influence on the broader investment trade and ODA flows between the Netherlands and the three countries.

4.1 Different trajectories of transition

The three countries represented different trajectories in achieving a mutually-beneficial economic relationship.³⁴

In Colombia, the Netherlands has made substantial progress on the transition. There was strong interest in Colombia among Dutch companies and the Colombian counterparts see the Netherlands as a good partner in key sectors (especially water and logistics). There was interest among the Dutch and Colombian government in continuing policy dialogue in key sectors.

³⁴ This section relies on the data presented later in chapter 4. It is meant to summarise and give shape to the findings.

However, more time and reforms in the Colombian business climate, such as on public procurement procedures and contractual conditions, are required for Dutch companies to take root and work effectively in Colombia. At the same time, stakeholders in the Colombian government and private sector highlighted that a better understanding among Dutch companies of how the Colombian government works and of the business culture in Colombia is essential to successfully do business in the country.

In South Africa, transition was not achieved and the timeline was formally extended. In South Africa, the deteriorating economic and political context affected the business environment, and as such the idea of a successful transition. In the “Opdrachtsbrief” to the embassy in South Africa, the BZ acknowledged this by extending the period to complete the transition in South Africa to 2023. It is doubtful that this shift will be complete in the near future, given South Africa’s very dual nature as a highly sophisticated economy operating alongside a large, under-developed informal sector.

Vietnam transitioned early. In Vietnam, the rapid transition was triggered by the end of the Multi-Annual Strategic Plan for Vietnam (2008-2011). Vietnam was selected since the Vietnam Relay Facility (VRF) had familiarized the embassy with mechanisms for flexible support to the Dutch business community (MTR). It was also justified by substantial growth in GDP per capita and resulting poverty reduction. However, this formal transition may have been premature and too abrupt, according to both Dutch and Vietnamese interviewees. Vietnam continued to receive substantial ODA flows from various global programmes of the Netherlands (approx. EUR 3.5 million/year), which hampered continuity from Dutch cooperation to Dutch trade in the key sectors.

Comparing country experience suggests that a linear understanding of the transition does not offer an effective depiction of actual processes.

In Colombia, the embassy expressed the need for a “new vision” after the transition.³⁵ The relationship between the two countries has made strong progress, although the Netherlands cannot expect its trade and investment relationship with Colombia to be the same as with a developed economy such as the United States, or with stronger, larger and more innovative emerging economies such as China or India. This is the case because the knowledge flows remain largely one way and Colombia does not have a strong manufacturing industry connecting to trade in intermediate goods. Policy-level dialogue and innovation in key sectors still require (a limited) amount of public investment and concessional resources.³⁶

³⁵ Interview data.

³⁶ Interviews with Colombian embassy. Interview with Ministry of Foreign Affairs staff.

The South African case has shown that positive changes in country conditions can be reversed. As described, stakeholders in the Vietnam transition indicated that it may have been premature and abrupt.

Additionally, over time the concept of the transition lost some of its original political urgency and was replaced by different priorities of subsequent Dutch government administrations.³⁷

Section 3.1. has elaborated on these shifting priorities.

4.2 Overall progress towards transition

The evaluation has harvested signs of progress towards transition at the level of individual projects along dimensions identified through the ToC reconstruction (section 3.2), particularly in terms of:

- Increased market interactions (supply and demand)
- Assessing and addressing relevant market barriers
- Building stronger networks and relationships
- Building sustainable operations in the partner country
- Combining interventions, including through clustering and sequencing

Table 1 summarises the data on these dimensions for the sample of projects for complete reference and will be cross-referenced in subsequent sections on the report, where relevant. Annex 5 contains the source data on each case study.

³⁷ Interview with RVO staff.

Table 1 Overall summary of the project sample information

Country	Colombia									South Africa							Vietnam		
	Horticulture		Water		Transport & Logistics			Other		Horticulture	Water					Horticulture	Water	Transport & Logistics	
Sector	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
Project	Rozen machines	Sustainable Trade Platform	Deltares	Master Plans	Forklift	DW&T dialogue	Centre of Expertise	Safety and Security	Holland House	Capacity Building SA	Integrated Water Platform SA	Mobile Meter Reading	Port, Transport and Log CoE	Catalyzing SA RD Cool Logistics	Sustainable Port Development Durban	Demstr Obstacle Limitation Eva Tool	Modern Greenhouse Vegetable Production	Water and Climate Services for Transboundary Water Management	Tomorrow is Green: Holland Village
Did companies increase their trade? (Y/N)	N	Y	Y	Y	N	N	Y	N	Y	N	N	N	N	Y	N	Y	N	N	Y
EQ 1: What (success) criteria and conditions appeared to be critical in the transition from a bilateral (development) relationship to a more mutual trade- and investment relationship in the three TF countries?																			
Which market barriers were present? 5-point scale (high 5, medium 4, low 3, none 2, not-applicable 1)																			
Labour-force/skills	low	high	low	medium	low	low	low	low	low	high			medium	high			medium	medium	medium
Access to finance	low	high	high	high	high	high	high	high	high				medium				high		
Market information	high	low	low	low	high	low	medium	high	low			medium					medium		low
Infrastructure	low	high	low	low	low	low	high	high	low		medium			high			low	medium	
Regulatory environment	low	low	medium	medium	low	low	low	low	low		medium		medium	high	medium	medium	low		
Which market barriers were addressed/not addressed? (Y/N or scale)																			
Labour-force/skills	N	Y	N	Y	N	N	N	N	N	Y	N	N	Y	Y	Y	N	Y	Y	Y
Access to finance	N	N	Y	N	N	N	Y	N	Y	N	N	N	N	N	N	N	Y	N	N
Market information	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	Y	N	Y	N	Y
Infrastructure	N	N	N	N	N	N	Y	N	N	N	N	N	N	Y	N	N	N	Y	N
Regulatory environment	N	Y	Y	Y	N	N	N	N	N	N	N	N	N	Y	N	N	N	N	N
Other	N	N	N	N	Y	Y	N	N	N	N	N	N	N	N	N	N	N	Y	Y
EQ 1.2: What role did the different stakeholders play to facilitate this project? 5-point scale (Major 5, expected 4, minimal 3, none 2, not-applicable 1)																			
BZ	3	4	3		3	3	4	3	3	4	3	1	3	5	4	3	3	4	5
RVO	3	3	4		4	4	3	4	4	5	3	3	1	3	5	4	3	4	4
Dutch private sector	4	4	4	4	4	4	4	4	4	4	3	3	3	5	3	3	5	4	5
Dutch knowledge institutions	3	3	4	4	3	4	3	3	3	4	1	1	1	2	3	3	4	5	3
BMOs (in-country)	3	4	3		3	3		3	3	2	1	1	1	1	1	1	1	1	4
Private sector (in-country)	3	5	4	4	4	4	4	3	4	4	1	3	1	5	1	1	5	5	5
Public sector (in-country)	3	4	4	4	3	4	4	3	3	2	4	1	3	5	3	3	4	4	3
Civil society (in-country)	3	5	3		3	3	4	3	3	2	4	3	3	1	4	4	3	1	3
Did the project increase cooperation among different actors? Which type of cooperation/partnerships? (e.g. G2G, G2B, B2B, B2G, K2K etc.) (Y/N)?																			
G2G	N	Y	N	Y	N	Y	N	N	N	N	N	N	N	N	N	N	N	Y	N
G2B	N	N	N	Y	N	Y	N	N	N	N	Y	N	N	N	N	N	N	N	Y
B2G	N	Y	Y	Y	N	Y	Y	N	Y	N	Y	N	N	Y	Y	N	N	Y	Y
B2B	Y	Y	N	Y	Y	Y	Y	N	Y	Y	Y	Y	N	Y	Y	N	Y	N	Y
K2K	N	Y	N	Y	N	Y	Y	N	N	Y	N	N	Y	N	N	Y	Y	Y	N
1 4 1 5 1 5 3 0 2 2 3 1 1 2 2 1 2 3 3																			
EQ 2: What mix of components/instruments under the TF turned out to be most effective and why?																			
EQ 2.1: How effective was TF and what combination of approaches (services offered) within TF have been effective and efficient in promoting the transition from aid to trade relationships? 5-point scale (high 5, medium 4, low 3, none 2, not-applicable 1)																			
Feasibility study (detailed design, business plan)							4	2						3			2		
Demonstration study	3				3			2					2	2	1	2	3	3	
Market research	3				3			2					1						
(Policy) advice		4	4	4		5			4						2				3
Sector coordination (e.g. chamber of commerce)		4				4			4										
Conference, seminar						4													4
Trade Fair						3						1							3
Trade missions						3										1			4
What operations continued? (Y/N)	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	N	N	Y	Y	N	Y	Y		

* Data from Durban Rail Service Center is not included, due to insufficient interviews. The Master Plans are included as a cluster, not an individual project, technically increasing the sample to 19 units.

4.3 Objective 1: Pursuing interests of Dutch companies

The main TF objective was enabling the shift from a bilateral development relationship towards mutually-beneficial economic cooperation. One key aspect of this objective was pursuing the interests of Dutch companies in the three target markets, which is reviewed in this section.

Table 2 summarises the strength of evidence underlying the main findings for this section.

There is clear indication that a substantial minority of the projects led to commercial benefits for Dutch companies in the form of increased trade. However, the reader should be cautious in generalising from this limited sample of projects to the overall portfolio, even if the additional data collected from CBS on turnover, sales or employees largely confirms the findings.

Table 2 Strength of evidence

Finding	Triangulation	Strength of evidence
The TF contributed to commercial expansion among a substantial proportion but not the majority of projects.	MTR, e-survey, interviews	Medium, as no shared indicators or comparable data on increased trade volume, sales or other transactions exists
The strongest impact on actual sales growth among the sampled projects appears to have been in Colombia.	Secondary data, MTR, Interviews	High
Companies were also able to use the TF support to expand into other markets in the region.	MTR, interviews	Medium

The TF contributed to commercial expansion among a substantial proportion but not the majority of sampled projects. This was in line with the MTR, which already noted that most stakeholders perceived that the number and volume of business transactions increased over

time.³⁸ Eight out of the final evaluation sample of nineteen projects recorded commercial successes for Dutch companies, whether through increased sales, market access, or public contracts (Figure 3). This is in line with the proportion of trade benefits recorded in the e-survey, where more than half of e-survey respondents never traded with the TF targeted country as a result of TF support.³⁹



Figure 3 N of projects in our sample that reported to have increased trade as a result of the TF

Table 3 presents an overview of the eight projects in our sample that achieved commercial success.

Table 3 Successful projects in our sample

Country	Project title	Sector	Trade outcome achieved
Colombia	Sustainable Trade Platform	Horticulture	Sustainable production increased in Colombia, leading to an expansion of exports of sustainable products to the Dutch market
Colombia	Deltares	Water	Services repeatedly sold to regional water authorities in the Colombian government
Colombia	Master Plans	Water	Tenders with the Colombian government won by Dutch providers

³⁸ ERBS (2017) Mid-Term Review of the Transition Facility, p. 21.

³⁹ E-survey data.

Colombia	Centre of Expertise	Logistics	Recovered its costs, did not make high profits but facilitated further business in Latin America
Colombia	Holland House	Cross-sector	Profitable and sustainable private entity delivering value to Dutch and Colombian firms
South Africa	Catalysing South African Rural Development by Intermodal Cool Logistics (Flying Swans)	Logistics	Increased exports and reverse trade (fruit to Netherlands, poultry and dairy to South Africa using same cold containers)
South Africa	Demonstration Obstacle Limitation Evaluation Tool	Logistics	Received a first order by Airports Company South Africa (ACSA), four years after TF support
Vietnam	"Tomorrow is Green" Holland Village 2015	Logistics	Increased sales for at least one participant

The strongest impact on actual sales growth among the sampled projects appears to have been in Colombia, with five out of eight success cases recorded there. This was also supported by the overall trade trends described in section 4.6.

One example of a particularly successful project there is the Sustainable Trade Platform Project, due to the volume of increased trade across a number of different products in the niche market of sustainable products. Solidaridad reported that Colombia became one of the countries with the largest share of sustainable commodity production worldwide. Colombia achieved an expansion of certified coffee from 30% of its total coffee production to 67% in 2017, during a period in which the amount sold doubled from 1 million bags to 2 million. Certified palm oil increased from 4-5% to 22%, whereby a substantial share of this increased production was absorbed by the Dutch and European markets.

In Colombia, Dutch companies were also able to gain entry into more challenging public procurement for the water management sector.

Companies were also able to use the TF support to expand into other markets in the region, even if they were not necessarily successful in the target market. According to the MTR, two-thirds of the projects indicated that the Dutch companies' position in the market improved somewhat.⁴⁰

As an example, the Port, Transport, and Logistics Centre of Excellence – jointly operated by STC Group and Universidad del Norte in Barranquilla, Colombia – was able to recover its costs in Colombia by providing trainings to port personnel, and subsequently using its regional presence and credibility to expand to Guatemala and Nicaragua, which also constitutes exports for Colombia.

Similarly, Flying Swans – a consortium of Dutch companies that offered an integrated cool logistics citrus chain to South Africa through TF funding – was able to springboard their approach from South Africa to the regional market in Ethiopia and Djibouti. They currently offer this approach in conjunction with their South African counterpart from the TF project, Transnet.

The sample of projects in the MTR confirms the judgement. 4 out of 20 projects had achieved commercial success by the time of the MTR. A few additional projects were, however, promising success in the near future.

3 of the 4 successful projects were in Colombia. They had established functioning production plants for banana pallets and gouda cheese, and led to procurement contracts in the field of consultancy for Colombia's Master Plans.

In South Africa, the remaining successful project was the Centre of Expertise in Water, which had influenced with Dutch expertise the TOR for large water utility tenders, resulting in Dutch companies winning some of these tenders.

4.4 Objective 2: Improved Business Climate

The business climate influences business decisions through factors that lie beyond the control of companies, in particular the regulatory environment and the fairness with which it was applied, bureaucracy, and regulatory incentives. An improved business climate was the second objective of the TF.

Table 4 summarises the strength of evidence underlying the main findings.

⁴⁰ ERBS (2017) Mid-Term Review of the Transition Facility, p. 73.

Table 4 Strength of evidence: Business climate

Finding	Triangulation	Strength of evidence
Despite its relevance for both attracting foreign investment and supporting commercial successes at scale across the economy, business climate reform was not sufficiently targeted and was allocated few resources.	Reliable secondary sources, MTR, portfolio review, e-survey, interviews	High
Despite being the second objective of the TF, resources were not mobilised for business environment reform by either the embassies or individual companies or related advocacy initiatives.	MTR, case studies, interviews	Medium

The reform of the business climate was an important contextual factor for the TF and an enabling condition for investment, but it was less a target of actual interventions. In practice, the TF has devoted limited attention to the business climate, despite it being the second objective of the TF. The portfolio review suggests that the number of G2G interventions and related studies was limited across the whole portfolio: only 22 G2G interventions across the 410 projects were labelled as G2G, constituting about 5% of the portfolio.

This finding is confirmed by the MTR, at which time there had been “no specific modalities to address constraints in the business climate”.⁴¹ The MTR noted that 80% of the interventions supported the Dutch business community in doing business with a target country, against 45% of the interventions that were considered relevant to improve the business climate, based on a review of the outputs in the intervention fiches at the time of the review.⁴² There were also few examples of interventions that actually addressed and improved the business climate.⁴³

In Colombia, four out of nine projects were involved in strengthening the business climate at least at the sector level. Through Dutch cooperation in the water and transport sectors, new models of integrated transport solutions in Colombia were introduced, contributing to a policy shift in the Colombian government towards emphasising connected transport systems (rivers, railways, roads, and oceanic ports). Additionally, the Master Plans projects worked on setting a policy framework for the Colombian government and private sector investment in river transport,

⁴¹ ERBS (2017) Mid-Term Review of the Transition Facility, p. 10.

⁴² ERBS (2017) Mid-Term Review of the Transition Facility, p. 53.

⁴³ ERBS (2017) Mid-Term Review of the Transition Facility, p. 73.

coastal protection, water management, and intermodal transport sectors. In Colombia, the embassy has appointed staff in key sectors, including engaging with counterpart governments on issues connected to the business climate, which were also supported by other parts of the Dutch government under the cross-ministerial Delta Strategy for strengthening the Dutch water sector globally.

Despite being the second objective of the TF, resources were not mobilised for business environment reform by either the embassies or individual companies or related advocacy initiatives. As the legal and regulatory environment is a public good, it also tended to be publicly financed, including through traditional ODA. The business climate required more traditional development cooperation interventions and grant financing, with one interviewee stating: “You needed ODA to address these issues”.⁴⁴ The ODA budget allocations to Colombia and South Africa were as follows:⁴⁵

Table 5 ODA budget allocations to Colombia and South Africa in millions of EURO

Embassy	2012	2013	2014	2015	2016	2017	2018
Colombia	0.4	0.7	0.3	1.2	0.4	0.2	0.1
South Africa		0.6	0.9	0.5	0.8	0.3	0.0
Total	0.4	1.3	1.2	1.7	1.2	0.5	0.1

On average, the two embassies had EUR 500,000 of ODA per year, with a peak of EUR 1.2 million for Colombia in 2015 and a rapid decline in resources after 2015 at both embassies. It was not possible to assess which portion of these funds was dedicated to advocating business climate reform, although interview data suggested that more efforts could have been made by the embassies in this regard.⁴⁶

During the TF lifetime, the general business environment trend improved in Colombia and Vietnam but deteriorated in South Africa, based on the World Bank Ease of Doing Business

⁴⁴ Interview data.

⁴⁵ Data was not available for Vietnam.

⁴⁶ Interview data.

index.⁴⁷ This is confirmed by the survey conducted for the MTR, which revealed that 60% of surveyed companies in the three countries considered that the business climate had improved.⁴⁸

The business climate in South Africa substantially deteriorated during the TF lifetime due to political and economic instability. In South Africa, at the beginning of the TF the embassy believed that it had entry points into the government through previous projects with the Presidency, the National Economic Development and Labour Council (NEDLAC), the Ministry of Trade, and the business community. However, these entry points eroded over time as state capture expanded. The government became increasingly reluctant to engage and business capacity and labour organisation turmoil made it difficult to engage effectively. Black Economic Empowerment (BEE) policies and corruption made it increasingly difficult to attract Dutch companies to invest in the country.⁴⁹ Individual projects also failed to progress – for example – in the Western Cape and Durban areas due to difficulties with the Minister for Water Affairs.

The MTR sample confirms these findings: only 3 projects out of 20 have contributed to strengthening the business climate. 2 of them were in South Africa: the Centre for Expertise in Water, which influenced the TOR for large water utility tenders with Dutch expertise, and an innovative learning platform aimed at building the skills of nurses. In Vietnam, The Centre of Expertise in Water is a joint venture where Vietnamese experts are trained with Dutch expertise in water, with the aim of helping Dutch companies winning tenders by the Vietnamese government. The main barriers that Dutch companies face in winning these tenders is price. The Centre is supposed to make available Dutch expertise with a “Vietnamese price-tag.”

4.5 TF contribution to development outcomes

The vision of the transition to a mutually-beneficial economic relationship implies that catalysing trade would also ultimately contribute to broader development outcomes for the partner countries, whether through public goods provision (e.g. ports, regulatory reform), job creation or promoting responsible business practices, including the application of environmental and social standards.

This section reviews the TF contribution to these broader development outcomes. However, as related TF objectives and indicators were not very clear beyond business climate reform, data availability was particularly limited, including on employment data.

Table 6 presents the strength of evidence for this section’s main findings.

⁴⁷ ERBS (2017) Mid-Term Review of the Transition Facility, p. 73.

⁴⁸ ERBS (2017) Mid-Term Review of the Transition Facility, p. 73.

⁴⁹ Interview data.

Table 6 Strength of evidence: Development outcomes

Finding	Triangulation	Strength of evidence
Half of the sampled projects recorded broader development results and outcomes, including the provision of public goods, benefits to small-scale farmers and more responsible business practices.	Case studies, interviews	Medium
As data was not gathered by the TF on the impact on final beneficiaries (e.g. indirect or induced employment), it was not possible to assess the indirect influence of supported companies' success across supply chains, on the broader economy and community.	Project documents, case studies, interviews	Medium
While promoting CSR and environmentally and socially responsible business practices were a requirement in the design of individual projects, they were not universally applied, resulting in mixed performance across projects on these criteria.	Desk review, case studies, interviews	Low

Half of the sampled projects have recorded initial signs of positive change towards various development results and outcomes. There were individual project examples of improvements for final beneficiaries such as farmers and the unemployed.

In Colombia, Solidaridad's Sustainable Trade Platform supported small-scale producers to reap more benefits from their sustainable products and included a focus on gender.

The Flying Swans project in South Africa contributed to an expansion of citrus production in Limpopo, while increasing the engagement of emerging black farmers. In a country that is hard hit by unemployment especially among its young population, it was deemed important to the embassy for TF projects to address employment issues, and most projects elaborated how their activities would contribute to increased employment opportunities.

The Hortidalat project in Vietnam also benefited small-scale farmers through a cooperative model, which had previously not been possible due to Vietnam's specific history with communist cooperatives.

It was not possible to assess the indirect influence of supported companies' commercial results on the broader economy and community in a more comparable, rigorous manner because data

was not gathered by the TF on the impact on final beneficiaries (e.g. indirect or induced employment). While some common TF indicators were drafted, these were not operationalised across projects through project-level log frames and related data gathering and reporting.

Promoting CSR and environmentally and socially responsible business practices was a requirement in the design of individual projects from the start. However, this requirement was not universally applied, resulting in mixed performance across projects on these criteria.

Promoting CSR and related environmentally and socially responsible business practices was not a primary goal of the TF. However, it was included from the start as a requirement for individual projects under the stipulation that all activities falling under an intervention should comply with the international CSR framework.⁵⁰ The intervention fiches should have demonstrated compliance with this framework or conducted an assessment of their CSR risk profile.

Fourteen out of 21 project fiches made some reference to the CSR framework, while the rest either did not include a related field in the fiche or CSR was not considered applicable. Only two projects – Rozenmachines and Flying Swans – referred to specific environmental and social standards (e.g. IFC and ILO). Based on the analysis of the project fiches and interviews, applicants and RVO staff considered this requirement a “tick the box” exercise, which demanded an approach to compliance and risk assessments during design but not related monitoring during implementation.

Nevertheless, there were some project-specific examples of relevant practices.

The success of the Sustainable Trade Platform in Colombia stands out not only for its sales results, but also for promoting Dutch values in sustainable production.

The ‘Tomorrow is Green’ initiative focused on Dutch technology and services in sustainability across multiple sectors.

The Flying Swans’ introduction of cool logistics has significantly increased the transportation of citrus fruits by train instead of roads, therefore contributing to reduced emissions. This latter project also indicated that they had been asked to elaborate their social and environmental standards in the project by RVO and the embassy, but they had not been asked to demonstrate their contributions.

The sample of the MTR confirms this trend, as 10 projects out of 20 are relevant for producing development value added. The development value added in these projects consisted mainly of building the understanding of the counterpart government for environmental management, but also, more rarely in building the technical capacity of counterpart producers, establishing

⁵⁰ RVO (2011) Transition Facility Implementation Framework, p.3.

production plants with positive benefits on employment, introducing new technologies for energy efficiency and waste management, and building the capacity of counterpart governments to deliver better services.

4.6 Changes in trade and aid flows

In order to achieve visionary transformation in the bilateral relationship from aid to trade, the TF would need to ultimately increase trade and investment and reduce ODA to the three countries from the Netherlands. This section therefore reviews the overall balance between trade and aid flows between the Netherlands and the three TF target countries.

The findings are based on a review of available secondary data from reputable, international sources, as well as the bespoke survey of TF applicants recently completed by CBS. Table 7 summarises the strength of evidence against each of the overall findings. Ultimately, the contribution of the TF to macro-level patterns of investment and trade in goods and services was limited, which was to be expected – as emphasised by key interlocutors – because the TF had not been designed on a sufficient scale to influence the aggregate trends.

Table 7 Strength of evidence: Trade and investment trends

Finding	Triangulation	Strength of evidence
The TF was associated with trade growth trends, notably with Colombia and in some sectors, but did not increase the relative position of the Netherlands as a trade partner with the three countries.	MTR, MDF analysis of COMTRADE data, CBS data	Medium, due to the CBS indication that growth may have been in sectors not supported by the TF
Trade in services did not grow substantially over the TF period.	MTR, MDF analysis of COMTRADE data	Medium, due to the lack of comparative trade in services data
There is no indication that FDI flows from the Netherlands into TF countries substantially grew during or after the TF.	MDF analysis of OECD data	Medium, due to data limitations
Among TF applicants, trade grew similarly among those who received and did not receive funding, suggesting that the TF did not make a difference.	CBS data	High

4.6.1 Trade flows

The TF was associated with trade growth trends. Based on data collected from COMTRADE for bilateral, directional goods movements in value terms, exports from the Netherlands to Colombia grew slightly (from USD 400 million to USD 500 million per year) to Vietnam increased substantially (from about USD 600 million to almost USE 1 billion), and to South Africa remained largely steady (at USD 2.5 billion per year) from the pre-TF to the TF period.⁵¹

The MTR supports this finding, where an analysis of goods data at the commodity (Standard International Trade Classification (SITC)) level revealed some positive yet varying trends across the three countries compared with the regional benchmarks (MTR, 67 & 73). The regression analysis conducted during the MTR also found no statistically relevant effects on total Dutch exports to any of the three countries compared with the region overall. However, there was some significance at the one-digit SITC level in Colombia and South Africa, and less in Vietnam. The effect on Dutch imports from TF countries was stronger.⁵²

The relative market position of the Netherlands vis-à-vis other countries did not improve. The relative position of the Netherlands did not appear to differ compared with the other trading partners, with Dutch exports and overall imports to the target countries growing in equal proportion. This suggests that growth likely occurred due to overall economic expansion and did not substantially change specifically due to the TF (Figure 4 and Figure 5).

⁵¹ MDF analysis of COMTRADE data 2005-2018.

⁵² ERBS (2017) Mid-Term Review of the Transition Facility, p. 67.

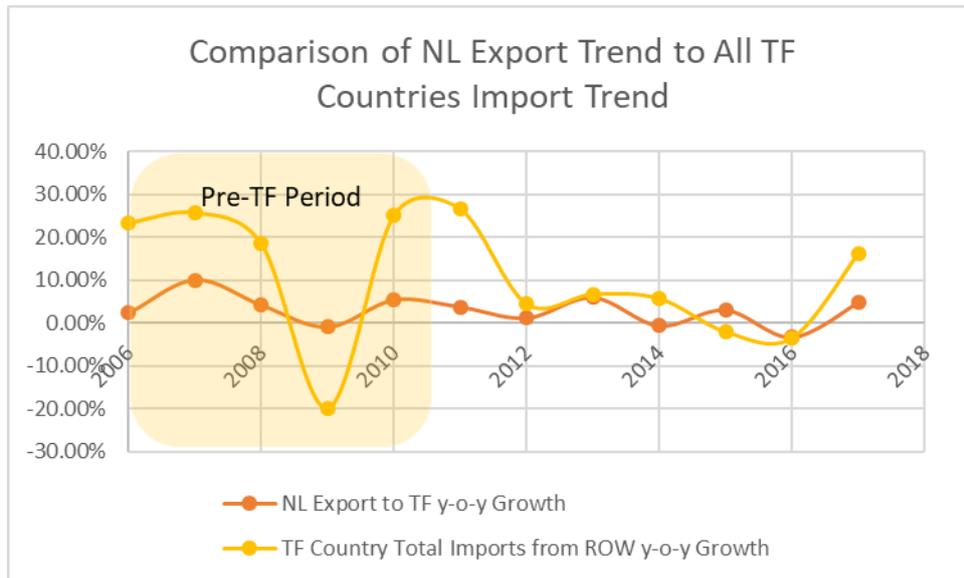


Figure 4 Percentage change of Netherlands export trends to all TF countries import trends

Source: MDF analysis of COMTRADE data

The Netherlands share of total EU exports to these countries slightly increased in South Africa, but remained largely the same in Vietnam and substantially declined in Colombia.⁵³

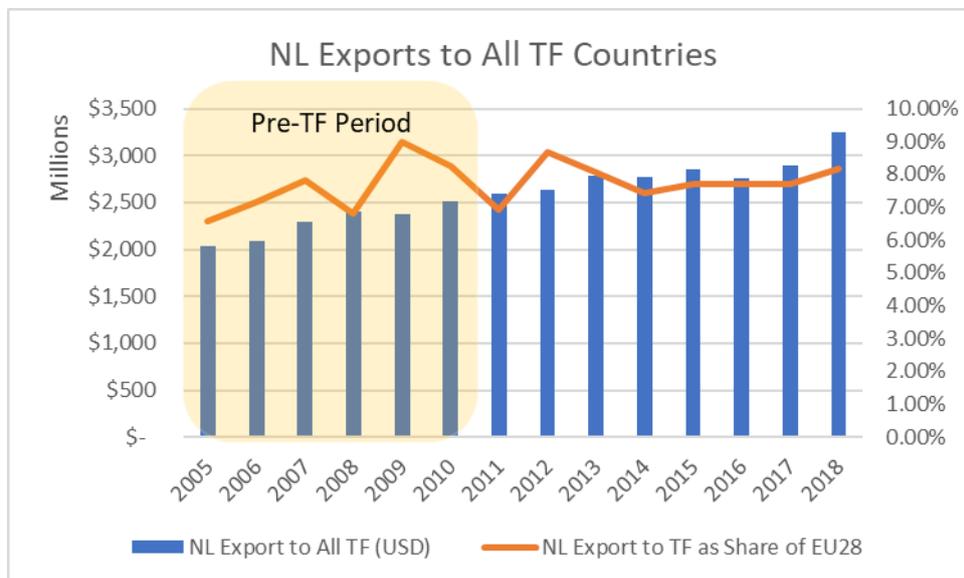


Figure 5 Netherlands export to TF countries as a share of EU28

⁵³ MDF analysis of COMTRADE data 2005-2018.

Source: MDF analysis of COMTRADE data

Trade in services – which is what TF applicants provide according to the e-survey – did not substantially increased over the TF period, based on more limited observation, due to data availability issues. Dutch exports of services to South Africa had an average compound annual growth rate (CAGR) of 2.4% between 2010 and 2017.⁵⁴ Service exports to Colombia substantially increased in the run up to transition – 79% annually from 2000 to 2009⁵⁵ – such that the trend would have needed to be extreme during and after transition to indicate an impact. There is no reporting on Netherlands-Colombia trade in services in any of the international databases that indicates that such growth has happened. This was also already confirmed at the time of the MTR, where data on trade in services did not indicate that the TF had any impact on trade flows.⁵⁶

E-survey respondents reported no to minimal growth in exports to TF countries on average, with the most reported growth in Colombia, followed by South Africa and then Vietnam. It should be noted that this is reported by respondents who participated in the TF and should therefore have been most strongly affected by the transition. However, it is notable that about one-quarter of these respondents reported substantial growth in exports.

As suggested by the SITC-level analysis conducted for the MTR, trade trends may be stronger in some supported sectors than in others that were not a focus of the TF. In order to test for this possibility, the evaluation team explored trends that are specific to the horticulture sector, one of the key sectors of the TF.

Dutch horticulture trade demonstrated a stronger relative growth trend with Colombia compared with other sectors, solid growth in exports to Vietnam, and more limited import growth from South Africa.

Both exports to and imports from Colombia in the horticulture sector significantly increased from the pre-TF to post-TF period. The Netherlands' share of total EU exports grew more dramatically (in the 20-40% annual range for most of the period). Overall, the Netherlands imported about twenty times more horticultural products from Colombia than it exported and Dutch and Colombian companies are part of a value chain where bulbs, cuttings, and other biological supplies are exported to Colombia for flower production and then flowers are exported to the Netherlands, which acts as a hub of distribution to the rest of Europe.

⁵⁴ MDF analysis of WTO data.

⁵⁵ MDF analysis of COMTRADE data.

⁵⁶ ERBS (2017) Mid-Term Review of the Transition Facility, p. 68.

In South Africa, imports from the Netherlands of horticulture products grew slightly from the pre-TF to TF period, but exports exhibited little growth. The Netherlands' share of total EU-26 trade with South Africa in the sector exhibited little change.

In Vietnam, horticultural imports and exports both grew dramatically from the pre-TF to TF periods. The Netherlands increased its share of total EU-26 exports from as low as 5% to over 10%. However, Netherlands' import share was relatively stable from the pre-TF to the TF period.

Comparing trends across the three countries suggests that the success of the TF at the higher end of the ToC was highly dependent on the country and sector, achieving strong success in some combinations of country sectors – such as horticulture in Colombia – due to contextual factors that will be explored in section 5.

4.6.2 FDI flows

There is no indication that FDI flows from the Netherlands into TF countries substantially increased during or after the TF (Figure 6).

FDI from the Netherlands into Colombia grew over the TF period, but then fell and current FDI is lower than prior to the TF.

FDI into South Africa also grew over the TF period, but the overall CAGR from 2010 to 2018 was less than 2%.⁵⁷

By contrast, FDI into Vietnam – while the lowest of the TF countries in absolute terms – increased by a healthy 8.5% over the same period (Figure 6). The MTR also did not indicate any influence on FDI data.⁵⁸

⁵⁷ MDF analysis of IMF data.

⁵⁸ ERBS (2017) Mid-Term Review of the Transition Facility, p. 73.

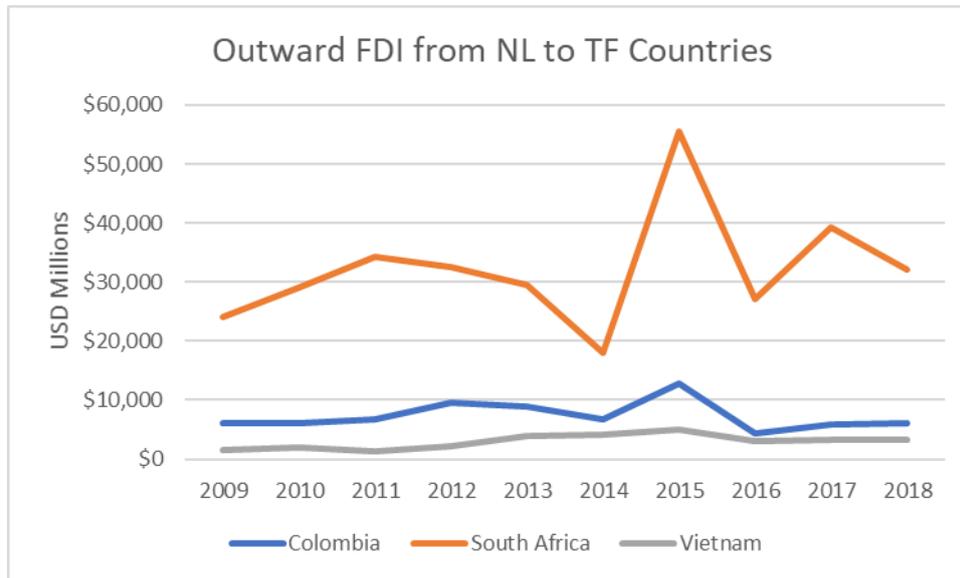


Figure 6 FDI flows from the Netherlands to the TF countries

Source: MDF analysis of OECD data

4.6.3 ODA flows

At the time of the MTR, the originally-envisioned replacement of ODA with non-ODA resources (at the project level) had not been realised. “Since ODA resources remained available for supporting SMEs, clients considered TF a ‘development cooperation’ programme rather than a programme for business support”.⁵⁹

Overall, at the time of this final evaluation, ODA trends from the Netherlands suggest that traditional development aid to the three countries has substantially declined. This was a part of the Dutch government coalition agreement in 2012. ODA flows substantially declined during the TF lifetime in all three countries, but subsequently increased to Colombia (Figure 7 and Figure 8). However, overall the volumes were not substantial, whereby a single intervention could influence the trend line.

Officially reported ODA flows to TF countries only comprise bilateral Dutch development programmes, not global programmes managed centrally from the Hague. Interview data suggested that the Netherlands still has substantial aid programmes in TF countries channelled through Dutch centrally-financed programmes, although these total less than development support prior to the TF.

⁵⁹ ERBS (2017) Mid-Term Review of the Transition Facility, p. 12.

Figure 7 compares ODA flows from the Netherlands to the target countries from the OECD and International Aid Transparency Initiative (IATI), with a view to triangulation, as well as addressing the ‘negative’ flows to Vietnam.⁶⁰

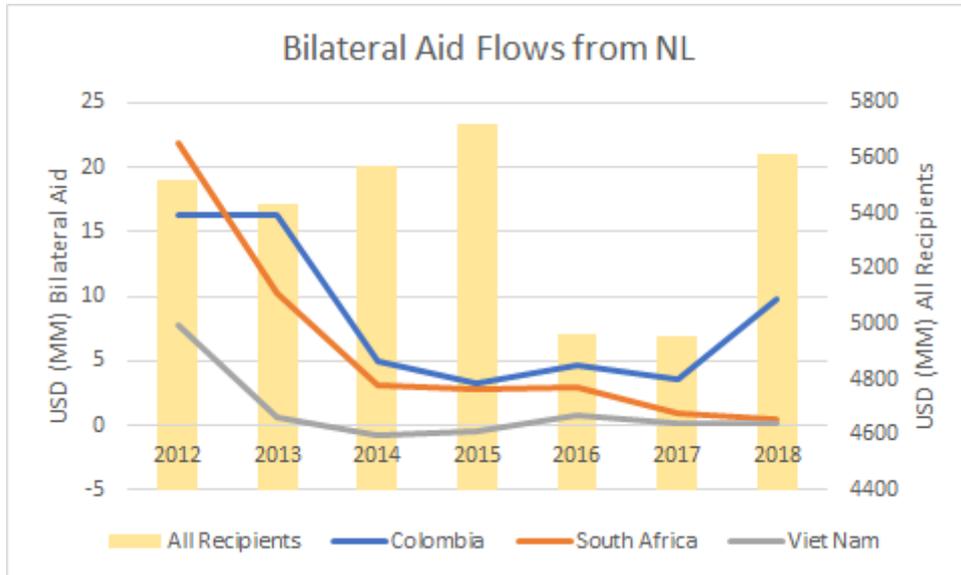


Figure 7 Bilateral aid flows to the three TF countries

Source: MDF analysis of OECD data

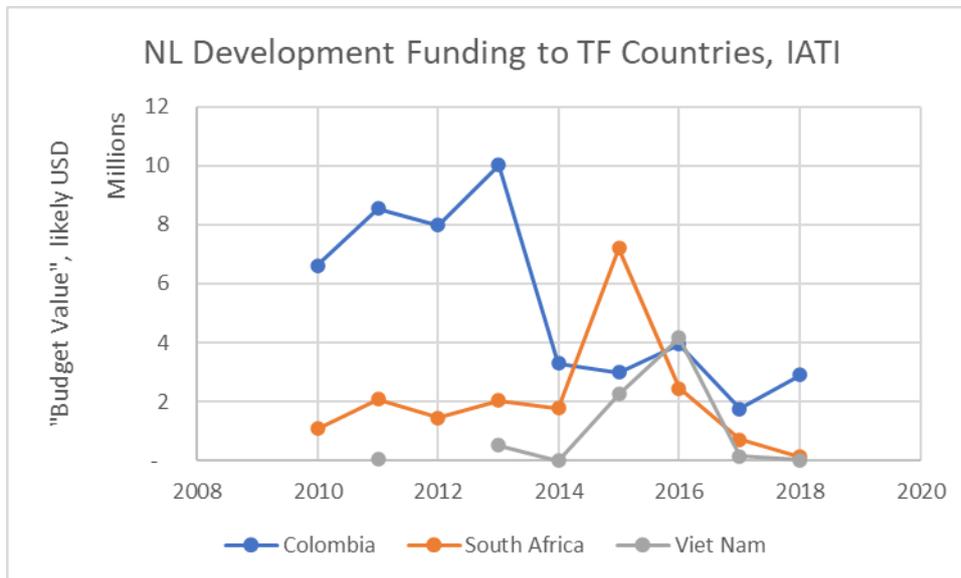


Figure 8 Bilateral aid flows to the three TF countries

Source: MDF analysis of IATI data for BZ, RVO, NSO and NWO

⁶⁰ Two sources were used to test for ODA declines to triangulate findings and address the ‘negative’ flows in ODA to Vietnam observed in the OECD data set.

4.6.4 Total trade growth of TF applicants

Total trade grew for TF beneficiaries, but also for rejected applicants. Trade growth happened largely in Colombia, which is consistent with our sample results.

CBS found that successful applicants in general increased their exports in the post “t” years relative to pre-application.⁶¹ However, trade grew equally for rejected applicants, as demonstrated in Figure 9.

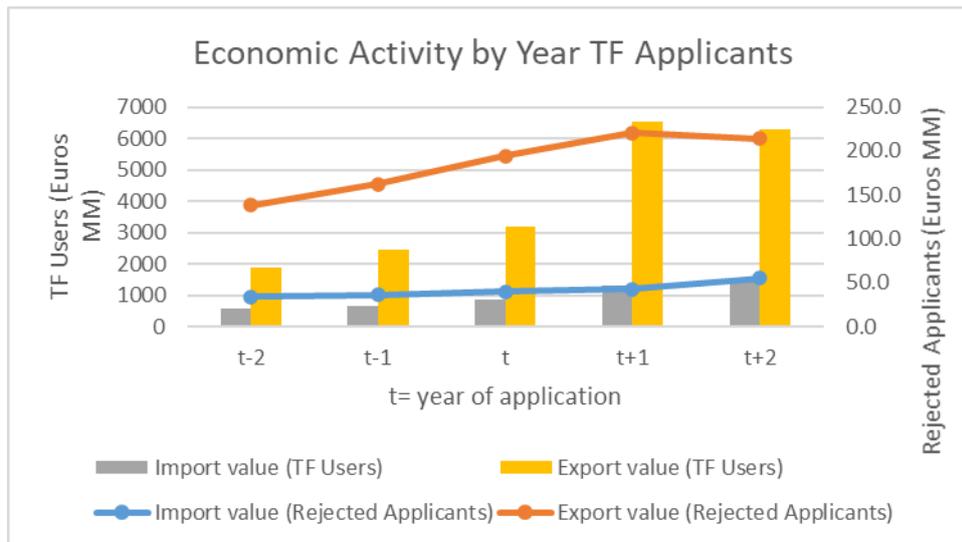


Figure 9 Export growth by TF beneficiaries and rejected applicants

Additionally, exports largely also related to the ‘industry’ and ‘wholesale and retail trade and hospitality’ sectors, which were not priority TF sectors, suggesting that the trade benefits may not have been connected to TF support.

⁶¹ The CBS analysis placed all applicants on a time continuum that related outcomes to the year of application, where “t” was the unique year of application for each entity.

5 TF Relevance: Context and conditions for Transition

EQ 1: What context-specific criteria and conditions appeared to be critical in each of the three TF countries in the transition from a bilateral (development) relationship to a more mutual trade and investment relationship?

This section assesses the contextual and market-related enabling factors and barriers that explain why projects and the TF in a given sector or country were more or less successful.

Section 5.1 explores the role of the global trade context, section 5.2 the country context and conditions, and section 5.3 the market-level opportunities and barriers.

Table 8 provides a summary of the strength of evidence connected to the section's three main findings. There is a strong degree of confidence in the evidence that the global trade context influenced the transition. Based on multiple quantitative and qualitative sources, it is also clear that the TF overall and individual TF projects were not designed to address the most significant market barriers. Assessing the ease of operating in a private sector driven sector primarily relied on case studies and interview data, although this is also experienced beyond the TF.

Table 8 Strength of evidence: Context and conditions for transition

Finding	Triangulation	Strength of evidence
Global trade trends and national contexts were the most important factors in the transition.	Desk review of secondary data, case studies, interviews	High
The TF was not designed to address the most pressing market barriers, with projects focusing predominantly on demonstrating Dutch knowledge and technology.	E-survey, case studies, interviews	Medium
Private sector projects were easier to implement than those in sectors requiring extensive public sector engagement, with faster results.	Case studies	Medium

5.1 Global trade context

Global trade trends and the national context were the most important factors for transition.

The global trade slowdown resulted in an overall reduction in trade, notably in 2015, despite TF investments.

In Colombia, bilateral trade and investment dipped between 2013 and 2018 as a result of the economic slowdown in Europe. Trends in the EU internal market are important for aggregate trade trends between the Netherlands and Colombia because Rotterdam is a key port of passage for most Colombian – as well as South African – goods headed to the EU market. Another important factor in the reduced value of bilateral trade and investment between 2013 and 2018 was the decrease in the global price of oil and other energy-sector commodities, which account for the lion's share of Colombian exports to the Netherlands.

Phytosanitary barriers placed by EU agencies had an important role in creating tensions in the relationship between Colombia and EU actors. The European Food Safety Association is an independent entity that makes decisions on which agricultural goods are allowed into the European market, and it has the most stringent standards in the world. During the TF period, it introduced a ban on Colombian commodities that registered above-allowed traces of chemicals, placing restrictions on Colombian producers' ability to access the European market.⁶² The Colombia counterparts complained that the regulation affected key products such as coffee and cocoa, as well as the possibility of diversifying exports of Colombian agricultural products to the European market.

Trade agreements – especially with the European Union – supported increased trade. In BZ, the International Trade Policy and Economic Governance Department follows negotiations and implementations of the trade agreements by the European Commission and the International Business Department follows bilateral trade facilitation.

The trade agreements and their implementation were overwhelmingly the most familiar topic for the Colombian Ministry of Commerce in relation to trade between the Netherlands and Colombia. By contrast, the Colombian Ministry of Commerce has reported knowing little about any Dutch bilateral programme in trade facilitation, including the TF. Among the TF countries, Colombia has signed the largest number of regional and bilateral trade agreements – including with the EU – and its trade agreement with the EU was comprehensive, addressing tariffs, access to public procurement contracts, technical barriers, investors' protection, and development and political cooperation.

⁶² Regulation (CE) number. 369/2005.

During the transition period, South Africa had a trade and cooperation agreement with the EU signed in 1999, which was replaced at the very end of the review period in 2018 by a new regional trade agreement that involves Botswana, Lesotho, Mozambique, Namibia, South Africa and Eswatini (formerly Swaziland).

Vietnam was the only TF country without a trade agreement in force with the EU, as it was only signed in October 2019.⁶³ Trade flows are still expected to substantially increase after this second-generation trade agreement enters into force, reducing tariffs and technical barriers to trade, opening public procurement, protecting intellectual property, and protecting investors' rights.

5.2 Country context and conditions

This section mainly relies on a desk review of information connected to broader country contexts and conditions, combining it with insights from country-level conditions that were relevant as barriers for some sampled projects.

In addition to global trade forces, individual country conditions were critical for both progressing and impeding the transition.

Since 1990, Colombia has implemented a policy of increasing integration into the world economy, seeking better market access conditions for its exports and the best suppliers for its imports, as well as endeavouring to reduce its production costs.

Between the beginning of 2012 and the end of 2017, Colombia's GDP grew at an average annual rate of 3.3%, driven chiefly by domestic demand, although during recent years the Colombian economy has seen a slowdown as a result of reduced exports – particularly oil and other raw materials – and a slower growth in domestic demand. Colombia's peace process also contributed to opening parts of the country that were inaccessible, contributing to economic growth in key sectors, such as agriculture and tourism.

In order to stimulate the economy, the authorities have launched an economic reform programme, which includes tax incentives, reductions in tariffs and other taxes, changes in the investment regime, and increased investment in infrastructure. Although the prospects for economic growth and inflation are favourable, a number of structural problems still pose a significant challenge, including the need to continue promoting diversification of the economy, improving logistic infrastructure, and reducing poverty.

Colombia's historical presence of corruption and a lack of transparency contributed to create an environment in which the government as a contractor was constrained by very detailed and rigid

⁶³ WTO data March 2020.

rules of procedures about what it could and could not do, which created difficulties for Dutch consultants in understanding and accessing the public procurement process.

Other specific factors also played a role, such as refugee flows and currency fluctuations. In Colombia, the Venezuelan refugee crisis depressed the cost of unskilled labour in the agricultural sector, which is a critical condition for Dutch machines to be competitive. The depreciating peso reduced the ability of Colombian customers to afford Dutch goods and services.

Vietnam has dramatically shifted its development trajectory over the past 30 years, moving from one of the least developed nations to a lower/middle-income country. Its strong growth record continues, supported by both export-oriented manufacturing and growing domestic demand. Economic growth in 2017 was 6.8 percent, growing to 7.1 percent in 2018. Vietnam sits only below Cambodia in terms of average annual growth for 2018, according to the ASEAN Economic Outlook.⁶⁴ The World Bank forecasted a moderate slowdown in growth in 2019, tied to moderating domestic consumption and fluctuations in external demand. However, the impact on demand for Vietnamese exports tied to global trade tensions and potential disruptions in the US-China trade relationship may support an improved outcome.

Vietnam's development trajectory has been accompanied by a dramatic growth of its middle class and increased productivity. The middle class is currently estimated to represent 13 percent of the population but is forecasted to rise to 26 percent by 2026.

These factors have and will continue to have a substantial impact on both Vietnamese exports as well as domestic demand. By the start of the TF in 2011, there was an expectation that in the coming years Vietnam would remain a promising emerging market due to its young, hard-working and fast-learning people and its geostrategic location, close to South China and at the heart of South East Asia. The substantial increase in GDP per capita and reduction in poverty rates contributed an earlier termination of TF support in Vietnam compared with Colombia and South Africa.

In South Africa, the economic, social and political context has deteriorated since the start of TF in 2011, with a resulting contraction in trade and investment in the country and a re-orientation towards other BRICS. In South Africa, the start of the TF also heralded the start of the state capture years under President Zuma, where corruption was accelerated and weak policy decisions resulted in the country moving backwards in terms of economic development as well as delivering services to poor communities in cities and rural communities in general.

This has resulted in widespread unrest and service delivery protests, and economic growth in the country has stagnated. Government red tape, labour market rigidity, and economic development

⁶⁴ AEAN, [ASEAN Economic Integration Brief](#), No. 05, June 2019.

policies are key stumbling blocks that both foreign and national businesses face when investing or deepening their investments in South Africa.

Despite its relative economic strength and diversified economy, South Africa ranks outside of the top 50 countries in terms of the World Bank's Ease of Doing Business Indicator and a key reason for this is the government's capacity to understand its role in business and trade facilitation.

In summary, comparing the role of the context in the three countries, the following factors have played a role as enablers and barriers of the transition:

- Economic growth in the partner country
- Policy direction that is open to international trade and investment
- Diversification in the economy
- Labour costs in key sectors
- Domestic demand connected to a rising middle class
- Corruption, rule of law, transparency, and ease of doing business
- Currency fluctuations

5.3 Market opportunities and barriers

The most critical market factor facilitating transition was the demand for the goods and services offered by Dutch firms. Interventions could be 'supply driven' through proactive engagement by the Dutch government and companies in the target market, or 'demand driven' by customers – whether public or private – in the three countries.

This section explores the demand for Dutch services and goods by using a framework capturing market opportunities and barriers by sampled projects and based on comparison.

The market system⁶⁵ was influenced by various barriers (e.g. market information, availability of skills and technology), including the legal and regulatory framework in a given sector and country.

Table 9 summarises the number of sampled projects facing different market barriers, based on an analysis of the case studies.

Table 9 Market barriers faced across the project sample

Market barrier	No. of sampled projects facing the barrier in different degrees	No. of sampled
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⁶⁵ A market system is a multi-function, multi-player arrangement comprising the core function of exchange by which goods and services are delivered and the supporting functions and rules which are performed and shaped by a variety of market players (<https://www.enterprise-development.org/wp-content/uploads/m4pguide2015.pdf>).

	(low, medium, high, non-applicable)				projects addressing the barrier
	Low	Medium	High	N/A	
Labour force, skills, technology	7	5	3	15	9
Access to finance	1	1	9	11	4
Market information	6	3	3	12	11
Infrastructure	7	2	4	13	3
Regulatory environment	8	6	1	15	4

Table 9 suggests that the main market barriers addressed by the sampled projects were market information and labour force skills and technology. This was confirmed by the e-survey, which had responses from a larger number of TF applicants. The sampled projects focused particularly on the lack of market information and labour force skills (e.g. through training).

Table 9 and also Figure 10 suggests that the TF focused on these barriers, even though these were not always the strongest barriers to market entry. Access to finance and infrastructures more frequently recur as market barriers with a high impact on the project.

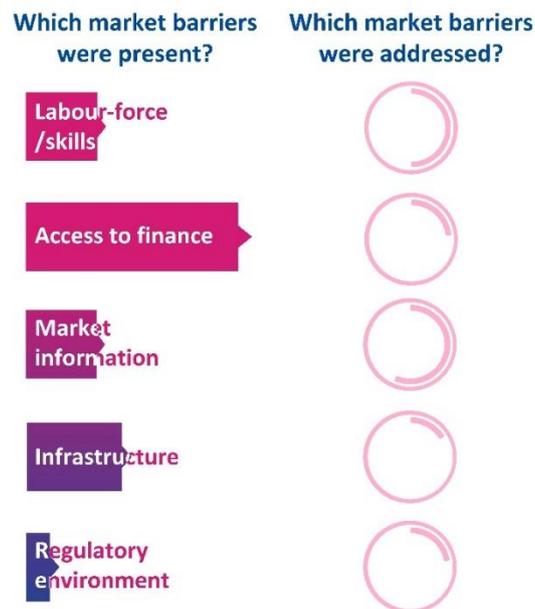


Figure 10 N of times that a trade barrier was identified as a high barrier in the sample projects, and N of times that the project addressed that barrier (over the total N of projects in our sample)

5.3.1 Market information

TF’s support for studies and familiarisation with the local context facilitated Dutch firms’ knowledge of the demand for their goods and services. Support was delivered through trade missions, capacity building, and demonstrations of the technology in the partner countries.⁶⁶

The TF delivered:

- Market research, which involves collecting market data that goes deeper than what is publicly available in terms of potential clients and their demand. RVO stopped this instrument because some market consultants were re-packaging existing research rather than providing new knowledge.
- A demonstration project, which allows a company to travel to the partner country and demonstrate its business idea to its potential clients.
- A feasibility study, as a report to a potential client that explains how they can overcome whatever barriers they face in buying Dutch solutions and what return on investment they can expect.

⁶⁶ Interviews with RVO staff.

Demonstration projects were the most common type of intervention across the portfolio (see section 7.2.), as well as across the sample of projects. However, actual and original market research was conducted less, which would have provided an impression of market demand.

5.3.2 Technology

The added value and appropriateness of Dutch innovation and technology was a major factor in explaining related demand. In our sample, successful projects proposed technology that was adapted to the context and the clients' ability to purchase, whereas less successful projects did this to a lesser extent.

For example, STC's project Port, Transport, and Logistics Centre of Excellence employed Dutch and Colombian consultants to revise a training curriculum originally developed for the Dutch market and adapt it to the Colombian situation.

On the other hand, the Rose Sorting Machine demonstrations did not result in any sales due to a lack of demand for the technology. Low labour costs due to the depreciated peso and additional labour due to the crisis across the border in Venezuela dampened interest in automation. Growers opted to develop their own, simpler and cheaper machines, or keep their cheaper labour force.

Innovative new technology and products took time to become mainstream, which hampered quick results. There was also a clear connection between product quality and its costs, with the risk that products meeting Dutch quality standards were too expensive for the partner government to purchase.

For example, interviews in Colombia with both Colombian government staff and Dutch contractors mentioned that this problem also applied to the work of Dutch consultants, whose standards of rigour in the advisory process and recommendations were sometimes too expensive to implement in Colombia. The Colombian side suggested that a focus on technical quality standards should be balanced with an understanding of the local context, needs, and actors, with proportional interventions. The Dutch side suggested that the total available contract budget should be matched with flexibility in terms of the level of effort, methodology, and adapting to the context to reward Dutch's higher efficiency and expertise compared with international competitors.

The MTR sample confirms this finding, connecting the Dutch technology marketed to the quality of being either too expensive for competing in the local market or requiring additional downstream or upstream linkages with technologies and skills of equal sophistication, which were not available in the local supply chains.

5.3.3 Regulatory environment

The TF identified this as a challenge at the outset. Colombia and South Africa assessed market barriers during strategy preparation, with the regulatory framework, bureaucracy, procurement

transparency and even corruption identified as major concerns. Labour market rigidities and BEE were a particular constraint in South Africa.

The regulatory environment was rarely considered a significant barrier to market entry according to the e-survey or case study analysis. In only one of the sample projects – Catalysing SA RD Cool Logistics – was the regulatory risk initially considered high.

However, our sampled projects suggest that the regulatory environment can be a significant barrier when the Dutch applicant relies on partner government capacity and procedures when acting as a contractual authority for public procurement. This included complicated and slow public procurement procedures, a lack of budget to finance reforms or capital projects, and contractual procedures that were not user friendly.

In Colombia, Dutch consultancy firms provided consultancy services to the Colombian government for developing its master plans, strengthening its knowledge in water management, and designing large-scale projects. Nonetheless, the embassy and the consultants themselves saw many hurdles to successfully provide services to the Colombian government and Colombian regional water and environmental authorities, including the following:

- The embassy acknowledges that water governance as a sector relies on public investment and that the Colombian environmental sector does not have the resources to pay for international consultants, mainly because the environmental sector is not at the top of political priorities. In mitigating these concerns, in one of the sampled projects the Dutch applicant (Deltares) split its support project between providing tools and knowledge – which remained under Dutch responsibility – and providing labour for implementing the tools, which became the responsibility of the counterpart government.
- The fragmentation of the water and environmental sector among various regional and local environmental and water management authorities is a challenge in reaching scale.
- As reported by Dutch consultants, the strict procedures of the Colombian government did not allow for required adaptation during the inception phase of the project.

In Colombia, the authorities did not understand why the policy discussions supported by the Delta State strategy group did not result in Dutch infrastructure investments. The continuation of the development aid mentality was also confirmed by the MTR.

Additionally, the partner public sector government have tended to continue operating within the old procedures and culture of development aid rather than with a new focus on trade cooperation, especially at the working level (e.g. in Vietnam).

5.3.4 Access to finance

Access to finance was as an important barrier, especially the ability of the local banking sector to understand new sectors and develop new financing vehicles among the sampled projects.

For example, in Colombia the availability of finance for sector transformation has been a barrier to Solidaridad's multi-stakeholder partnership, which aims to make the commodity sector more environmentally friendly. A lack of access to local finance was also mentioned by smaller Dutch companies focused on much smaller-scale operations.

As a second example, in the Hortidalat project in Vietnam the financing component failed to grow beyond a single demonstration project, partly due to missing regulation but particularly due to the way in which Vietnamese banks assess the credit worthiness of cooperatives and farmers. Ultimately, the financial product developed was not sufficiently profitable. As for Dutch companies, it was unclear whether they had applied for export finance guarantees and if not, why not. For example, through the Export Credit Guarantee the Dutch government issues irrevocable payment guarantees providing absolute certainty for investors to recover their investment and related interest.

The most frequently unaddressed barrier was access to finance for funding the project ideas that stemmed from policy dialogue between the Netherlands and the partner country. The TF clearly was not established with the idea that it would have sufficient resources to address major infrastructure obstacles such as ports, roads, energy or IT. In the evaluation sample of project, we have not found linkages to programmes by and entities of the Dutch Government that have a mandate for addressing these barriers, such as the Private Sector Investment Programme and its successor programme, the Dutch Good Growth Fund, or FMO, the Dutch Development Bank.⁶⁷

In Colombia, policy dialogue between the Netherlands and Colombia led to the creation of project ideas such as the deep sea port in Barranquilla. However, neither the Colombian nor Dutch actors are willing to finance the related infrastructure investments.

In some countries, the initial similarity and interoperability of the ports in the two countries substantially facilitated the introduction of new logistics that would link these port systems again. This even resulted in reverse trade in which containers with citrus going from Durban to

⁶⁷ The Private Sector Investment programme (PSI) was a subsidy programme of the Dutch Ministry of Foreign Affairs / Development Cooperation, which closed for applications in 2014, that supports innovative investment projects in emerging markets in Africa, Asia, Latin America and Eastern Europe (see country list elsewhere in this document). A PSI project is an investment project, implemented by a Dutch or for certain countries other foreign company together with a local company in the emerging market. If the investment meets the criteria, it can be eligible for a grant by PSI. This grant consists of a financial contribution of 50% to the costs of the investment, up to a maximum of EUR 750,000 (grant). The Dutch Green Growth Fund targets Dutch entrepreneurs that do business abroad and Intermediary Funds that invest in local SMEs. In support to Dutch entrepreneurs importing from or exporting to DGGF countries, the DGGF offers guarantees to EU banks and banks in DGGF countries, and offers loans to Dutch entrepreneurs. The size of DGGF support goes up to EUR 15 million for imports and EUR 30 million for exports, and only finances projects viable from a financial point of view.

Rotterdam would be filled with dairy and poultry products on their way back, using the same logistics.

The MTR confirms that access to finance, especially when investments were risky in far-away markets with long-term repayment schedules, was a key barrier to Dutch firms success.

5.4 Sectors most conducive to change

EQ 1.1: What sectors proved most receptive to this transition and why?

Some sectors were more amenable to rapid results. This section reviews contribution factors that are connected to a given sector supported by the TF.

Quick wins and the most successful projects tended to be in sectors dominated by the private sector (e.g. horticulture, logistics). Four out of the eight successful projects involved the logistics sector in all three countries, and they were predominantly implemented through private sector players. In Colombia, the fact that Forklift targeted private port terminal concessions meant that it did not have to deal with public procurement.

Two of the remaining three successful projects were in the water sector in Colombia, which is connected with the length and strength of Dutch cooperation with Colombia in this sector. Colombian counterparts recognise Dutch actors as having world-class knowledge and experience in this sector.

The two final successful projects were also in Colombia. One was the Holland House, which works on trade facilitation across sectors. The second – the Sustainable Trade Platform in Colombia – is in the horticulture sector and it relies on the participation of the Ministry of Agriculture.

Some sectors are connected to public sector engagement, such as working with utilities (e.g. water sector), public agencies (e.g. firefighters or police), and the building of infrastructure (e.g. port infrastructure), which makes them more complex, time-consuming, and difficult to implement.

Public procurement processes were particularly complex and lengthy, while governments also lacked the resources to fully implement recommendations. While successfully establishing a strong policy and investment framework, the Water Master Plans were subsequently only partially implemented by the Colombian government due to a lack of public funds in the environmental and transportation sector and unwillingness of the private sector to invest.

In South Africa, government cooperation was necessary but the authorities became increasingly unreliable, making it necessary to avoid government structures in some interventions. This was possible to some extent in the horticultural sector, but not in water and logistics. For the

horticultural project Capacity Building South Africa, the lack of engagement and even withdrawal of the counterpart organisation – Gauteng Department of Agriculture (GDARD) – was deemed to be the major factor for project failure. In Vietnam, the Water and Climate Services project struggled due to a lack of government engagement.

6 Partnerships in transition

EQ 1.2: What role did the different stakeholders play to facilitate or hinder this transition?

Partnerships were critical for transitioning from aid to trade and navigating in new, potential markets. This section therefore assesses overall stakeholder engagement, economic diplomacy, engagement at the local level and the dual management structure between the embassies and the RVO. It also considers different constellations of partners, such as:

- Business to business (B2B)
- Business to government (B2G)
- Government to government (G2G)
- Knowledge institution to knowledge institution (K2K)

Table 10 shows the strength of the evidence supporting the main findings in this section. A strong degree of confidence supports the evaluation findings in this area, whereby increased cooperation between Dutch and local actors was the greatest TF achievement and engagement with local partners was also a critical success factor. Many of the successful projects already had a presence in the target market prior to receiving TF support, which might challenge the justification for funding and the additionality of the TF support provided.

Table 10 Strength of evidence: Partnerships

Finding	Triangulation	Strength of evidence
Increased cooperation was a clear TF achievement, with strong local partnerships also a critical TF success factor.	E-survey, case studies, interviews	High
Success was also associated with existing presence in the target market prior to TF support, although this also questions the need for TF support.	MTR, e-survey, case studies, interviews	High

6.1 Type and level of stakeholder engagement

This section explores the extent of stakeholder engagement among selected projects.

Table 11 Types of partnerships among projects

	G2G	G2B	B2G	B2B	K2K
No. of sampled projects	4	4	11	14	9

The increased cooperation as defined by actors working together was by far the clearest TF result. Networks and connections were created and facilitated in all three countries. All but one of the sampled projects included partnerships (excluding the Safety and Security project in Colombia). Fourteen projects included B2B cooperation, eleven projects B2G cooperation, and nine projects involved cooperation with knowledge institutes. Cooperation included potential vertical relationships between customers and providers and between tenderers and contracting authorities, partners in government at the policy level, and horizontal pre-competitive connections between actors in an industry, such as the coffee industry in Colombia.

The partner government was involved in three different roles: as a client in purchasing advisory services connected to its role in setting regulation and managing the public good, as a partner in sector-wide multi-stakeholder policy discussions, and as a commissioner of large-scale projects.

In Colombia, eight out of nine projects reported increased cooperation, ranging from individual Dutch companies becoming connected to potential customers to industry-wide multi-stakeholder connections. Many of the B2G relationships were also built up over time, such as the Water Master Plans and the Deltares cooperation in water management with regional water authorities in Colombia. Interviews suggested that the stronger networks created by the TF involved better chemistry between the parties and personal connections but serious intent to collaborate differed from project to project.

As an example of building cooperation over time, from the cooperation period in Colombia Deltares had inherited a long-term relationship with the water authority for the Cauca valley, CVC.⁶⁸ Based on earlier development cooperation, Deltares had a good idea of the gaps in CVC's water management information and its needs, as well as a good relationship with other actors in water management, such as the Universidad del Valle and UNESCO-IEC (Institute for Water Education). Deltares was able to leverage these established connections and continue providing services to water authorities in Colombia, using TF support for integrating the funding available to the Colombian counterparts.

⁶⁸ Cauca Valley is a region of Western Colombia, with the capital of Cali.

In South Africa, none of the partnerships related to cooperation with South African government counterparts, which has been a constraining rather than an enabling partner to these projects. One notable exception was cooperation with Transnet in the Flying Swans project, which was a state-owned enterprise.

In Vietnam, all projects reported increased cooperation with counterpart actors. In particular, the Holland Village developed an innovative way of leveraging a large business and public event to also influence government through side sessions.

6.2 Partnership as a project success factor

This section explores the relationship between stakeholder engagement and successful projects, comparing the perceived degree of engagement in the most effective projects identified in section 4.3 and other less effective projects across the sample of projects.

Table 12 summarises project applicants' perception on the degree of cooperation with different types of stakeholders based on a Likert scale, where 5 indicates a high level of cooperation and 1 a low level of engagement. The table aims to review whether cooperation was a success factor, looking for whether successful projects have a higher level of cooperation than unsuccessful ones, broken down by the type of cooperation.

Table 12 Level of cooperation in effective and less effective projects

Stakeholder	Level of cooperation in effective projects	Level of cooperation in less effective projects
BZ	3.9	3.1
RVO	3.9	3.5
Dutch private sector	4.1	3.8
Dutch knowledge institutions	3.0	2.9
BMOs (in-country)	2.3	1.9
Private sector (in-country)	4.0	3.2
Public sector (in-country)	3.7	3.1
Civil society (in-country)	3.3	2.9

Figure 11 shows the proportion of the sample projects that supported an expansion of interactions in the relevant category.

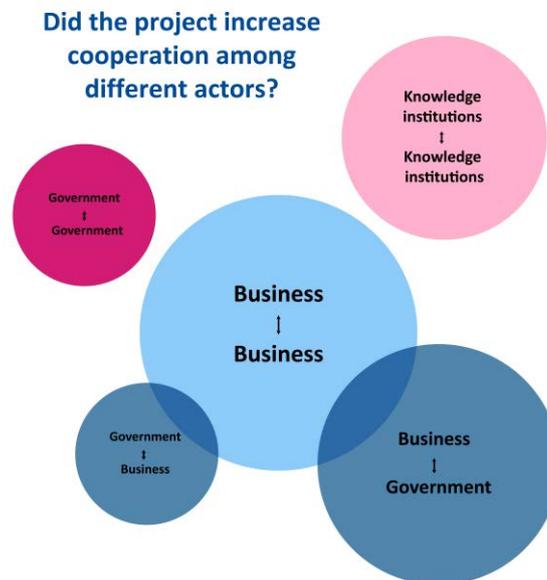


Figure 11 The circles represent the proportion of the projects in the sample that increased cooperation among the relevant category of actors, with intersections depicting the proportion of projects that supported interactions among both categories

Strong local partnerships were a critical TF success factor. Overall stakeholder engagement was higher in successful projects than in less effective projects. Local partners were considered a positive force in at least half of the sampled projects. Local partnerships appeared particularly strong in Colombia, where they played a role in all successful projects. This finding is also confirmed by the e-survey: over 70 per cent of e-survey respondents considered local private sector companies the most important TF partner.

Local partners were key for logistical support, tailoring products to the country market, providing marketing with local clients, navigating relations with counterpart authorities, and reducing the costs of Dutch firms, especially consultants. Additionally, employing local staff was a key requirement in making the work of Dutch firms welcome from the perspective of partner governments in Colombia and South Africa.

As an example, working with Colombian consultancy companies in the water sector was key for success in the Master Plans cluster. The Dutch government and Colombia's Ministry of Environment launched procurement processes for consultancy services connected to developing Colombia's master plans for river transport, dredging, and coastal erosion master plan. Jesyca – a Colombian consultancy company – reported that the Dutch contractors initially faced problems in their communication with the Ministry of Environment of Colombia, mainly because none of them had offices or personnel in Bogota. Jesyca saw a key role in the project in smoothing the relationship with the Ministry of Environment and ensuring that whatever was proposed was in

line with the Colombian context. This was confirmed by Dutch firms providing services to the Colombian government. Royal Haskoning and STC also noted that partnering with local consultants was key to making their services more affordable for the Colombian market. The Ministry of Transport of Colombia also encouraged the inclusion of Colombians and partnerships with Colombian consultants or companies.

The engagement of the public sector was particularly challenging, with particularly weak engagement of the public sector in South Africa.

In Vietnam, the Water and Climate Services project ultimately did not succeed in promoting Dutch technology due to challenges with maintaining engagement with the government authorities. This project aimed to develop the use of systems and models to collect, analyse, and forecast water data from satellites to predict water levels, subsidence, flooding, etc. The Netherlands Space Office (NSO) led the first phase with a G2G technical assistance, facing capacity issues with the Vietnamese government counterparts. The second phase was handed over to the University of Delft, which introduced a new technology for which the government was not prepared. Therefore, the University of Delft successfully petitioned the RVO to change the lead Vietnamese partner from the government to a knowledge institution. While the K2K relationship is now strong, the government is now supported by the World Bank in the Mekong Delta and is procuring French technology for satellite data collection and management.

Success was also associated with existing presence in the target market prior to TF support, although this could question the need for TF support. The MTR discovered that only one-third of the TF applicants were first entrants in the target countries.⁶⁹ In our sample, the entities that achieved the strongest success were already established in the country.

In Colombia, the Centre of Excellence – STC's previous work in Colombia – facilitated its success, while Solidaridad and Deltares had also previously been active in Colombia. Likewise, the Forkliftcenter was already established in Colombia as part of its forklift selling and renting business in terms of the operating team and office.

In South Africa, Flying Swans was less reliant on building new local relationships, as the relationship with the Netherlands had been so longstanding and consistent, according to interview data.

In Vietnam, Holland Village allowed Dutch businesses that were already present in the country to promote technologies, attract existing customers and appeal to new ones. It benefited from the local presence of a number of active companies. At the same time, the existing market presence

⁶⁹ ERBS (2017) Mid-Term Review of the Transition Facility, p. 10.

suggests that TF assistance may not have created much additionality, if the benefiting companies could have achieved commercial success without TF support.

Local networks were also frequently established and referred to as a key business success, even for companies that have not yet managed to increase sales. This is also confirmed by the MTR project sample, where there were no examples of business transactions without a local partner.

This was the case in at least two of the three sampled projects in Colombia that did not result in increased sales during the TF period. Nonetheless, these local contacts may still result in actual business opportunities over time.

For the South African projects Demonstration Obstacle Limitation Evaluation Tool and Capacity Building, the TF resulted in new clients and orders through the local networks, albeit outside of the initial project plans.

The MTR sample confirms these findings, suggesting the presence of a local partner, especially in dealing with complex public sector entities, was one of the contribution factors to success.

The most successful projects tended to comprise multiple constellations of partners (e.g. B2B, G2B, B2G).

Two of the most successful projects in Colombia – the Sustainable Trade Platform and the Water Master Plans – also had the greatest variety, with four and five different partnership types supported by the TF, respectively. This echoed all of the actors in the market system or a given value chain, whether private sector, public sector or knowledge institutions. According to one interview, “in the STP project, all the supply chain actors were involved, including the certifiers. Solidaridad managed to raise awareness and participation of the whole sector”.

In South Africa, the Flying Swans project offered an integrated approach due to the multiple Dutch partners that it involved, such as the Frugi Venta, Boskalis International, Havenbedrijf Rotterdam and South African partners involving public (Transnet) and private partners (Citrus Growers Association). This ensured strong partner constellations spanning the different logistical chain needs. The initial strong involvement of FMO as an applicant and later consortium member also ensured a perspective on future financial means for continuing the partnership/consortium.

Comparing the experiences in the sampled projects suggests that the positive contribution of an instrument like the TF depends on:

- the presence of strong local partners for Dutch firms; and
- established and productive cooperation with the counterpart government.

6.3 Economic diplomacy

As noted in section 5.5, G2G was not a very common partnership type promoted by the TF portfolio or the sampled projects. Government engagement nevertheless remained an essential function. In this section, the evaluation explores what role the TF played in strengthening the Dutch government's capacity for economic diplomacy.

The Netherlands was clearly able to maintain a seat at the table in Colombia, particularly due to the perceived added value of Dutch knowledge in the logistics and water sectors. The embassy, the RVO, and the Ministry of Infrastructure successfully cooperated in the context of the Delta Strategy to maintain Dutch influence in the logistic and water sector, maintaining and expanding relationships with their counterparts in the Colombian government that they had built over decades of bilateral cooperation. During the TF period, the embassy employed an economist fully dedicated to these sectors. Colombian stakeholders confirmed that they looked at the Dutch model for their new integrated framework for intermodal transport. They also adopted Rotterdam as a model port city for their largest port on the Atlantic and looked forward to working with Dutch companies in the field of advisory services for water management and large-scale dredging. Unrelated to these sectors, interviews with RVO and embassy staff suggested that TF support had allowed them to raise the profile of the Netherlands with the general public, placing the Netherlands as the Guest of Honour of the 2016 International Bogota Book Fair.⁷⁰

Economic diplomacy was challenged in South Africa by declining government engagement and the continuing importance of the focus on inequality and poverty alleviation. The embassy indicated that the policy of the South African government was focused on transformation, which had a development aid component. The embassy acknowledged that there is a commercial sector in South Africa that could play a role in the transition, but it insisted that the Netherlands cannot ignore a focus on the inequality and poverty in the country. Due to South Africa's history of apartheid, the Dutch diplomatic policy and approach was framed around the message of co-creating South Africa, whereby the Netherlands was a long-term partner to collaboratively look for sustainable solutions to local challenges.⁷¹ The embassy used the available instruments for economic diplomacy, and TF was considered a stable factor that facilitated larger projects such as Flying Swans.

Economic diplomacy appeared to be the furthest advanced in Vietnam, due to the need of working in a situation where government has a clear control of the economy. Both the embassy and the RVO played their respective roles. It was clear to the embassy that Vietnam's economy

⁷⁰ The Bogota Book Fair ranks – after Guadalajara and Buenos Aires – as the third largest book fair for a general audience in Latin America. The literary events take place during the full two weeks of the fair and include performances, presentations, interviews, expositions and workshops.

⁷¹ Meerjarig Interdepartementaal Beleidskader Zuid-Afrika 2016-2020, p. 3.

was very strongly directed by the government, which controlled (and owned) key economic sectors, making economic diplomacy a key element of supporting Dutch economic cooperation and development.

A 2018 OECD competition review of Vietnam noted that very few countries have as many – or powerful – state-owned enterprises (SOEs) as Vietnam. The 2012 annual plan notes: “The dominant role of the state, the level of competition and the physical and cultural remoteness from the Netherlands, provide for a clear and continued role for the Dutch diplomatic missions in Vietnam in serving economic interests through excellent bilateral relations. Its opportunities as well as its challenges justify prioritising Vietnam as a key emerging market for the Netherlands in the years to come.”

Both the embassy and the RVO in Vietnam continued to focus their efforts on economic and commercial work, focusing on economic diplomacy by building on strong bilateral relations and seeking opportunities for economic cooperation through economic instruments. Traditional ODA programmes were phased out in 2012 and the lessons learnt from the Vietnam Relay Facility (VRF) were utilised for turning its successor programme the TF to mutually profitable economic cooperation from the start. In this respect, the transition from ODA to economic cooperation was already firmly under way at the start of the TF.

A comparison of the three countries’ experiences reveals that the positive contribution of an instrument like the TF to the Dutch economic diplomacy depends on:

- the priorities of the embassy in the country context, whereby the embassy sees the transition as feasible in the context; and
- the internal make-up of the embassy organisation, since it requires skills in designing and managing projects that not all embassies necessarily have in-house, especially those in middle-income countries.

7 TF Efficiency: Components, instruments and the dual management structure

EQ 2: What mix of components/instruments under the TF proved to be most effective and why?

This section explores the extent to which the portfolio was 1) clearly focused on priorities and through resources, being driven by the strategic objectives of the Dutch government, multi-annual development plans of the embassies, and 2) sufficiently flexible to generate effective clusters and sequencing of interventions to improve results.

As shown in the ToC, unique features of the TF included a focus on priority countries and sectors and adaptation and flexibility in project identification.

The TF focus in the three countries was guided by the multi-annual development plans of the embassies, as well as the definition of priority sectors. Based on the key sectors, RVO aimed to proactively mobilise market knowledge and Dutch actors in that sector, and then fund individual projects resulting from first interactions. Financial resources were also only allocated to three countries in these priority sectors. Sections 6.1 and 6.2 review the focus on priority sectors and TF resource allocation.

The focus on strategic and sector priorities was balanced by a degree of flexibility. The expectation was that around 80% of projects would fall in the priority areas with flexibility for the remaining 20%, reflecting the so-called 80:20 rule. The TF acted as a facilitator between different ODA and non-ODA modalities, including non-TF instruments, with expectations of strategic clustering and sequencing of projects. The array of potential intervention types extended from development cooperation to economic diplomacy and remained flexible for innovation.

Table 13 presents the strength of evidence supporting the evaluation findings in these areas.

Table 13 Strength of evidence: Components and instruments

Finding	Triangulation	Strength of evidence
The commitment to the strategic sectors varied between the three TF countries, with the 80:20 rule applied in Vietnam but not in Colombia or South Africa.	Portfolio review, interview data	High

Finding	Triangulation	Strength of evidence
While the sector priorities were clear through the strategic plans for each of the three countries, the effectiveness and efficiency of the large number of isolated interventions with relatively small budgets was limited.	Desk review, portfolio analysis, case studies, interviews	High
Project identification and design was more ad hoc and diverse than the ideal, with weak thematic and policy connections in an emerging cluster being at least as effective as this more structured approach to sequencing interventions.	Case study (clusters in the logistics and water sector in Colombia)	Medium, due to the inability to effectively identify clusters across the portfolio
The TF project identification process was initially not easy to implement through the dual management structure.	Interview data	Low

7.1 Strategic planning

Table 14 **Error! Reference source not found.** presents an overview of the priority sectors identified for the three countries.

Water, agri-food, agri-horticulture, and logistics were chosen as priority sectors in all three countries. Both Colombia and Vietnam considered the inclusion of the health sector and conducted market research towards the end of the TF, although ultimately they did not fund related projects. Colombia identified the most priority sectors (seven) and South Africa the fewest (5).

Table 14 Priority sectors in the three countries. Priority sectors are colour coded in deep blue.

Sector	Colombia	South Africa	Vietnam
Water			
Agri-food			

Agri-horticulture			
Bio-based economy			
Climate change			
Energy			
Maritime			
Logistics			
Finance			
Health			

The portfolio review suggests that the 80:20 rule was applied in Vietnam but not in Colombia or South Africa. Of all 194 TF projects in Colombia, 131 projects (68 per cent) were covered under the priority sectors. Of all 60 TF projects in Vietnam, 51 projects (85 per cent) were covered under these sectors. Of all 153 TF projects in South Africa, 99 projects (65 per cent) were covered under priority sectors.

The comparison of strategy setting processes across countries suggests that the TF strategy was constituted by:

1. a continuation of project themes already ongoing through development cooperation;
2. market research contracted to external providers; and
3. the participatory consultation of Dutch and counterpart firms.

The timing and depth of each step differed among the three countries. Colombia and South Africa continued existing projects in the initial phase, whereby Colombia had relied on an external consultancy to provide the analytical work on which the new Transition Strategy was based. Compared to the other countries, Vietnam opted for a more limited sector focus and timeframe for the Transition Facility, with more concrete performance targets.

The comparison of the three strategy processes demonstrated a good understanding of barriers and opportunities related to the country context and the Dutch comparative advantage. However, the strategies may have underplayed some of the challenges that this evaluation has retrospectively picked up, in particular public procurement and donor coordination – or a lack thereof – as well as the impact of the continuing availability of ODA funds from other partners in the three countries.

7.2 Resource concentration

The sector priorities were clear through the strategic plans for each of the three countries.

However, the evaluation sample of projects and the portfolio review suggest that a portfolio with this large number of isolated interventions with relatively small budgets was not efficient.

Project budgets ranged from EUR 424 to EUR 2.2 million. 99.5 % of the projects were under EUR 1 million in contract value, with only two projects above this limit. The lowest allocated budget for a project was a EUR 424 subsidy for a technical water-related meeting in Colombia in 2012. The highest allocated budget was EUR 2.2 million for the Sustainable Trade Platform of Solidaridad, which was also one of the most successful projects in the sample. For 48 projects, no budget information was included in the portfolio data.

Table 15 Budget overview of TF projects

Budget range/projects	# of projects	Percentage of total
No budget data	48	12%
Budget below EUR 50,000	167	41%
Budget between EUR 50,000 and 200,000	131	32%
Budget between EUR 200,000 and 1,000,000	59	14.5%
Budget over EUR 1,000,000	2	0.5%
Total	407	100%

The available data suggests that budget caps were too low to actually implement recommendations from market studies. There was frustration for those that could not take next steps if one or more partners were not interested in a follow-up. There was also insufficient finance to build a larger set of sequenced interventions.

7.3 Project identification and sequencing of TF services

7.3.1 TF services

The RVO and the embassies were able to apply a variety of instruments and services under the TF. If the RVO and the embassy reached a consensus on a project, they worked to determine what was needed for implementation and determined what kind of financial instrument to apply. This could include supplying a subsidy, different missions, supplying expert input, and requests for proposals, among others. Even in Vietnam, where ODA support had formally ended, the embassy was nevertheless able to use some delegated funds to set up and manage projects. The MTR

called this flexibility in process of the TF the “democratisation” in the access of Dutch firms to instruments that supported their international trade ambitions. However, this also led to a loss of focused interventions, most notably on interventions that targeted the business climate.⁷²

The most frequent intervention types were studies, in addition to direct funding of recipients.

The portfolio analysis demonstrated that besides direct subsidies, the most frequent intervention types were DHK demonstration (42 projects) and feasibility studies (38 projects). There were 29 assignment fact-finding projects from 2012 to 2015, some with apparent links to successful projects in the sample (e.g. expert advice on multimodal river transport). There was roughly an equal balance of incoming (18) and outgoing (15) trade missions. This included both ODA and non-ODA funded missions for technical experts from La Mojana and Colombian authorities, respectively. There was also substantial classification of projects as “other.” Unfortunately, as noted in the MTR, it was not possible to analyse any linkages between these different interventions based on the portfolio data.

Looking at the portfolio of interventions from a financial perspective, the top five financial sources were: 1. ODA subsidy: EURO 8,416,508.00; 2) Delegated budget: EURO 7,262,080.00; G2G: EURO 3,575,265.00; Demonstration study: EURO 3,264,481.00; and Settled file: EURO 2,258,938.00.

Qualitative scoring based on the experiences of the sampled projects suggests that the effectiveness of sector coordination and policy advice was the highest among the different TF services, followed by trade fairs and conferences, and with different knowledge products ranked last (e.g. feasibility studies, demonstration studies).

Table 16 Effectiveness of TF services. Source: MDF assessment based on triangulate qualitative information (interviews with project applicants, RVO advisors, and counterpart country stakeholders. Scale from 1 to 5: high effective 5, medium 4, low 3, none 2, not-applicable 1.

TF services	Average effectiveness across project sample (on a five-point scale)
Feasibility study (detailed design, business plan)	2.75
Demonstration study	2.3
Market research	2.25
(Policy) advice	3.71

⁷² ERBS (2017) Mid-Term Review of the Transition Facility, p. 75-76.

Sector coordination (e.g. chamber of commerce)	4
Conference, seminar	3
Trade fair	3
Trade missions	2.66

The average number of different interventions combined in the successful projects was 1.75 and 2.3 for less successful projects. This suggests that successful projects required more limited support from the Dutch government, while increased support for less successful projects was not sufficient to overcome the barriers that they faced.

7.3.2 Sequencing

In all three countries, the RVO took a proactive approach to project identification. Based on interview data, this proactive approach comprised:

- a sector study of opportunities at the sector level;
- a trade mission at the sector level, and – if relevant – a follow-up mission; and
- awarding a subsidy.

The first two steps of the process funded one intervention each, a sector-wide market study and a sector-wide trade mission that tied together many Dutch and Colombian companies that worked in the sector. In the third step, the TF was supposed to fund company-level subsidies.

The MTR sample does not allow to conduct the same analysis as contained in Table 16, as the data collection had not been targeted to the same question. However, we note that the MTR sample contains more projects that conducted outgoing or incoming trade missions and market research, suggesting that the portfolio of the TF has evolved from more generally supply-led projects to more demand-driven one in the latter part of the programme, as generally planned.

Nevertheless, project identification and design in our sample of project was more ad hoc and diverse than this ideal sequencing suggest, with country differences and weak thematic and policy connections emerging in clusters rather than being planned at the outset. Fortunately, linking projects through emerging clusters seem to be as effective as a more structured and pre-planned approach to sequencing interventions.

In Colombia, the TF was much more ‘demand driven’. The water and transport and logistics sectors followed a different logic based on past Dutch cooperation in these sectors and the demand for support by the Colombian government following the 2011 droughts and floods. They started with high-level policy advice and cooperation between the Dutch government and the

Colombian government, built this through the involvement of Dutch consultancies in advisory role, and had trade conferences and trade missions later to tie up all of the different strands of work and promote the Dutch sector for follow-up work. The ideal sequencing described above was applied in Colombia for the dairy sector, which is outside of the sample selected by the evaluation and for which the evaluation team found anecdotal evidence of both successful and less successful projects. The first two steps of the process were also applied for the health sector towards the end of the TF, albeit when there was no time for following up with funding for Dutch companies.

In South Africa, the TF was more 'supply driven' by the Dutch government. It started with the embassy seeking leads in South Africa and trying to sell them in the Netherlands. If parties were interested, a prospect was started, and an instrument was selected that could facilitate the project.

In Vietnam, the approach was also largely demand driven, although the sample – notably the Holland Village – may give a supply-driven impression. The Holland Village built on a historically-grounded series of trade fairs, aiming to influence policy through side events.

7.3.3 Clustering

In Colombia, the evaluation team explored the presence of an emerging cluster, bringing together TF projects in water, transport, and logistics. The cluster of interventions emerged based on weak connections across thematic lines:

- in response to the 2011 floods and droughts in Colombia, as well as climate change and environmental degradation; and
- discussions around the new inter and multimodal transport model for Colombia, in particular connected to the Magdalena river.

The connections were established between policy advice within and across different sectors, inter-sector conferences where the advice was given and the Dutch expertise showcased, trade fairs and missions, and the activities of Dutch companies outside of TF funding. The cluster included different funding sources and actors – even outside of the TF – such as the Dutch Organisation for the Internationalisation of Education (Nuffic) and the Delta State strategy.

Box 2 provides an overview of the connections in the emerging cluster.

Box 2 Transport and logistics, and water transport in Colombia

The **transport, water and logistics cluster** seems to be sequenced as follows:

- 1) Policy dialogue between ministries (Dutch Ministry of Infrastructure, Dutch embassy, and Colombian counterparts).
- 2) Contracts for the procurement of consultancy services for the Master Plans and other work on water governance issued by the Colombian government and partly funded by the Dutch government.
- 3) Spin-off consultancy contracts funded entirely by the Colombian government, which also led to a successful Colombian application to the Green Climate Fund.
- 4) Support to the centre of excellence in ports and logistics for training personnel at the port terminals.
- 5) Three water and logistics sector-wide public and private conferences since 2016, with support from Holland House. The conferences brought together all actors in these two sectors and led to both showcasing the Dutch firms and discussing the Dutch model as applied to infrastructure and environmental governance issues in Colombia. For example, the Colombians were discussing the Rotterdam model of a port city for their own port plans for Barranquilla. Following these steps, there have been:
 - 6) Spin-off trade fairs and visits to the NL, including to Rotterdam by Colombian actors that were not funded by TF .
 - 7) Support by the embassy to help large Dutch dredging companies prepare for the tenders for the mega project of the dredging of the Magdalena river.

7.3.4 Individual projects

The portfolio analysis and e-survey also revealed that from the applicant perspective, most interventions were nevertheless implemented in isolation. As already noted above and in the MTR, it was not possible to identify clusters or groups of interventions based on the portfolio data. Identifying them would have required an in-depth understanding of the individual projects and their context.

67 per cent of e-survey respondents implemented only a single intervention. This was confirmed by the portfolio analysis, e-survey, and interview data. Based on the e-survey, the justification for cases of the same applicant following multiple projects was to receive support in multiple countries, or requests for local support for multiple projects, rather than a strategic sequencing and build-up of interventions directed by the embassy or the RVO. Besides the earlier prioritisation of sectors, preparatory work and trade missions, it was difficult to assess systematically whether the embassy and the RVO strategically linked multiple interventions over time with or without the same companies/providers. According to interviews in South Africa and Vietnam, it seems that the embassy stepped back if it could not discern strong interest around a project and could not provide in-depth support to all of the projects in the portfolio.

Among the sample of projects, there is an example where sequencing interventions by a single TF applicant was successful. The Catalysing South African Rural Development by Intermodal Cool Logistics (Flying Swans) closely followed its original sequenced design. Catalysing South African Rural Development by Intermodal Cool Logistics (Flying Swans) was a project that followed a sequencing of interventions, and was already designed as such. The “Gauteng cool rail” train-component was a feasibility study. This was followed up by a demonstration project of the Limpopo consolidation centre, which is now itself entering into the feasibility study phase. The project itself was a sequence of interventions, with one intervention logically leading to the other, as envisaged in the project application. FMO was the initial project applicant for this particular project, later being replaced by Mercator Novus. In the overall portfolio of TF projects, Mercator Novus had successfully applied for another project, running in direct parallel with the Catalyzing SA Rural Development by Intermodal Cool Logistics, which was a fact-finding assignment with the project title “Preparatory study Flying Swans”.

In the sample of projects, there is also an example where sequencing interventions by a single TF applicant was not successful. In Colombia, a consortium of Dutch enterprises in the safety and security sector received three sequenced forms of support for establishing a training centre in Colombia. First, the consortium conducted a market studies, then they demonstrated its services and capabilities with a demonstration project, and finally received support for a feasibility study. However, the project idea was never realised due to a lack of finance and counterpart government support for the training centre.

7.3.5 Dual management structure

This section reviews the role of cooperation between the RVO and the embassy in identifying interventions, the collegial project approval process and the so-called transition desk.

Before the TF, RVO advisers assessed subsidy demands from Dutch companies based on the criteria connected with the instruments, providing support based upon the applicant meeting the requirements. The embassies in the TF countries identified and designed projects from their delegated budget.

During the TF, the embassies and the RVO collegially approved projects. Additionally, the TF architects insisted on connecting the DHI and DHK instruments with the TF, opening a special window under these programmes for TF countries. This required an additional level of connection between the TF and these instruments. TF advisers (and DHI and DHK advisers) received proposals for funding from different sources (embassy, TF windows, DHI and DHK windows) and discussed them together, arriving at joint funding decisions.

Funding decisions were mainly taken based on these discussions, including with potential applicants. Based on the initial discussions – which typically revolved around clarifying what the TF did and did not do – the RVO would then conduct an internal check whether a proposed project fit the TF goals and if a counterpart party existed and was likely to be interested. The RVO typically also encouraged the requesting party to have discussions with the embassies.

Once the initial assessment was completed, the RVO either wrote a proposal or supported the TF applicant to do so and send it to the embassy. The RVO also worked to build consensus between the various parties in the proposal process. Discussions between RVO and the embassy typically focused on whether the contents of the proposal fit the TF criteria and requirements, whether partners existed and if the right set of objectives was set. Finally, they found ways to finance the project among the various instruments that were available.

Interviews suggest that the TF project identification process through dual management was initially not easy to implement. At the beginning of the TF, the embassies wanted to block proposals that did not fit country priorities, in Colombia and especially South Africa. Additionally, the DHI/DHK instruments were bound by law to fund all proposals that met their criteria, even if the embassies did not agree that the support was strategic. In the meantime, the RVO also struggled to influence the approval and design process based on its experience, e.g. in the establishment of bilateral chambers of commerce. Over time, during implementation – at least in Colombia and Vietnam – the parties involved managed to solve these problems through communication and focusing on shared objectives.

An example of success in collegiality is the design of the Holland House in Colombia, for which RVO staff reported that the discussions had initially been heated as the RVO did not feel that the design was taking on board the lessons that it had learnt with funding similar skills in the past. However, after an agreement was reached that included these lessons learnt, the Holland House went to become one of the successes of the TF, as one of the most active Dutch bilateral chambers worldwide.

Flexibility and collegiality in project approval were highly appreciated and replicated in the PSD Apps programme. The evaluation of PSD Apps concluded that the collaboration in PSD apps between RVO and Embassies is good, and in instances where they do not reach an agreement on project proposals, this is mainly related to the level or lack of ODA relevance in the project idea proposed by the Embassy.⁷³ The evaluation also highlighted that the role of PSD coaches as brokers in PSD apps has been essential, also in linking the programme to the larger portfolio of programmes by RVO and embassies. The relationship between BZ and RVO was considered excellent, in terms of the overall process and direct lines of frequent communication regarding PSD Apps.

The quality of the dual management was influenced by staffing at the counterpart embassy and similar interests in the RVO and the embassies.

In Colombia, the embassy maintained five staff members in the economic cooperation section, including economists focused on key TF sectors. These staff members followed TF projects and

⁷³ Evaluation of PSD apps

provided additional support to Dutch companies in key areas, such as the large contracts for dredging the Magdalena river. This level of human resources ensured the ability to work in effective partnership with RVO advisers based in the Hague, but was still insufficient for following all TF projects funded in Colombia. Interviews with embassy staff suggested that they had to prioritise support where Colombian counterparts showed the most interest. Additionally, the Head of the Economic Affairs section changed twice in Bogota during the TF lifetime.

In South Africa, there were only a handful of staff members left at the time of interviews at the embassy who had been involved with TF projects. The embassy and the RVO had very different interests, one in a strong, country-driven development orientation, and the other in the success of Dutch firms. Dual management did not initially work smoothly in South Africa, with many initial discussions on process, procedures, and ways of collaboration delaying progress. The embassy ensured that development aims were kept on the agenda, recognising the challenges that South Africa faced, and ensuring that it kept the Netherlands as a credible and socially aware partner, while the RVO has promoted more Dutch business opportunities.

In Vietnam, three sector specialists who had been involved in the TF remained. In Vietnam, cooperation between the BZ and RVO was considered by participants to be strong, with RVO responsible for the TF budget, but consent for all funding decisions taken jointly.⁷⁴ This was partly due to downsizing of the embassy in Hanoi, with the elimination of ODA over time. The design of the TF encouraged close cooperation. Consensus building was crucial for funding approval.

Based on the e-survey, project applicants considered the RVO as a more important partner than the embassy in Colombia and South Africa, with equally strong importance in Vietnam. These differences may also be due to the fact that the e-survey was targeted at TF applicants, largely Dutch companies, and the individuals in charge.

In summary, the enabling factors and barriers for a successful dual management seem to be:

- The presence of sufficient staff members at the embassies to support the portfolio of projects. In some cases, the dual management structure expanded the TF portfolio of projects to areas that the embassy did not have the capacity or interest to follow. Some project applicants were more supported by the embassy than others. Some interviews even suggested that TF funding should not have been allocated at all without strong embassy support, especially in cases of strong reliance on embassy support.
- The commitment of individuals and limited staff rotation at the embassies: the Dutch stakeholders recognised that the right people in the right place were the key to success. However, embassy staff usually only stayed in a given post for 2-4 years.

⁷⁴ Interview data.

- Recognition of the complementary of the knowledge held at RVO and the embassies: the RVO had unique knowledge in facilitating trade across multiple countries, while the embassies understand the counterpart stakeholders – especially governments – better.
- Alignment of objectives between the RVO and the embassy: supporting Dutch firms and contributing to other aims of Dutch policy pursued at the country level by the embassies.

8 Sustainability: TF interventions over time

EQ3: What projects continued, what companies increased their trade relations, and did they experience an improved trade-enabling environment and increased market access? How and to what extent did TF facilitate this?

Sustainability is a key concern of any intervention. This section assesses the extent to which TF-funded interventions continued after the end of the support, highlighting particular examples of the uptake, replication of interventions, as well as the leveraging of additional support.

Table 17 Strength of evidence: Sustainability

Finding	Triangulation	Strength of evidence
While about half of the projects continued after the end of TF support, additional finance including Dutch grants were frequently required.	MTR, case studies	Medium
The TF might not have been sufficiently large or long term to have led to sustainable, increased trade.	Portfolio review, MTR, case studies, interviews	High

8.1 Continuation of activities

Half of the sampled projects continued their activities subsequent to the end of TF support. This was largely in line with the findings of the MTR, where about half expected new commercial activities within six months.⁷⁵ This is in line with the MTR sample as well.

A qualitative review of the sampled projects allowed exploring what enabled sustainability in some projects.

Dutch and Vietnamese knowledge institutions – supported by the industry – have been working together since 2015 on the design and establishment of the Fresh Academy. This included developing training programmes, training materials, as well as implementing and testing them by

⁷⁵ ERBS (2017) Mid-Term Review of the Transition Facility, p. 12.

training the trainers. These developments culminated in the start of actual operations of the Fresh Academy. The first commercial training courses in practical horticulture were available from early 2018 onwards in Vietnam. The Fresh Academy was the first training and knowledge centre in Vietnam offering training courses continuously on a commercial basis within the agricultural sector.⁷⁶

In the case of Solidaridad's Sustainable Trade Platform – which is still working and may expand into new products – sustainability depended on the availability of additional funding under development programmes managed from the Hague.

In the case of Flying Swans, Deltares, and STC, sustainability was achieved through building credibility and successful operations and then using them as a stepping stone for expanding to other regions and clients. Flying Swans and Deltares achieved this by obtaining funding from other concessional sources. Flying Swans secured new funding through the African Development Bank and Deltares contributed to Colombia's successful application to the Green Climate Fund.

8.2 Additional funding sources

Most projects were not financially self-sustaining, requiring new financing sources. As highlighted earlier in this report, access to finance remained a market barrier in the three countries during the TF, and this lack of access to finance has hampered the sustainability of the interventions. According to the MTR, the continuation or further development of 80% of the sampled interventions has depended on additional financial input.

Often the only financing option implied continuing grant assistance from the Dutch government. Since the companies in the target countries lacked access to capital and Dutch companies were not always willing to invest more, further development depended on the availability of (mainly Dutch) public resources.⁷⁷ These funding streams and instruments were sourced from development, sectoral, and business-oriented subsidies. In the case of the Colombian projects, the funding sources for project applicants varied from PSD Apps, Nuffic, the Dialogue and Dissent facility, as well as water-specific Delta Strategy funding. Flying Swans in South Africa also applied for and secured funding from FMO/BZ.

A number of new sources of private sector funding were available from the Dutch government. The Partnership Development Facility (PDF) – initiated in 2016 by the BZ and FMO – funded early-stage projects in food-, water- and climate-related sectors. The Flying Swans project considered PDF as a follow-up to TF, inspired by its dual management structure. TF played an important role

⁷⁶ <https://www.freshstudio.vn/index.php/news-publications/item/362-successful-launch-of-the-fresh-academy-in-vietnam>.

⁷⁷ ERBS (2017) Mid-Term Review of the Transition Facility, p. 12.

in bringing the triangle of RVO, embassy and companies together. With the scaling up of financing under PDF, the relationship with the embassy continued.

The PSD Apps programme (2014-2017) partly took over the TF model. It financed a wide array of instruments – so-called ‘apps’ – to contribute to a favourable business climate in 68 countries and enhance business opportunities for both local and Dutch entrepreneurs. The available budget of a little over EUR 17 million per year needed to be spread over these 70 countries.⁷⁸ This invariably meant the loss of flexibility and size of instruments, or the “meat on the bones”, as embassy staff in South Africa referred to it. Secondly, the PSD Apps has been re-oriented after 2017 as an instrument for supporting the private sector in the partner country, with its role in supporting the Dutch private sector in a trade and investment relationship becoming less prominent. The flexible development, combination and adjustment of apps was copied from the TF, with some apps dropped (e.g. internal training) and others added (e.g. Orange Corners).

The PIB focused on supporting Dutch business with commercial activities abroad through better positioning of Dutch business and knowledge institutes from top sectors within promising new markets. This was achieved through similar instruments as in the TF, such as missions, branding, and G2G, which should lead to broader networks, fewer business obstacles/trade barriers, and increased market access. Economic diplomacy was also a central aim and was meant to achieve the intended impact of sustainable economic growth for involved participants. However, instead of three focus countries like TF, PIB had 63 focus countries.⁷⁹

Notably all of the successor programmes expanded the number of countries without a substantial expansion in budget, thus further diffusing impact.

8.3 Long-term potential

Ultimately the TF might not have been sufficiently large or long term to have led to sustainable increased trade. Sustainable trade depends on many variables, as demonstrated in the previous sections. These processes take time, while contextual conditions need to remain in favour of a trade relationship. For the sampled cases, a substantial amount of time was required for conditions to improve before the results of the projects became (mutually) beneficial. As an example, for the Demonstration Obstacle Limitation Evaluation Tool project in South Africa, the first order only came four years after the TF project closed. It takes time for innovative technology to become mainstream or sufficiently adapted and appropriate to local contexts, which especially influences projects that revolve around new technologies.

⁷⁸ Technopolis (2018b) Mid-term Review of PSD apps programme: Final Report, p.16.

⁷⁹ PWC (2017) Beleidsvaluatie PIB – 2016 Eindrapport.

The available data suggests that neither the RVO nor the embassy sought or succeeded in coordinating support with other multilateral and bilateral donors, with a view to leveraging additional support and bringing results to scale. Other donors interviewed – including other EU member states and EU delegations – were generally not familiar with the TF approach, which is potentially partly due to lack of institutional memory in other donors as their staff also rotates. A more coordinated donor approach would have also mitigated the potentially negative effects of the continuation of ODA funding by other donors, which the Netherlands was attempting to transition to other forms of support.

9 Conclusions

The Dutch government and three TF target countries had very different understandings of transition and very different development trajectories. Substantial progress was made in Colombia, but the transition was not considered complete. In South Africa, transition was not achieved, and the deadline was formally extended for an additional two years. Vietnam formally concluded the Transition Facility early, although some felt that the process was too abrupt and early.

The TF's influence on the commercial success of individual companies and broader trade and investment trends was limited.

Despite its relevance for both attracting foreign investment and supporting commercial successes at scale across the economy, business climate reform was not sufficiently targeted and was allocated few resources. Only limited resources were mobilised for business environment reform by either the embassies (e.g. delegated budget) or individual companies or related advocacy initiatives.

The TF had strong potential to contribute to broader development outcomes in the targeted countries, with half of the project sample demonstrating related results (e.g. the provision of public goods, benefits to small-scale farmers and more responsible business practices). However, as related data was not gathered, it was not possible to assess the indirect influence of supported companies' success across supply chains, on the broader economy and community.

While promoting CSR and environmentally and socially responsible business practices was a requirement in the design of individual projects, they were not universally applied, resulting in mixed performance across projects on these criteria.

EQ 1: What context-specific criteria and conditions appeared to be critical in each of the three TF countries in the transition from a bilateral (development) relationship to a more mutual trade- and investment relationship?

Global trade trends and the national context were the most important factors influencing the transition. These externalities were major determinants along the transition path of each of the countries, including global trade contraction, trade relations between China and the United States, and the price of oil, as well as more domestic variables such as trade agreements, trade relations with other countries, phytosanitary measures, currency fluctuations, refugee flows, or changes in government. The economic advances in Vietnam brought the TF to an early close, while the economic and political conditions in South Africa proved particularly challenging for TF projects. In Colombia, economic progress was an important enabling factor for the Transition.

The most critical market factor influencing the transition – especially for individual projects – was the demand for the goods and services offered by Dutch firms, particularly know-how and technology. The demand for Dutch know-how and technology was a critical condition for market entry and commercial success. This demand existed particularly in Colombia, for private investment in the horticulture or logistics sector, but most notably also from the government in the water and transportation sector. Of the three countries, in Colombia, Dutch companies managed to successfully bid for public procurement contracts among the sample of projects reviewed. At the same time, the added value and appropriateness of Dutch innovation and technology was also a major factor in the failure of some projects in the case of less appropriate or affordable solutions.

Due to its limited scope and size, the TF could not always address the most pressing market barriers. It tended to address market information, technology and skills gaps, even when these did not appear to be the main challenges to commercial success. Access to finance and infrastructures were the main barriers identified across the TF projects, but were also barriers that the TF was not meant to address.

The main TF achievement was to secure market presence and build strong local partners, while strengthening local partnerships, particularly B2B and B2G relationships. Most projects in the sample strengthened local partnerships. B2B relations were the most common type of relationship fostered, with more limited support provided for G2G efforts. The most successful projects had multiple constellations of partners, ranging from B2B, G2G, B2G and K2K relationships. Even for projects that did not yet achieve commercial success, market entry and the building of local partnerships had value in itself, presumably with a view to future commercial success or as a springboard into other markets.

EQ 2: What mix of components/instruments under the TF proved to be most effective and why?

While the TF was guided by overarching sector priorities and market opportunities, the efficiency of a large number of isolated interventions with relatively small budgets reduced TF effectiveness. All of the target countries had clear sector priorities, although only Vietnam applied the 80:20 rule, with 80 percent of interventions in the priority sectors. Only two out of over 400 projects had budgets over EUR 1 million. Most project applicants implemented only one project. Initial studies – the most common type of intervention – were not followed up by the implementation of project ideas, including due to budget limitations and limitations in follow up projects at RVO because of State support rules.

The average number of different interventions combined in the successful projects was 1.75 and 2.3 for less successful projects. This suggests that successful projects required more limited support from the Dutch government, while increased support for less successful projects was not sufficient to overcome the barriers that they faced.

Qualitative scoring based on the experiences of the sampled projects suggests that the effectiveness of sector coordination and policy advice was the highest among the different TF services, followed by trade fairs and conferences, and with different knowledge products ranked last (e.g. feasibility studies, demonstration studies).

Clustering projects across policy and cooperation themes was an emerging strategy, with a more ad-hoc and diverse approach than the proactive, formal sequencing of interventions. The successful cluster in Colombia employed at least policy dialogue, studies, training, conferences, trade missions and technical assistance to the government and private companies and has resulted in few public contracts. Project identification and design was more ad hoc and diverse than the sequenced approach, delivering weak thematic and policy connections in emerging clusters, which were, however, at least as effective as the more structured approach to sequencing interventions. While the dual management process was initially challenging, collegial decision-making improved through implementation, although challenges persisted in South Africa.

The TF project identification and facilitation process was initially contentious due to both parties adapting to the new dual management structure, roles and responsibilities, although collegial decision-making improved during implementation.

EQ3: What projects continued, what companies increased their trade relations, and did they experience an improved trade-enabling environment and increased market access? How and to what extent did TF facilitate this?

While about half of the projects continued their activities after the end of TF support, additional finance – including Dutch grants – was frequently required. Together with the satisfaction of gaining market information and access, especially through local partnerships, this may suggest that the commercial success sought may still come. However, ultimately the TF might not have been sufficiently large or long term to have led to sustainable increased trade.

10 Recommendations

The evaluation has conducted a sense-making discussion together with the staff at BZ and RVO involved in the evaluation. From the discussion, thematic clusters have emerged for grouping the findings and recommendations around their learning and evidence needs. Following on this, the evaluation presents in Table 18 recommendations grouped, against the supporting conclusions, around the following clusters:

1. The TF approach to working together across Ministries and Agencies of the Dutch Government, especially the Transition Desk
2. The contextual success factors for the Transition
3. Establishing synergies between the objectives of supporting Dutch companies and generating development results, especially in the field of a better business climate
4. Strengthening the governance and strategic focus of cross-government programmes
5. Strengthening the monitoring and evaluation of complex programmes.

Table 18 Conclusions and recommendations

Conclusion	Recommendation	Responsibility
1. Internal success factors of the TF: networks and Transition Desk		
<p>The TF project identification and facilitation process was initially contentious due to both parties adapting to the new dual management structure and roles and responsibilities, although collegial decision-making improved during implementation.</p> <p>Flexibility and collegiality in project identification was considered one of the most important lessons learnt from the TF, with the TF also allowing involvement of other Ministries and</p>	<p>1. In future cross-government programmes, replicate approaches such as the Transition Desk that facilitate a smoother collaboration between BZ, Embassies, and also other Ministries, especially the Ministries in charge of top sectors, such as the Ministry of Economic Affairs and Climate Change for programmes supporting Dutch companies abroad. From the start, incorporate a change management approach with the aim of smoothing collaboration between Ministries, RVO and embassies in future cross-government programmes, clearly defining roles, responsibilities, governance, and procedures.</p>	<p>Relevant for all cross-government (inter-Ministry / inter-agency) programmes</p>

<p>Dutch government agencies in TF projects</p>		
<p>The collaboration across Ministries did not succeed as expected, as the TF was relocated inside BZ and the majority of financing sources of the TF was ODA</p>		
<p>The absence of delegated budget at the Embassy level is not a barrier for involving the Embassies in decision making on programmes funded with central-level budget.</p>		
<p>2. Success factors: contextual factors and how the TF has responded to them</p>		
<p>TF influence on the commercial success of individual companies and broader trade and investment trends was limited. The main TF achievement was obtaining market presence and building strong local partners, particularly B2B and B2G relationships.</p> <p>Due to its limited scope and size, the TF could not always address the most pressing market barriers, and was not sustainable over time.</p>	<ol style="list-style-type: none"> 2. Set more realistic objectives at the programme level, with achievable and measurable targets that are regularly monitored. 3. Explore coordination with complementary investments (e.g. multilateral development banks, other donors) to access funding to ensure that all relevant market conditions (e.g. access to finance, infrastructure) are in place for business success in a given sector. 4. Continue building the relationships successfully established in the countries after the formal end of the transition. Strengthen G2G relationships through economic diplomacy, as well as capacity-building support where required. 	<p>Relevant for future programmes working on transition from development cooperation to trade</p>

<p>While about half of the projects continued after the end of TF support, additional finance – including Dutch grants – was frequently required.</p>		
<p>The transition is not a linear process. Countries can experience set-backs in their development processes (economic crises, political crises, etc...).</p>	<p>5. Ensure the opportunity to quickly adapt transition programmes, in case of substantial changes in the enabling factors and barriers to expanding Dutch trade in particular countries, ensuring that there is a pathway back to development cooperation as well as a pathway forward to trade and investment.</p>	
<p>Global trade trends and the national context were the most important factors influencing the transition. The most critical market factor influencing the transition – especially for individual projects – was the demand for the goods and services offered by Dutch firms, particularly know-how and technology, and linking with local partners.</p>	<p>6. Reform the project identification requirements of future and current programmes involving Dutch business in economic diplomacy to be more mindful of contextual opportunities and challenges that could affect project proposals. Ensure that market analysis and discussions with local partners are conducted (include in project fiche). The project identification should discuss and assess market demand for Dutch goods and services adequately, making sure that the Dutch technology and services are suited to the markets, and whether the Dutch company understands the partner government well (in case the project requires them to work with the public sector).</p>	<p>Embassies/RVO/TF Beneficiaries</p> <p>Relevant for future and current programmes involving Dutch business in economic diplomacy</p>
<p>3. Synergies between aid and trade agenda</p>		
<p>Programme can be realistically designed to achieve the objective of supporting Dutch enterprises and achieving development outcomes, such as the outcome of</p>	<p>7. Establish a transition policy, if possible, for countries that graduate from development assistance, without forcing the transition for reasons connected only to Dutch politics. Establish programmes that are able to respond to reversals in country conditions (economic or political crisis).</p>	<p>Relevant for BZ policy on synergy between objectives of supporting Dutch business and delivering</p>

<p>supporting the business environment.</p> <p>The TF had strong potential to contribute to broader, development outcomes in the targeted countries, with half of the project sample demonstrating related results (e.g. the provision of public goods, benefits to small-scale farmers and more responsible business practices). However, as related data was not gathered, it was not possible to assess the indirect influence of supported companies' success on the broader economy and community.</p>	<p>8. In programmes with a double objective, the development outcomes would have to be more clearly incorporated into programme objectives, with related KPIs and monitoring during implementation, than was the case in the TF. The focus of programmes with a double objective of supporting Dutch business and delivering development outcome should then be on those Dutch firms that can deliver value for business environment and are at the forefront of doing business not just sustainably but actually producing environmental and social benefits, rather than on Dutch firm generally.</p> <p>9. In addition to prescribing adherence to CSR standards, actual company implementation and performance on environmental and social standards would need to be tracked over time; for example, through related company plans and grievance mechanisms, potentially through agreements with third-party neutral entities (for example, NGOs).</p>	<p>development outcomes</p> <p>BZ/Embassies</p> <p>Embassies/RVO/TF Beneficiaries</p>
<p>Despite its relevance for both attracting foreign investment and supporting commercial successes at scale across the economy, business climate reform was not sufficiently targeted and was allocated few resources.</p>		
<p>Promoting CSR and environmentally and socially responsible business practices was a requirement in the design of individual projects, but it was not universally applied,</p>		

<p>resulting in mixed performance across projects on these criteria.</p>		
<p>4. Strategic focus of the TF</p>		
<p>While the TF was guided by overarching sector priorities and market opportunities, the efficiency of a large number of isolated interventions with relatively small budgets reduced TF effectiveness.</p>	<p>10. Establish a robust Inter-Ministerial and Inter-agency governance structure for cross-government programmes that is above operational level. Governance should be at a level where strategic choices can be taken and synergy created, including planning for the long term, adapting the programme to action and changes in circumstances, connecting with other donors in other countries, other Ministries in the Dutch government, and across objectives and countries.</p> <p>11. At the strategic level, strengthen coordination with other donors. Before transitioning, assess the remaining international offer of aid funds from other countries, understand whether other countries will follow the transition, and what risks moving first in the transition may pose. Working in coordination with complementary investments (e.g. multilateral development banks) to ensure that all relevant market conditions are in place for business success in a given sector.</p> <p>12. Without jeopardising access of SMEs, select fewer but longer-term, more strategic, larger-scale commitment (e.g. higher budget caps) projects to address systemic market barriers and increase business impact. Projects that could be prioritised to achieve this are ones that build connections or strong consortia between Dutch companies. Alongside a stronger strategic governance and focus, maintain the flexibility of</p>	<p>Embassies/RVO/TF Beneficiaries</p>
<p>The Netherlands government and three TF target countries had very different understandings of transition and very different development trajectories of the transition.</p>		
<p>Clustering projects across policy and cooperation themes was an emerging strategy, with a more ad-hoc and diverse approach than a proactive, formal sequencing of interventions.</p> <p>This approach was particularly successful in the transportation, water and logistics sector in Colombia.</p>		

	<p>promoting emerging clusters, but define better systems and procedures for monitoring in real-time their establishment, evolution and performance.</p>	
<p>5. Monitoring and evaluation</p>		
<p>The monitoring and evaluation of the transition was not as strong as it could be due to the absence of baseline, annual review, constant monitoring of key indicators, and annual strategic discussions informed by the accumulating evidence.</p>	<p>13. Introduce innovative and robust M&E instruments that are linked to decision-making at the strategic level. Missing M&E elements are: 1) setting a baseline, 2) establishing M&E instruments and procedures at the outset that allow collecting qualitative and quantitative data and information on the contribution factors at play, 3) conduct annual monitoring 4) and have annual discussions on progress and lesson learnt.</p>	<p>Relevant for all cross-government (inter-Ministry / inter-agency) programmes, RVO and Embassies</p>

I Annexes

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Annex 2 Stakeholders Consulted

1. A van Boven - Deplhy (former DLV Plant) (project applicant in South Africa)
2. Albert Bos - STC group (project applicant in South Africa)
3. Alcides Santander Mercado, Universidad del Norte (working on STC's project)
4. Alexandra Diaz, Dutch embassy in Colombia (responsible for water and transport sectors)
5. Andre Loozekoot, Head Economic Department, Dutch Embassy in South Africa
6. Andy Poorstra, Forkliftcenter (project applicant in Colombia)
7. Anne Cremers, International Trade Policy and Economic Governance Department, Ministry of Foreign Affairs
8. Anne Kempers, Former Team Manager / Coordinator of the TF
9. Anne Ligthelm, Former Team Manager / Coordinator of the TF
10. Anouk Baron, Second Secretary, Netherlands embassy in Vietnam
11. Ante Zoric, Mobile Water Management, Director
12. Barbara Swart, Ministry of Infrastructure and Water Management, Senior Policy Advisor
13. Bernard Likalimba, Senior Policy Officer Agriculture, Dutch Embassy in South Africa
14. Bernat Montagut, European Delegation to Colombia
15. Camillo Pecha Garzón, CRECE (part of Solidaridad project in Colombia)
16. Carla Manion, Vopak, Operations Manager (project applicant in South Africa)
17. Carlos Velez Quintero, Deltares (business development)
18. Caroline Ramaeker, Head of Economic Affairs, Dutch Embassy in Colombia
19. Cesar Garay, former staff at Cormagdalena (Colombian counterpart of Deltares project)
20. Corina Kerkmans, TF advisor
21. David Lord, Senior Water Supply & Sanitation Specialist, World Bank
22. Deirdre Batchelor, Coordinator Health and Innovation, and Transport and logistics, embassy in South Africa
23. Diego Rubio, National Planning Department of Colombia
24. Edgar Higuera, Director of the Logistics and Transport Chamber at the National Business Association in Colombia (counterpart of a project in Colombia)
25. Elsbeth Akkerman, Ambassador, Netherlands embassy
26. Femke Bos, FMO (project applicant in South Africa)
27. Gabor Fluit, Business Group Director, DeHeus
28. Gjis Simons, Managing Director, WaterFutures
29. Gonzalo Vargas, Pro Colombia (Colombian export promotion agency)
30. Gottlieb Arends, Western Cape Government, Chief Director for Environmental Quality
31. Gustavo Gomez, Asoexport (chamber of commerce of Colombian exporting companies)
32. Gustavo Martínez, National Planning Department of Colombia
33. Han Peters, Ambassador in South Africa
34. Harman Idema, Dutch Ambassador to Chile, Former Head of Development (Aid) Affairs at BZ
35. Inge Horstmeier, (TF)/DHK/DHI advisor

36. Jack Vera, Embassy in South Africa, Agricultural Attaché
37. Jan Helmer, RWS (project leader for a project in Colombia)
38. Jan Louis Spoelstra, Transnet Freight Rail (project applicant in South Africa)
39. Jan Willem van Bokhoven, Executive Director, Holland House
40. Jeroen Bosboom, Your Man on Site (consultant for a project in South Africa)
41. Jeroen van den Brink, TF advisor
42. Joen Bruenen, Solidaridad (project applicant in Colombia)
43. Jos Leeters, Director, Bureau Leeters (project applicant in Vietnam)
44. Joost Staffhorst, former TF adviser
45. Jorge Rubiano, Ministry of Commerce of Colombia, Trade Relations Division
46. Jorge Sáenz, General Manager, Jesyca (involved in the Master Plans projects)
47. Joyce Hammanod, Health Unit, Environmental Health, government of South Africa
48. Klaas Bouwman, DIO
49. Laura Veloza, Pro Colombia (Colombian export promotion agency)
50. Laurant Umans, First Secretary, Netherlands embassy in Vietnam
51. Le Quoc Hung (Dr), Deputy Director General, NRSC (counterpart in Vietnam)
52. Liesbeth Hofs, OS (Aid) evaluations at RVO
53. Lucas Du Pre, Agricultural Attaché, Dutch embassy in Colombia
54. Mandla Nkomo, Director, Solidaridad South Africa (project applicant in South Africa)
55. Marc Van Der Linden, former TF advisor for Vietnam
56. Marcel Biemond, Mercator Novus (project applicant in South Africa)
57. Marcel Reymond, Head of Cooperation, Embassy of Switzerland
58. Maria Camila Celis, Ministry of Transport of Colombia
59. Maria Paula Arenas, Ministry of Commerce of Colombia, Investment Division
60. Marjan Kreijns, Director, The Green Village, University of Delft
61. Marjin Zwinkels, Co-Director, Living Lands, (project applicant in South Africa)
62. Mark Fikkers, Havatec (project applicant in Colombia)
63. Marta Faneca, Hydro-Geologist at Deltares
64. Martha Lucia Arevalo, Advisor on Economic and Politic Affairs
65. Martino Routier, IN-pact (project applicant in Colombia)
66. Micaela Passamani, TF advisor (responsible for DHI and DHK instruments)
67. Mónica Soroche, National Planning Department of Colombia
68. Gottlieb Arendse, Western Cape government, South Africa
69. Kloppers, Western Cape government, South Africa
70. Nathalie Olijslager, Permanent Representative of the Netherlands at the UN, former Head of Economic Affairs at embassy in South Africa
71. Neil de Smidt, Buhle Farmers Academy (project applicant in South Africa)
72. Nguyen Quoc Khanh, Director General, NRSC
73. Nguyen Huong Lan, Senior Trade Advisor, Netherlands embassy in Vietnam
74. Nghiem Van Tuan (Dr), Head of Science and International Cooperation, NRSC (counterpart in Vietnam)
75. Nicole Jungerman, Director, HKV
76. Nicole Broers, Research Assistant, Netherlands embassy in Vietnam

77. Patrick Hoffman, Independent Consultant working for IN-Pact on their project
78. Pauline Blom, First Embassy Secretary Economic Affairs, Dutch Embassy in Vietnam
79. Pauline Eizema, Head of mission, embassy in Hanoi, Vietnam
80. Pavel Pokakukhin, Director, Dutch Business Association in Vietnam
81. Pham Minh Uyen, Senior Trade Advisor, Netherlands embassy in Vietnam
82. Pim Kieskamp, Coordinator Evaluation and former TF advisor
83. Rene van Koesveld, R&D Director, Crops, Fresh Studio
84. Rens Dullaart - L'art consultancy (consultant for a project in South Africa)
85. Richard Kemper, Corporate Staff Department at RVO, unit for Quality, Monitoring and Evaluations
86. Robbert van der Bij, Business Developer, Holland Colombia Water Platform
87. Robert van der Hum, DDE
88. Roel van de Loo, SPSS (working on a project in South Africa)
89. Roxana de Raad, former Evaluation Manager at TF
90. Rutger Perdon, Director Business Development South and Central America, Royal Haskoning
91. Ruud Grim, Netherlands Space Office, Senior Advisor Applications & Coordinator G4AW (project applicant in Vietnam)
92. Sebastian Paust (Dr), First Counsellor, Head of Development Cooperation, Netherlands embassy in Vietnam
93. Silvina Pereira Marques, STC International, Area Manager Latin America
94. Sophia Pereire Merquez, STC Group (project applicant in South Africa)
95. Stephanie de Beer, Coordinator of Water and Climate, embassy in South Africa
96. Steven Collet, former Head of Economic Affairs, BZ
97. Sylvia van Buchem, former TF Advisor
98. Ton en Sander, STC group (project applicant in South Africa)
99. Tran Trong Quang Khai, Head of ICPM, Sacombank
100. Wilna Kloppers, Director for Pollution and Chemicals Management, Western Cape government

Annex 3 Guide for key informant interview

Main lines of questioning:

1. In which types of interventions were you most involved? Was a single instrument sufficient, or did they operate best together or in sequence? Which sequence?
2. What signs of change/no change did you see that are relevant for the objectives of the TF (remind the respondent about the two objectives of the TF)?

In case the respondent is unsure about what to list (or to ensure that the answer is complete), please list the following area of possible change. Please ensure that the respondent understands that these are areas of possible change, but that they do not have to list signs under all of these areas.

- a. Trade and investment benefits to Dutch or local companies
 - b. Market functioning in the sector, including solving of trade barriers
 - c. Business climate for the sector
 - d. Number of Dutch companies active in the sector
 - e. The effectiveness with which the Netherlands engages in economic diplomacy
 - f. Improved relationship and network with the partner country
 - g. Any other sign of change that the respondent finds relevant
3. What contributed to the positive/negative signs of change?
To ensure that the answer is complete), please list the following possible contributory factors.
 - a. What role did the service offered by the TF play for the change that you identified before?
 - b. How did the political context help/hinder the achievement of results?
 - c. Did the embassy help to navigate the local context/relationship?
 - d. Were there any challenging market barriers in the given sector?
 - e. Were there particular social or cultural barriers?
 - f. Did international competition from other countries play an important role?
 - g. Who was involved in making the change possible? Were local companies involved? Were knowledge institutions involved? Were government ministries involved?
 - h. What was the role of the RVO and the embassies?
 - i. Comparing the sectors of engagement, which ones were more successful and why?

- j. Which factors impeded performance?
- 4. What are the signs that the support offered is sustainable?

You can ask in particular the following:

- a. Do supported companies continue operations in the country? Are they likely to continue?
- b. Is there evidence of replication or scaling up of interventions introduced by the TF?
- c. What will happen to Dutch economic diplomacy and relationship with the country now that the TF has been phased out?

Annex 4 List of projects

Applicant name	Project reference	Country	Sector	Project title
Havatec	DHK14D56	Colombia	Agro-horticulture	Demonstratieproject Rozensorteeremachine Colombia (DRC)
Praktijkonderzoek Plant & Omgeving B.V.	TF13VNOS02	Vietnam	Agro-horticulture	Accelerating modern greenhouse vegetable production sector in Da Lat City, Lam Dong Province, Vietnam.
Stichting Deltares	TF14COOS01	Colombia	Water	The role of groundwater in flooding in Colombia and tools for its management: Pilot Project in the Valle del Cauca.
Consulate General of the Kingdom of the Netherlands	TF14VNP07	Vietnam	Transport and logistics	Tomorrow is Green v.h.Holland Village 2015
STIG B.V.	TF14ZAOS04	South Africa	Transport and logistics	Durban Rail Service Center
Stichting The Holland Safety & Security Association (THSA)	TF15COOS05	Colombia	Transport and logistics	Investment Plan for a Safety & Security Academy Caribbean Coastline of Colombia
Rijkswaterstaat Dienst Water, Verkeer en Leefomgeving	TF15COP24	Colombia	Transport and logistics	Follow-up Logitstiek en Transport
STC Group	TF15ZAOS03	South Africa	Transport and logistics	STC.1266 Development and establishment of a Port, Transport and Logistics Centre of Excellence

DLV Plant B.V.	TF15ZAOS04	South Africa	Agro-horticulture	Capacity building South Africa
FMO	TF15ZAOS08	South Africa	Transport and logistics	Catalyzing South African rural development by cool logistics
DCMR Milieudienst Rijnmond	TF15ZAP10	South Africa	Transport and logistics	SPD Durban
To70 BV	DHKF15D11	South Africa	Transport and logistics	Demonstratie Obstacle Limitation Evaluation Tool
Forkliftcenter	DHKF15K19	Colombia	Transport and logistics	ForkliftCenter Market Research Colombia
Ambassade van het Koninkrijk der Nederlanden	TF13COP13	Colombia	Other	Holland House Colombia
Stichting STC-Group	TF13COOS01	Colombia	Transport and logistics	Port, Transport and Logistics Centre of Excellence (CE)
Solidaridad	24594-2012120204	Colombia	Water	Sustainable Trade Programme
Nelen & Schuurmans	DHKF15D31	South Africa	Water	Integrated Water Platform for South -Africa
Mobile Water management	DHKF15D10	South Africa	Water	Mobile Meter Reading
Netherlands Space Office (NSO)	TF13VNP4	Vietnam	Water	Water and Climate Services for Transboundary Water Management and Natural Disaster Risk Management

Annex 5 Case studies overview

Forkliftcenter

Title	Forkliftcenter - Market Research Colombia
Timeline	July 2015 - January 2016
Short description	Forklift is a small Dutch company and provides heavy forklift forks to industrial clients. With TF support, it aimed to expand its market presence in Colombia, exploring the possibility of bringing to market an integrated control and maintenance system for forklifts, which runs diagnostics and repairs on the entire forklift fleet of a client. It contracted the Trade and Investment Centre (and then the Holland House) for a market study, following which, Forklift conducted a demonstration project.
Applicant	Forklift
Country	Colombia
Sector	Transport
ODA / non ODA	Non ODA
Size	35,000 for the market research

10.1.1 Signs of change

The demonstration project that followed the market research was a success: 65 potential Colombian clients attended the demonstration, mostly from staff of Colombian port terminals.

The demonstration project led to requests for quotation from several of these potential clients, which, however, have not converted into actual sales yet at the time of writing (April 2020).

10.1.2 Contribution claims

Forklift claims that the market research conducted by the Holland House has helped it in understanding Colombian rules for importing and exporting, without which understanding Forklift could not have operated well. Additionally, it has helped in finding strong local partners for delivering its services.

The Embassy and the Holland House played an important support role in connecting Forklift with potential clients at the Colombian port terminals.

10.1.3 Enabling factors

Forklift already had a market presence in Colombia. Before the start of TF support, Forklift had sold already 5-7 Forklifts to port terminals, employed a marketing team based in Panama for marketing its products in Colombia, and opened an office in Cartagena which allowed it to connect with Colombian companies.

There is a private-sector market for Forklift's product. Colombia has privatised port terminals, which are now private entities that hold the port terminal in concession with the government for a period of 20 years. The Government has renewed the concessions recently, which allow the private entities to make now long-term investments. Stakeholders confirm that the port sector is easier to enter for Dutch companies than sectors dominated by public procurement.

Forklift does face any competition for its integrated control and repair system. No other firm markets a similar solution on the Colombian market.

10.1.4 Barriers

The product was new. Forklift reported that it had to explain to potential clients what the product can do and demonstrate how it could help them in practice, because the clients did not have the benefit clear.

Culturally, in Colombia, commercial relationships develop slower than in the NL. The applicant reports that potential Colombian clients are very enthusiastic and positive about the product when interacting in person. However, they are cautious in translating the interest into actual buying decisions.

10.1.5 Project sequencing

Forklift conducted:

- 1) A market study
- 2) A demonstration project

10.1.6 Signs of sustainability

Forklift is a small company, which had needed support in entering a new market. Forklift is confident in allowing market dynamics in determining the future success of its product in Colombia, without the need of further support, now that connections and information is established.

Additionally, Forklift is planning to use the experience acquired in Colombia for marketing the same product in Mexico and Morocco.

10.1.7 Suggestions from the applicant to the Dutch Government

It takes a lot of time and expertise to understand and fulfil RVO procedures and ask for support. Could RVO make the process easier for small companies who are not used to work for RVO?

It should not be expected that small companies that enter a new market are in a position to invest in the development of the communities they work with.

Multi-modal transport in Colombia

Title	Follow up on exchange of knowledge programme on Multimodal Transport
Timeline	NA
Short description	The Colombian Dutch Dialogue on logistics and transport has aimed to showcase the Dutch integrated approach to connecting seaports and the interior and avoid road congestion, and also to create business opportunities for Dutch companies with experience in this field. The dialogue has taken place in a conference setting with presentations and interactive workshops with the presence of Colombian and Dutch experts working in logistics, transport, and water sector.
Applicant	Rijkswaterstaat
Country	Colombia
Sector	Transport / Water
ODA / non ODA	ODA
Size	Maximum of EURO 150,000 including VAT

10.1.8 Signs of change

The conference was a success: it attracted 200 Colombian participants and 25 - 30 Dutch experts from organizations such as the Port of Amsterdam, Marin, Wageningen University, and other Dutch residents in Colombia. It was attended by the Dutch Ambassador and ANDI's President (ANDI is the largest business chamber in Colombia) and attracted coverage by the Colombian radio.

The main change catalysed by the conference has been at the level of network connections and the image of the Dutch logistics and transport sector. Colombian stakeholders, for example in the Ministry of Transport, perceive that Dutch companies are good partners on contracts and public-private partnerships, such as for the dredging of the river Magdalena, ports and concessions, and anything related to bikes.

The dialogue also contributed to Colombia adopting a model of inter-modal and integrated transport for the River Magdalena, including a project concept around a deep-sea water port in Barranquilla, for which it has been looking at Rotterdam as the model of port city.

The Dutch actors participating to the Conference have tried to develop concrete pilot projects building on the ideas discussed and relationships established during the conference, for example on river shipping. However, the evaluation team could not obtain information on whether Dutch companies have developed commercial projects based on ideas discussed during the conference.

10.1.9 Contribution claims

The conference contributed to strengthening the Dutch-Colombian network of experts and to position Dutch enterprises for upcoming tenders and public-private partnerships in the sector.

10.1.10 Supporting factors

The NL's unique expertise and strength in constructing on, working with, and transporting on water was a key reason why the Colombian counterparts have showed strong interest in the dialogue.

It has also helped that Conference came at the end of strong cooperation and other lines of work and brought together actors that had been working in Colombia on different topics.

- The Master Plans for the Colombian Government
- The Feasibility Study for the rehabilitation of the Canal del Dique
- Dredging on the River Magdalena
- Strengthening the capacity of Colombian Government and Regional Water Authorities in water management, also using the TF budget for cooperation (as example of projects funded by TF, see case studies on Deltares and STC)
- Study visits from Colombian experts to the Netherlands

Happening in a context where relationships were already established meant that the Conference could invite the right people and discuss topics that would be most interesting for the counterparts.

Developing the concept for the conference in participation with Dutch and Colombian actors (RVO, the Embassy, the Dutch Colombian Chamber of Commerce in Bogota, and ANDI). RVO approached the Dutch participants and the Colombian Chamber of Commerce approached the Colombian participants.

Designing an interactive conference that allowed the Dutch experts to present themselves to and interact with the Colombian counterparts. The conference contained joint presentations, showing that Dutch and Colombian experts have been working together.

The Dutch Ministry of Infrastructure and Water Management has a dedicated strategy for cooperating in water and logistics, under which Colombia is a priority country. Therefore, staff at

the Ministry of Infrastructure and Water Management has been working on the water sector in Colombia with dedicated budget for dialogue, in close partnership with the Embassy.

10.1.11 Barriers

The Colombian Government lacks funds for implementing the Multi-Modal Transport Plan for the river Magdalena and looks for international private investment, but for the moment Dutch actors do not appear willing to invest in key ideas contained in the plan.

Dutch companies report that the ;lack of coordination among port terminals operating in the same city is one of the barriers stopping Dutch investors in funding Colombian ports, because having many actor make investing in infrastructure more complex.

The Embassy could not follow up on every potential project idea generated by the dialogue because they were too many. It has prioritised larger tenders and PPPs, such as the one for the River Navigability of the Magdalena river and the one for the Canal del Dique rehabilitation. For these priorities, the Embassy visits the counterparts in the Colombian government regularly.

Dutch companies face competition from companies from China, Spain, US, Russia, and Turkey, whose fees and labour costs are lower.

The Colombian Government had terminated the previous public-private partnership for the River Magdalena project due to issues related to corruption in the sector and allegation that the Belgian-Dutch consortium was over-charging due to limited competition.

The contractual conditions in Colombian public procurement are not contractor-friendly. They include contractors' responsibility for events outside their control and do not balance well control, responsibility, and reward.

Colombian contracting authorities follow bureaucratic processes and are afraid to change plans. Their staff are legally responsible for implementing the plan as agreed upon. Dutch companies have complained that they cannot adopt and improve on the plan when it is not realistic or with new information, in the face of unforeseeable problems and in dialogue with the client. At the same time, the Colombian counterparts complain that Dutch companies are too brusque in detailing from the start what they cannot achieve in the available budget.

10.1.12 Project sequencing

1. The Master Plans for the Colombian Government
2. The Feasibility Study for the rehabilitation of the Canal del Dique
3. Dredging on the River Magdalena
4. Strengthening the capacity of Colombian Government and Regional Water Authorities in water management, also using the TF budget for cooperation (as example of projects funded by TF, see case studies on Deltares and STC)
5. Study visits from Colombian experts to the Netherlands
6. Exchange Conference

10.1.13 Signs of sustainability

The concept of a sector-wide Conference was replicated twice. The third Conference took place in Rotterdam, showcasing the integrated approach to transport of this city. PSD apps will now fund the next phase of dialogue.

The Dutch actors complained that cooperating without a budget for implementing some of the ideas coming out of the dialogue has been a challenge. The NL MoI and the GoC MoT have reported continued interest in working together for implementing the Master Plans.

Dutch cooperation in the water sector with Colombia is sustainable because the GoC has a dedicated sector strategy for it, with the involvement of Dutch water actors: the Delta Strategy and Delta Team.

10.1.14 Suggestions from the applicant to the Dutch Government

- Keep mixing G2G and G2B cooperation, such as in mixing the Master Plans and the public private dialogue conference)
- Encourage consortia of Dutch and local companies
- Create a transparent atmosphere so that people can get out of the dialogue what is useful to them
- Be mindful of cultural differences in sharing and presenting information. Take time to get to know and explore the counterpart
- Explore how to cooperate G2G without public funds available for funding project ideas

Safety and Security Academy

Title	Investment Plan for a Safety and Security Academy - Caribbean Coastline of Colombia
Timeline	August 2015 - August 2016
Short description	The project aimed at setting up an academy for teaching and demonstrating the latest techniques and tools in firefighting and emergency response in the Caribbean Coast of Colombia. The consortium obtained funding for a market research, a demonstration project, and, in the third phase, a feasibility study which included the architectural design of the academy, design of the curriculum, design of the business plan, and exploration of finance sources (required finance is USD 20-30 million).
Applicant	The Holland Safety and Security Association (a consortium of 9 Dutch companies in the sector)
Country	Colombia
Sector	Other (classified as transport)
ODA / non ODA	ODA
Size	EURO 247.87

10.1.15 Signs of change

The project did not succeed in raising the finance needed for constructing the Academy. The consortium has since terminated operations in Colombia, but is exploring the possibility to market the Academy in Panama.

10.1.16 Contribution claims

NA

10.1.17 Supporting factors

NA

10.1.18 Barriers

The proposal of the integrated academy was innovative and not tested even in the NL. This likely made this proposal ambitious in Colombia's emerging market context, especially in view of the

large investment required for establishing the academy. The broadness of the idea also led to a lack of clarity regarding who the main counterpart to focus on.

The Colombian government was not interested enough to invest in the project.

The project applicant reports that the Embassy did not support the project enough, particularly in facilitating a partnership with the Colombian Ministry for Defence. The Embassy reports that it could not see interest in the counterparts around the project and preferred focusing scarce resources on projects that were generating more interest.

Only two of the companies in the consortium were active. The companies in the consortium had not worked together before, especially not in Colombia. The consortium had employed a professional in trade relationships with Colombia who saw the TF as source of professional income.

The size of funding required might have put public sector investors off, since Colombia might not be ready to invest USD 32 million.

The project applicant could not go to Colombian Banks for finance because it found borrowing money from them is expensive and because the Academy was supposed to provide a public service.

Local elections led to a turnover in the politicians holding power at the municipalities and also at the Colombian agencies involved in the work.

10.1.19 Project sequencing

1. Market research.
2. Demonstration project.
3. Feasibility study.

10.1.20 Signs of sustainability

The consortium ceased operations in Colombia, but remains interested in operating in Panama.

10.1.21 Suggestions from the applicant to the Dutch Government

- The GoC and Embassy should only invest in projects that they can support.
- RVO should make it easier for firms to understand the TF and deal with its procedures, and should understand the sense of urgency with which things need to happen.

Centre of Excellence

Title	Port, Transport, and Logistics Centre of Excellence
Timeline	Dec 2013 - June 2015
Applicant	STC and UNINORTE
Short description	<p>STC and UNINORTE used the project funds and developed a new curriculum for the Centre, which became the curricula used in the NL and adapted it to Colombia by Colombian and Dutch experts.</p> <p>STC housed the Centre of Excellence in one of the buildings of the Uninorte and provided 1-2 mobile trainings.</p>
Country	Colombia
Sector	Water / Transport
ODA / non ODA	ODA
Size	The subsidy of EURO 429.262 was 80% of project costs

10.1.22 Signs of change

The applicant reports that providing education services is seldom profitable in the short term. In this context, it reports that the Centre of Excellence succeeded as expected: provided important educational services to Colombian ports personnel, recovered its costs, but never made large profits.

However, STC has obtained other commercial benefits from the presence of the Centre of Excellence. It has obtained recognition in Latin America as an industry leader in training, and gained important connections with Colombian partners.

This, in turn, led to profitable activities. For example, STC expanded cooperation with important clients, such as the Port of Cartagena and SENA, the Government Agency in charge of professional education. STC is now part of an international cooperation agreement with SENA, ratified by the two Prime Ministers.

The applicant claimed that the Centre of Excellence has exported training services in other countries, such as Nicaragua, Guatemala, and Chile.

The Centre of Excellence has built the expertise in the Colombian port sector, contributing to making it function better and lowering the impact of civil servants' rotation on quality management of the port sector, since the Centre has trained an estimated 200 people already with the required skills.

10.1.23 Contribution claims

Receiving the TF support allowed STC to spend enough time for developing a new curriculum that fit Colombian needs, which allowed STC to unlock the potential of the Centre of Excellence. Developing a curriculum is expensive, and STC claims that it could have done so without TF support, since it cannot recover these costs easily with participants' contributions.

10.1.24 Enabling factors

Having an effective and active partner, the Universidad del Norte, brought down STC's operating costs and cleared other barriers, such as accreditation status as an higher education entity in Colombia. The Embassy has the merit of having connected STC with the Universidad del Norte.

STC operated in Colombia and in other Latin American countries before the TF support.

STC has created the Centre's curriculum using a participatory approach with a mixed team of Dutch and Colombian experts and taking on board the priorities of the Colombian Government.

According to the Colombian partners, it has helped that the Colombian counterparts recognised the NL as a world leader on the topics covered by the Centre.

10.1.25 Barriers

Translation in and from Spanish was maybe the biggest challenge STC experienced in Colombia.

The electoral cycle has reduced the contracting activity of national and local government.

The corruption scandal around the Navigability of the River Magdalena generated uncertainty among operators and stopped investments. The relaunching of a new bidding process has however restored the sector's confidence.

10.1.26 Project sequencing

STC has only received one subsidy from the TF.

However, the Centre of Excellence as an entity has applied to other Dutch funds, such as NUFFIC, to finance trainings in Nicaragua. In Nicaragua, the Centre has held two trainings, the last one including a distance coaching.

1. Subsidy for developing curricula
2. Nuffic support for designing and delivering additional trainings.

10.1.27 Signs of sustainability

The TF support has strengthened STC's operations in Colombia, which will continue.

The Centre has gained international recognition among actors in the logistic sector in Colombia and in other countries in the region.

According to the Colombian partner, however, the sustainability of the Centre is not completely secure. The Centre depends of two income sources: private clients with enough financial strength to pay for services and aid funds that cover the needs of those local actors that cannot afford the services. They are concerned for the future of the Centre's activities in Colombia if international aid funds dry up due to the transition.

10.1.28 Suggestions from the applicant to the Dutch Government

The applicant has appreciated the experience of working with the TF, and hopes that the Dutch Government creates similar programmes that allow RVO to operate flexibly, understand project dynamics, and support long-term investments.

Deltares – Valle del Cauca

Title	The Role of Groundwater in flooding in Colombia and tools for its management: Pilot Project in the Valle del Cauca
Timeline	2014-2015
Applicant	Deltares, Unesco IHE, CVC Cauca, Fugro, Eijkelkamp BV, NWP
Short description	<p>Colombia lacked reliable information on water source use, especially for groundwater. Deltares had been supporting CVC, the regional water management authority for the Valle del Cauca, under previous phases of Dutch cooperation in the water sector in Colombia.</p> <p>The TF supported CVC in contracting Deltares for an additional phase of cooperation, working on water forecasting models. Connected to this work, Deltares supported Colombia's Adaptation Fund on water modelling and capacity to create hydrological model.</p>
Country	Colombia
Sector	Water
ODA / non ODA	ODA
Size	NA

10.1.29 Signs of change

Deltares has maintained and expanded its relationship with CVC and introduced other Dutch companies working as sub-contractors to Colombian clients.

CVC has paid for two follow-up projects with Colombian funds.

Deltares has moved on to work with other Colombian regional water authorities, such as the water authority for the city in Cali', the capital of the Valle del Cauca.

The project provided better information on water flows and groundwater to the regional water authorities and facilitated cooperation between two distinct regional water authorities. Multiple sources have reported that cooperation between regional water authorities is difficult to catalyse.

The National Planning Department used the results from the study conducted by Deltares, presented the results to the Green Climate Fund, and leveraged additional funding of USD 38.5 million.

The cooperation in the Cauca project strengthened the ownership in the National Planning Department for flooding protection and adaptation.

10.1.30 Contribution claims

The TF support has allowed the Colombian client to retain the services of Deltares.

10.1.31 Enabling factors

Deltares is a hybrid type of company: a foundation partly publicly funded, which allows Deltares to conduct projects that would be out-of-reach for private parties relying entirely on profits.

Notwithstanding the fact that environmental governance is a difficult sector for trade (see below among the hindering factors), some forms of support in this sector are more marketable. For example, Deltares created a river modelling software for CVC, which can be transformed into an off-the-shelf tool for other regional authorities.

The applicant sees a demand for knowledge on water management in Colombia and open opportunities in creating forecasting for groundwater and coastal erosion.

Deltares enjoyed a long-term relationship with CVC and knew which information it had and needed. Deltares also had an established relationship with actors that would then become its partners on the consortium.

A way of working on the project that worked well in side-stepping the high fees of Dutch consultants was one where Deltares provided tools and knowledge and the counterpart provided the labour for conducting activities.

10.1.32 Barriers

Commercial success in water governance is difficult. The intersection between environment and governance is problematic for trade and might be easier for cooperation-based instruments. Dutch companies can sell technical assistance and consultancy to the Government of Colombia, but the organizations working in the environmental sector do not generally have resources to pay for international consultants. CVC was the exception: it is the strongest regional environmental authority in the country.

Experiences of flooding and drought, however, raise the political profile of sector strengthening.

Cooperation between Dutch companies and the Colombian Government is hampered by the fact that Dutch companies sometimes propose solutions that are not adequate to Colombia, are blunt about the fact that the Colombian Government objectives cannot achieve its objectives in the budget, and do not understand how the Colombian Government works. The Dutch companies

propose the right technical way to conduct a project, but the Colombian Government might not have the funds or flexibility to adopt it.

The environmental actors in Colombia have not been able to deplete the Government Fund created with oil royalties because they do not have the capacity for preparing enough studies and proposals to access these funds.

In Colombia, regionalisation of water governance at a level where water authorities cannot achieve scale and cooperation becomes difficult is a barrier for effective provision of services.

Other countries still provide aid funds in the water governance sector and are now stepping in where the NL was strong. One example is Germany.

10.1.33 Project sequencing

The TF funded project provided technical assistance and built on previous technical assistance funded by the Embassy. Deltares obtained a follow up project where it added a monitoring system for the water, funded exclusively with CVC funded and a third project, also funded by CVC, which added a decision making tool to the package. Under the TF, Deltares has received only support for providing policy advice to the Colombian Government.

- 1) Policy advice through tendering

10.1.34 Signs of sustainability

Deltares sees potential to provide support to other regional authorities. They have been approached by a new water authority that represents 43 water companies in cities affected by water scarcity.

10.1.35 Suggestions from the applicant to the Dutch Government

NA

The Holland House

Title	Holland House Colombia
Timeline	2012 – present (but F support lasted 3 years)
Short description	The Holland House is a bilateral chamber of commerce that provides business-support, market research, and networking services to Dutch and Colombian firms and supports the increase of sustainable, bilateral trade and investments between NL and Colombia.
Country	Colombia
Sector	Other
ODA / non ODA	Non ODA
Size	EURO 350,000

10.1.36 Signs of change

Holland House's income has grown faster than planned and expected. The Holland House has reached financial sustainability and has expanded to three offices, one in the capital city Bogota and two others in Medellin and Barranquilla.

The Holland House grew to be the third chamber of commerce in Colombia after the chambers of US and Germany, and is the largest Dutch chamber of commerce in the world.

The Holland House obtains 40% of its income from Colombian companies that want to be active in Europe and in the NL in particular.

10.1.37 Contribution claims

The model followed for establishing the Holland House and requiring that it has a strong approach for becoming financially sustainable is due to the lessons learned by RVO in supporting similar bilateral chambers in other countries. The dual management character of the TF allowed RVO to bring its expertise to the table.

10.1.38 Enabling factors

Structural factors have contributed to the success of the Holland House. Colombian economic development attracts Dutch firms in a period when competitor countries in the region have adopted more protectionist policies in (Brazil, Argentina, and Ecuador).

The Caribbean part of Colombian borders the Kingdom's islands in the Caribbean, providing a point of contact and source of attraction for the European and Dutch model.

The model of the Holland House has taken on board lessons learned by RVO in supporting bilateral chambers in other countries, that financial sustainability needs to be embedded in the model from the start.

The Holland House provides services to both Colombian and Dutch companies.

Most of the Holland House's income comes from consultancy services through market research and trade fairs rather than membership and rent: membership fee with 250 members provides 20% of income, rental of facilities provides 15% of income, and consultancy provides 65%.

10.1.39 Barriers

Competition from rival bilateral chambers of commerce.

10.1.40 Sequencing

The Holland House was a partnership of the public and private sector. It received a subsidy of EURO 350,000 over three years.

Once established, the Holland House supported other Dutch actors with trade fairs and missions, facilitating contacts between Dutch and Colombian companies, and market studies. Among our sample of projects, the Holland House supported the Colombian Dutch Dialogue, supported all the Dutch companies active in our sample, being able to tell at what stage they were with their work in Colombia and reasons for their success and failure.

- 1) Subsidy to cover core cost for a limited period of time (3 years)

10.1.41 Signs of sustainability

Currently, the Holland House is financially self-sustainable and still growing.

The Dutch Parliament has established a scheme for replicating the Holland House model in other countries. Currently, Holland Houses are established in Mexico, Panama and Chile. They follow the same model of the Colombian original, but are completely private funded.

10.1.42 Suggestions from the applicant to the Dutch Government

RVO and the Embassies should be more flexible in their demands for events and connections. For example, they should allow more flexibility in creating agenda for the trade visits.

Rose-sorting Machines

Title	Demonstration Project Rose Sorting Machine Colombia (DRC)
Timeline	2014-2017
Short description	The TF supported a demonstration project aimed at awakening the interest of potential Colombian buyers of rose sorting machines.
Applicant	Havatec (Dutch machine manufacturer), Bicco Farms Colombia and other flowers breeders.
Country	Colombia
Sector	Horticulture
ODA / non ODA	Non-ODA
Size	The subsidy covers EURO 169.362 out of a project that was double that size.

10.1.43 Signs of change

Havatec has brought to Colombia a couple of flowers' sorting machines and conducted demonstrations with potential clients. However, it has not yet managed to sell any machines.

The perception at Havatec is the experience of trying to market machines in Colombia was a positive learning experience which increased their knowledge of the Colombian market.

10.1.44 Contribution claims

The TF supported an expansion of Havatec network and knowledge of potential clients in Colombia, as well of barriers to selling machines there.

10.1.45 Enabling factors

RVO visited the demo project, helped with market research, but did not help in connecting with potential customers.

The Colombian flower market produces for exports to the US and European markets, which means that it can rely on substantial revenues of foreign currency.

10.1.46 Barriers

The applicant reports that decreasing labour costs in agriculture have been the main barrier to the uptake of its machine. This decrease was driven by a depreciation of Colombian peso and immigration of poor farmers from Venezuela. Consequently, Colombian producers have had a less

need to substitute labour with capital because the payback time of the capital investment compared to the cost of labour is now much longer.

Colombian producers recognized that the machines would have granted them savings of 50% in labour costs over time, but faced a high capital investment upfront, as each machine costs around EURO 100,000.

10.1.47 Project sequencing

Havatec had conducted a market research and visited many post-harvest facilities. There, they had noticed the way in which the local industry worked and demonstrated the functioning of their machines.

- 1) Market research
- 2) Demonstration study

10.1.48 Signs of sustainability

Havatec considers Colombia as a potential market for the future, when labour costs will increase.

10.1.49 Suggestions from the applicant to the Dutch Government

NA

Sustainable Trade Platform

Title	Sustainable Trade Platform
Timeline	2012-2016
Short description	To enhance the sustainability of for agricultural commodity sectors (improved business climate) and increase sustainable trade and investment between Colombia and the Netherlands.
Applicant	Solidaridad, Fyffes, Chiquita, Jumbo Supermarkets, Plus Supermarkets, Unilever, Mild Coffee Company, Intergreen, Suata Plans, Max Havelaar, UTZ Certified
Country	Colombia
Sector	Horticulture
ODA / non ODA	ODA
Size	2.901.432 euros (694.832 euros - contribution by private partners)

10.1.50 Signs of change

The platform worked well in catalysing dialogue across the industry in important commodities, such as cocoa, coffee, and palm oil.

Out of the dialogue, producers received strengthened extension services from exporters and buyers, which improved their capacity to produce according to market standards and building sustainable businesses in compliance with labour and environmental requirements.

Technical assistance to Colombian producers helped them meet standards for entry to the EU internal market and turned local growers into providers for the NL market.

The applicant report that Colombia is now among the top 1-2 countries in producing sustainable commodities and achieved sizable expansion of production in certified coffee, cocoa, and palm oil during the project period.

According to the applicant, the NL is considered a leader in sustainable commodity trade in Colombia. German actors are looking for a tool similar to the Sustainable Trade Platform for connecting Colombian sustainable producers to the German market.

In the banana sector, the platform contributed to plague control with a manual.

10.1.51 Contribution claims

The platform was one of the contribution factors in raising Colombian production of sustainable products during the project period. The ability of Solidaridad to bring together all industry actors in a pre-competitive setting for collective action to support sustainability was a key benefit of TF support to the Colombian commodity sector.

10.1.52 Enabling factors

The platform has allowed companies to discuss sustainability in a precompetitive setting. Some of them have their own standards and the platform allowed them to share good practices and have conversations on benchmarks.

World's demand for sustainable products has been strong during the project period, which is important because most of the sustainable commodities produced in Colombia are exported.

Cordial relations between the Dutch and Colombian Ministers of Agriculture and close ties among technical government agencies enabled to platform and ensured high-level political ownership.

Solidaridad's neutral and technically strong stance helped in facilitating well the platform. Solidaridad has hired staff expert in the sector in Colombia. Its network organization allowed it to pull learning from experiences on sustainable projects in other countries.

10.1.53 Barriers

Regular changes in ministers and directors at agency level in the Colombian Government made it difficult to sustain public sector's interest and participation.

In the coffee sector, the Colombian Coffee Federation has been traditionally dominant in the market, because it was at the same time a lead buyer, exporter, and the sector's regulator on behalf of the Colombian Government. This conflict of interest and concentration of power had initially made dialogue difficult with the other market actors, who aimed at expanding their export and production share and liberalising the market.

Low education levels in Colombian producers hinders their capacity to innovate and adopt new technologies.

In the coffee industry, the world price of coffee remained low during the project period, which made it more difficult for growers in producing coffee of good quality.

10.1.54 Project sequencing

The platform included different instruments, but internally to the same large contract. Once the Transition Facility closed down, Solidaridad obtained support from the Dialogue and Dissent window of the Ministry of Foreign Affairs for continuing operations with ODA money. The platform included:

1. High-level policy dialogue at the Ministerial-level to ensure the buy-in at the political level

2. Research and investigation of commodities that are most relevant for the bilateral trade relations, sustainability issues, and sectoral markets dynamics and actors
3. Engagement of the actors and establishment of a platform of dialogue that could share information and decide how to support producers for the following year
4. Providing technical assistance, trainings, tools, and information to producers
5. Establishment of market connections between Colombian and Dutch companies.

10.1.55 Signs of sustainability

The industry platforms are still working. Solidaridad is now considering working with new products as fruits (mango, avocado, coconut), cocoa, sustainable livestock, and deforestation issues.

Currently, Solidaridad has scaled down the work of the platform and is working with half of the resources that were initially available.

10.1.56 Suggestions from the applicant to the Dutch Government

To reach the scale for sector transformation, it is necessary to involve financial institutions of the scale of large private Banks. Is this something the Dutch Government could work on?

The NL should continue to work on sustainable production in Colombia to avoid being overtaken by competitors, such as Germany, that are also interested in working with the topic and have development funds still available for cooperation.

The Dutch Government should strengthen the measurements and evaluation of the interventions conducted under the Platform.

The Master Plans

The Master Plans case study differs from the other the other case studies because the evaluation had not initially included it in the sample and because it does not concern one project specifically, but rather a cluster of projects.

During interviews in Colombia with actors active in other sample projects, the evaluation team has collected enough data on the achievements and dynamics of the Master Plans projects to feel confident in including it in the sample, even if the structure of the case study is looser than for the other cases.

Title	Master Plans
Timeline	NA
Short description	The TF has supported the Government of Colombia in contracting Dutch firms for contributing to its master plans for coastal erosion, multi-modal transport, and river navigability.
Actors involved	Arcadis, Deltares, Royal Haskoning Partner Colombian firms
Country	Colombia
Sector	Water
ODA / non ODA	ODA
Size	NA

10.1.57 Signs of change

Dutch firms accessed contracts with Colombian clients and expanded their network, presence in, and knowledge of Colombia.

The Colombian Government has produced three Master Plans for its investment in coastal erosion, multi-modal transport, and water navigability.

The Colombian Government has however struggled to find adequate resources for implementing the plans.

10.1.58 Contribution claim

The TF allowed the Colombian Government to retain the services of Dutch firms.

10.1.59 Enabling factors

Policy level cooperation and discussions between the GoN and GoC constituted the premise under which the GoN funded the provision of services from Dutch firms to the GoC.

Partnering with strong local partners allowed Dutch contractors to navigate the barriers in working with the Colombian Government and provide relevant services at a lower price.

10.1.60 Barriers

Dutch companies were not established in Colombia and did not have strong contacts and understanding of the Colombian Government.

10.1.61 Signs of sustainability

The Delta Strategy is continuing discussions on implementing the Master Plans, even if the Dutch Government does not have available budget for implementing part of the plans.

Hortidalat

Title	Hortidalat
Timeline	NA
Short description	The project aimed to develop financial services to finance greenhouse production, leading to more sustainable production and increasing farmer incomes. The project expected the technology and capacity to leverage finance options.
Applicant(s)	Fresh TDO Wageningen University Da Lat University
Country	Vietnam
Sector	Horticulture
ODA / non ODA	NA
Size	NA

10.1.62 Signs of change

The project education side was successful, mainly the proactive involvement of university students - student activities, thesis topics, training of students and teachers.

The project was successful in displaying Dutch technology in Vietnam. The applicant reports that the pilot farmers working on the projects were very successful in applying the training they got, also on a commercial basis.

The project has continued developing the technology, but not raised enough finance. Rabobank had agreed to upscale its investment to 1 million in loans, but VN banks had refused because they felt that lending without collateral, just against a business case, was too risky. Sacco bank had internal problems: it was not a good time for them to develop new products.

10.1.63 Contribution claims

10.1.64 Supporting factors

The involvement of both public and private sector actors.

Flexible and understanding RVO project managers.

Strong local presence and strong local partner: Fresh Studio had been in country since 2007.

10.1.65 Hindering factors

The project started with a broad consortium, which made it hard to have all on board and speak with one voice. Several companies dropped out, also because formalities and financing were complicated.

Working with VN banks was a particular challenge.

10.1.66 Sequencing

The Transition Facility was a good follow up to the Vietnam facility. It had the opportunity to strengthen small scale solutions with a scheme that provided 50% grant and required 50% in kind contribution. Private partners agreed that their work in the project would be free, as an in-kind contribution.

In the current situation, this scheme does not seem to match too well the opportunities that are there in Vietnam, which are either very small or very big: in needs of several million USD in investment.

10.1.67 Signs of sustainability

Fresh Studio sought to formulate a new programme, a knowledge development project (Fresh Academy).

Not all project activities were sustained in practice. Da Lat is an isolated project with a clear starting and end time, which did not seek structural change. Still, Da Lat staff became more familiar with modern horticulture and now another follow up project includes Da Lot (Fresh Academy). The Fresh academy does not have a fixed location, but a lot of it occurs at Da Lat Univ.

Many Dutch private companies have been involved in the project and have further developed in VN. Rijk Zwaan, a seed company, and CO-port continue to have a close relationship and introducing their products for bio pest control to Vietnam. BVB substraits has a new project in the north of Vietnam to introduce high quality seedlings to farmers there - all spin offs of TF.

10.1.68 Suggestions from the applicant to the Dutch Government

No suggestions provided

Tomorrow is Green

The evidence for this case study is drawn entirely from the perspective of former staff at the Dutch Embassy.

Title	
Tomorrow is Green	
Timeline	
Short description	The original plan of the project was to organise in 2013 a whole village in HCMC as 10 days event to show how NL business contributes to sustainability. The idea was then to have a second event to continue exposure, but the budget was not enough for it. Together with the Consulate General in HCMC, the Embassy decided to conduct a campaign around sustainability and the Dutch private sector with activities throughout Vietnam and smaller, less costly events. The project had received extension (budget) as there was interest in VN. The private sector was not engaged in designing the original concept, but was involved in the redesign. The private sector co-financed the events, mostly with in-kind contribution.
Applicant(s)	
Country	
Sector	Vietnam
ODA / non ODA	
Size	

10.1.69 Signs of change

The village was a success in terms of exposure with 500,000 people passing through the Village, good government relation building, and successful side events. It was a bit more expensive in hindsight than anticipated.

The Dutch private sector obtained exposure and improved its positioning in Vietnam.

The image of the NL improved and changed over the course of programme, the campaign reiterated that the NL is a strong partner in the sustainability agenda.

10.1.70 Contribution claims

NA

10.1.71 Supporting factors

Using high-level visits from the Netherlands to be able to get a high level Vietnamese counterpart in the room helped in accelerating the position of the Dutch private sector.

The Dutch private sector was willing to contribute to the project and to other cultural activities of the Embassy and the Consulate. To select PS partners, the Embassy would reach out to PS community, depending on agenda of event. Mostly, the Dutch partners were already established in VN. The Dutch Business Association of VN is a forum for soliciting engagement and helped the Embassy to reach out to companies with a good fit.

Dutch Days, a cultural event organized by the Embassy and the Consulate, connected to 45 year of bilateral relations.

Activities in agriculture were more successful because agricultural companies have more short-term opportunities to develop business cases and work in a private sector market. The water sector tends to work with government over longer time horizon, where it becomes more difficult to see direct connections.

10.1.72 Hindering factors

In Vietnam, the NL faces a lot of competition, especially from the Scandinavian countries. In this contested area, the NL stands out mostly as a partner for the sectors of water, agriculture, and transport and logistics, but less on the sector of smart cities.

10.1.73 Sequencing

There was no sequencing.

10.1.74 Signs of sustainability

Dutch company won a WB bid to work on the planning and rehabilitation of the Mekong Delta, partly due to the exposure through the TF.

10.1.75 Suggestions from the applicant to the Dutch Government

Water and Climate Services

Title	
Timeline	NA
Short description	10 years ago, the NL Space Agency learnt from the Dutch Embassy in Vietnam that the VN government was concerned about water management in the Mekong Delta because China was building dams up river. The NL Space Agency developed the capacity and systems of the VN government to understand the Mekong water system. The VN partner is the Ministry of Natural Resources and Environment (the National Remote Sensing Office - NRSO). The project organized workshops with different stakeholders in VN and conducted demand-led support. The first phase of the project took 3 years and continued into a second phase. The project worked in the domain of satellite observations, using remote sensing to improve water management.
Applicant(s)	The NL Space Agency, University of Delft
Country	Vietnam
Sector	Water
ODA / non ODA	ODA
Size	NA

10.1.76 Signs of change

The project created a demonstration of the services that could be implemented in VN. The Idea is that seeing the demo, the VN government would better specify information needs. The project managed to develop demo, but the VN government did not engage in follow-up partnership.

The project built the capacity of university staff to work with these techniques.

10.1.77 Contribution claims

The project was able to create a functioning demo.

10.1.78 Supporting factors

The project has been flexible. RVO and the Embassy has provided good support, but interfered little. The applicant felt trusted.

10.1.79 Hindering factors

Turn-over in the Embassy

Lack of interest in the Government of Vietnam to engage further with the results of the demo. This is combined with other donors being available to fund follow-up activities. If other donors provide funding for this, then it will be very difficult to transition from donor funding to a commercial relationship for the same services.

The project might have under-estimated the complexity of VN political system. The Embassy had provided contact points within various departments, but from there on, the Embassy priorities was not able to help the project understand the system. There was a division inside the Government of Vietnam, between two ministries: the Ministry for Natural Resources and Environment, which is not fully responsible for water management, and the Ministry for Agriculture and Rural Development. The Ministry kept fighting about who is responsible for water management. The local partner, the NRSO within MONRE, was not open to collaboration.

The VN government capacity was lower than expected, so more time than expected had to be devoted to capacity development.

There was also a language barrier. The director of NRSC spoke English poorly, which meant that communication required translation.

10.1.80 Sequencing

The project mixed a feasibility study, a demonstration study, and government to government support and advice.

10.1.81 Signs of sustainability

The change in capacity via university cooperation is sustainable, because part of a process that was already ongoing at start of project and continued after the project finished through other sources of funding stream.

The project also led to the Geo Data for Agriculture and Water (G4AW) network, which is fully funded by NL and now has two projects running in Vietnam.

There are plans by the VN government and the WB to set up a Mekong water management project.

10.1.82 Suggestions from the applicant to the Dutch Government

For the first mover in the transition between aid cooperation to economic cooperation, the time for the transition can be quite long.

Capacity Building South Africa

Title	Capacity Building South Africa
Timeline	October 2015 – 31 March 2017
Short description	South Africa has a nascent horticulture sector amongst emerging farmers. The South African government recognises it as a sector that can not only create employment but start to address the imbalance in black land ownership and participation in commercial farming. The aim of the project was to build a network of emerging farmers and training institutes in the Gauteng province for horticulture graduates. A consortium was established with local training institutes, farms, provincial government and a Dutch horticultural training institute. The specific Dutch aim was to expand business operations of Delphy/formerDLV Plant in South Africa.
Applicant	Delphy/former DLV Plant
Country	South Africa
Sector	Horticulture
ODA / non ODA	ODA
Size of project	EUR 165 239

10.1.83 Signs of change

The project did not aim to address trade and investment benefits to Dutch and local companies but rather focused on training of local emerging farmers. The consortium managed to develop a curriculum for deep practical skills in horticulture cultivation. Unfortunately the project did not proceed much after this point as the main government partner, the Gauteng Provincial Government did no longer participate.

10.1.84 Contribution claims

The funds helped to develop a curriculum that horticulture graduates could now follow at a very hands-on level. The focus was on cultivation factors. Without the TF funding the curriculum would not have been developed but the money spent did not result in any change as government support was needed for implementation.

10.1.85 Supporting factors

Good support from both RVO and the Embassy, and a positive outcome in terms of network building.

10.1.86 Barriers

The main hindering factor the difficulty in getting everyone on board for the project. Both the Gauteng provincial Ministry and the University did not show much engagement. Most government departments were either not interested in collaborating with any bilateral ODA partners or were destabilised to the extent that they could not engage. There were too many formal rules and procedures to follow, and the lack of own investment in the project led to the lack of progress.

10.1.87 Sequencing

There has been no sequencing of activities, only the first initial step.

10.1.88 Signs of sustainability

The applicant built a new network of partners in South Africa, and through this network acquired a new client for its services.

10.1.89 Suggestions from the applicant to the Dutch Government

The Dutch government should have clarity on when a country and its economy can be considered to have transitioned. Dutch companies should also explore the introduction of new technologies to the South African horticultural sector to allow the new farmers to make the most of high-tech farming methods from the outset.

Catalysing Cool Logistics

Title	Catalysing South African rural development by international cool logistics. Also known as the Flying Swans project.
Timeline	3 years
Short description	<p>Citrus is one of South Africa's key exports to the EU and continues to grow. The sector has benefitted from the SADC-EU EPA by increased quotas and may do so again once Brexit is finalised. There have been difficulties around pest control of black spot fungus and inefficiencies around the export chain. The project aimed at improving the long-term cool logistics system for citrus exports. In total six high-impact projects were formulated to assist citrus exporters to adopt modern, fully optimised intermodal container logistics systems.</p> <p>Two projects fall directly under this support, namely the development of the Gauteng cool rail system and the development of the Limpopo consolidation centre. In addition, the project ensured that unpacked containers in the Netherlands were sent back with Dutch products, including poultry and dairy products.</p>
Applicant	FMO/Mercator Novus
Country	South Africa
Sector	Horticulture
ODA / non ODA	ODA
Size of project	EUR 450 000

10.1.90 Signs of change

Old ways of shipping fruit in pallets to ships has become obsolete and the Dutch partner already had good linkages with the South African exporters and government that allowed for synergies in adopting modern technologies in the rail sector. Before the project one train with citrus cargo reached the Durban port, now eight. Mercator Novus provided the expertise, whilst Transnet South Africa accepted the expertise and brought the private sector on board. The consortium

established a joint-design process of cooled transport. This has increased fruit transports by train, and expanded citrus production in the Limpopo area.

Cooling of citrus in Limpopo has assisted with the elimination of black spot fungus, which was a prior phytosanitary risk.

The benefits and the system of cooled transport are now being exported to Ethiopia and Djibouti with the support of the African Development Bank. The impact has, therefore, been continent wide.

10.1.91 Contribution claims

The Embassy played an important role to match its network with that of FMO and Mercator Novus and the group of people steering the project had regular contact and saw the overlapping interests clearly. Both Embassy and RVO were flexible when the project had to make changes to its management structure. There was a focus on environmental standards and a clear case could be made that trains rather than trucks would have a positive impact on the environment. Whereas the focus has been to work with established large white farmers a separate facility has been set up for smallholders and emerging black farmers to also benefit from the project.

10.1.92 Enabling factors

This project had a very strong relationship with Transnet and very good support from the Embassy and RVO. The visit to South Africa by Prime Minister Mark Rutte played a role in impressing Transnet and getting the project signed. The integrated approach that was offered was a good answer to Chinese competition, and solved the entire logistical chain. The improved import and export are mutually beneficial.

10.1.93 Barriers

NA

10.1.94 Project sequencing

The project started with a feasibility study to use trains instead of trucks for cool transport. A demonstration project followed that is now leading to increased business.

10.1.95 Signs of sustainability

There are signs that project continues through PDF funding that it secured. A good relationship exists between the various partners and all signs are that this will continue, also in new collaborative projects in other African regions.

10.1.96 Suggestions from the applicant to the Dutch Government

It was to have RVO more practically involved, perhaps on a steering committee or board, while acknowledging the potential conflict of interest it would bring.

Sustainable Port Development Durban

Title	Sustainable Port Development Durban – also known as the E-nose Project
Timeline	2015-2017
Short description	<p>Air pollution around the port of Durban has been an area of concern and remains difficult to address as it affects communities living nearby and the City’s response to emergency situations.</p> <p>Vopak had introduced e-noses to monitor their environmental performance in the Durban port area. The aim of the project was to allow Comon-Invent to expand sales of such noses to other port users.</p> <p>The government would adopt an integrated system of evidence-based enforcement of environmental regulations. This would be possible through gathering all the e-nose data, have an early warning system and work in concert with communities and emergency response teams.</p>
Applicant	Comon-Invent, Vopak Durban
Country	South Africa
Sector	Transport and Logistics
ODA / non ODA	ODA
Size of project	EUR 150 000

10.1.97 Signs of change

The Ethekwini Health Unit (government partner) was very complementary about the exposure they were given to how an optimal integrated system could work. A good relationship was built with Rotterdam counterparts. Most officials trained have been retained in government, despite the fact that the unit that was to drive the project was split apart by central government interference. A few companies exposed to the E-noses bought the equipment.

10.1.98 Contribution claims

The relationship with the Rotterdam partner has been a good contribution as relationships seem to have survived political turmoil in South Africa. There should be opportunity now to complete the project objectives.

10.1.99 Enabling factors

The Embassy and the private sector companies did push the SA government but due to heavy infighting in the province there was no opportunity to ultimately get the project off the ground as government was to be a key partner.

10.1.100 Barriers

The largest hindering factor were the difficulties experienced with the South African government that went through a period of mismanagement and rampant corruption under the Presidency of Jacob Zuma.

10.1.101 Project sequencing

A study tour followed a demonstration of the technology by Vopak in Durban. These two activities should have led to the next step of integrating systems.

10.1.102 Signs of sustainability

No signs of sustainability unless the partners are willing to take up the project again given the change in political environment.

10.1.103 Suggestions from the applicant to the Dutch Government

There is good opportunity now to continue with the project if there is potential under the PDF.

Mobile Meter Reading

Title	Mobile Water Meter (MWM)
Timeline	January 2015 – December 2015
Short description	<p>The project is focused on field measurement of water levels and quality, using smartphones as monitoring device, which dramatically lowers costs and heightens efficiency of measurement and data. The project was to showcase the mobile water meters in South Africa, coupled with the HydroNet platform, that would show the effectiveness and efficiency of using smartphones to monitor water data and quality.</p> <p>The project started with Hydrologics and ‘Your man on Site’ as the main counterparts, but Hydrologics technology could not match requirements. The project never delivered while spending the project money. Poor financial management became a hallmark of the project.</p> <p>Through contacts of the Consulate in Cape Town, a connection was arranged with a company called Amanzi in the Western Cape. A site to test the application in a rural setting was found in Heidelberg, with 500 water connections amongst farmers. It worked well, but the promised business case by Amanzi was never delivered while they spent the project money.</p> <p>MWM still hopes that a first buyer in SA will materialize, but meanwhile have been focusing on Mozambique and Ethiopia instead.</p>
Applicant	Mobile Water Management BV
Country	South Africa
Sector	Water
ODA / non ODA	Non-ODA (DHK Subsidy)
Size of the project	EUR 84 880 (EUR 76 392 used)

10.1.104 Signs of change

The results of the project are extremely poor and not much can be shown despite a relatively high project level spend.

10.1.105 Contribution claims

The project has delivered (limited) water-related collaboration between the Netherlands and South Africa

10.1.106 Enabling factors

The Dutch Embassy contributed to the project by arranging facilitating connections in the water sector.

10.1.107 Barriers

Financial mismanagement and management turmoil led to a long halt in the project implementation and clarity. Furthermore, there were severely weak relationships between collaborating partners in the project, even leading to legal cases against each other, and promised outputs not delivered.

10.1.108 Project sequencing

Some demonstration of the meters in Gauteng and the Western Cape but there was no uptake of the product.

10.1.109 Signs of sustainability

Zero signs of sustainability.

10.1.110 Suggestions from the applicant to the Dutch Government

The NL have gone too far in depersonalising relationships and short-term thinking. We need a longer and better transition. The fact that embassy staff only stay for 2-4 years, which may be good for them, but bad for the building of relationships. The transition from aid to trade has not helped in that regard. Change management: you should want to try and change everything at the same time, policy and your people. Success is people's work, with the right staff you can create shared ownership. You also need the will to go somewhere, the rest is just external factors.

Port, Transport and Logistics Centre of Excellence

Title	Port, Transport and Logistics Centre of Excellence
Timeline	January 2016 – June 2017
Short description	<p>South Africa suffers from an acute skills shortage and therefore struggles to fill the posts of operational, tactical and strategic level personnel especially in supply chain management.</p> <p>The objective was to assist South Africa to train prospect staff for the sector locally with Dutch support by creating an educational platform at Stellenbosch University for port, transport and logistics issues.</p>
Applicant	STC Group
Country	South Africa
Sector	Transport and Logistics
ODA / non ODA	ODA Subsidy
Size of the project	EUR 562 427 – subsidy EUR 449 942 (80%)

10.1.111 Signs of change

Curriculum was developed but the project has as yet not been able to train students given staff shortages at the University.

10.1.112 Contribution claims

The partners reported that RVO gave sufficient support, although they were distant and did not involve themselves into the content of the project. RVO gave extensions without much hesitation.

10.1.113 Enabling factors

The partners are still talking about finding ways to translate the curriculum into actual teaching with different Dutch support mechanisms or taking the curriculum to market.

10.1.114 Barriers

South Africa's economy is currently in a downward spiral across all sectors with government having to cutting budget across all government departments. This has affected education budgets, and as such the University of Stellenbosch and its available human resources for this project as well.

10.1.115 Project sequencing

Partners met to discuss and develop curriculum. Curriculum was development but no teaching has happened.

10.1.116 Signs of sustainability

With the curriculum developed, the project can be picked up again and training can still take place.

Integrated Water Platform South Africa

Title	Integrated Water Platform South Africa
Timeline	September 2015 – October 2016
Short description	<p>The idea of the project came off the back of the drought in the Western Cape. The idea was to introduce smart technology solutions which could help decision-makers manage water resources better.</p> <p>The Platform was supposed to deliver a flexible web-based information platform with access to different data types. New technology would be introduced to allow for spatial planning, operational water management and calamity management. Introduction of the technology Hydro-Net for meteorological and hydrological data collection.</p>
Applicant	Nelen en Schuurmans
Country	South Africa
Sector	Water
ODA / non ODA	Non-ODA
Size of the project	EUR 184 700

10.1.117 Signs of change

Some good networks were established between the Dutch partners, local administrators and the Western Cape government. However, apart from one networking event nothing concrete came out of it.

10.1.118 Contribution claims

The network that has developed has also been taken up in other efforts in the Western Cape, like the Co-Create projects that has secured buy-in across many sectors and communities.

10.1.119 Enabling factors

Apart from a stakeholder workshop that was convened at the height of the drought experienced in the Western Cape, very little seems to have come out of this project. The workshop allowed for broad participation and information sharing and solution brainstorming. Key personnel left the

government department that should have driven the project further and that negatively affected the network that was established with the Dutch Embassy. It will take some time to rekindle.

10.1.120 Barriers

The Ministry of Water became was affected by corruption under President Zuma's cabinet and it became very difficult to make any progress in the water sector across the country. Key personnel left the government department that should have driven the project further and that negatively affected the network that was established with the Dutch Embassy.

10.1.121 Project sequencing

Networking was supposed to lead to the introduction of new technologies and integrated water management systems.

10.1.122 Signs of sustainability

Speaking to the Western Cape government there seems to be some appetite for taking the project further, however, they are also hamstrung by lack of funding to fill posts and a shift in provincial policy towards safety and security and the creation of jobs.

10.1.123 Suggestions from the applicant to the Dutch Government

Dutch companies that already have a foothold in South Africa should be given preference above new-comers to lead consortiums and drive projects. It takes a long time to develop partnerships and work within a contested political landscape.

Demonstrable Obstacle Limitation Evaluation Tool

Title	Demonstrable Obstacle Limitation Evaluation Tool
Timeline	February 2015 – February 2016
Short description	The To70 tool was to be introduced to South Africa which allows aviation activities to expand whilst taking due cognisance of all stakeholders and interests around aviation plans that may cause conflict, and helps faster decision-making
Applicant	To70 BV
Country	South Africa
Sector	Transport
ODA / non ODA	ODA
Size of the project	EUR 141 480

10.1.124 Signs of change

The project was able to hold a demonstration event to show how the tool would enable the South African aviation industry and interest groups to smooth out conflicting interests. However, no progress was made after the event. At the beginning of 2020 a first big order came in from the Johannesburg Airport Authority.

10.1.125 Contribution claims

RVO and the Embassy helped to convene stakeholders through their economic diplomacy efforts.

10.1.126 Enabling factors

The event allowed for networking opportunities and relationships to develop that were strong enough to last past the difficult economic and political period in South Africa, as new opportunities are now emerging.

10.1.127 Barriers

South Africa's political climate was very difficult to work in, while the country's Black Economic Empowerment policies made foreign participation and establishment of an office in the country very difficult.

10.1.128 Project sequencing

Trade missions were followed by a demonstration event.

10.1.129 Signs of sustainability

The fact that business opportunities are now emerging for the partners shows that there are some elements of sustainability.

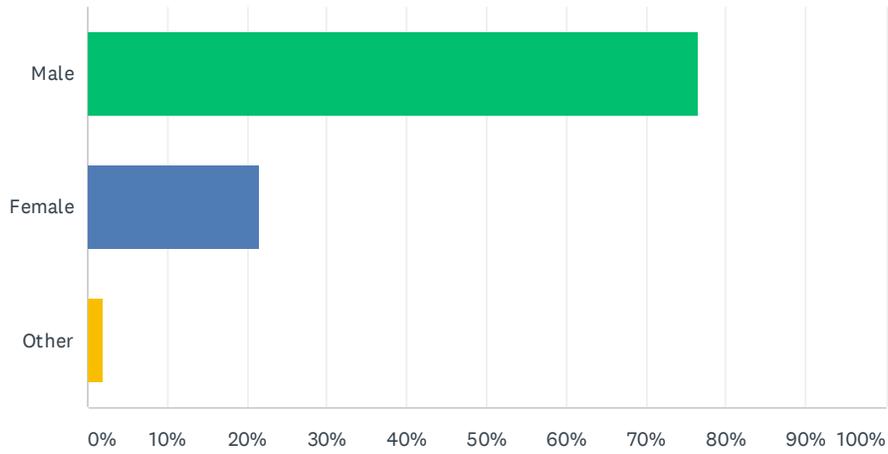
10.1.130 Suggestions from the applicant to the Dutch Government

Make TF applicable to other countries as well, and better organize the interaction between companies and RVO on the knowledge/content level of the project, as in-house knowledge and expertise on the project subjects seemed lacking.

Annex 6 Survey results

Q1 What gender do you identify with?

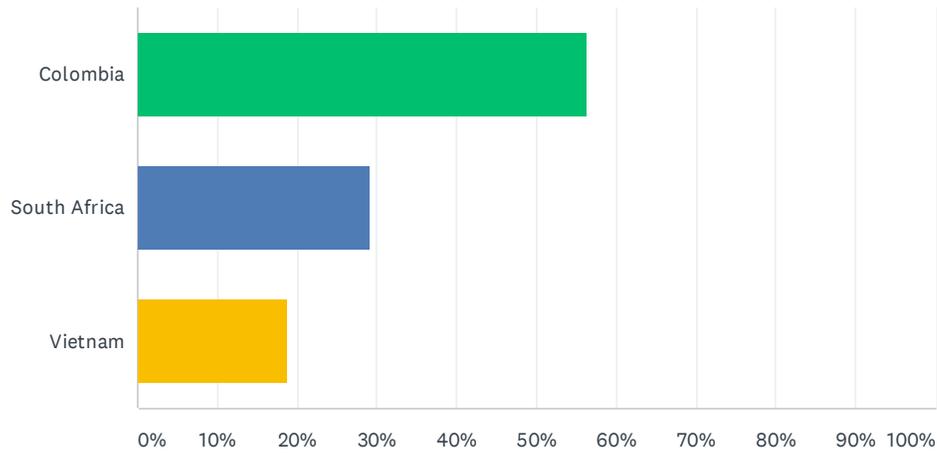
Answered: 51 Skipped: 0



ANSWER CHOICES	RESPONSES	
Male	76.47%	39
Female	21.57%	11
Other	1.96%	1
TOTAL		51

Q2 In which country(ies) have you received support from the Transition Facility? Please select all that apply

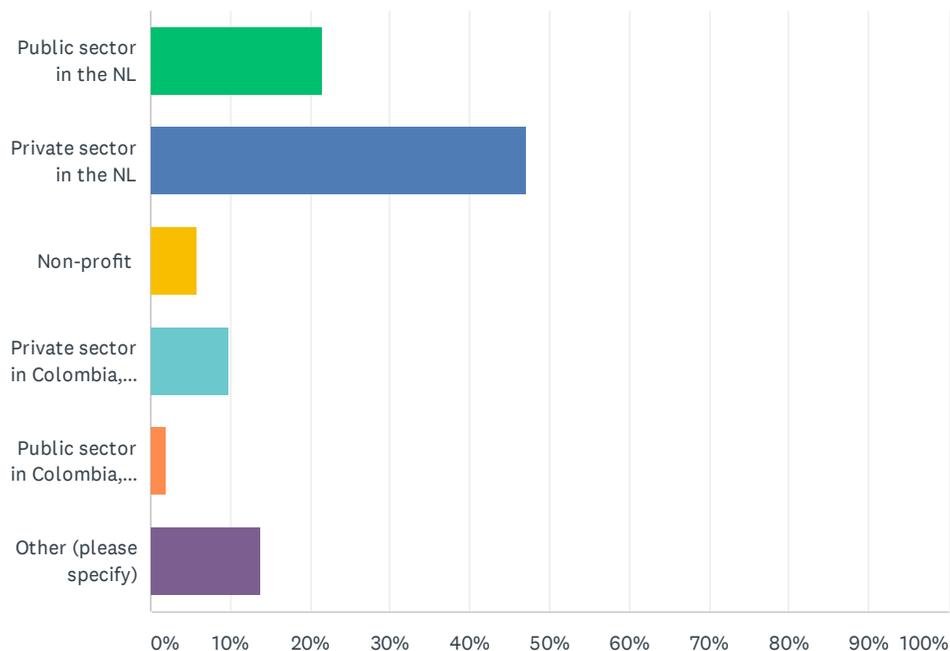
Answered: 48 Skipped: 3



ANSWER CHOICES	RESPONSES	
Colombia	56.25%	27
South Africa	29.17%	14
Vietnam	18.75%	9
Total Respondents: 48		

Q3 What type of entity do you work in?

Answered: 51 Skipped: 0

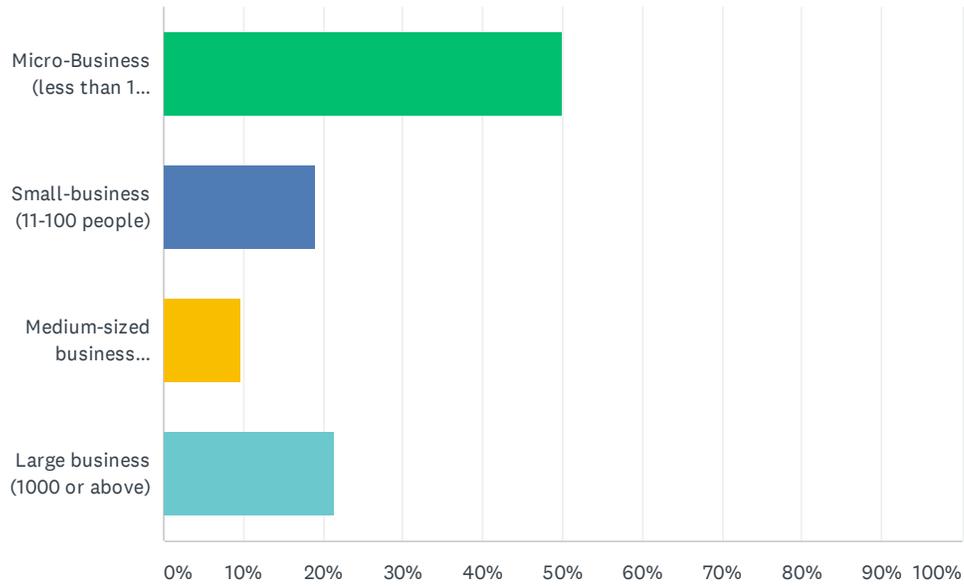


ANSWER CHOICES	RESPONSES
Public sector in the NL	21.57% 11
Private sector in the NL	47.06% 24
Non-profit	5.88% 3
Private sector in Colombia, South Africa, or Vietnam	9.80% 5
Public sector in Colombia, South Africa, or Vietnam	1.96% 1
Other (please specify)	13.73% 7
TOTAL	51

#	OTHER (PLEASE SPECIFY)	DATE
1	Higher Agricultural Education	2/12/2020 11:48 AM
2	Higher Education - SA	2/6/2020 2:57 PM
3	university	2/4/2020 12:03 PM
4	Research Institute	2/4/2020 10:32 AM
5	we work in private and public sector in NL and SA	2/2/2020 7:19 AM
6	we are a private company with a public motherorganization	1/31/2020 9:37 AM
7	Commercial Biotechnology	1/31/2020 7:57 AM

Q4 If you work for a company, what is the size of the firm?

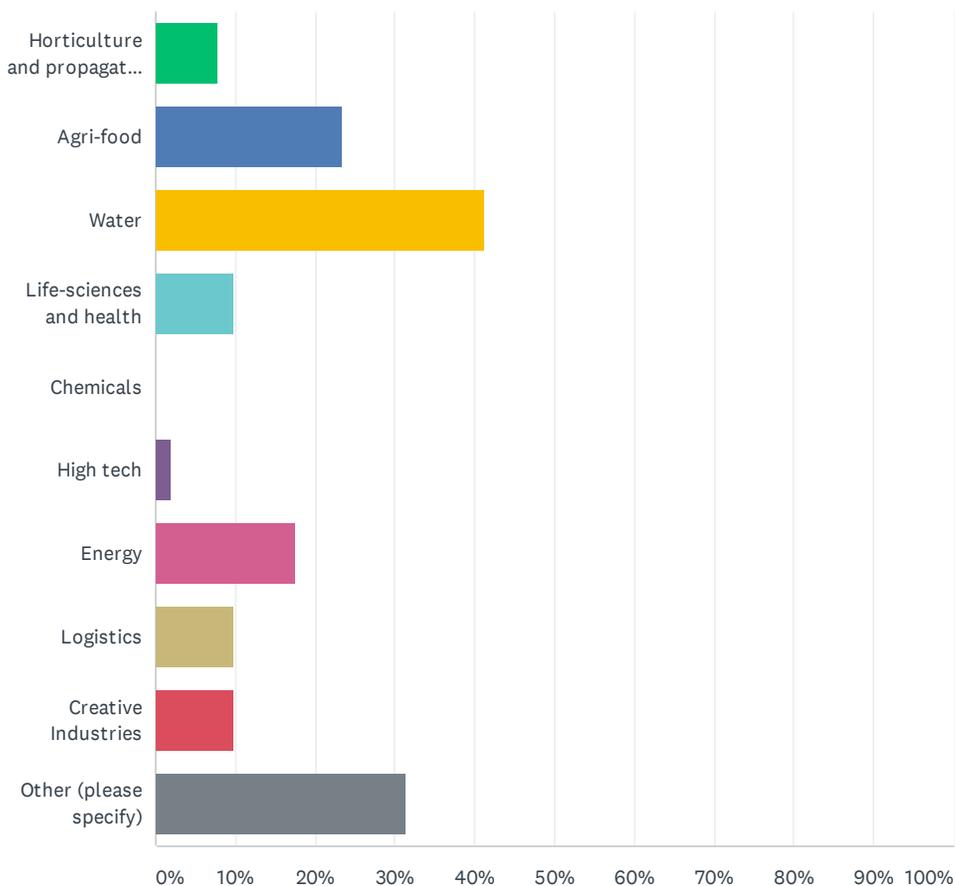
Answered: 42 Skipped: 9



ANSWER CHOICES	RESPONSES	
Micro-Business (less than 10 people)	50.00%	21
Small-business (11-100 people)	19.05%	8
Medium-sized business (101-999)	9.52%	4
Large business (1000 or above)	21.43%	9
TOTAL		42

Q5 Which of the top sectors of Dutch policy is your company / entity active in?

Answered: 51 Skipped: 0



ANSWER CHOICES	RESPONSES
Horticulture and propagation materials	7.84% 4
Agri-food	23.53% 12
Water	41.18% 21
Life-sciences and health	9.80% 5
Chemicals	0.00% 0
High tech	1.96% 1
Energy	17.65% 9
Logistics	9.80% 5
Creative Industries	9.80% 5
Other (please specify)	31.37% 16
Total Respondents: 51	

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#	OTHER (PLEASE SPECIFY)	DATE
1	Urban planning	2/11/2020 8:29 AM
2	satellite applications	2/11/2020 5:51 AM
3	Sustainability	2/4/2020 10:37 AM
4	Implementing training programmes and solutions including technical infrastructure, portals and electronic devices like tablets and smartphones.	2/4/2020 9:37 AM
5	Construction & Production	2/4/2020 9:36 AM
6	IT for Agro branche (plants)	2/4/2020 9:36 AM
7	Manufacturer of Flower processing equipment	2/3/2020 10:03 AM
8	circular and biobased economy	2/3/2020 7:42 AM
9	All	2/3/2020 6:56 AM
10	Port development and environment, safety	2/2/2020 10:11 AM
11	waste and circular economy	1/31/2020 10:05 AM
12	Government	1/31/2020 8:05 AM
13	All	1/31/2020 8:00 AM
14	Infrastructure	1/31/2020 7:59 AM
15	Capacity building of the phytosanitary department	1/31/2020 7:48 AM
16	land administration	1/31/2020 7:29 AM

Q6 How would you describe the main business area of your company or entity? (for example, MDF is a company that conducts evaluations of international development programmes for public sector clients)

Answered: 50 Skipped: 1

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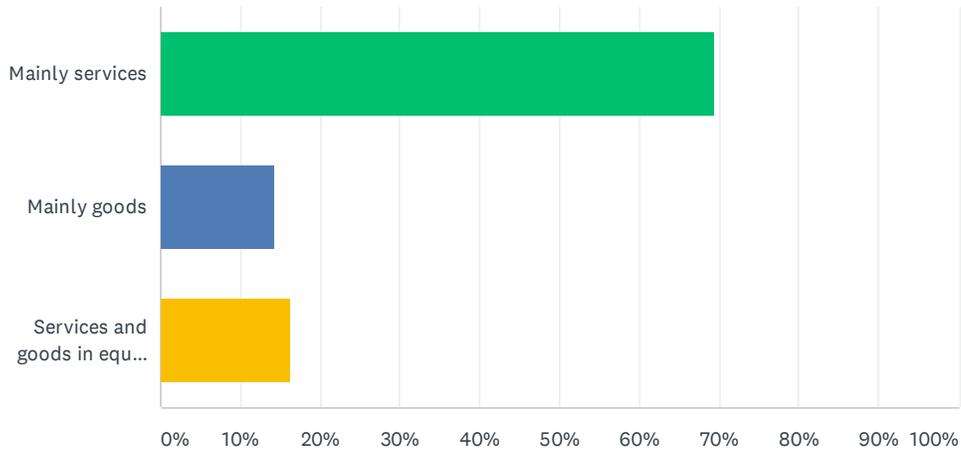
#	RESPONSES	DATE
1	De Heus is a company focusing on animal and fish nutrition.	2/18/2020 4:18 AM
2	Business development	2/17/2020 11:47 AM
3	consultants, engineers and architects	2/17/2020 7:26 AM
4	University of Applied Sciences: an educational and expertise centre for the Agrifood- and environmental sectors	2/12/2020 11:48 AM
5	Development of health care infrastructure in DCs	2/11/2020 2:57 PM
6	Advise on urban development and urban design	2/11/2020 8:29 AM
7	we are a governmental organization not delivering services and goods; we will respond in further question from perspective of company delivering services (where applicable)	2/11/2020 5:51 AM
8	Deltas, coasts, rivers, ports, inland waterways, water quality, infrastructure, environment and construction	2/11/2020 5:33 AM
9	advice to governments	2/11/2020 5:32 AM
10	Enki Energy designs and builds digesters for decentral waste treatment and biogas production.	2/11/2020 5:27 AM
11	We manufacture Co2 neutral charcoal furnaces with a low emission output.	2/11/2020 5:23 AM
12	Sustainable lifestyle	2/11/2020 5:21 AM
13	Consultancy, engineering	2/11/2020 5:13 AM
14	blended learning skills development Health industry	2/11/2020 2:07 AM
15	We support business between Netherlands and e.g. Vietnam in Agro Food.	2/10/2020 5:07 AM
16	Consultant Inland Dredging	2/7/2020 5:37 AM
17	Higher Education. Empowering young people	2/6/2020 2:57 PM
18	TwynstraGudde is a company that works for both public and private entities. Our core competences are strategy and policy development, program and project management, organisational development, (public-private) coalition building and stakeholder management, (learning) evaluations	2/5/2020 7:03 AM
19	urban development	2/5/2020 3:42 AM
20	Water resources Engineering: education, research & innovation	2/4/2020 12:03 PM
21	Corporate sustainability to enhance competitiveness	2/4/2020 10:37 AM
22	Applied research and specialist consultancy in the field of water and subsurface	2/4/2020 10:32 AM
23	Research	2/4/2020 9:54 AM
24	start-up for new technology of wind driven water desalination	2/4/2020 9:45 AM
25	monitoring propagation	2/4/2020 9:43 AM
26	TPG Academy is a company that implements training solutions, the infrastructure and programmes for knowledge transfer and knowledge sharing (community platforms) for the public and private sector.	2/4/2020 9:37 AM
27	Developing technology to sell factories, services and supplies to convert banana stems into transport pallets.	2/4/2020 9:36 AM
28	ABS provides software solutions for production and breeding companies in agro materials, i.c. on field crop, vegetables and ornamentals across the world.	2/4/2020 9:36 AM
29	Selling machinery	2/3/2020 10:03 AM
30	Creating an enabling environment for sustainable energy and agriculture	2/3/2020 7:42 AM
31	RVO is a company that executes the Transition Facility	2/3/2020 6:56 AM
32	Design and consultancy for built and natural assets.	2/3/2020 3:59 AM
33	Healthy Soil (N-xt Fertilizers) produces special liquid fertilizers and advice farmers to improve soil condition which results in improved crop yields and quality.	2/3/2020 3:27 AM
34	Developing an agro business with a market in Europe, in beginsel gericht op het maken van	2/2/2020 12:14 PM

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	winst in combinatie met het creëren van werkgelegenheid voor slachtoffers van subversieve elementen in marginale gebieden.	
35	Consultant company that implements sustainable development in industrial (port) areas. And implementation of circular economy.	2/2/2020 10:11 AM
36	Delta technology for governments, knowledge institutes and private sector around the globe	2/2/2020 8:42 AM
37	Colsen is a Company that supplies environmental and bio-energy plants to private an public sector. They can be involved from the project idea till the start-up and operations. Colsen works world wide.	2/2/2020 7:19 AM
38	We support public sector organizations with the implementation of infrastructure asset management.	1/31/2020 3:12 PM
39	MetaSus promotes exports and international cooperation in environmental technology	1/31/2020 10:05 AM
40	Training, education, technical assistance and applied research for The transport and logistics sectors	1/31/2020 9:49 AM
41	Training, education, consultancy and applied research for the Maritime, transport , logistic and petro-chemical cluster.	1/31/2020 9:37 AM
42	promotion of Dutch water technology in Colombia	1/31/2020 8:54 AM
43	Sustainable Pork Production	1/31/2020 8:41 AM
44	Supporting companies to develop business in a responsible way, so also focussed on avoiding or mitigating problem in HR. AW and environment.	1/31/2020 8:05 AM
45	Bilateral Chamber of Commerce aimed at improving economic and commercial ties between the Kingdom and Colombia.	1/31/2020 8:00 AM
46	public sector, construction and maintenance of water and mobility networks.	1/31/2020 7:59 AM
47	Demonstration and application of molecular diagnostics	1/31/2020 7:57 AM
48	engages in water operator partnerships	1/31/2020 7:51 AM
49	We are a governmental inspection service	1/31/2020 7:48 AM
50	Kadaster collects and registers administrative and spatial data on property and the rights involved. Kadaster protects legal certainty. Kadaster is responsible for national mapping and is an advisory body for land-use issues and national spatial data infrastructures. Kadaster also aims to further improve land administration world wide.	1/31/2020 7:29 AM

Q7 Does your company provide mainly services or goods?

Answered: 49 Skipped: 2



ANSWER CHOICES	RESPONSES	
Mainly services	69.39%	34
Mainly goods	14.29%	7
Services and goods in equal measure	16.33%	8
Total Respondents: 49		

Q8 Why did your company apply to the Transition Facility to expand operations in Colombia, Vietnam, or South Africa?

Answered: 46 Skipped: 5

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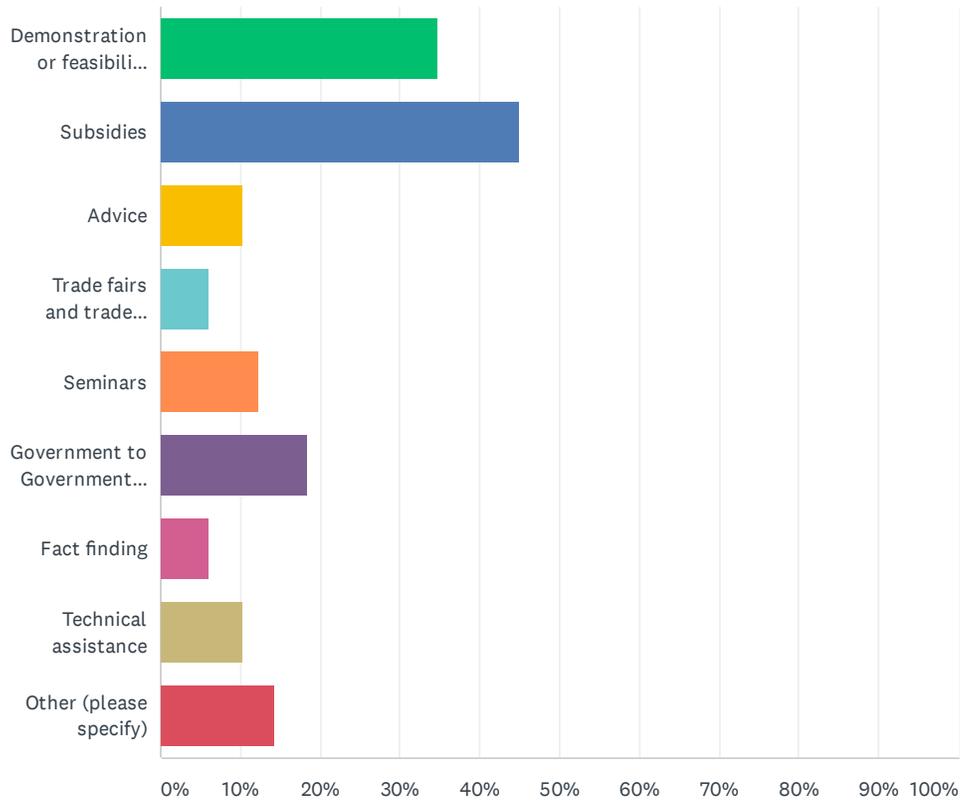
#	RESPONSES	DATE
1	To establish a state-of-the-art R&D facility, at which research, training and demonstrations activities can be conducted in close collaboration with research institutes and fish farmers.	2/18/2020 4:19 AM
2	no clue about which TF project this is about????	2/17/2020 11:49 AM
3	dont know, I worked on content, not process	2/17/2020 7:25 AM
4	Our graduates work with Dutch companies that are increasingly active in emerging markets. For us it is therefore of strategic importance to gain project experience and develop strategic working relations with education and business in these markets.	2/12/2020 11:51 AM
5	Good opportunities to expand to South Africa	2/11/2020 2:58 PM
6	as a non-profit organisation we needed the subsidy to be able to organise our project and to involve professional designing companies from the Netherlands (to cover their costs, there was no fee)	2/11/2020 8:31 AM
7	on request of Embassy Vietnam to start a G2G cooperation	2/11/2020 5:52 AM
8	Colombia is a target/focus country for us	2/11/2020 5:35 AM
9	to provide advice services for the NL water sector on business opportunities in Colombia	2/11/2020 5:33 AM
10	We saw good opportunities in S-America and political situation in Colombia is stable now.	2/11/2020 5:28 AM
11	We did not (yet)	2/11/2020 5:23 AM
12	interesting market	2/11/2020 5:22 AM
13	-	2/11/2020 5:13 AM
14	We wanted to introduce a Dutch product to the SA Health care industry as it has been proven to be very successful in The Netherlands and the demand for SA was/is huge.	2/11/2020 2:09 AM
15	We are service providers to Netherlands' businesses. Want to create more opportunities for NL business.	2/10/2020 5:08 AM
16	Requested by the NL embassy in Hanoi	2/7/2020 5:40 AM
17	To create a soft landings platform for Dutch entrepreneurs and businesses to bring or expand their businesses to Soit Africa.	2/6/2020 3:00 PM
18	To share our knowledge and expertise on stakeholder engagement, governance and coalition building.	2/5/2020 7:07 AM
19	start projects	2/5/2020 3:42 AM
20	we wanted to set-up an joint venture in Vietnam.	2/4/2020 12:04 PM
21	Our services are relatively expensive as compared to local knowledge providers; the Transition Facility helped us to show the added value and obtain the necessary trust during the first years in the country.	2/4/2020 10:51 AM
22	We thought it would be an ideal partner in establishing our presence in Latin America	2/4/2020 10:38 AM
23	Generate information on business opportunities in Biomass in Colombia for NL companies and to assess our own options for generating projects in Colombia	2/4/2020 9:57 AM
24	the project fitted perfect in teh need of Ciolombia and as demonstration project of our start-up	2/4/2020 9:46 AM
25	South Africa is seen by us as the lead country for the Africa continent in terms of production of agro material. How can we enter these African markets ?	2/4/2020 9:43 AM
26	To demonstrate that a blended learning concept, including the use of tablets is feasible and accepted by South African stakeholders (Public & private)	2/4/2020 9:39 AM
27	To establish the first factory in the world with a local partner	2/4/2020 9:38 AM
28	Try to get into that market	2/3/2020 10:04 AM
29	On request of the embassy of SA to create an enabling environment for renewable energy	2/3/2020 7:43 AM
30	At the time Colombia was an interesting market both in terms of content (water issues) and location (our LATAM offices).	2/3/2020 4:06 AM
31	We had a request from Vietnam to support them	2/3/2020 3:28 AM
32	Financial support in order to develop a project which was new and therefore risky but at the	2/2/2020 12:22 PM

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	same time high potential.	
33	Possibilities in those countries (Col + ZA)	2/2/2020 10:13 AM
34	The Dutch embassy in Buenos Aires connected us to this (assuming that RVO was involved under the Transition Facility). Otherwise ignore	2/2/2020 8:45 AM
35	We saw good possibilities for thermophilic sludge digestion for our customer Ethekwini . With a good demonstration on one of the WWTP 's also the other metros can be informed. With this demonstration sustainable energy from wastewater can be boosted.	2/2/2020 7:23 AM
36	We were invited.	1/31/2020 3:13 PM
37	To strengthen an existing Partners for International Business program on waste and water directed towards Colombia	1/31/2020 10:07 AM
38	In order to develop and implement a Center Of Excellence	1/31/2020 9:50 AM
39	to set up logistic faculty's.	1/31/2020 9:38 AM
40	Promotion of the Dutch water technology sector for drinking water and waste water treatment.	1/31/2020 8:55 AM
41	Expand in Colombia	1/31/2020 8:42 AM
42	Our organisation plays an important role in the transition from aid to trade. The financial support has been paramount to be able to start and consolidate our operation.	1/31/2020 8:04 AM
43	Demonstration of a molecular diagnostic test + measuring device for application in South Africa	1/31/2020 7:57 AM
44	Support for innovation platform at South African water operator partner	1/31/2020 7:52 AM
45	We did not apply, but were asked by the embassy in Vietnam.	1/31/2020 7:50 AM
46	A very good possibility to open contacts in Colombia to work on affordable and effective ways to regularise land rights in post conflict areas for better rural economic development.	1/31/2020 7:36 AM

Q9 What support did you receive from the Transition Facility?

Answered: 49 Skipped: 2



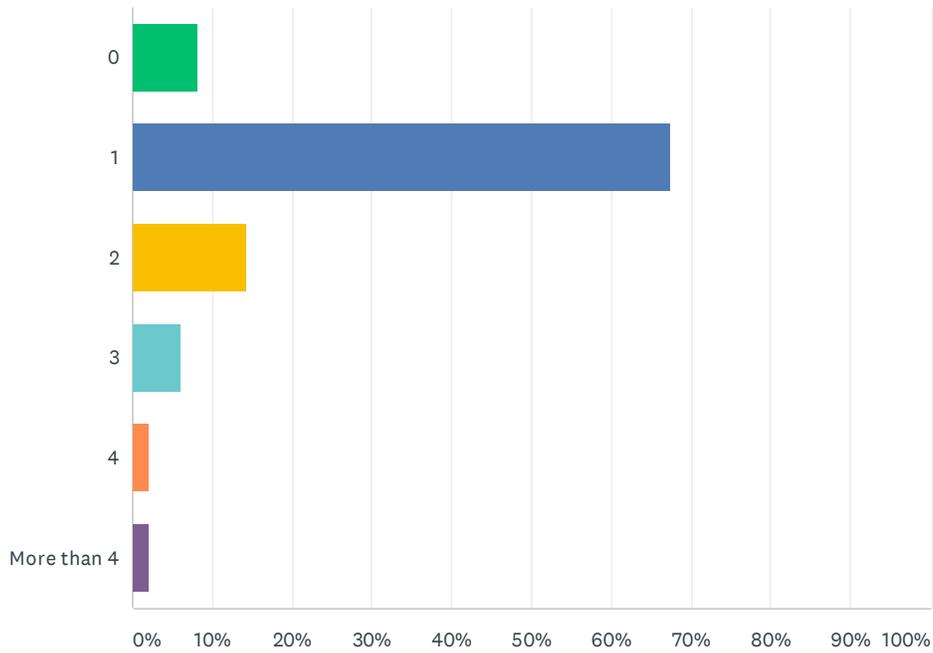
ANSWER CHOICES	RESPONSES	
Demonstration or feasibility studies	34.69%	17
Subsidies	44.90%	22
Advice	10.20%	5
Trade fairs and trade missions	6.12%	3
Seminars	12.24%	6
Government to Government support	18.37%	9
Fact finding	6.12%	3
Technical assistance	10.20%	5
Other (please specify)	14.29%	7
Total Respondents: 49		

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#	OTHER (PLEASE SPECIFY)	DATE
1	no clue (almost 10 years ago)	2/17/2020 11:49 AM
2	dont know	2/17/2020 7:25 AM
3	none	2/11/2020 5:23 AM
4	Assignment for advice on governance and organisation for the realisation of a national center for (water) modelation	2/5/2020 7:07 AM
5	Masterplans Rio Cauca, Coastal Erosion, Navigability and Sea Ports Dredging. All of these masterplans were 50% co financed by the TF. The other part was financed by the Colombians.	2/3/2020 4:06 AM
6	Basicly and ultmately none what so ever!	2/2/2020 12:22 PM
7	Pre-feasibility	2/2/2020 8:45 AM

Q10 How many projects did you have that were funded by the Transition Facility?

Answered: 49 Skipped: 2



ANSWER CHOICES	RESPONSES	
0	8.16%	4
1	67.35%	33
2	14.29%	7
3	6.12%	3
4	2.04%	1
More than 4	2.04%	1
TOTAL		49

Q11 If relevant, why did you decide to apply multiple times for support?

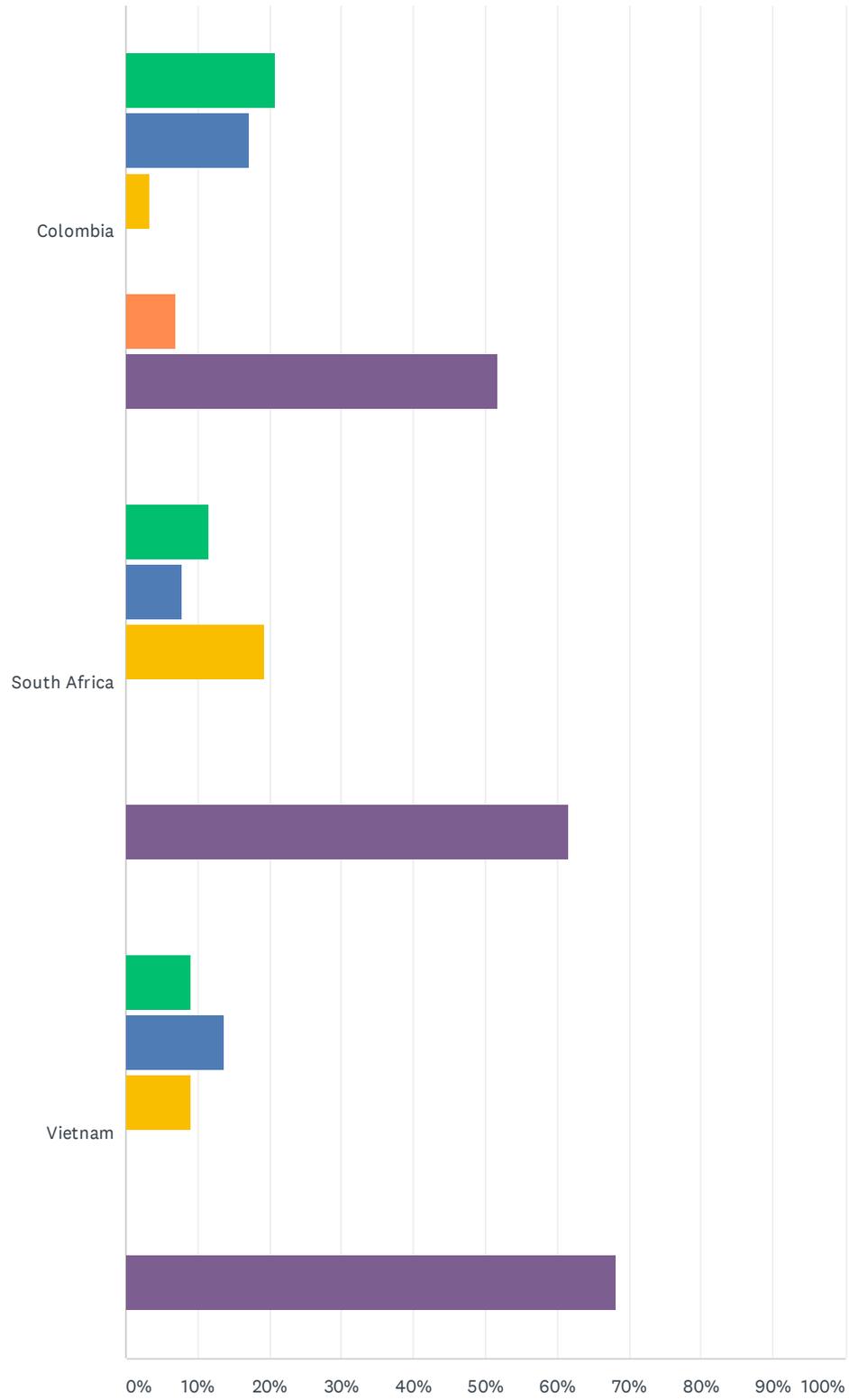
Answered: 15 Skipped: 36

#	RESPONSES	DATE
1	dont know	2/17/2020 7:25 AM
2	Na	2/11/2020 2:58 PM
3	Colombia is a target/focus country for us	2/11/2020 5:35 AM
4	Two different projects	2/10/2020 5:08 AM
5	N/A	2/6/2020 3:00 PM
6	First time was an assignment directly from the TF, following a request for proposal. Second time was an assignment as a subcontractor for Deltares	2/5/2020 7:07 AM
7	Different areas of expertise. Transition to economic cooperation takes time, particularly when other countries keep providing development assistance.	2/4/2020 10:51 AM
8	Each time the main question was how can we enter a new market in a smart way (we did this for India and this time for SA)	2/4/2020 9:43 AM
9	no	2/4/2020 9:38 AM
10	The masterplans were tendered via the regular RVO channel.	2/3/2020 4:06 AM
11	From the start I had good contact with the people from RVO, so I had faith that we could work something out.	2/2/2020 12:22 PM
12	One successful project lead to the next one.	2/2/2020 10:13 AM
13	I am not sure whether it was really three times that we received support, but it was several times to strengthen the PIB project	1/31/2020 10:07 AM
14	both countries needed such facilities	1/31/2020 9:38 AM
15	We received 1 direct subsidy from TF. But have also executed several trade missions/fairs, studies, DHI's that were funded by TF and where the Dutch companies/organizations decided to contract us for the local support in Colombia.	1/31/2020 8:04 AM

Q12 Did your entity increase its exports from Colombia, Vietnam, or South Africa in the period after you received support from the TF?

Answered: 47 Skipped: 4

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- Yes, they increased a lot
- Yes, they increased a little
- No, they remained stable
- No, they decreased a little
- No, they decreased a lot
- I have never exported to the country

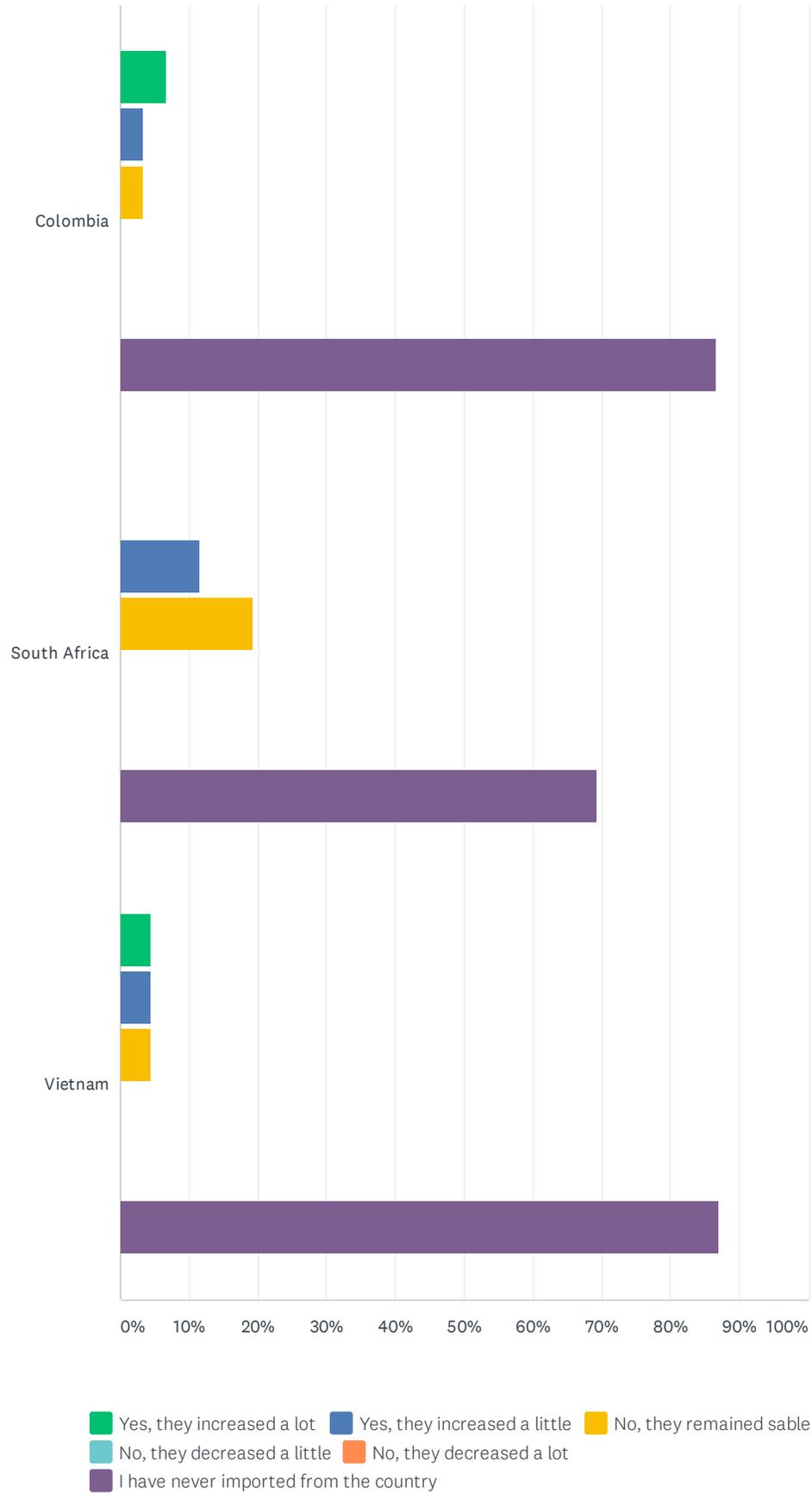
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	YES, THEY INCREASED A LOT	YES, THEY INCREASED A LITTLE	NO, THEY REMAINED SABLE	NO, THEY DECREASED A LITTLE	NO, THEY DECREASED A LOT	I HAVE NEVER EXPORTED TO THE COUNTRY	TOTAL
Colombia	20.69% 6	17.24% 5	3.45% 1	0.00% 0	6.90% 2	51.72% 15	29
South Africa	11.54% 3	7.69% 2	19.23% 5	0.00% 0	0.00% 0	61.54% 16	26
Vietnam	9.09% 2	13.64% 3	9.09% 2	0.00% 0	0.00% 0	68.18% 15	22

Q13 Did your entity increase its imports from Colombia, Vietnam, or South Africa in the period after you received support from the TF?

Answered: 47 Skipped: 4

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	YES, THEY INCREASED A LOT	YES, THEY INCREASED A LITTLE	NO, THEY REMAINED SABLE	NO, THEY DECREASED A LITTLE	NO, THEY DECREASED A LOT	I HAVE NEVER IMPORTED FROM THE COUNTRY	TOTAL
Colombia	6.67% 2	3.33% 1	3.33% 1	0.00% 0	0.00% 0	86.67% 26	30
South Africa	0.00% 0	11.54% 3	19.23% 5	0.00% 0	0.00% 0	69.23% 18	26
Vietnam	4.35% 1	4.35% 1	4.35% 1	0.00% 0	0.00% 0	86.96% 20	23

Q14 What were the other major achievements your entity experienced in working in South Africa, Vietnam, Colombia as a result of TF support?

Answered: 47 Skipped: 4

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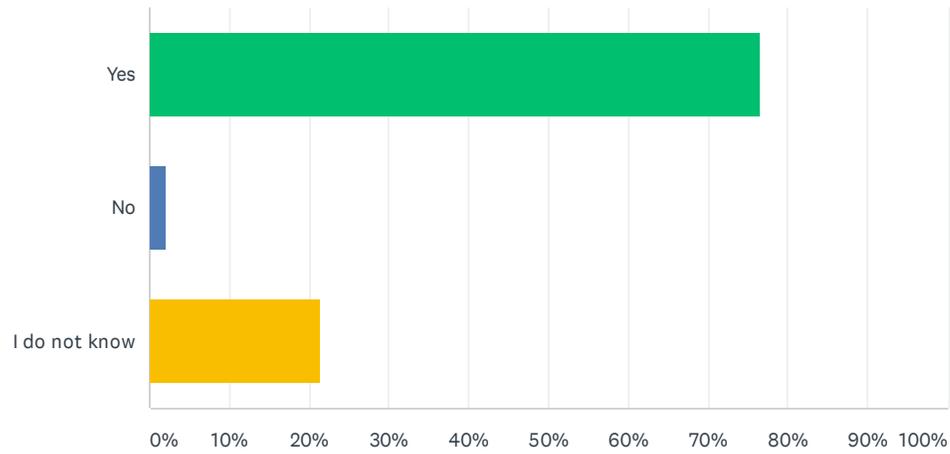
#	RESPONSES	DATE
1	A dynamic environment has been created where aquaculture knowledge and sustainable farming practices can be developed further.	2/18/2020 4:28 AM
2	?	2/17/2020 11:50 AM
3	Established a presence in SA	2/17/2020 6:30 AM
4	Development of strategic working relations with education and business partners, facilitating staff and student exchange	2/12/2020 11:55 AM
5	Na	2/11/2020 2:59 PM
6	Long term cooperation with offices and universities, extension of network, mutual projects	2/11/2020 8:34 AM
7	visibility, outreach, network of government organizations	2/11/2020 5:53 AM
8	Increasing knowledge of our name in Colombia, acquiring project in Colombia, increasing our network in Colombia	2/11/2020 5:38 AM
9	better insight in business potential	2/11/2020 5:34 AM
10	We got a much better idea of the needs of the clients in Colombia, and we were able to expand our network (also in other S-American countries)	2/11/2020 5:32 AM
11	nonet the current time. We are in the process of doing business	2/11/2020 5:24 AM
12	Country branding colombia	2/11/2020 5:23 AM
13	Bringing us in contact with Governmental institutions	2/11/2020 2:10 AM
14	We increased business opportunities for NL companies.	2/10/2020 5:08 AM
15	Contracted to make a dredging plan for the Mekong Delta	2/7/2020 5:42 AM
16	Increased network and collaboration	2/6/2020 4:04 PM
17	Entrance to public entities on the right level to be able to come to results in the assignment (given that it concerned G2G support) Support related to understanding context and culture	2/5/2020 7:08 AM
18	opening market	2/5/2020 3:43 AM
19	excelelent legal support in setting up a joint venture	2/4/2020 12:05 PM
20	The TF resulted in different projects financed completely by Colombian entities to provide specialist advice on water resources and coastal management.	2/4/2020 10:57 AM
21	Very successful program. Please refer to the final report on the GRI grant	2/4/2020 10:41 AM
22	We developed new projects with Colombian partners supporting sustainable oil palm	2/4/2020 10:03 AM
23	To better understand the market place in general (volume + players + commercial rules) and to become aware of our chances and risks.	2/4/2020 9:49 AM
24	getting accustomed to the needs and culture of Cilombia	2/4/2020 9:48 AM
25	education	2/4/2020 9:45 AM
26	We piloted the concept in Gauteng and Western Cape. In total 2,000 work seekers did attend the programme which was combined with other programmes. Drop-out rate of our programme was less then 5%. A very low percentage compared with other programmes.	2/4/2020 9:44 AM
27	Concept of the factory lead to Factory and local partner in Costa Rica when the local company in Colombia postponed decision making. However Colombia remains an option today to contact again and do the intended business after all.	2/4/2020 9:40 AM
28	?	2/3/2020 10:05 AM
29	awareness on a regional level to implement sustainable energy, more collaboration between companies from both countries	2/3/2020 7:45 AM
30	We increased our local network considerably, leading to potential local tenders. However due to local legislation, for us it is (still) difficult to respond to these tenders.	2/3/2020 4:10 AM
31	We encountered serious language problems, we have to communicat directly with the farmers, this did not work through tranlators.	2/3/2020 3:30 AM
32	I made achievements possible on my own, not as result of TF-support	2/2/2020 12:29 PM

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33	Improvement of the local situation with regards to environment and safety; and concrete spin-off in circular economy	2/2/2020 10:14 AM
34	I replied that imports and exports are stable, because I have no knowledge about this. I only know my project in Argentina	2/2/2020 8:49 AM
35	Improving the relation with the people from the metro's and attention from the Consultants involved in WWT in SA	2/2/2020 7:27 AM
36	We supported an center of expertise which deployed many activities	1/31/2020 3:15 PM
37	Policy support at the federal level in Colombia in the areas of recycling strategies and the introduction of Extended Producer Responsibility (EPR)	1/31/2020 10:11 AM
38	Having international curricula developed according to the local needs and trained experts from both Colombia and The Netherlands.	1/31/2020 9:52 AM
39	expanding the educational footprint in the countries.	1/31/2020 9:40 AM
40	Enabling Dutch companies to do business and to get a beter acceptance of government to government advice from Dutch Experts	1/31/2020 8:57 AM
41	More market knowledge, more network, more recognition on our service input (more respect for our added value).	1/31/2020 8:52 AM
42	We achieved financial self-sustainability within the established 3 years. Today we are 1 of the leading and most versatile Chambers in Colombia and Dutch Chambers in the world.	1/31/2020 8:07 AM
43	Organization of a 2day seminar	1/31/2020 8:01 AM
44	Demonstration of a portable HIV diagnostic test to a relevant audience of hospital and laboratory managers	1/31/2020 8:00 AM
45	We are a governmental organisation, so we do not trade. But we established a good relation with the local governmental counterpart.	1/31/2020 7:55 AM
46	to help launch several Dutch innovations and give them market entry to the South African water market	1/31/2020 7:53 AM
47	We carried out a succesfull pilot and participated in the Expert Group on land administratio. The advantage of this G2G collaboration is that we gave straightforward advice without profit objective . These debates lead to better results. We advised on a suitable methodology for land administration for all, taking into account costs, time and citizens' participation	1/31/2020 7:51 AM

Q15 To your knowledge, did your project(s) have broader positive or negative economic, environmental, social, political effects?

Answered: 47 Skipped: 4



ANSWER CHOICES	RESPONSES	
Yes	76.60%	36
No	2.13%	1
I do not know	21.28%	10
TOTAL		47

Q16 If yes, please describe here (including potential negative effects)

Answered: 31 Skipped: 20

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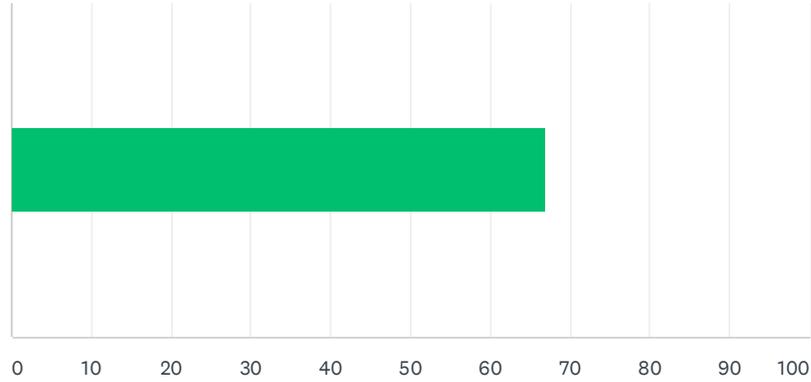
#	RESPONSES	DATE
1	Positive attention from Vietnamese farmers and local government about water recirculation and water filtration systems to avoid pollution, which eventually should also economically give a boost to the export volumes and value of locally produced fish.	2/18/2020 4:28 AM
2	Positive effects	2/17/2020 6:30 AM
3	Important topics and educational programs from The Netherlands (sustainable food systems, circular economy) have gained interest from the Ministry of Agriculture & Rural Development	2/12/2020 11:55 AM
4	The project raised the knowledge and commitment of parties in South Africa to integral urban planning issues which was evaluated as a very positive result.	2/11/2020 8:34 AM
5	Our project definitely had positive effects on environment and social structure as it decreased the waste problem and increased participation of labour force.	2/11/2020 5:32 AM
6	Positive exposure for Colombia	2/11/2020 5:23 AM
7	policy effects --> increased awareness on regulations and laws and inquiry on Netherlands' regulations and laws for some topics not part of the TF	2/10/2020 5:08 AM
8	Advice was taken over by the World Bank	2/7/2020 5:42 AM
9	Various effects - call me, I'll gladly wxplain	2/6/2020 4:04 PM
10	positive effects: exchange between staff and students between NI and VN universities	2/4/2020 12:05 PM
11	Yes, the projects improved coordination between Colombian entities and provided unique knowledge that was relevant to them.	2/4/2020 10:57 AM
12	Please refer to the final report of the GRI project	2/4/2020 10:41 AM
13	Project contributed to understanding of sustainable biomass and oil palm supply for the Netherlands	2/4/2020 10:03 AM
14	It brings much more professionalism into those companies that are using our solutions. They are able to compete with companies in the big league.	2/4/2020 9:49 AM
15	in general teh technology was accepted and interest was raised in applying this technology	2/4/2020 9:48 AM
16	See answer on question 14. 2.000 work seekers did benefit from the programme. We also trained 68 unemployed youth. They did deliver the training modules and they are now accredited facilitator, moderator and assessor. Accredited by the SETA's	2/4/2020 9:44 AM
17	As under 14	2/4/2020 9:40 AM
18	public awareness of climate change and need for renewable energy	2/3/2020 7:45 AM
19	The water issues addressed in the masterplans all have (potential) large impacts. Not acting will have large negative impacts.	2/3/2020 4:10 AM
20	I am in the process of an agro cultural project with has a great inapct on all elements of rural life, such as employment, income and education	2/2/2020 12:29 PM
21	Improvement of the local situation with regards to environment and safety; and concrete spin-off in circular economy	2/2/2020 10:14 AM
22	Although we advised against the new "Macri Canal", our study was used to justify implementation. Implementation only stopped because president Macri lost the last elections	2/2/2020 8:49 AM
23	The attention for sludge treatment is increased in SA, which means improvement for the sustainable energy production, but also attention for the better quality of operations of WWTP	2/2/2020 7:27 AM
24	Our serious game was used in local gouvernement training sessions. It contributed to knowledge development and local cooperation.	1/31/2020 3:15 PM
25	The PIB/TF project initiated business for various companies in the Netherlands. Especially in the area of waste management, equipment deliveries in Colombia (and as a consequence also in other countries of Latin America) helped improve waste management practises	1/31/2020 10:11 AM
26	Netherlands is frequently used in speeches by the ministry responsible for drinking water as the example country.	1/31/2020 8:57 AM
27	-> increased animal welfare, proven -> increased sustainability, proven Against better profit	1/31/2020 8:52 AM
28	Demonstration to relevant governmental officers and discussion of potential changes in governmental tender procedures	1/31/2020 8:00 AM

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29	Conditions were negotiated fro market access of a number of agricultural products.	1/31/2020 7:55 AM
30	none	1/31/2020 7:53 AM
31	Our contribution had positive policy effects: awareness that the current methodologies will never produce the envisioned policy results. Addressing the institutionally fragmented panorama of land administration (where institutions compete to secure their own business processes, where inter-institutional collaboration is expressed but not materialized at the "work floor") became a priority.	1/31/2020 7:51 AM

Q17 In your opinion, how much did the Transition Facility help you in achieving the changes you reported in questions 12 (exports), 13 (imports), 14 (other advantages), 15 (development goals)?

Answered: 46 Skipped: 5



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	67	3,079	46
Total Respondents: 46			

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#		DATE
1	70	2/18/2020 6:14 AM
2	50	2/17/2020 11:51 AM
3	80	2/17/2020 6:31 AM
4	80	2/12/2020 11:58 AM
5	0	2/11/2020 2:59 PM
6	99	2/11/2020 8:36 AM
7	25	2/11/2020 5:56 AM
8	75	2/11/2020 5:43 AM
9	90	2/11/2020 5:36 AM
10	70	2/11/2020 5:35 AM
11	0	2/11/2020 5:25 AM
12	59	2/11/2020 5:23 AM
13	70	2/11/2020 2:14 AM
14	70	2/10/2020 5:10 AM
15	98	2/7/2020 5:48 AM
16	80	2/6/2020 4:07 PM
17	0	2/5/2020 7:10 AM
18	90	2/5/2020 3:44 AM
19	87	2/4/2020 12:06 PM
20	90	2/4/2020 10:57 AM
21	82	2/4/2020 10:06 AM
22	50	2/4/2020 9:57 AM
23	100	2/4/2020 9:52 AM
24	60	2/4/2020 9:51 AM
25	0	2/4/2020 9:48 AM
26	90	2/4/2020 9:43 AM
27	50	2/3/2020 10:08 AM
28	70	2/3/2020 7:46 AM
29	86	2/3/2020 4:14 AM
30	0	2/3/2020 3:32 AM
31	0	2/2/2020 12:34 PM
32	90	2/2/2020 10:17 AM
33	100	2/2/2020 8:50 AM
34	90	2/2/2020 7:33 AM
35	61	1/31/2020 3:17 PM
36	80	1/31/2020 10:14 AM
37	88	1/31/2020 9:54 AM
38	75	1/31/2020 9:42 AM
39	100	1/31/2020 8:59 AM
40	85	1/31/2020 8:53 AM

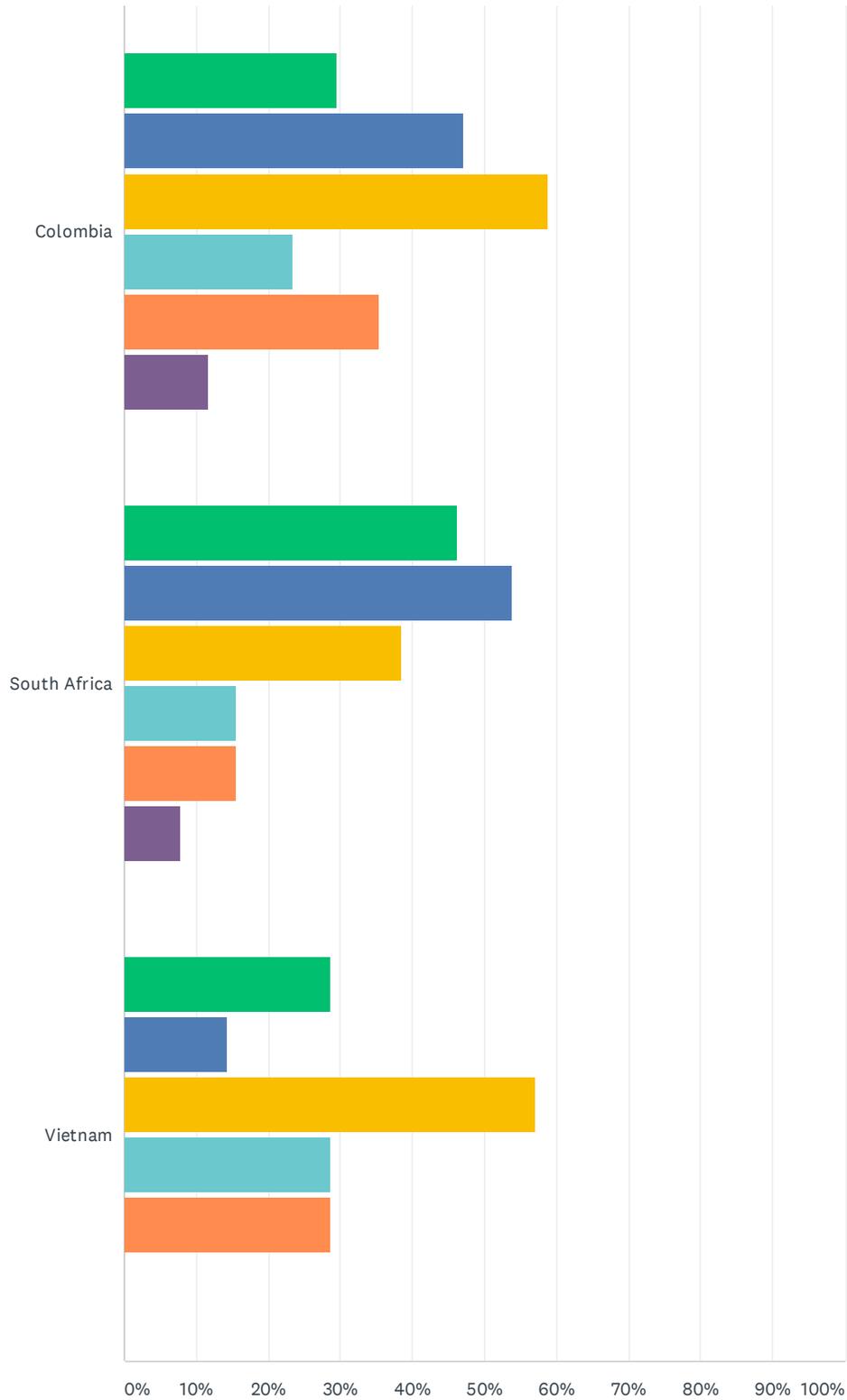
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41	90	1/31/2020 8:09 AM
42	51	1/31/2020 8:04 AM
43	98	1/31/2020 8:04 AM
44	0	1/31/2020 7:58 AM
45	100	1/31/2020 7:55 AM
46	100	1/31/2020 7:55 AM

Q18 Which of the market barriers that you were actually experiencing did the Transition Facility help address?

Answered: 34 Skipped: 17

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- Limited skilled labor force
- Limited access to finance
- Limited market information on opportunities and threats
- Lack of key infrastructures for trade
- Regulatory environment restrictive to foreign investment and trade
- Poor custom procedures

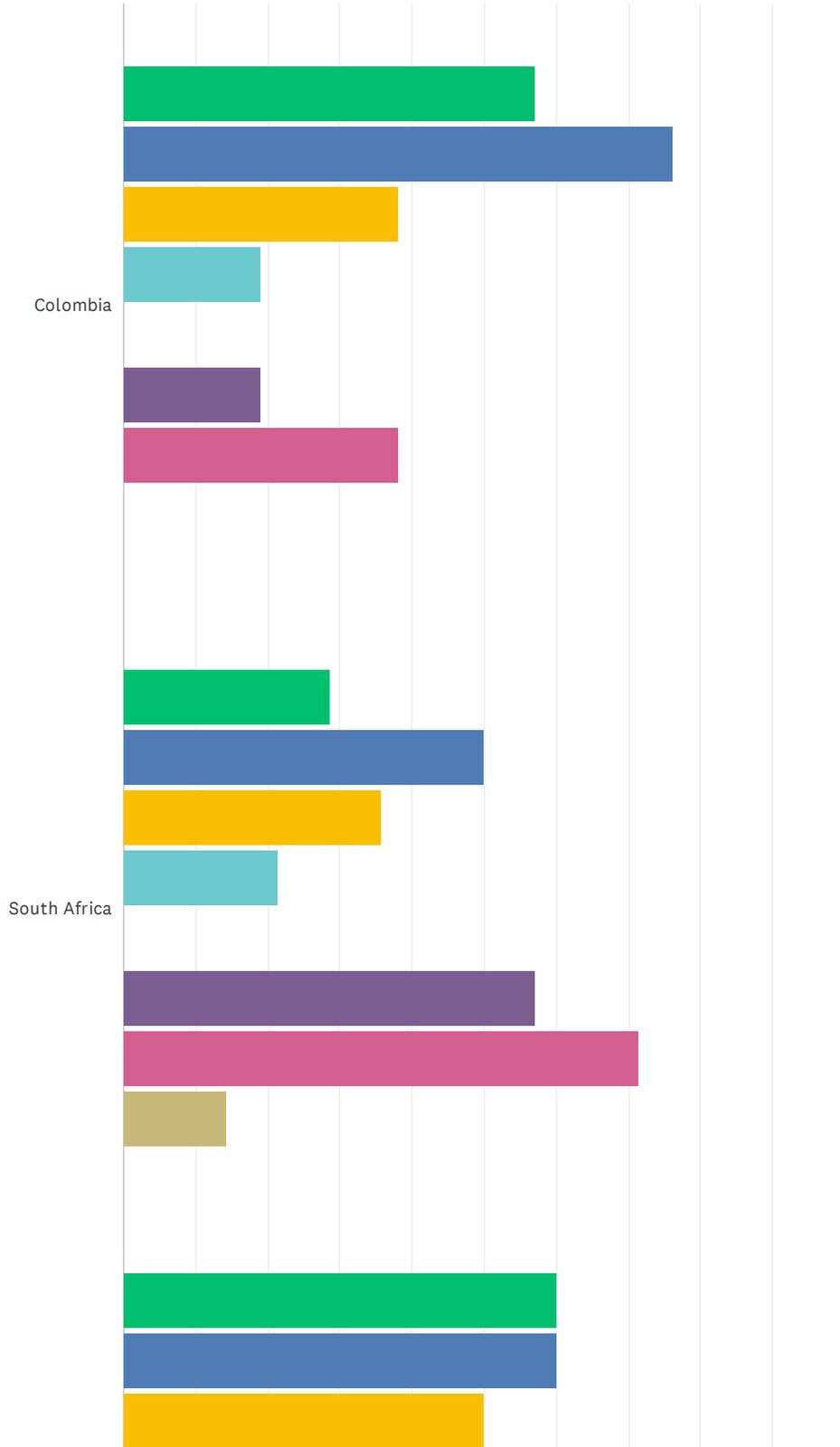
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	LIMITED SKILLED LABOR FORCE	LIMITED ACCESS TO FINANCE	LIMITED MARKET INFORMATION ON OPPORTUNITIES AND THREATS	LACK OF KEY INFRASTRUCTURES FOR TRADE	REGULATORY ENVIRONMENT RESTRICTIVE TO FOREIGN INVESTMENT AND TRADE	POOR CUSTOM PROCEDURES	TOTAL RESPONDENTS
Colombia	29.41% 5	47.06% 8	58.82% 10	23.53% 4	35.29% 6	11.76% 2	17
South Africa	46.15% 6	53.85% 7	38.46% 5	15.38% 2	15.38% 2	7.69% 1	13
Vietnam	28.57% 2	14.29% 1	57.14% 4	28.57% 2	28.57% 2	0.00% 0	7

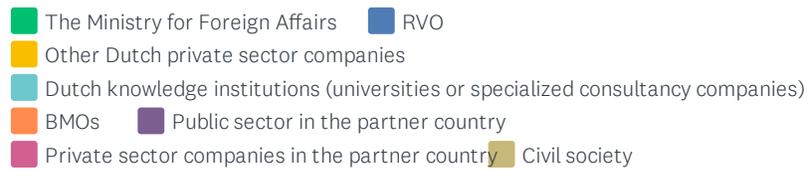
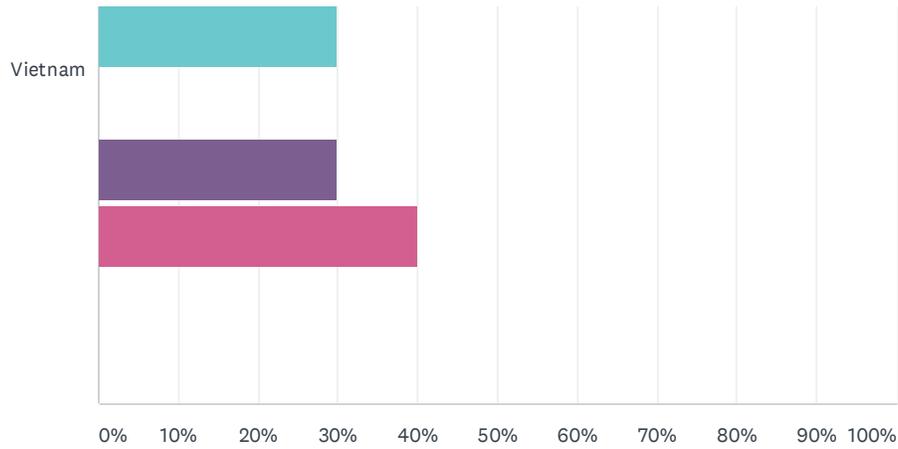
#	OTHER (PLEASE SPECIFY)	DATE
1	?	2/17/2020 11:51 AM
2	cultural, governmental hierarchy	2/11/2020 5:56 AM
3	Legislation and environmental laws/procedures	2/11/2020 5:43 AM
4	subsidy	2/11/2020 5:36 AM
5	The TF did help opening doors and did help with initiating new projects.	2/4/2020 9:52 AM
6	nothing	2/4/2020 9:48 AM
7	Mainly because communications	2/3/2020 3:32 AM
8	No help at all	2/2/2020 12:34 PM
9	I have no ideas	2/2/2020 8:50 AM
10	Ethikwini was very much interested but was unable to provide enough funding. Without TF the demonstration would not be done.	2/2/2020 7:33 AM
11	it is education we did, none are applicable	1/31/2020 9:42 AM
12	Little understanding in Colombia of Dutch capabilities	1/31/2020 8:59 AM
13	Not applicable to our organisation	1/31/2020 7:58 AM

Q19 Which actors supported the most your work in the partner country?
(please select a maximum of three choices per row, choosing the actors that helped your company or entity the most)

Answered: 43 Skipped: 8



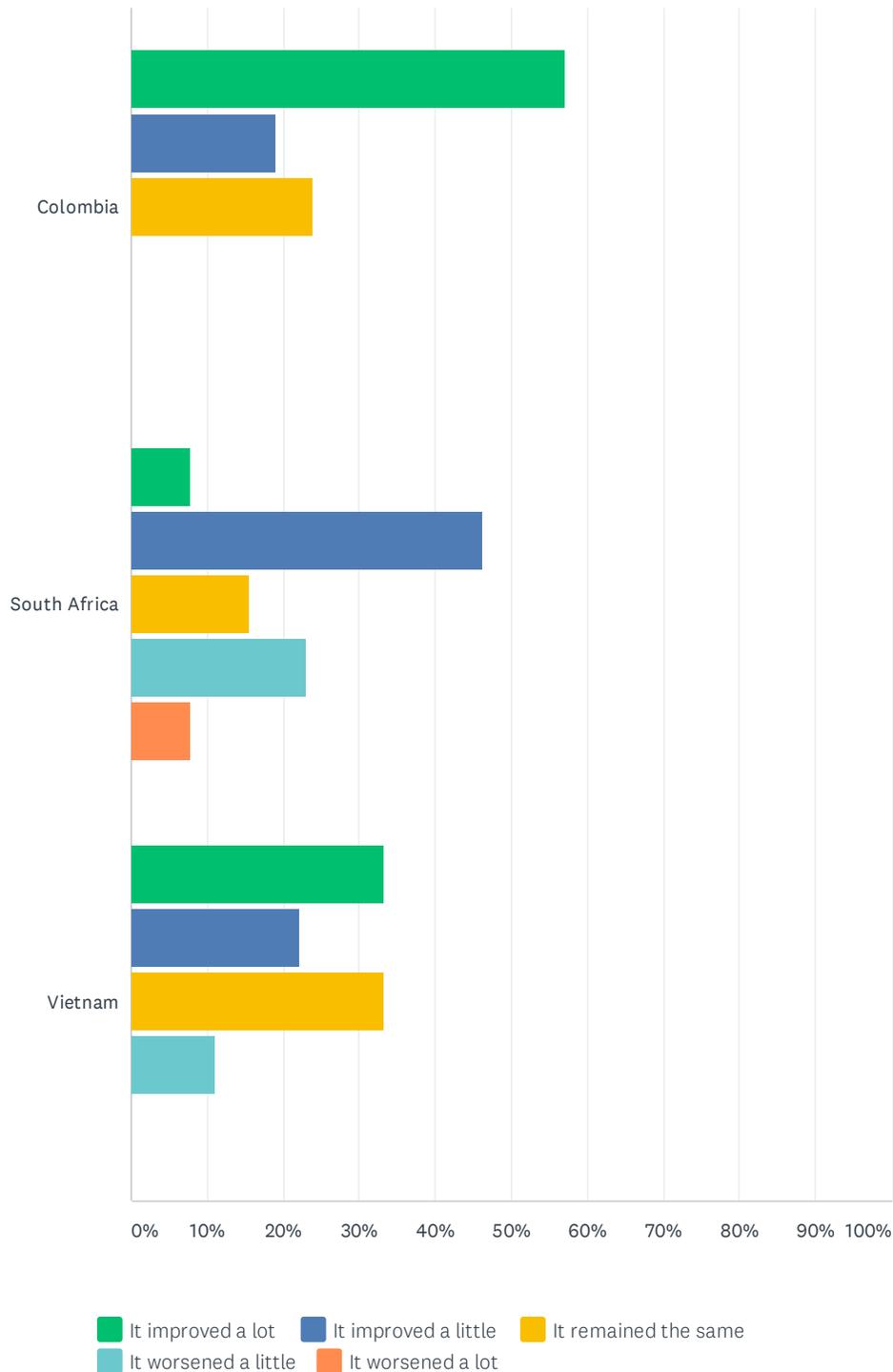
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	THE MINISTRY FOR FOREIGN AFFAIRS	RVO	OTHER DUTCH PRIVATE SECTOR COMPANIES	DUTCH KNOWLEDGE INSTITUTIONS (UNIVERSITIES OR SPECIALIZED CONSULTANCY COMPANIES)	BMOs	PUBLIC SECTOR IN THE PARTNER COUNTRY	PRIVATE SECTOR COMPANIES IN THE PARTNER COUNTRY	CIVIL SOCIETY	TOTAL RESPONDEE
Colombia	57.14% 12	76.19% 16	38.10% 8	19.05% 4	0.00% 0	19.05% 4	38.10% 8	0.00% 0	
South Africa	28.57% 4	50.00% 7	35.71% 5	21.43% 3	0.00% 0	57.14% 8	71.43% 10	14.29% 2	
Vietnam	60.00% 6	60.00% 6	50.00% 5	30.00% 3	0.00% 0	30.00% 3	40.00% 4	0.00% 0	

Q20 In your opinion, did the economic relationship (trade, investment, and exchanges) between the Netherlands and Colombia, South Africa or Vietnam improve since 2011?

Answered: 41 Skipped: 10



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	IT IMPROVED A LOT	IT IMPROVED A LITTLE	IT REMAINED THE SAME	IT WORSENERD A LITTLE	IT WORSENERD A LOT	TOTAL	WEIGHTED AVERAGE
Colombia	57.14% 12	19.05% 4	23.81% 5	0.00% 0	0.00% 0	21	1.67
South Africa	7.69% 1	46.15% 6	15.38% 2	23.08% 3	7.69% 1	13	2.77
Vietnam	33.33% 3	22.22% 2	33.33% 3	11.11% 1	0.00% 0	9	2.22

Q21 Could you explain the reason for your answer to the previous question?

Answered: 33 Skipped: 18

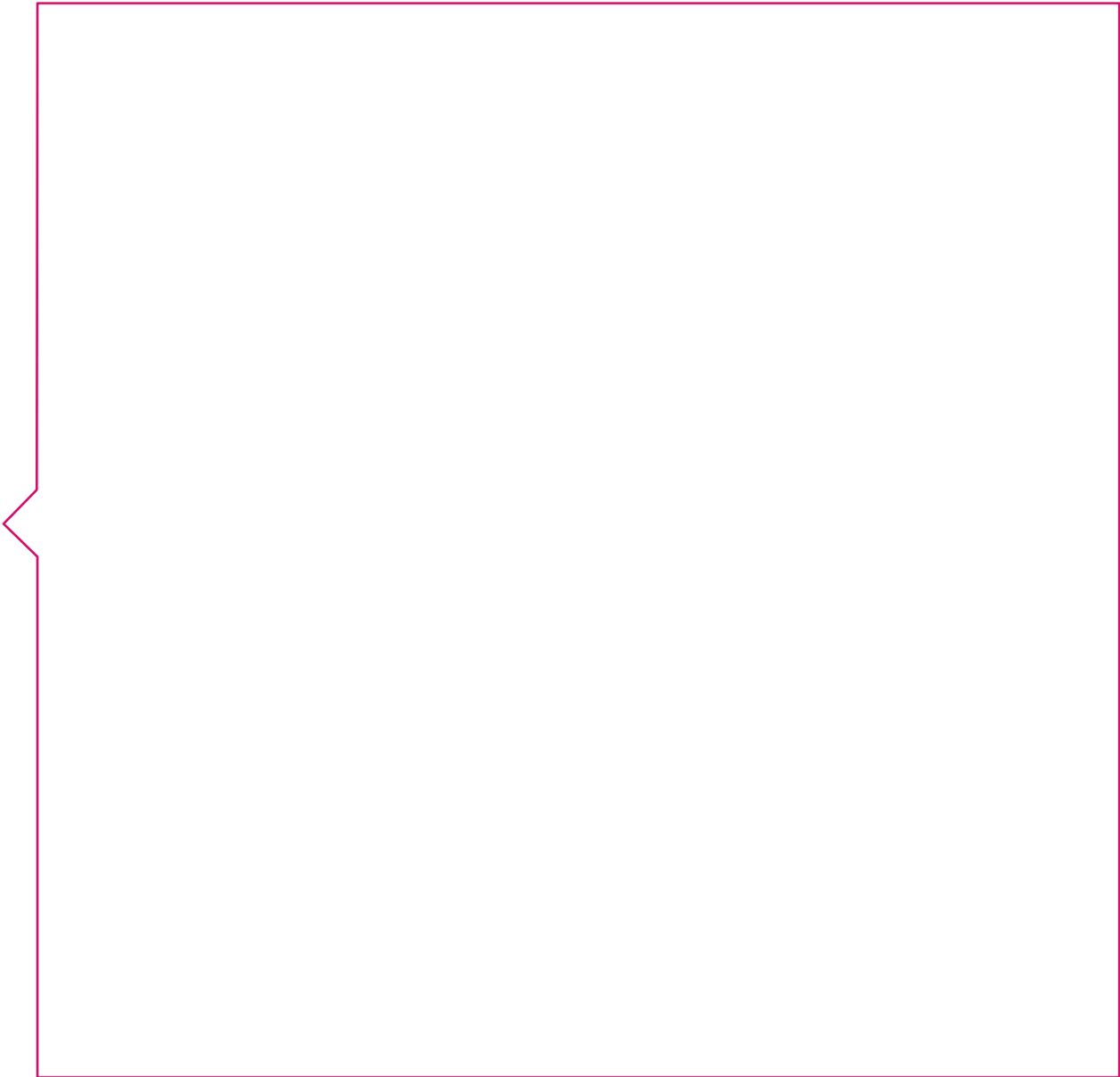
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#	RESPONSES	DATE
1	Good relationship further developed, free trade agreement, etc.	2/18/2020 6:14 AM
2	?	2/17/2020 11:51 AM
3	Market development in Vietnam requires a long term business strategy and a continuous development of strategic partnerships between Vietnamese and Dutch business	2/12/2020 11:58 AM
4	It is already quite good and improving bit by bit. There are a lot of good intentions, but the number of projects only increases slowly	2/11/2020 5:43 AM
5	We experience increasing openness and availability of information.	2/11/2020 5:35 AM
6	It is very difficult to move forward with the SA Health departments in Government. Especially as the execution of CPD has a delay. If no delay, this would have helped us a lot in growing the business and improving skills in SA Health industry. Unfortunately we are not there yet.	2/11/2020 2:14 AM
7	it improved, but "a lot" is too much said	2/10/2020 5:10 AM
8	It started the awareness of innovative sustainable tender and contracts using performance based contracts with the focus on quality and where price becomes secondary	2/7/2020 5:48 AM
9	Access to information	2/6/2020 4:07 PM
10	From our perspective, there are no changes	2/5/2020 7:10 AM
11	no more developing cooperation projects	2/4/2020 12:06 PM
12	Before 2011 there almost was not any economic relation on water resources management. Currently the Netherlands in general, our institute and some of the Dutch companies are recognized players.	2/4/2020 10:57 AM
13	Oil palm export has increased to NL from Colombia. We contribute to sustainability of this.	2/4/2020 10:06 AM
14	a. SA is suffering from extreme dryness which brings my potential customers into a lower financial position for investments. b. The political situation in SA has become less stable due to political and financial weaknesses.	2/4/2020 9:57 AM
15	For small private companies it is much harder to get co-funding from RVO / DGGF. The approval of applications is not based on a viable Business Case. The applicant and partners are also audited on 2-3 years financial figures. I did implement successful projects in Russia, Afghanistan, South Africa and I am co-founder of 3 international successful project management standards. Today I can't even submit an application based on year end reports.	2/4/2020 9:52 AM
16	example the succesfull trade mission of the prime minister in 2019	2/4/2020 9:51 AM
17	I don't know. The labour costst went down, so the pay of of our machines are to low. so we could't sell anything. I don't know the situation now...	2/3/2020 10:08 AM
18	As we understand better the local market and have a network of local partners, we can better understand the conditions and opportunities. However there still remain considerable hurdles for us to become more involved in local sponsored projects.	2/3/2020 4:14 AM
19	We did not have the possibillity to build up an economical relationship	2/3/2020 3:32 AM
20	I would say it remains the same, but I do not have any figures to substantiate my answer	2/2/2020 12:34 PM
21	The general situation in Colombia and SA had not improved due to political and economic issues.	2/2/2020 10:17 AM
22	For our Company the work in SA is booming in our daughter Company Aquest Colsen.	2/2/2020 7:33 AM
23	I do not know.	1/31/2020 3:17 PM
24	In the case of Colombia, the Transition Facility came at the right moment to be a true transition point to get from aid to trade.	1/31/2020 10:14 AM
25	Because The relationship between The Countries improved a lot, a lot of activities -to my knowledge- done together.	1/31/2020 9:54 AM
26	Colombia is developing fast and the Transition facility enable activity suchs as Holland House, HCWP, Waste window to become active and have succesful strong Dutch presence as leaders in areas that are in The Netherlands recognised as priority areas.	1/31/2020 8:59 AM
27	Burocracy is still a big barrier. Willingnes to purchase abroad improved a lot.	1/31/2020 8:53 AM
28	When we started, 40 Dutch companies were permanently active in Colombia; Today more than	1/31/2020 8:09 AM

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250 companies have a structural foothold in the country.

29	We kept contact but unclear whether (because of us) the relationship changed	1/31/2020 8:04 AM
30	Sales has improved but not to the extend as expected due to changes in policies in South Africa, due to exclusion of potential patients from the population that needs to be tested.	1/31/2020 8:04 AM
31	The excellent relation helped negotiate market access.	1/31/2020 7:58 AM
32	our company has left the south African market	1/31/2020 7:55 AM
33	I can not compare it to 2011, but one can clearly see improved economic relations and knowledge exchange.	1/31/2020 7:55 AM



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