



INTRODUCTION TO GENESIS ANALYTICS

Africa's largest economics-based consultancy

G:ENESIS
UNLOCKING VALUE FOR 20 YEARS

ABOUT US

Genesis Analytics was one of the first economics-based consultancy firms to be established in Africa and has grown into the largest. More than 45% of our work is now outside of South Africa.

OUR PURPOSE IS TO UNLOCK VALUE IN AFRICA.

Our 80-plus full-time consultants use their analytical capabilities to improve decision-making and, through better decisions, unlock substantial value for our clients and society. We use a variety of techniques and approaches to bring clarity for decision-makers.

We know that Africa holds great opportunities for unlocking social value and for business growth. The growing youth population in Africa presents a historic opportunity to change the course of the future for the continent. [READ MORE ABOUT GENESIS ON OUR WEBSITE](#)

WE WORK ACROSS VARIOUS AREAS OF EXPERTISE, COMBINING OUR TECHNICAL SKILLS WITH IN-DEPTH KNOWLEDGE IN MANY CRITICAL SECTORS.



AGRICULTURE
AND AGRIBUSINESS



FINANCIAL
SERVICES STRATEGY



REGULATORY
ECONOMICS



APPLIED BEHAVIOURAL
ECONOMICS



HEALTH



SHARED
VALUE



CLIMATE CHANGE
AND WATER



INFRASTRUCTURE



TRANSACTION
ADVISORY



COMPETITION
ECONOMICS



MONITORING
AND EVALUATION



YOUTH ECONOMIC
OPPORTUNITIES

WHY CHOOSE GENESIS ANALYTICS

In 20 years Genesis has forged relationships with governments, foundations and donor organisations, as well as multi-national companies, NGOs and trade unions across more than 32 countries in Africa.

THE QUALITY OF OUR WORK HAS A REPUTATION FOR:



ANALYTICAL STRENGTH

While economics is core, we apply financial, strategic and evaluative tools to improve decisions and **UNLOCK VALUE**.

Our professionals are equipped, and indeed required, to wield our analytical tools with rigour, imagination - and courage



SERVICE IN THE PRIVATE AND PUBLIC SECTORS - AND WHERE THEY MEET

The same teams service both the corporate and public sectors.

EXPERIENCE in the one, we believe, enriches our work in the other. We are often asked to work where the market meets the state



REPUTATION FOR ETHICS AND FAIRNESS

The zone where the state meets the market is crowded, so we work hard to earn and maintain a reputation for **RIGOUR, ETHICS AND FAIRNESS**.

What we do and say is taken seriously and when we err, we own up and act swiftly to recover lost ground



FOCUSING ON THE DECISION AND HOW IT IS MADE

We aim to **IMPROVE** a wide range of **DECISIONS**, ranging from a regulatory process in a multi-billion-dollar industry to the nutrition decisions of a young woman in rural Rwanda

[READ MORE ABOUT UNLOCKING VALUE](#)

Our skills and experience enable **OUR CLIENTS** to make better decisions





AGRICULTURE AND AGRIBUSINESS

Africa's agricultural sector is critical to sustainable economic growth and alleviating poverty, and three Genesis practices work in this area.

We design, implement and manage market-led, pro-poor programmes that address systemic agricultural market failures. We combine deep technical expertise in agriculture, agro-processing, agricultural finance and policy, and climate change with insights gained from working in fruit, vegetable, cash and staple crop value chains across Southern, East and West Africa to design programmes that meet the pro-poor development objectives of our clients.

The agriculture and agribusiness sectors are also important for policy, regulation and competition work. The importance of agriculture to employment and social welfare is reflected in our work for private firms and the authorities in the competition, regulatory and trade fields across grains, sugar, forestry and sawmilling, poultry and seeds.

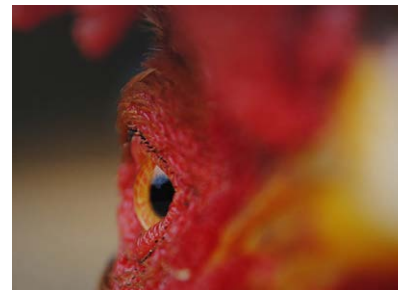
In assessing, reflecting, revising and improving programme outcomes, monitoring and evaluation (M&E) is a critical component.

OUR SERVICE EXPERTISE

- Market systems development
- Monitoring & evaluation
- Rural & agricultural finance
- Competition economics
- Trade

SECTORS WHERE WE HAVE EXPERIENCE IN

- Climate change
- Manufacturing



HOW WE UNLOCK VALUE

Vuna looks for models for climate-smart agriculture

Genesis, in partnership with The Springfield Centre, did an impact analysis of climate-smart innovation models that have been rolled out across five countries by the DFID-funded Vuna programme to establish the extent to which these models are catalysing systemic change and to assess whether the models build resilience of farmers.

Plan to create 45 000 jobs in Ethiopia

Genesis led an agro-industrial component in a DFID-funded market systems development programme that aims to bolster economic growth in Ethiopia over the next six years. We developed a model that identified the Ethiopian Horticultural Exporters and Producers Association and existing commercial farmers as partners to help farmers export their produce.

Working to make Southern Africa competitive

We are part of a consortium that has been awarded the \$74-million contract to manage USAID's Southern Africa Trade and Investment Hub programme, whose purpose is to help a range of Southern African countries become competitive in agriculture and manufacturing in the next five years.

Trade-related analysis on poultry imports from the USA

Genesis is an important source of independent analysis and advice to the South African Poultry Association (SAPA) and to South Africa's International Trade Administration Commission (ITAC). We helped ITAC understand the potential impacts on domestic prices and on domestic poultry producers arising from SAPA's tariff and anti-dumping applications.

Raising incomes of the poor in the Niger Delta

Genesis provided market systems development advisory services to DFID's programme in Nigeria's second poorest region where oil industries have created wage and commodities inflation. Our aim is to help generate pro-poor and inclusive economic growth in the non-oil sectors of the nine Niger Delta states by raising the incomes of at least 150 000 people - 50% of whom are women - by 50%.

Helping innovation for Africa's rural farm families

We did the mid-term evaluation of MasterCard Foundation's One Acre Fund, which extends financing, technical support and other services to smallholder farmers in Burundi, Kenya and Rwanda.

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)



APPLIED BEHAVIOURAL ECONOMICS

Genesis Analytics has the first specialist team of behavioural economists in Southern Africa.

Behavioural economics studies how contextual factors affect decisions. As specialists in human behaviour and decision-making, we help businesses grow and become more profitable by effecting large-scale customer behaviour change.

Our aim is to make small, tested and approved changes have a large impact. Our cases, for example, have resulted in a 550% increase in a telesales campaign, a 147% increase in self-service channels, a 26% increase in cross-selling, meaningful changes in customer perceptions of value, improved effectiveness of staff induction training, increases in customer satisfaction and more than doubling customer retention.

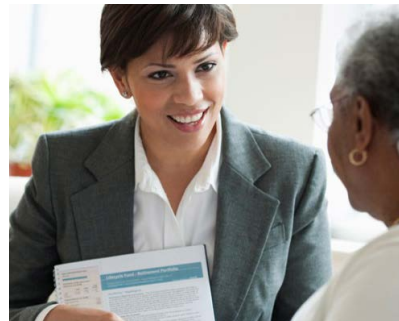
Companies across the world – from financial services to telecommunications – are using behavioural economics to understand and change customer behaviour. The full effect has yet to be quantified. We have only begun to scratch the surface.

OUR SERVICE EXPERTISE

- Behavioural analysis
- Behavioural change
- Prototyping
- Behavioural economics capacity building

SECTORS WHERE WE HAVE EXPERIENCE IN

- Communications & media
- Financial services
- Health
- Manufacturing



HOW WE UNLOCK VALUE

Improving retention and retirement decision-making

A large global insurer commissioned us to redesign its client-facing documents, resulting in better customer decision-making and increase retention rates. A rigorous pilot showed that the new documents increased client retention by 24%, benefiting customers (better financial wellness) and our client (increased average policy/investment terms).

Building an internal behavioural team at a large European bank

Genesis was commissioned to build an internal behavioural economics capability at a large European retail bank. The pilots demonstrated multiple successes, building internal buy-in, including a 76% increase in financial product sales through the contact centre; a 42% increase in primary account sales in branches; and more than doubling online product sales.

Nudging South Africans to save for retirement

We worked with a global insurance provider's outbound call centre to encourage more South Africans to save adequately for retirement by avoiding early withdrawals. Imbedding behavioural economics concepts into these conversations led to a 140% increase in the value of retirement benefits conserved over the six-week pilot period and funds retained increased from R250-million annually to R600-million.

Helping customers avoid too much debt, profitably

A long-term client approached us to help promote its debt-management proposition, resulting in a 14-fold improvement in sales. Using key insights from behavioural science, such as the intention-action gap, the team used behavioural insights in SMS, emails and conversations in a contact centre to give a behaviourally informed message to targeted customers.

New way to manage difficult conversations with clients

We helped a client's financial advisers and intermediaries manage difficult conversations with customers. Behavioural principles were used to successfully influence the way customers perceived the discussions. Following the positive results of the test, the client went ahead with the implementation of the proposed strategy.

Nudging customers into branches to increase sales

A large South African retail financial services provider retained Genesis Analytics to help meet its branch foot traffic and sales objectives. The intervention resulted in a 16% increase in footfall and a 9% increase in sales in less than two months.

Nudging customers to use more cards and less cash

We assisted an international merchant bank in building a behavioural change framework for increasing bank-card use as a payment instrument among South African consumers.

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)



CLIMATE CHANGE AND WATER

In sub-Saharan Africa, poor people are disproportionately vulnerable to climate-change shocks like floods, droughts and heatwaves.

Our agriculture and infrastructure teams help increase the resilience of individuals and communities to these shocks.

In agriculture, we provide design and implementation support for Climate-Smart Agriculture (CSA) programmes, as well as strategic and advisory services to governments, the private sector, donors and farmer organisation on adaptation and mitigation in land-use sectors. We work to improve smallholder farmers' access to products, services and information that increase their uptake of sustainable and locally suited CSA practices.

In the infrastructure sector, we prepare, appraise and mobilise finance projects that improve the resilience of poor and vulnerable communities.

Water is the most significant area of global risk and the Infrastructure and Public-Private Partnerships Advisory practice has a depth of knowledge and experience working in the water sector. It provides strategic advice to donors, governments and the private sector.

OUR SERVICE EXPERTISE

- Climate risk & vulnerability analysis
- Climate change impact analysis
- CSA design, implementation & evaluation
- CSA options analysis, screening & evaluation
- Climate proofing of investments
- Climate change adaptation strategy formulation
- Project preparation
- Project finance

SECTORS WHERE WE HAVE EXPERIENCE IN

- Agriculture & agribusiness
- Infrastructure



HOW WE UNLOCK VALUE

SADC water and infrastructure projects

Genesis worked with the Climate Resilient Infrastructure Development Facility (CRIDF), a DFID-funded facility that prepares water and infrastructure projects across SADC, to provide financial and economic appraisal of projects to assess impact, inform decision-making and to ensure financial, operational and social sustainability.

Building a climate-compatible development business case

The Climate Development Knowledge Network (CDKN) in Rwanda wanted to develop a business case for climate-compatible development. The Genesis team helped select sites then developed the impact evaluation and cost-benefit analysis for selected projects.

Review of M&E frameworks for Helmsley Trust

In 2014 Genesis was commissioned by the Leona M and Harry B Helmsley Charitable Trust to monitor and evaluate projects that provided at-risk children with greater access to education, improved nutrition, and clean water and sanitation. Since August 2016, the \$41-million programme has 18 partners with interventions across sub-Saharan Africa.

Climate-smart farming in Zimbabwe

Seven successful cases of climate-smart agriculture in Zimbabwe documented by Genesis are to be included in a manual for the country's eight agricultural colleges. We also assisted the Department of Agriculture to establish a unit dedicated to climate change.

Water for livelihoods in KAZA's transfrontier area

Genesis was retained to support CRIDF improve the livelihoods of local communities in the Kavango-Zambezi Transfrontier Conservation Area (KAZA). KAZA is an SADC initiative across two major transboundary river basins (the Okavango and Zambezi). Genesis worked on the design and implementation of small-scale water supply projects.

Early flood forecasting for Incomati Basin

Genesis was engaged as the financial and economic adviser on a three-year project to support a flood-risk mitigation system in the Incomati Basin. Our work was integral in establishing early warning flood forecasting. The Incomati River Basin comprises 46 000km² spanning South Africa, Swaziland and Mozambique and is home to about 500 000 people.

Business case for resilient smallholder farming

Genesis researched the business case for the Promoting Climate-Resilient Agrifood Solutions for Cereals and Livestock Farmers project in Southern Africa. The findings presented compelling evidence of win-win outcomes from private-sector investments that unlocked access to technology (e.g. drought-tolerant seed varieties and livestock breeds), finance, markets, information, insurance and other risk-management tools that build resilience of smallholder farmers.

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)



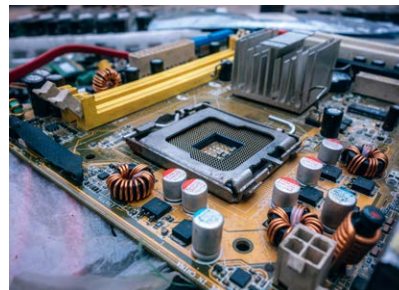
COMPETITION ECONOMICS

As the leading provider of competition economics services in Africa, Genesis Analytics has unmatched skills and experience.

Blue-chip companies across Africa rely on us for expert advice and support when they interact with competition authorities. We also work with regulators and competition authorities, giving us a position of trust based on a reputation for robust and independent expert economic views.

We offer clients a comprehensive range of expert economic services in competition law and remain the provider of choice for most top law firms when they need to retain expert economists. Our approach to competition economics involves the application of rigorous economic analysis, using quantitative and conceptual approaches.

We also offer the full spectrum of expert economic support and advice in litigated and contested processes. Our diverse litigation experience enables us to provide rigorous and legally defensible analysis, advice and testimony in a variety of legal processes, including damages, international trade disputes, and other arbitration and High Court proceedings.



OUR SERVICE EXPERTISE

- Abuse of dominance & prohibited practices
- Merger analysis & public interest
- Expert testimony
- Compliance advice
- Damages quantification
- International trade disputes
- High Court litigation & arbitration proceedings

SECTORS WHERE WE HAVE EXPERIENCE IN

- Agriculture & agribusiness
- Communications & media
- Entertainment
- Financial services
- Energy
- Health
- Manufacturing
- Mining
- Public & social
- Retail
- Transport & logistics

HOW WE UNLOCK VALUE

Genesis probes restrictive warranties on car parts

We conducted an economic assessment of the impact of prescriptive warranty provisions used by original equipment motor vehicle manufacturers on South African consumers. The Competition Commission workshopped recommendations to remedy the distortions and then published the draft code of conduct for competition in the automotive industry in 2017.

Expert analysis in Africa's largest bottling merger

Genesis was appointed jointly by The Coca-Cola Company, SABMiller and Coca-Cola Sabco to provide expert economic advice regarding the creation of Coca-Cola Beverages Africa, the largest Coca-Cola bottler on the African continent. The transaction was investigated and approved by the competition authorities of Botswana, Kenya, Namibia, Tanzania and South Africa, and the Common Market for East and Southern Africa (COMESA).

Unlocking competition in digital finance in Africa and Asia

Genesis was commissioned to study impediments to more effective competition in mobile money markets in India, Bangladesh, Kenya and Nigeria. The explosive growth in mobile money in a number of countries has provided the poor with access to financial services.

Telkom series of abuse of dominance cases

Genesis was selected by the Competition Commission of South Africa to provide expert reports and testimony in a series of abuse of dominance cases brought against Telkom. Genesis was later asked to take a lead role in the settlement negotiations, which resulted in a functional separation of wholesale and retail services, cash fines of R200-million and price reductions of almost R900-million.

Expert analysis on impact of Walmart-Massmart merger

We were appointed to provide expert analysis on Walmart's proposed acquisition of Massmart by affected trade unions. The case not only shaped the legal view of public interest in merger control, but that useful economic tools are able to accurately quantify and measure the effects on public interest variables and, in doing so, greatly improve legal decision-making on otherwise vague concepts.

Expert economic testimony paves the way to tile merger

Genesis was appointed by Italtile to provide expert economic opinion and testimony in Italtile's acquisition of Ceramic Industries Limited and Ezee Tile. Genesis's analysis assisted the tribunal in reaching its decision to overturn the commission's prohibition - with the sole condition that Italtile not be granted access to information about CIL's other customers.

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)

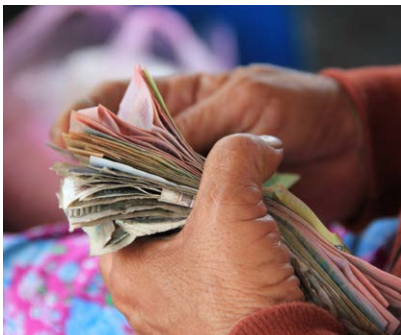


FINANCIAL SERVICES STRATEGY

Our Financial Services team has completed more than 500 projects across sub-Saharan Africa and the Middle East since 2001.

We help leading financial institutions address challenges, unlock value for stakeholders and shape the future of the industry. Our team has a unique understanding of the evolving market structures, economics, and strategic and regulatory trends across all segments of the financial services sector in these markets. Our distinct approach is characterised by deep specialisation and rigorous, fact-based analysis based on a strong economics foundation.

As mobile technology becomes cheaper and more people have access to the internet, opportunities and risks are created in the financial services sector and Genesis is increasingly working in this space. The connected network of devices, systems and services is leading to an increase in process automation that in turn generates new types of data being collected and analysed.



OUR SERVICE EXPERTISE

- Strategy
- Digital
- Transaction advisory (corporate finance)
- Market analysis & positioning
- Business & operating models
- Financial sector regulation
- Risk management
- Financial inclusion
- Financial institution expertise
- Monitoring & evaluation
- Competition economics
- Applied behavioural economics

SECTORS WHERE WE HAVE EXPERIENCE IN

- Retail banking
- Corporate & investment banking
- Insurance & asset management
- Business banking
- Capital markets
- Payments

HOW WE UNLOCK VALUE

Mapping path for local card-processing in SA

Genesis partnered with South Africa's domestic payment switch, BankservAfrica, on how to continue providing card-switching services. The recommendations resulted in a consultative process with shareholders on how to meet the needs of the market and maintain the benefits of domestic card-processing.

Making Botswana an investment gateway to Africa

We assisted Botswana's Investment and Trade Centre develop a detailed plan to develop an international finance centre that could match Africa's leader, Mauritius. The plan was presented and the government affirmed its commitment to developing the centre.

Strategic plan for a large Tanzanian financial institution

Genesis was commissioned by a large Tanzanian financial institution to conduct a market opportunity analysis and strategic review of its business with a view to defining its medium-term strategy through to 2020. A four-step looped framework was adopted and, with board approval, the strategy was implemented.

Business case for new retail bank

Genesis partnered with a JSE-listed South African financial services provider to develop a business case for specialist banking services to the business and personal market. The outputs informed the client's market-entry strategy. Genesis conducted further work in 2016 on delivering a new technologically driven retail bank.

Quantifying the true cost of cash

South Africa has a high proportion of banked adults but cash still accounts for over 50% of the total value of all consumer transactions. Genesis partnered with MasterCard to quantify the true cost of this reliance on cash for consumers in South Africa.

New costing model for top-tier SA bank

A top-tier South African bank needed to relook at the costs of its shared services and the allocation methodology. We developed a revised cost-recovery model that enabled operations and product management to understand their costs better, to take control of their costs and make informed business decisions.

Sizing Africa's vehicle and asset finance market

A large Pan-African bank approached Genesis to conduct a market-sizing exercise for vehicle asset finance (VAF) across its operations in 10 countries encompassing personal, business and commercial vehicles. The client used the research to develop its Africa go-to market strategy for VAF products.

Merger creates one of Ghana's biggest banks

Genesis was contracted as an external adviser in the merger of one of the largest local banks in Ghana with an SME finance provider. The benefits of the merger continue to be realised and it is now not only one of the largest local banks in Ghana, but one of the largest banks in that country.

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)



FINANCIAL INCLUSION

Over the past 10 years we have evaluated programmes and provided strategy advice to government agencies, donors and financial institutions.

Our aim is to facilitate better market systems and improved livelihoods through bringing traditionally excluded clients into formal financial services, and by working with financial institutions to develop innovative financial products and channels to meet under-served markets.

Improving access to and the use of financial services create greater opportunities to escape poverty, realise economic objectives and soften the impact of negative shocks. Genesis works with a host of donor agencies and financial institutions across the continent to design, implement and evaluate financial-inclusion interventions that unlock value.

HOW WE UNLOCK VALUE

Review shows way to increase financial access

Genesis partnered with a prominent private foundation in the financial inclusion community to identify what it had learnt in expanding access to formal financial services across the continent. They have been used by the foundation to craft a plan to guide the remainder of the grant.

Strengthening financial integration in SADC

Genesis was commissioned by an international aid agency to define the scope of a new Regional Financial Integration (RFI) programme aimed at improving financial integration within SADC.

Strategy for financial inclusion unit of Ghanaian bank

We assisted a leading Ghanaian bank to deliver on its goal of having five million active accounts by 2018. We identified 'capability' gaps that could be supported by FSD Africa. The analysis involved a market opportunity analysis and internal capability assessment.

Learning partner for responsible finance in Rwanda

Genesis has been contracted for four years to Responsible Finance Through Local Leadership and Learning as its learning partner to develop and implement a solid strategy to extract and disseminate learnings obtained nationally and regionally.

OUR SERVICE EXPERTISE

- Financial literacy
- Market systems development
- Monitoring and evaluation
- Product & channel innovation
- Strategy
- Learning partner

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)



FINANCIAL REGULATION

In the specialised area of financial services regulation, our work has adapted to the dramatic changes to global financial regulation since the financial crisis.

Our work with policy-makers, regulators, industry associations, market infrastructures and financial institutions has given us a unique insight into the development and implementation of financial regulations.

This improves the advice we offer in regulatory design, impact assessment and stakeholder engagement as these relate to banking, insurance, capital markets and financial inclusion regulation.

HOW WE UNLOCK VALUE

Balancing innovation with regulation to grow SA financial services

Genesis partnered the Centre of Excellence in Financial Services to understand which policy and regulatory approaches best suited the South African financial sector in preserving the country's sound financial system while enabling fintech innovation.

Business model for e-wallet customer payments

Genesis was commissioned by a large provider of online retailing and services to examine the regulatory regime of Nigeria for the launch of an e-wallet for payments and lending. The business model took advantage of the card eco-system that reduced the complexity of operations and the need for additional licences.

Sizing market for mobile-phone money transfers

Genesis was commissioned by a large mobile network operator in Africa to establish the size of the market for local and cross-border money transfers in 16 countries in Africa, the Middle East and South America. We selected countries best suited for the product.

Assessing future direction of financial regulation

Genesis was engaged by a large financial services firm to advise on micro-economic policy and financial regulation. The work produced a regulatory risk framework that is still used by the company, and led to an engagement with the National Treasury and Financial Services Board on new policy and improved working relationships.

OUR SERVICE EXPERTISE

- Regulatory impact assessment
- Regulatory development & engagement support

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)



HEALTH

We work with our clients to improve the health of populations throughout sub-Saharan Africa and provide decades of experience in the design, implementation and evaluation of health programmes.

We develop customised solutions for the region's most pressing health problems. This has included working with the Gates Foundation to strengthen HIV prevention programmes, and assessing public support for a tax on sugary drinks. Our work in evaluation ranges from evaluating large national programmes using quantitative household surveys to specific process evaluations of individual programmes.

We work with clients from both the private and public sectors, and have the ability to work across the sub-continent. We also deliver robust economic and regulatory analysis for clients. This has included input on policy and regulatory developments such as the proposed National Health Insurance policy, single-exit pricing, pharmacy dispensing fees and the National Health Amendment Bill.

OUR SERVICE EXPERTISE

- Research, evaluation & design
- Prevention
- Health financing & health economics
- Regulatory economics
- Competition economics



HOW WE UNLOCK VALUE

Campaign does improve men's perceptions on HIV testing

We evaluated the Centre for Communication Impact's Testa Boy campaign to address the slow uptake of HIV testing among men. Our study showed that those who took part in the campaign were 50% more likely to agree that men who tested for HIV were regarded as strong and responsible.

South Africans more aware of risks of sugary drinks

We evaluated the Vital Strategies and Healthy Living Alliance campaign to educate South Africans on the sugar content in sugar-sweetened beverages and the harm of excessive sugar consumption. A campaign, 'Are you drinking yourself sick?', resulted in a 16% increase in support for the sugar tax.

Positive impact of Soul Buddyz clubs on young women

Genesis was asked by the Soul City Institute for Health and Development Communication to determine the long-term impact of its Soul Buddyz Clubs in primary schools. We found that ex-Buddyz were more likely to have completed Grade 12, be involved in community activities and to have used a condom at first sex.

Pricing study for private eye care practice

We evaluated the baseline cost and operations for a private healthcare group to determine whether global fees for disease management recovered its costs. We quantified potential fees, growth for the practice, and provision of quality services and outcomes for patients.

HIV prevention strategy for the Gates Foundation

We are supporting the Gates Foundation to ensure that its funding for healthcare and HIV is appropriate in sub-Saharan Africa. As part of this project we produced a special edition of Lancet medical journal on HIV prevention for the 2016 International AIDS conference.

SA cities sign up to meet 90-90-90 targets

Genesis was contracted by UNAIDS to support the planning and facilitation of Fast-Track Cities meeting in South Africa to support cities in formulating plans to meet the 90-90-90 targets to eradicate AIDS. We conducted research on 19 municipalities to characterise their health profiles and understand their responses to the HIV epidemic.

Regulation of medicine dispensing fee in pharmacies

We worked with the Pharmacy Stakeholders Forum of South Africa in its litigation with the Department of Health on dispensing fees for medicines sold through pharmacies. We found that the proposed fees threatened the viability of a large number of community pharmacies. This led to the suspension of the proposed fees.

Genesis tests names for new HIV prevention ring

The International Partnership for Microbicides pioneered initiatives to provide women with affordable, self-initiated protection against HIV, including the dapivirine vaginal ring. Genesis tested eight names in Uganda, Malawi, South Africa and Zimbabwe.

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)



INFRASTRUCTURE

Infrastructure holds the key to development in Africa but there has been limited success in meeting the challenge.

We offer the tools and expertise to strengthen infrastructure planning, identify sources of finance, and enable project development efficiently and effectively.

The Infrastructure and Public-Private Partnerships (PPP) Advisory practice understands the gaps in infrastructure funding. Our expertise lies in taking projects from concept phase to appraisal, preparation, the design of financing strategies and providing transaction advisory services, using PPPs as a model for design and implementation.

Our team has strong financial and economic-modelling skills and is able to appraise and structure projects to deliver the best value with minimum risk. Together with our understanding of the regulatory environment for infrastructure development, we provide new solutions to infrastructure development challenges.

We undertake project preparation to appraise the solutions, financial and economic viability as well as the broader socio-economic impacts to provide our clients with a solid foundation for data-driven decision-making.

OUR SERVICE EXPERTISE

- Project preparation
- Transaction advisory (project finance)
- Capital raising
- Enabling environment
- Climate resilience
- Regulatory economics

SECTORS WHERE WE HAVE EXPERIENCE IN

- Energy
- Water
- Transport & logistics
- ICT
- Pipelines
- Urban & built environment (real estate)



HOW WE UNLOCK VALUE

Lead in multi-billion-rand plan to transform Joburg CBD

We are the lead financial and economic adviser on an urban regeneration project that aims to transform the Johannesburg central business district (CBD). The project aims to upgrade office accommodation for the Gauteng Provincial Government across 19 buildings and two vacant sites. The project will create an administrative focal point, housing the Office of the Premier and other provincial government departments.

Facilitating LPG shipments to the Western Cape

Genesis was retained by Avedia Energy to assist its contested application to the National Energy Regulator of South Africa (NERSA) for a licence to construct and operate an LPG storage facility in Saldanha in the Western Cape. Our analysis and independent testimony were key inputs and its decision was to grant a licence to Avedia and enforce the requirement for Sunrise Energy to provide interconnection.

Plan for safe water in 12 Zambian border towns

We were retained as the project economists for the 12 Towns Project aimed at providing a sustainable and equitable supply of safe water and appropriate sanitation to 12 border towns in Zambia. Inadequate levels of water access and sanitation facilities can lead to the transmission of water-borne diseases across borders. This stifles trade and other commercial and social activities within a sub-region and, at in extreme cases, can trigger cross-border conflict.

Genesis develops five-year plan to electrify rural Lesotho

Genesis has developed a plan to restructure Lesotho's regulatory arrangements to extend electrification to rural areas. We mapped proposed changes to the Rural Electrification Unit (REU) that could electrify 9 000 rural households over the next five years. Donors, among whom were the EU, the World Bank and UNDP, indicated their intention to provide additional funding of €35-million, \$30-million and \$3.5-million, if the energy sector was reformed and where the restructuring of the REU was a vital component.

National PPP policy for Seychelles

Genesis was commissioned by the Investment Climate Facility to assist the Seychelles government in developing a legal and regulatory architecture to support PPPs. The cabinet approved the policy. We provided basic PPP training across public institutions.

Securing water for Botswana

Genesis leads the financial work stream on a project to assess the viability of a scheme that will bring water from the northern border of Botswana to the large demand centres in the south east. The Chobe-Zambezi water-transfer project assesses the viability and costs of constructing a scheme that will transfer water from the Chobe and Zambezi rivers on the northern border to the demand centres in south-eastern Botswana.

[**MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE**](#)



MONITORING AND EVALUATION

We maximise the social and economic impact of development efforts.

As a provider of monitoring and evaluation services we combine our understanding of the African context with our experience in qualitative and quantitative methods to assess progress and measure value creation.

We provide African governments, companies, international donors, foundations and non-profits with the information and insight to improve interventions and produce better results, achieving greater impact on economies and lives.

We combine a range of M&E tools and approaches with deep sector and contextual specialisations to unlock value in African markets for companies, governments and societies.

Our team consists of members of the American Evaluation Association (AEA), Aspen Network of Development Entrepreneurs, the African Evaluation Association (AfrEA), the South African Monitoring and Evaluation Association (SAMEA) and the Evaluation Society of Kenya (ESK).

OUR SERVICE EXPERTISE

- Design, review and support of M&E systems
- Evaluation & impact assessment
- Ongoing support as a learning partner
- Market systems development
- Financial inclusion

SECTORS WHERE WE HAVE EXPERIENCE IN

- Agriculture & agribusiness
- Education
- Financial services
- Health
- Public & social
- Youth economic opportunities



HOW WE UNLOCK VALUE

Mid-term review of project to support agri-finance innovation

We conducted a mid-term evaluation of the Financial Inclusion for Smallholder Farmers in Africa Project (FISFAP, a five-year \$15.5-million project funded by the MasterCard Foundation and implemented by AGRA). It aimed to improve food security and incomes for about 700 000 smallholder farmers in Ghana, Kenya and Tanzania. The evaluation recommended strategy and identified course corrections.

Impact evaluation of Industrial Innovation Programme

Genesis was contracted to evaluate the South African Department of Trade and Industry's Support Programme for Industry Innovation (SPII). Based on the findings, the team worked closely with the DTI, leading to the re-launch of SPII with the mandate extended from pre-production prototype to pre-commercialisation. Genesis won a National Evaluation Plan award for the evaluation.

Final evaluation of Banking on Change

We were contracted by Banking on Change, a partnership between Barclays, CARE International UK and Plan UK, to understand the achievements and impact of the programme, and to document the key learnings. The evaluation was a validation of Banking on Change's achievements and highlighted lessons that informed each partner's future approaches to design and programming in the financial inclusion and youth economic opportunities sectors.

Final evaluation of YouthSave initiative

Genesis was contracted by the MasterCard Foundation to conduct a final evaluation of the YouthSave initiative aimed at 12- to 18-year-olds in Canada, Colombia, Ghana, Kenya and Nepal. The purpose was to contribute to the youth savings evidence base, and inform their approach to the funding of programmes and partnerships.

Learning partner for ASISA Foundation

We were first contracted in 2014 as the monitoring, evaluation and learning partner on the pilot consumer financial education programme by the Association for Savings and Investment South Africa (ASISA). The foundation has since funded three, more targeted, interventions.

Developing Mpumalanga's M&E framework

The office of the Premier in Mpumalanga province required assistance in developing an M&E framework. This involved setting a framework for information flow to support evidence-based decision-making and develop indicators to measure progress across all 14 outcomes.

Evaluation of credit aid to ailing SA municipalities

An international donor organisation contracted Genesis to conduct an ex-post evaluation on what influenced its most recent credit line to structurally weak municipalities in South Africa. The conclusion enabled the donor and development finance institution to discuss terms to improve the next line of credit.

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)



REGULATORY ECONOMICS

Extensive regulatory oversight is a feature of a number of critical sectors, such as energy, telecommunications, transport, water, healthcare, financial services and broadcasting.

Interventions are driven by concerns about market failure and protection of consumers as these sectors provide important social services or products, and effective regulation facilitates social goals such as access to services and greater affordability.

As a leading provider of regulatory economics advice, Genesis has extensive expertise ranging from policy questions to technical aspects. We offer expert economic and regulatory expertise to governments, regulators and private firms across Africa. Our depth of knowledge across regulated sectors and our experience in contested processes mean our analysis stands up to the strictest scrutiny.

As a result, Genesis has played a central role in the assessment of regulated electricity tariffs and the proposed carbon tax in the energy sector; wholesale and interconnection regulation in telecommunications; digital migration in broadcasting; windfall taxation in liquid fuels; the NHI and price regulation in healthcare; and financial inclusion regulation in financial services.

OUR SERVICE EXPERTISE

- Sector strategy & regulatory frameworks
- Licensing advisory & support
- Tariff design & determination
- Regulatory impact assessment
- Regulatory development & engagement support

SECTORS WHERE WE HAVE EXPERIENCE IN

- Communications & media
- Financial services
- Energy
- Health
- Infrastructure



HOW WE UNLOCK VALUE

Pricing models for liquid-fuel price regulation in Zimbabwe

Genesis assisted the Zimbabwe Energy Regulatory Authority to develop pricing models for the regulation of liquid fuels in Zimbabwe. Despite data challenges, the team developed evidence-based fuel-price building blocks that would enhance the viability of the liquid-fuel industry in Zimbabwe as well as transparency in the price-setting process.

Financial model sets new mobile termination rates

Financial models built by Genesis on behalf of the Independent Communications Authority of South Africa (ICASA) uncovered the termination costs of fixed and mobile telecommunications operators. This enabled ICASA to introduce cost-oriented termination-rate regulation for the first time. To maximise their pro-competitive potential, the regulations progressively reduce termination rates over time, to encourage future termination cost reductions.

Financial evaluation of third National Lottery applicants

South Africa's Ministry of Trade and Industry commissioned Genesis to conduct an independent assessment of the financial and business models of applicants competing for the operation of the National Lottery. The assessment enabled the minister to select the successful bidder. The Genesis report and scoring stood up to scrutiny in a number of reviews by one of the unsuccessful bidders and it also proved invaluable to the High Court judges in adjudicating the litigation.

Genesis reviews SA's energy future through to 2050

Genesis was commissioned by a civil society organisation to review and comment on the South African government's long-term energy planning documents, which were published in late 2016.

Critical analysis of Eskom's multi-year price determinations

The Genesis team helped ensure that Eskom's tariff increases as part of the MYPD (Multi-Year Tariff Determination) process were governed by sound regulatory principles. Genesis has been deeply involved in critically assessing all the MYPD tariff applications of Eskom since 2009. This involvement included providing technical assistance and expert advice to the National Energy Regulator of South Africa (NERSA).

ICASA employs Genesis to sharpen SA telecoms competition

Having established a long-standing relationship with the South African communications regulator, ICASA, Genesis was retained by the regulator to assist with its Priority Market Study. The study identified key markets that were not characterised by effective competition and might require regulatory intervention. A goal of the National Development Plan (NDP) was that technology be a key enabler of economic activity, and the intervention enabled this to be realised.

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)



SHARED VALUE

Shared Value works at the intersection of business and society, helping companies to understand, manage and improve societal relations.

At risk for companies are credibility with consumers, regulatory permissions, media and investor reputation and social licence to operate. Understanding societal need and building better relations with stakeholders can spark new models, products and revenues.

Our Shared Value team works with executives to measure and articulate the value of their company to society, to design and implement strategies of shared value, to respond to public policy pressures, and to build partnerships and dialogue.

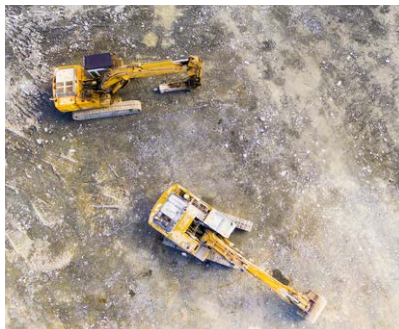
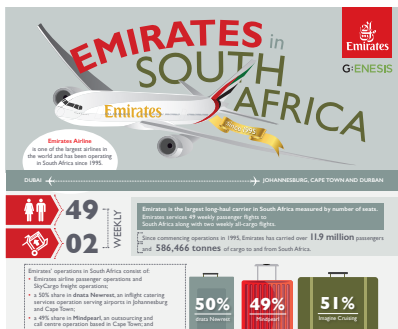
Genesis is the only Africa-based affiliate of the Shared Value Initiative in Boston, the world's leading shared-value accredited practitioners' network.

OUR SERVICE EXPERTISE

- Socio-economic impact assessment
- Public policy response & advocacy strategy
- Shared value & inclusive business strategy
- Strategic stakeholder engagement & dialogue

SECTORS WHERE WE HAVE EXPERIENCE IN

- Agriculture & agribusiness
- Financial services
- Mining
- Public & social
- Transport & logistics



HOW WE UNLOCK VALUE

Raising the drinking age to 21

The National Economic and Development Labour Council in South Africa (Nedlac) commissioned us to conduct an urgent independent study on the likely economic, health and social impacts of some of the amendments proposed in the Liquor Amendment Bill, 2017. We combined our expertise across three practices in impact assessment, economic modelling and public health issues.

Economic impact of Emirates on South Africa

Emirates, one of the world's largest airlines, sought to demonstrate that it creates high value for South Africa's economy. Our analysis showed that its global connectivity creates additional arrivals in South Africa with benefits for tourism, business and trade.

Study reopens debate on black equity in SA mines

Genesis was commissioned by a global mining company to conduct conceptual research on black equity ownership on South African mines. The main conclusion was that the current approach was not working and a paper was put forward with fresh ideas on black ownership in the mining sector.

Strategic review of property company's CSI

Genesis was commissioned by the largest property company in South Africa, Growthpoint Properties, to review its approach to corporate social responsibility. This involved a shift towards building a coherent societal strategy, as well as reviewing its approach to CSI.

New sustainability approach for big four bank

Genesis was employed by one of the big four banks in South Africa to review its sustainability strategy. We helped to devise a new sustainability strategy rooted in shared value. The new approach was endorsed by the bank's leadership and led to a restructuring of the sustainability unit.

A strategy to engage with trade unions

One of the largest insurance and investment companies in South Africa wanted to engage with trade unions to improve relations and to open new business opportunities. Through our strategy for engagement, the client streamlined internal structures to be union-centric and helped to secure new insurance business relationships.

Conceptualisation of a national economic summit

We were engaged by a global mining house to assess the feasibility and design of a national economic summit in South Africa. The summit would introduce widespread reform in the economy at the highest levels, in effect an 'economic CODESA'. The concept paper was used to build national consensus towards a new economic dialogue.

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)



TRANSACTION ADVISORY

We offer transaction advisory services across two of our sectors of expertise: **Financial Services** and **Infrastructure**.

CORPORATE FINANCE ADVISORY

Our service spans the full investment cycle, from opportunity identification and mapping, capital raising, commercial and strategic due diligence to post-acquisition strategic alignment.

We work closely with investors such as private equity firms, development finance institutions and corporates to determine the attractiveness of investments in new and existing markets across Africa. We also assist businesses that require additional capital by mapping out their funding options and preparing the collateral they need to approach investors.

OUR SERVICE EXPERTISE

- Commercial & strategic due diligence
- Investment advisory services
- Post-acquisition strategic alignment

HOW WE UNLOCK VALUE

Prospects for new Ethiopian mobile-money operator

We were commissioned by an international private equity investor to conduct the commercial due diligence of an early-stage Ethiopian technology service provider. Genesis was able to unlock additional value for the investment team by providing the basis for its investment and helping to inform its post-investment strategy.

Genesis advises Carlyle Group on Africa deal

Genesis provided commercial due diligence services to global alternative asset manager The Carlyle Group on its investment in Global Credit Ratings (GCR). Genesis also built a comprehensive financial model to support the transaction.

Due diligence of major SA credit firms

An established private-equity investor asked Genesis to assess the strategies of two major South African credit services businesses – a credit bureau and a leading data-marketing services provider. We assessed the growth trajectories of each business individually and collectively to determine their attractiveness. Our work was incorporated in the client's investment committee processes and led to the acquisition of both businesses. The deal won the Catalyst Private Equity Deal of 2014 accolade at the South African Dealmakers Awards in 2015.

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)

PROJECT FINANCE ADVISORY

Our service is geared towards assisting public institutions and private investors in the planning, procurement and implementation of large-scale transactions for infrastructure and related services.

Our expertise is in concessions and public-private partnerships (PPPs), which involve a contract between a public-sector institution and a private party for the provision of an infrastructure asset or service.

Our service and expertise span the full project cycle, from inception, planning, project appraisal (including financial and economic modelling), financial structuring, procurement, capital raising (debt and equity), contract negotiation to commercial and financial close

HOW WE UNLOCK VALUE

Feasibility study for Songwe River basin

Genesis worked with the African Development Bank on the Songwe River Basin Development Project – a transboundary project on the border of Tanzania and Malawi. Our analysis involved the financial and economic appraisal, and the design of financing strategies.

Adviser to Lesotho government's PPP unit

Genesis provided overall leadership to the Transaction Advisory Team retained by the Government of Lesotho over a three-year period. Our role was to guide the project team in every aspect of the procurement of government accommodation via PPP.

Hostel plan for 35 000 Kenyan students

Genesis is the lead partner in a consortium that has been retained to provide transaction advisory services for the development of hostels for 35 000 students at five universities in Kenya. Three public universities in Kenya are set to expand student accommodation by more than 23 400 beds after the Treasury approved their requests to let private investors build hostels.

OUR SERVICE EXPERTISE

- Feasibility assessment
- PPP transaction advisory
- Financial structuring & capital raising
- Planning procurement support

SECTORS WHERE WE HAVE EXPERIENCE IN

- Infrastructure
- Energy
- Water

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)



YOUTH ECONOMIC OPPORTUNITIES

Youth unemployment is reaching crisis levels throughout Africa and poses a serious constraint on inclusive economic development. This comes at a time when half the population of Africa is under 18 years.

Youth unemployment creates problems such as lost productivity and political unrest, and requires increased public spending. This makes it imperative to create opportunities for the youth to be included in the economy and become productive members of the labour force.

We provide monitoring and evaluation services for development programmes aimed at creating economic opportunities for youth in many sectors. We work at the public-private interface of government, donor, philanthropic and private-sector clients. Our evaluations balance technical rigour with practical considerations, ensuring that evaluation findings are rooted in the contextual reality.

Our experienced evaluators ensure that young people are comfortable in sharing their stories, experiences and opinions. We adapt qualitative and quantitative evaluation methods and ensure that young voices are central to the evaluation.

OUR SERVICE EXPERTISE

- Monitoring & evaluation
- Evaluation & impact assessment
- Ongoing support as a learning partner
- Design, review & support of M&E systems
- Financial inclusion

SECTORS WHERE WE HAVE EXPERIENCE IN

- Agriculture & agribusiness
- Education
- Financial services
- Public & social



HOW WE UNLOCK VALUE

Impact of in-school classes for budding entrepreneurs

We conducted an impact evaluation that targeted learners who had completed three years of the programme between 2012-2015. The startUP&go programme is funded by the International Labour Organisation and provided to learners in Grades 10, 11 and 12 who are enrolled for business studies in Free State province.

Impact study of internship programme on Harambee candidates

We conducted an impact study on how participation in the Harambee internship influenced young people's social and economic circumstances. Harambee addresses skills gaps of unemployed young South Africans and links them to employment opportunities. We determined whether the programme met its objectives and inform the implementation of future financial-adviser internship programmes.

Assessing progress of job creation for Mombasa youth

Genesis was contracted to conduct a mid-term evaluation of Kuza, a market systems development intervention funded by DFID Kenya aimed at creating employment opportunities for unemployed young people in Mombasa. We assessed the efficiency and effectiveness of project implementation, evaluated how any changes in intervention design and delivery could be improved in the future, and identified opportunities for development and project scale up.

Partners with Rockefeller on digital initiative

Genesis was awarded a two-year grant by The Rockefeller Foundation to serve as monitoring and evaluation partner to its Digital Jobs Africa (DJA) initiative. The initiative was launched in 2013 to catalyse new, sustainable employment opportunities and skills training for African youth, with a focus on the ICT sector.

Technical advisory to National Treasury's Jobs Fund

Genesis was appointed as ongoing technical advisers to the Jobs Fund on investment strategy, governance, monitoring and evaluation and general operations. The Jobs Fund was created by the public and private sectors to seek innovative models that prioritise systemic solutions and create sustainable new permanent jobs. Through its project partners, the fund aims to create 150 000 jobs.

Enterprise project tests rural youth employment plan

TechnoServe commissioned evaluations of the Strengthening Rural Youth Development through Enterprise (STRYDE) programme to understand the impact, learn from the implementation of two phases in four countries, and test the sustainability of its roll-out model. We found that the programme contributed to demystifying financial services, created linkages with market players and employers, stimulated economic activity, and improved community perceptions of the youth.

[MORE ABOUT THESE AND OTHER PROJECTS WE HAVE DONE](#)

OUR TEAM

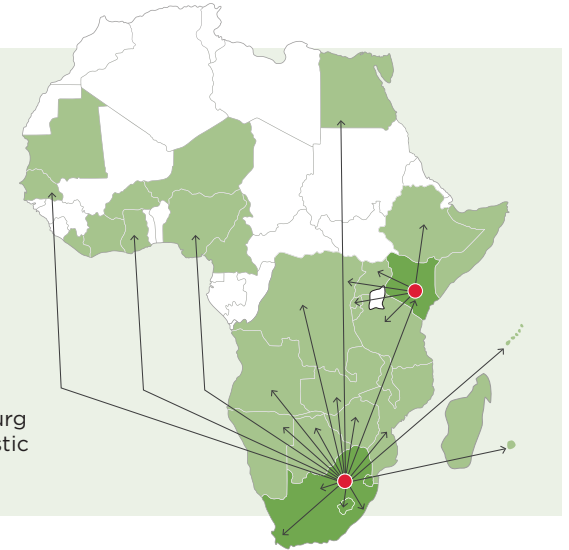
The founding partner and the management team have decades of experience in working in Africa, the Middle East and India. Our team of more than 80 full-time consultants has worked on hundreds of projects in more than 32 African countries.



OUR REACH IN AFRICA

Genesis has engaged with more than 400 clients and several hundred projects across sub-Saharan Africa

● Country offices in Johannesburg and Nairobi serve both domestic and regional clients



SOME OF OUR QUALIFICATIONS INCLUDE

Master of Science in Economics | BCom Honours, Financial Analysis & Portfolio Management | Master of Research Psychology | Master of Business Administration | Honours in Economics, Statistics and Marketing | MBChB | Master of Science in Epidemiology and Biostatistics | Master of Science in Medicine | Master of Science in Biomedical Engineering | Master of Public Health | Master of Science in Genetics | Master of Arts in Demography and Population Studies | Master's in Economic Development | Master in Forced Migration | Master in Public Health | Honours in Property Studies | Master in Development Evaluation and Management | Master in Rural Health | Bachelor of Arts in Public Management and Governance | Honours in Politics | Master of Business Administration | Master in Development Studies | Master's from the Kennedy School of Government | Master in Urbanisation and Development | PhD in Environmental Science | Master's in the Political Economy of Development | MSc in Engineering | MBA



Genesis Analytics

The largest economics-based consultancy in Africa

Physical 50 Sixth Road, Hyde Park, Johannesburg Main +27 11 994 7000 Facsimile +27 86 688 2247 Office Manager beverleyp@genesis-analytics.com
Physical Fourth Floor, West Park Suites, Ojijo Road, Parklands, Nairobi Main +254 (0)70 194 5800 Office Manager ruthg@genesis-analytics.com

www.genesis-analytics.com