INTRODUCTION

This report provides members of the IATI Steering Committee with an interim update on activities carried out during the financial year September 2013 - August 2014 (FY13/14), the period during which hosting of the initiative transitioned from its former arrangement led by DFID following the process approved by the Steering Committee during its March 2013 meeting. This narrative report is accompanied by a detailed work plan and budget for the second year, September 2014 – August 2015 (FY14/15).

In accordance with the process outlined in the IATI Standard Operating Procedure (SOP), the Sub-Group was asked to review the draft budget and work plan in August, and comments were received from four members of the group, the fifth place currently being vacant. These comments have been incorporated where possible in this version of the work plan, which also includes an updated budget based on revised projections of expenditure for Year Two. While the process outlined in the SOP provides for the Sub Group to recommend acceptance or rejection of the work plan and budget to the Steering Committee (SOP 4.1.3), the irregularity of Sub Group meetings combined with lack of response/changes in personnel in some member agencies has made it difficult to proceed on this basis. After consultation with the Chair, this paper is therefore circulated...
to the full Steering Committee membership to seek its approval of the work plan during the October meeting, to enable IATI to continue its work into the second year.

The consortium\(^1\) took over the hosting of IATI from DFID in September 2013 and its immediate priority was to place IATI on a secure financial footing by implementing the new funding structure including a fee-based component, which was agreed by the Steering Committee in March 2013. The Secretariat is grateful to those members who paid their membership fees promptly and/or made additional voluntary contributions\(^2\). Nevertheless, IATI faced significant cash-flow issues in the early months, which inevitably impacted on timely and complete delivery of the work plan. This was highlighted in the financial update provided to the March 2014 Steering Committee meeting, and in accordance with the decision taken at that meeting, the Secretariat re-prioritised the FY13/14 work plan in line with the funds available at the time, delaying the start of some activities and postponing others until year two or pending fund availability.

The Secretariat is keen to see that the workplan for Year 2 is fully funded to enable timely delivery of all of the planned activities in this critical year leading up to the Busan deadline of December 2015 and has prepared a separate options paper outlining the way forward on funding and fundraising. Nonetheless some scenarios are outlined in later sections on the implications of failure to fully fund IATI.

Financial overview of Year 1 (FY13/14)

**BUDGET**

1. Total approved budget for 2013/2014 $2,663,569
   a. In-kind contributions from consortium members $455,071
   b. To be raised through membership fees and voluntary contributions $2,208,498

**INCOME**

2. Total income received by August 2014 $2,089,707
   a. Less advance payment of membership fees\(^3\) for FY14/15 and FY 15/16 $258,138
   b. Y1 Membership fees; voluntary contributions; residual fund and interest earned (83% of total budget) $1,831,569

**EXPENDITURE and COMMITMENT**

\(^1\) The hosting consortium is led by UNDP together with UNOPS, the Governments of Sweden and Ghana, and Development Initiatives

\(^2\) Voluntary contributions were made by the following: The William and Flora Hewlett Foundation, United States Agency for International Development (USAID), Canada - Department of Foreign Affairs, Trade and Development (DFATD), Sweden - SIDA, International Fund for Agricultural Development (IFAD), UK - Department for International Development (DFID), European Commission (EC)

\(^3\) Advanced membership payments were received from USAID, Denmark, Germany, Canada, Transparency International, IFAD
3. Expenditure and commitments $1,784,597
   a. Project expenditure as at August 31st 2014 (72% of total budget) $1,596,426
   b. Project Advances and open POs $17,393
   c. Commitments of the Y1 activities (2013/2014) $170,778

PROJECT BALANCE (August 2014)

4. Balance as at 31 August 2014(4) = (2) – (2a) - (3) $46,971

The late receipt of contributions significantly impacted the ability of the Secretariat to carry out all planned activities in line with the FY13/14 work plan. Nonetheless, by August 31st 2014, 72% of the FY13/14 budget had been utilised. Of the remaining almost $410,000 received too late in the year to be programmed, some $320,000 has been committed to activities to be carried out during the first quarters of FY14/15.

Summary of key achievements from September 2013 – August 2014

Despite the significant financial constraints faced at the outset of FY13/14, IATI has made good progress and can point to the following key achievements in its technical, political and administrative work. A more detailed review of the activities carried out in Year One (FY13/14) can be found at Annex D.

Technical

- Data store developed and launched;
- Number of publishers increased from 175 to 266;
- Annual Report launched;
- Upgrades to the standard packaged and timetabled – 1.04 complete, work on 2.01 and 1.05 in progress;
- Guidance documentation improved and planning underway for further handbooks and audio-visual guides;
- d-portal.org successfully developed and launched at the Global Partnership High Level Meeting (HLM) in Mexico;
- Technical Advisory Group (TAG) meeting successfully held in Montreal.

Political

- Governance arrangements for IATI set on firm foundations with the election of Steering Committee Chair and Vice-Chair (October) and TAG Chair (January).
- IATI recognized as a key part of the development cooperation architecture at the Mexico HLM, with several references to it in the opening plenary, a Focus Session co-hosted with OECD-DAC and the Office of the President of Mexico, a stall in the market place, a

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4 The expenditures are based on the Interim Financial Statement (IFS) for the period up to August 31st, 2014 which is provided for information purposes only. Final figures will appear in the certified financial statement once the accounts for the financial period are actually closed.
reference in the communiqué and a specific deliverable annexed to the communiqué as one of a number of voluntary initiatives;

- Political outreach strategy developed, and implementation underway including with Arab donors and some individual SSC donors.
- Increase in membership to include Myanmar, Yemen, Bond, the INGO Accountability Charter, the Bill and Melinda Gates Foundation and European Investment Bank.

Administrative

- New membership-based funding model introduced, generating a total of US$ 2,089,707 to date (83% of FY13/14 budget).
- New governance arrangements incorporated into an online Standard Operating Procedures publication;
- Logistical support provided for two Steering Committee meetings (Copenhagen, Denmark) and one TAG meeting (Montreal, Canada) respectively.

Together with Annex D, this concludes the section of the paper reviewing Year One.
Proposed work plan for Year Two (FY14/15)

With less than eighteen months to go until the Busan deadline of December 2015, the overarching aim of the FY14/15 work plan is to support existing and potential new IATI members in meeting their transparency commitments. The new work plan therefore places greater emphasis on improving data quality, with the proposed development of a data quality strategy that incorporates new tools for measuring data quality. Enhanced technical capacity will be essential to maintain the highest standards of technical support to existing members. As part of these efforts the Secretariat will also seek to facilitate peer learning, increase the documentation of lessons learned and work with the Netherlands, UK and Sweden to complete the CRS/IATI-pilot.

Detailed proposals for the FY14/15 work plan are outlined below in order of outputs and set out in the accompanying spreadsheet (Annex E). Activities and costs postponed from FY13/14 are clearly indicated in the spreadsheet, which has been designed to streamline the process of monitoring and evaluation in future years.

The majority of activities undertaken by the technical team constitute ongoing and/or recurrent work, and this is reflected in the FY14/15 work plan and budget, for which the core technical activities and costs remain broadly the same as for FY13/14.

OUTPUT 1 – IATI Standard upgraded and technical infrastructure maintained and developed

The work plan proposes additional investment in IATI's technical infrastructure (1.A) (e.g. the Registry and Datastore), both of which require further development to meet the needs of an ever-increasing number of publishers and data users and growing amounts of data. Increased community engagement will be encouraged to ensure the Standard is regularly upgraded (1.B). Existing publisher tools will be enhanced and new tools and products developed to streamline the reporting process (1.C), and a new interface will be designed to enable one login for all IATI products and accounts (5.D). The main changes in regard to the technical activities for FY14/15 are listed below:

- 1.A.1 Move the IATI Registry from its current CKAN OKF platform and upgrade/strengthen it to accommodate increasing numbers of publishers and amounts of data;
- 1.A.2 Further develop the IATI Datastore to make it more stable, and ensure that IATI members and publishers can rely on the Datastore to power their own applications;
- 1.A.3 Move IATI technical infrastructure to hosted, managed servers offering a higher level of support
- 1.C.1 Develop AidStream in line with the IATI Standard's upgrade process
- 5.D.3 Scope, design and build a single log-in user interface to bring together access to all IATI products and tools (back end)
- 5.D.2 Merge IATI's websites and online tools into a single web presence under a common url (front end, user experience).
OUTPUT 2 Quality and quantity of IATI data improved, including all IATI components of the Common Standard

In addition to the core technical work of Output 1, an overarching data quality strategy will be developed and implemented to support members in meeting their Busan December 2015 deadlines (2.A & 2.C), and others wishing to improve their data. The Secretariat will continue to work with the DAC Secretariat on the Common Standard and with the Joint Support Team (JST) to refine the transparency indicator methodology (2.B). In this regard the IATI Secretariat has recently circulated a paper for open consultation that offers a number of refinements on the IATI elements, with a view to agreeing on a proposal for refinements to the methodology ahead of the October 2014 Steering Committee meeting. The precise timetable for the next round of formal monitoring will be determined by the JST, but it is anticipated that this will take place early in 2015.

Highlighted FY14/15 activities for Output 2 are listed here:

- **2.A.1** Make monthly statistics on data quality available on IATI dashboard, using the same methodology as for the transparency indicator and future IATI Annual Reports where possible;
- **2.A.2** Support all publishers to improve data quality, especially supporting Busan endorsers to meet their commitments ahead of the December 2015 deadline;
- **2.B.1** Support completion of CRS/IATI-pilot by Sweden, UK and the Netherlands and begin implementation of recommendations;
- **2.B.2** Consult IATI members on proposed refinements to transparency indicator methodology, in close coordination with WP-Stat;
- **2.C.1** Provide policy support to current members and new members identified in the outreach strategy, including through peer learning, information sharing on use of IATI data plus users’ demand for data, regional workshops and development of lessons learned documents;
- **2.C.3** Upon request, conduct technical visits to selected key targets identified through outreach strategy, to assist them in the process of publishing to IATI.

OUTPUT 3: Frameworks and systems in place for partner country members to use IATI data

Work will continue to ensure that IATI data is available and accessible at country level to support financial and budgetary decision-making processes. In order to catalyse use of IATI data at country level, the Secretariat will prioritise the completion of planned country pilots and work towards more systematic process of automatic data exchange (3.A). Activities exploring the potential application of the Standard to other resource flows (3.B) will include a strategic assessment of the existing methodologies to track technical cooperation (3.B.2). This analytical work will support a regional workshop to factor technical cooperation, including South-South Cooperation, into IATI (3.B.3), postponed from FY13/14, and additional budget is allocated in FY14/15 for this activity.
Highlighted activities in Output 3 are as follows:

- 3.A.2 Produce a manual based on lessons learned from pilot work to enable partner countries with AIMS to roll out automatic data exchange;
- 3.A.3 Conduct regional workshop (Africa) on data usage and country systems integration;
- 3.B.1 Work with different publisher types to ensure the Standard is fit for the diverse needs of stakeholders such as humanitarian actors and providers of technical cooperation including SSC;
- 3.B.2 Undertake strategic assessment of the existing methodologies to track technical cooperation including SSC, to feed in to 3.B.3;
- 3.B.3 Organise 1-2 regional workshops (funds permitting) to factor technical cooperation into IATI.

**OUTPUT 4: IATI is effectively and efficiently managed at institutional and administrative levels**

The IATI Secretariat will continue to provide efficient support to governance structures including the Steering Committee, Partner Country Caucus and Technical Advisory Group (4.A), ensuring that members are fully engaged in IATI matters (4.B) and the TAG effectively contributes to the work of the technical team and advises the Steering Committee (4.C). On the administrative side, the Secretariat will continue to support the governance mechanisms in place through efficient management (4.E). Highlighted activities of the Secretariat are as follows:

- 4.A.1 and 4.C.1 Organise two Steering Committee meetings and one TAG meeting per year;
- 4.B.1 Launch and conduct timely consultations with members on issues of interest ahead of SC meetings, including through 4.C.2 the online TAG community space;
- 4.D.2 Implement a fundraising strategy including through targeted requests for voluntary funding
- 4.E.2 Carry out independent external evaluation of IATI early in 2015 to inform the discussion on post 2015 institutional arrangements.

**OUTPUT 5: Outreach strengthened among existing IATI members and other development actors**

The Secretariat will continue to reach out to potential new members as prioritised within the outreach strategy, and there will be a greater investment in developing communications materials in FY14/15, with a number of activities carried over from FY13/14, such as an overall website redesign. The Secretariat also recognises the need for more regular engagement with existing members, and a clearer strategy for stakeholder engagement will be developed and implemented in FY14/15. Consultations with members are essential for the continued development of the Standard and will be conducted on issues of particular interest such as on technical upgrades and strategic policy issues. Actions will also be taken to identify strategic opportunities for collaboration with other development actors and to represent IATI in ongoing and new development policy discussions such as the post-2015 agenda and data revolution. Highlighted activities within Output 5 are as follows:
5.A.1 Implement clear strategy of strategic engagement with existing members, including briefing of senior speakers advocating for publishing and using IATI data;
5.C.1 Update communications strategy and generate communications and advocacy materials for potential and current members;
5.C.4 Develop and implement specific communications campaigns around thematic areas or relevant international events;
5.C.5 Build evidence base of successful use cases of IATI data for advocacy and communications purposes;
5.E.3 Represent IATI in the development policy agenda/discussion in relevant international fora, and 5.E.4 in technical communities and at key events.

Proposed budget for Year 2 (FY 14/15)

In order to support these new activities, it is proposed that (subject to the availability of funds), one new developer and one support analyst join the team at Development Initiatives to support technical development and assist existing members and publishers to improve the quality of their data.

The following table sets out the proposed budget for FY14/15, shown alongside the budget for FY 13/14 for comparison. The increase in the second year amounts to less than 10%. The Secretariat begins its second year in a significantly better position with carried over funds amounting to just over $400,000, enhanced by advance membership fees of $175,000. Nonetheless the Secretariat wishes to express significant concern about its ability to continue functioning sustainably on the basis of the 70:30 funding model agreed by the Steering Committee. In view of the magnitude of concern over resourcing of IATI in the future, the Secretariat is currently working on a number of options to be presented in a separate paper for consideration by the Steering Committee.

<table>
<thead>
<tr>
<th>Headlines</th>
<th>FY14/15</th>
<th>FY13/14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total staff costs</td>
<td>$1,750,575</td>
<td>$1,627,853</td>
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<tr>
<td>Total activity costs</td>
<td>$1,118,815</td>
<td>$930,599</td>
</tr>
<tr>
<td>UNDP GMS 8%</td>
<td>$73,474</td>
<td>$53,308</td>
</tr>
<tr>
<td>UNOPS 1%</td>
<td>$14,099</td>
<td>$13,335</td>
</tr>
<tr>
<td><strong>Total budget FY14/15</strong></td>
<td><strong>$2,956,963</strong></td>
<td><strong>$2,663,569</strong></td>
</tr>
<tr>
<td>Total in kind staff contributions</td>
<td>$(379,879)</td>
<td>$(455,071)</td>
</tr>
<tr>
<td>Ghana contribution to regional workshop</td>
<td>$(22,000)</td>
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<tr>
<td>Activity &amp; staff costs rolled over from FY13/14</td>
<td>$(409,512)</td>
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<tr>
<td>Cash carried over from the trust fund</td>
<td>$(46,971)</td>
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<tr>
<td>Advance membership fees received for FY14/15*</td>
<td>$(175,534)</td>
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</tr>
<tr>
<td><strong>Total still to be raised</strong></td>
<td><strong>$1,923,067</strong></td>
<td></td>
</tr>
</tbody>
</table>

*Five members have paid full Y2 fees in advance, and one has paid partial advance fees

The Secretariat has worked to develop a lean budget whilst retaining necessary ambition for the second year of its operation as a membership organisation, at a pivotal point in the timeframe for
members to meet their Busan commitments on transparency. In considering the approval of this budget, it is important for Steering Committee members to be aware of the implications of failure to fully fund IATI. Some brief information is provided here for the purpose of making a decision on the budget and workplan, though the details will be expanded in a separate options paper on funding strategy and fundraising.

Challenges with funding model and fundraising strategy

The 70:30 funding model approved by the Steering Committee in March 2013 was based on the premise that 70% of IATI’s budget would be raised from membership fees and the remaining 30% from additional voluntary contributions. The level of membership fees was set on this basis, and was predicated on all eligible members making the agreed contribution in a timely manner. In practice, Y1 membership fees were only paid by 21 out of 35 members in the providers of development cooperation category and by four CSOs, with no contributions received from partner countries. As a result, the amount raised from membership fees was only around 50% of the anticipated amount.

Although the amount raised from additional voluntary contributions was slightly more than anticipated - around $865,000 against a target of $800,000 – the non-payment and late payment of membership fees in Y1 left a significant deficit in IATI’s budget. If repeated in Y2, this would call into question the sustainability of the 70:30 funding model adopted by the Steering Committee. This issue has therefore been tabled for discussion at the forthcoming Steering Committee meeting, for which the Secretariat will table a paper that explores both alternative funding models and ideas for a fundraising strategy.

The Steering Committee may also wish to reflect on the status of eligible members who fail to pay their membership fees, and options on this question will also be tabled for discussion at the forthcoming Steering Committee meeting in October.

Possible budget scenarios

Taking into account the reality of the current situation, two different budget scenarios are presented below. Both scenarios assume that IATI will be successful in raising the same amount of money from additional voluntary contributions in Y2 as it was in Y1, and that membership fees remain at the same level as set in Y1. Scenario One sets out the amount that would be raised if all members paid their Y2 fees in full. The result would be a modest surplus of almost $270,000.
Scenario One

***Income scenario 1 - all eligible members pay their fees**; AVC is the same as FY13/14***

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership fees - donors x 30</td>
<td>$1,296,066</td>
</tr>
<tr>
<td>Membership fees - CSOs x 3</td>
<td>$3,300</td>
</tr>
<tr>
<td>Membership fees - partner countries x 23</td>
<td>$25,300</td>
</tr>
<tr>
<td>Additional voluntary contributions (AVC)</td>
<td>$865,725</td>
</tr>
<tr>
<td><strong>Total Y2 income</strong></td>
<td><strong>$2,190,391</strong></td>
</tr>
<tr>
<td><strong>Total to be raised</strong></td>
<td><strong>$1,923,067</strong></td>
</tr>
<tr>
<td><strong>Surplus</strong></td>
<td><strong>$267,324</strong></td>
</tr>
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</table>

**fees remain the same as FY13/14

Scenario Two

Scenario Two is based on the same level of non-payment of fees as IATI experienced in Y1. The result is a shortfall of just over $320,000.

***Income scenario 2 - membership fees** and AVC income is the same as in FY13/14***

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership fees - donors x 17</td>
<td>$733,816</td>
</tr>
<tr>
<td>Membership fees - CSOs x 3</td>
<td>$3,300</td>
</tr>
<tr>
<td>Membership fees - partner countries x 0</td>
<td>$-</td>
</tr>
<tr>
<td>Additional voluntary contributions (AVC)</td>
<td>$865,725</td>
</tr>
<tr>
<td><strong>Total Y2 income</strong></td>
<td><strong>$1,602,841</strong></td>
</tr>
<tr>
<td><strong>Total to be raised</strong></td>
<td><strong>$1,923,067</strong></td>
</tr>
<tr>
<td><strong>Shortfall</strong></td>
<td><strong>$(320,226)</strong></td>
</tr>
</tbody>
</table>

**fees remain the same as FY13/14

The stark contrast between these two scenarios emphasises the importance of the Steering Committee addressing the shortcomings of the current funding model at its October meeting.

In the event that IATI funding faces the funding shortfall in Scenario Two, a number of activities outlined in the attached work plan would be reduced to the value of the shortfall, or until funds are received. Whilst the prioritisation of activities would be undertaken in conjunction with the Subgroup on Budget and Finance, examples of some of those activities the Secretariat would be unable to deliver might include the Annual TAG workshop ($170,000), redesign of websites and tools ($60,000), regional workshop on factoring SSC into IATI ($65,000), and policy advice on integration of AIMS with PFMS ($30,000).

Action requested

This concludes the narrative report on Year 1 (FY13/14) and budget and workplan for Year 2 (FY14/15). Members are requested to approve the budget and work plan for Y2 at the Steering Committee meeting in Copenhagen on 15th-16th October 2014.
List of Annexes

- Annex A – Income for Financial Year 13/14
- Annex B – Certified Financial Statement at 31 December 2013
- Annex C – Interim Financial Statement at 31 August 2014
- Annex D – Detailed review of Year One (FY13/14) work plan
- Annex E – Proposed budget and workplan for FY 14/15 (Excel)
Annex D - Detailed review of Year One (FY13/14) work plan

IATI is already meeting and in some cases exceeding the majority of indicators set for its technical work. These achievements were possible due to the exceptional flexibility of the consortium members through concessions to fund their own activities during the half of the financial year before contributions were received. This cannot however be sustained into future years.

The following paragraphs detail the status of work with reference to the numbered activities set out in the FY13/14 work plan.

In summary, the Datastore has been successfully developed and launched (1.A.1), and the target of 250 publishers by 2015 (1.A.2) was reached in June 2014. The target of 80% of published files being validated against the IATI schema by 2015 (1.B.1 and 1.B.2) has already been met, with 95% of published files validated. Work on open licensing (1.B.3) has been de-prioritised for now as progress is dependent on future Registry options. The technical section of the IATI Annual Report was completed on time, and monthly compliance statistics will be available by October 2014 (1.B.4 and 1.B.5, plus activity 5.1). In line with activity 1.C.1, upgrades to the standard are now packaged and timetabled, with Version 1.04 completed, and work on the integer upgrade to v.2.01 and decimal upgrade v.1.05 are in progress. Online guidance on the standard (1.C.2) has been improved, with more accessible information on the overall publishing process – such as advice on how to achieve institutional buy-in for transparency. Plans are already in place to ensure continuous review and improvement of all guidance materials and new audio-visual guidance for publishers will be launched in September 2014.

Under 1.C.3 and 1.C.4 (harmonising IATI with other similar standards and improving its effectiveness and accuracy), work is underway on traceability and geocoding, and with the humanitarian sector. TAG working groups have been established on geo-coding and humanitarian work. Proposed guidelines for best practice for development finance institutions (DFIs) to publish to IATI have been developed, and IATI was included in a scoping paper on joined-up data presented at the Open Government Partnership Conference in London last November. Planned work with the OECD-DAC on a single table of definitions has not yet been completed, largely because IATI’s work with the DAC Secretariat has focussed on developing and delivering the transparency indicator assessment (relevant to work under activities 1.F.1 and 1.F.2).

The one area where technical work has fallen behind schedule is in relation to country pilots (1.D), where certain activities could not be planned and completed before funds were received, and were accordingly postponed to FY14/15. The DRC pilot, designed to test automatic data exchange of IATI data with the DRC’s Aid Management Platform (AMP) has nonetheless been concluded and a final report on this process and plans for further piloting work based on the lessons learned will be presented at the October Steering Committee meeting. Work on a planned pilot in Rwanda will go further and also test implementation of automatic service for data transfer from the IATI Registry to the Development Assistance Database (DAD), including administrator’s approval of data merging. This is due to be carried out in August 2014 and a report will be provided during the October
Steering Committee meetings. A manual is currently being developed to support the roll-out of automatic data exchange with Aid Information Management Systems (AIMS). The development of d-portal.org and its successful launch at Mexico contributes to making IATI data more accessible at country level and paves the way for important conversations between partner countries and their development partners on quality of data (1.D.5). A regional workshop on data use at country level that was planned to take place in Accra in September was postponed following the decision of the Government of Ghana in August to suspend all international meetings for a three month period to prevent the spread of the Ebola virus. (3.A.3)

With regard to activity 1.E (exploring the potential application of IATI to other resource flows), initial conversations have taken place with a number of key providers of SSC, and a concept note is being developed for a technical workshop in the first half of 2015.

IATI has continued to work with OECD-DAC in the development of the common open standard (activities 1.F). In further support to this work, the Secretariat has given technical assistance to the pilot on aligning CRS reporting and IATI publication which is currently being carried out by the Netherlands, UK and Sweden.

All of the indicators relating to the TAG (1.G) have been met - newsletter sign-ups are up 400% (compared with a target of 100% increase) and a regular newsletter is sent fortnightly. In January 2014 the new TAG Chair convened a meeting in Montreal, Canada, generously funded by the Canadian government, and welcomed more than 110 participants representing over 70 governments and multilaterals, CSOs, NGOs, foundations and private sector based in 25 different countries in Africa, Asia, Europe as well as North and South America. The technical team continues to curate TAG discussions and lead consultations on improvements to the standard.

Under activities 2.A and 2.B (support for new and existing publishers), existing targets have already been met, and the Secretariat has further plans to work with existing publishers on an individual basis to improve the quality of their data once monthly statistics are available and v.2.01 has been signed off by the Steering Committee in the autumn.

Activities relating to outreach and information (section 3 of the work plan) were amongst those most affected by lack of funds in the early part of the year, with key communications staff only recruited in July. DI and UNDP staff have continued to maintain the IATI website without making significant improvements to it (3.A). Under activity 3.B, an outreach strategy has been developed with support of a new sub-group (3.B.1), and implementation has commenced. Discussions and technical visits with key actors identified as part of the outreach strategy have led to concrete results including an announcement by South Korea of its intention to join IATI in 2015 at the Mexico HLM, and publication by Japan of some initial data. The Secretariat continues its dialogue with others, including Italy, providing support to make their new open aid portal IATI-compatible, and with France as it works towards its country-by-country implementation of IATI. Myanmar, Yemen, the Bill and Melinda Gates Foundation, European Investment Bank, Bond and the INGO Accountability Charter have joined IATI, and Kenya and South Korea have both indicated their intention to formally join IATI in the near future. Work on a communications strategy (3.B.2) and associated materials, including the speakers’ kit, could get underway with the appointment of a new communications consultant joining the Secretariat at UNDP.
Under 3.C (partner country outreach) the Secretariat has encouraged the strong contribution by partner country members in key international fora. For example, Madagascar and Ghana contributed to a roundtable on transparency at the monitoring workshop in Mexico, while the Foreign Minister from Honduras and the Deputy Minister, Ministry of National Planning and Economic Development from Myanmar spoke at the focus event co-hosted by IATI, along with the Steering Committee Vice-Chair from Bangladesh. The Secretariat supported the Steering Committee Chair from the Netherlands plus representatives from Madagascar and Honduras, to contribute to a roundtable on transparency at the Istanbul Conference on Emerging Actors (3.C.2), and organised partner country participation in TAG and SC meetings (3.C.3). A regional workshop in Ghana will take place in September 2013 (3.C.4) and other workshops on knowledge sharing and on technical cooperation, including South-South Cooperation, have also been pushed back into FY14/15 and Terms of Reference for this workshop will be available for review during the October SC meeting. The Secretariat’s collaboration with OECD-DAC (3.D) has grown in strength throughout the period, though the joint work focussed during the initial period on the development and piloting of the transparency indicator.

Activities under section 4 (Reform of IATI Structures) have been successfully completed – new governance arrangements (4.A.1) have been incorporated into a Standard Operating Procedure, which is updated with new decisions after each Steering Committee as necessary. The new funding framework has been implemented (4.B.2) and a draft fundraising strategy has been outlined based on the agreed funding model which sees a ratio of 70:30 collected through membership fees and voluntary contributions respectively (4.B.2).

Under Section 5 of the workplan, two Steering Committee meetings have taken place in UN City, Copenhagen, Denmark, with the first in October 2013 attended by 56 representatives from 33 governments and organisations. Eleven representatives from nine partner country governments from Africa, Asia and South America attended a Partner Country Caucus meeting chaired by Ghana the day before. Sixty-four delegates attended the second Steering Committee meeting in March 2014, with 18 representatives from 15 partner country governments taking part in the Partner Country Caucus. All activities listed under Section 5 of the work plan (Steering Committee and TAG support function) have in this way been successfully completed, with the exception of activity 5.A.4 (an evaluation of IATI). The Secretariat remains committed to this, and plans to commission an independent evaluation in early-2015. A working group of 4-5 people drawn from IATI membership would be called upon to develop terms of reference for the exercise. The outcomes of this evaluation will be helpful inform the debate on IATI’s future within the context of the wider post-2015 debate.