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EGA LEARNING AGENDA VALUE CHAIN META-ANALYSIS

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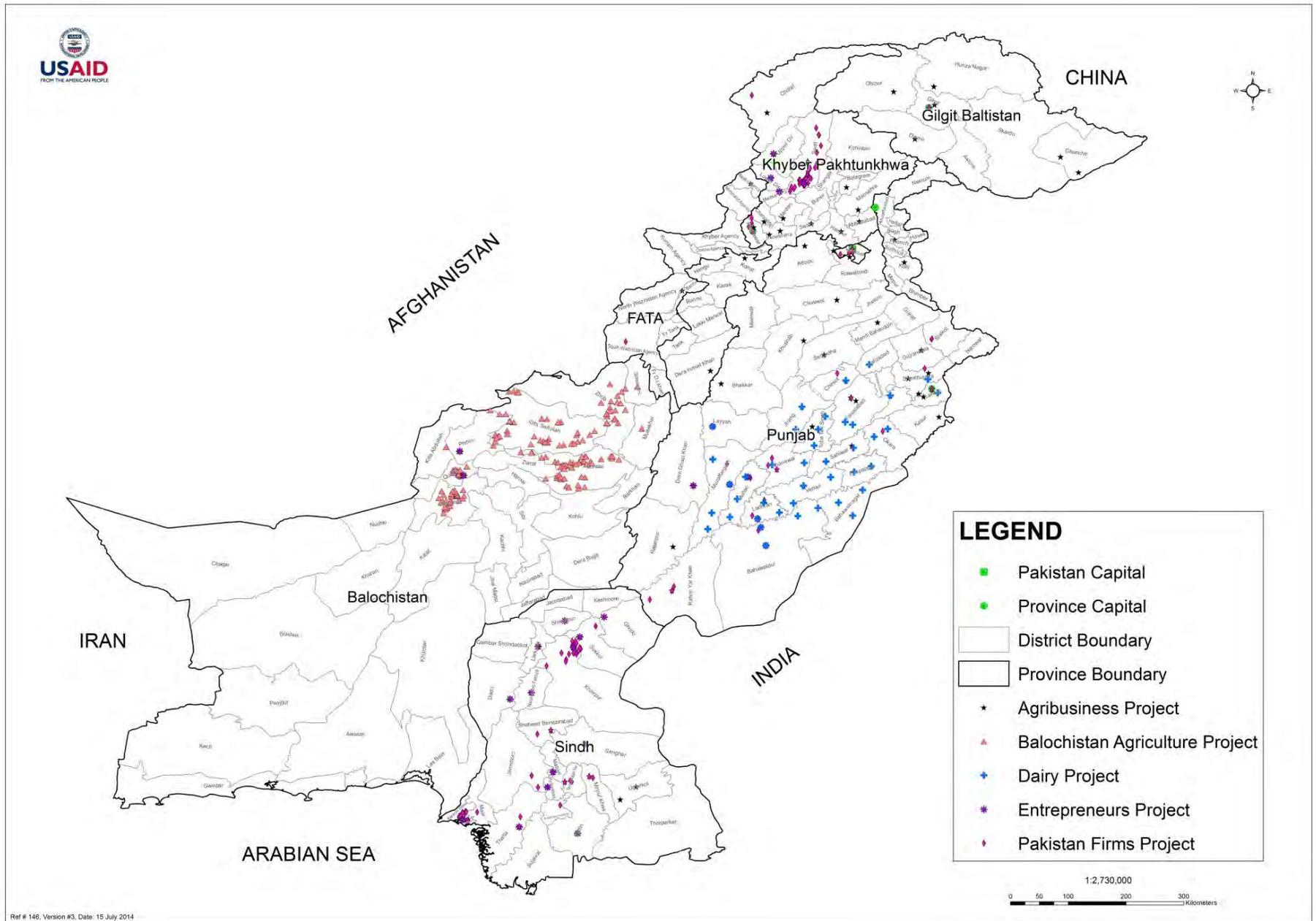
AIT	Artificial Insemination Technician
ASF	Agribusiness Support Fund
BAP	Balochistan Agriculture Project
BDS	Business Development Services
BEE	Business Enabling Environment
COP	Chief of Party
DRDF	Dairy and Rural Development Foundation
EGA	Economic Growth and Agriculture
FAO	Food and Agriculture Organization
FCR	Findings, Conclusions, and Recommendations
FEG	Farmers Enterprise Group
FMC	Farmers Market Collective
FSA	Female Sale Agents
Global GAP	Global Good Agricultural Practices
HEF	Hand-Embellished Fabric
IFPRI	International Food Policy Research Institute
KFP	Key Facilitating Partner
KP	Khyber Pakhtunkhwa
MAP	Medicinal and Aromatic Plant
MEDA	Mennonite Economic Development Associates
NTWG	National Technical Working Group
NGO	Non-Governmental Organization
PSSP	Pakistan Strategy Support Project
PTP	Pakistan Trade Project
SME	Small and Medium-Sized Enterprises
SMEDA	Small Medium Enterprise Development Authority
USAID	United States Agency for International Development
VC	Value Chain
WLEW	Women Livestock Extension Worker

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FIGURE I: MAP OF EGA VALUE CHAIN PROJECT LOCATIONS



EXECUTIVE SUMMARY

The United States Agency for International Development's (USAID's) Economic Growth and Agriculture (EGA) Office manages a portfolio of 11 projects, five of which employ a value chain development approach. Two of the EGA projects focus exclusively on policy. EGA commissioned Management Systems International's Monitoring and Evaluation Program (MEP) to assess the relative effectiveness of different value chain approaches in the various contexts in which they are applied by USAID-funded projects. It also asked MEP to assess the extent to which EGA policy-oriented projects can or could support projects that work to develop value chains. The meta-analysis was divided into Phase I: scoping and planning and Phase II: effectiveness. This report focuses on Phase II.

Based on conclusions from the Phase I report, the meta-analysis team identified the various approaches used by USAID value chain projects in Pakistan. These approaches are:

- Approach 1, which includes the Dairy and Agribusiness Projects. These projects follow a bottom-up approach to economic growth, with more emphasis on production than marketing. This approach focuses on small producers or processors with existing markets and emphasizes sales to local markets. These projects emphasize agricultural products, which are essential consumables and therefore have pre-existing market demand.
- Approach 2, which includes the Balochistan Agriculture Project (BAP) and Entrepreneurs Project. These projects follow a bottom-up approach to economic growth with more emphasis on marketing than production. This approach focuses on small and medium-sized producers or processors requiring new market development and emphasizes sales to local markets. The projects adopting this approach emphasize non-essential consumable products, but also include essential consumables.
- Approach 3, which includes the Firms Project. This follows a top-down approach to economic growth with more emphasis on production than marketing. This approach focuses on medium and large producers or processors requiring new market development and emphasizes sales to international markets.¹ Although its activities are aimed at improved linkages and increased acceptance of beneficiaries' products in international markets, they largely focus on improving productivity and product quality.

The meta-analysis of value chain approaches used five indicators² or areas of inquiry as measures of effectiveness. These included: Income; Productivity; New Practices and Technologies; Buyers; and Women's Empowerment.

Meta-Analysis Methodology

The meta-analysis relied on qualitative methods. For data collection, these included group and individual interviews with key project stakeholders, including: implementing partners; independent value chain/sector specialists; autonomous producer associations; project-sponsored producer associations; and major/innovative value chain players. The meta-analysis team used the same interview guide for both individual and group interviews across all stakeholders to ensure consistency in data collection. Overall, the team conducted 47 interviews, including 35 individual interviews (including one with a Chief of Party [COP])

¹ Surpluses of export-quality produce are sold in local markets at almost the same price as local produce; however, surpluses of locally sold produce do not reach export markets.

² These were based on indicators identified in the Phase I report: Income and Productivity, Quantity Sold, New Markets, New Technologies and Practices and Women's Empowerment. For Phase II, the team modified these somewhat by dropping "Quantity Sold" because it is already embedded in Productivity. Income and Productivity were separated into two distinct indicators. Finally, New Markets was renamed Buyers.

and 10 group interviews (including four with COPs and their teams). Two additional interviews were held with the COPs of EGA's two policy projects. Based on the availability of interviewees with knowledge of relevant value chains, 18 out of 33 value chains were selected to represent the broad diversity of agricultural and non-agricultural value chains on which the five projects focus.

The main strength of the methodology is that it allows for an in-depth analysis of the determinants of effectiveness. It also facilitates triangulation across multiple data sources, data collection methods and data analysis, increasing the reliability and validity of findings and conclusions. Another strength of the study design is substantial reliance on data collected from sources external to the project. An important limitation of this methodology is that the sample drawn through a purposive technique may be subject to selection bias. While the approach produces rich data on the mechanisms by which projects are or are not effective, the results are not as easily generalizable to other projects elsewhere in Pakistan or the world as results from a representative sample would be.

Summary of Findings and Conclusions

Approach 1: Bottom-Up, Production-Oriented

This “bottom-up,” production-oriented approach has been largely effective across most indicators. It has been an effective means of increasing small and medium-sized producers' incomes. Introducing and facilitating new technology accomplished this and practices, providing improved inputs, tools and machinery, and imparting knowledge about their use to beneficiaries through both direct and indirect training. The result was increased productivity through improved yields and quality of produce. While this approach to value chain development enabled small and medium-sized producers to link with new and larger buyers, this was somewhat limited as it was not the major objective of the approach. This is especially true of the Dairy Project, which focuses almost exclusively on improving production processes and linked beneficiaries with only a few selected milk buyers located in the immediate project area. Agribusiness, in contrast, took a somewhat more holistic approach, linking its beneficiaries with larger producers, processors, and exporters. This approach also successfully increased women's economic participation. However, there is little or no evidence that the approach led to improvement in other indicators³ of empowerment such as increased mobility, confidence or improved leadership roles.

Approach 2: Bottom-Up, Marketing-Oriented

This approach has been effective across all indicators. It has been an effective means of increasing small and medium-sized producers' incomes through higher prices and sales. Establishing beneficiary linkages to local markets and improved market intelligence, particularly about customer demand, accomplished this. The result was improved productivity by focusing on market demand. Thus, while the approach emphasized marketing, there were production implications as well. While the Entrepreneurs project is almost exclusively focused on increasing the marketability of beneficiaries' products, BAP took a more holistic approach focusing on both marketability and production. This is evident in BAP's introduction of new technology and better practices by providing inputs, tools and machinery and imparting the knowledge necessary to use them. This approach also successfully increased women's economic participation and empowerment, as evidenced by the increased mobility, self-confidence, and leadership roles of some project beneficiaries, particularly in the Entrepreneurs project. One possible reason for this is that the project focused predominantly on female beneficiaries.

³ These indicators were reported by the interview respondents during data collection.

Approach 3: Top-Down, Production-Oriented

This approach has been largely effective across four of the five indicators. This is evident in that the approach has been an effective means of increasing the incomes of large and medium-sized producers by increasing domestic sales and exports. This was accomplished by introducing and facilitating the adoption of new technology and practices, providing improved inputs, tools and machinery, and training beneficiaries in how to use them. The result was increased productivity through improved yields and quality of produce. A key element in the success of this approach was cost sharing between the project and its beneficiaries for procurement of new technologies, which reduced beneficiaries' risk and increased their willingness to make the necessary investments. Unfortunately, there is little or no evidence that the approach increased women's economic participation, much less contributed to their empowerment because they did not focus on women.

Business-Enabling Environment

Projects using all three approaches have been involved in business-enabling environment issues at different levels to improve value chain development and their work has resulted in proposed amendments to outdated acts, a review of sectoral policies, and suggestions to improve the regulatory frameworks that affect value chain development. However, this work has been carried out with minimum collaboration among the five value chain projects and the two policy projects.

Contextualizing EGA Value Chain Approaches

Contextual factors also influence the relative effectiveness of the alternative approaches to value chain development. Relevant contextual factors include labor force characteristics; cultural norms, particularly around women's roles; geographic and environmental factors; and political and security-related issues. Agriculture is the single largest sector in Pakistan and is particularly important for women's employment. The sector is dominated by small landholdings and, because of climatic requirements, has specific regional characteristics. These factors influence the choice of the most appropriate value chain development approach for reaching particular focus populations and regions. The cultural environment in Pakistan, particularly as it relates to opportunities to engage and empower women, is also an important factor dictating the choice of value chain approaches. In general, bottom-up approaches designed specifically to address issues related to women's economic engagement and empowerment will be most effective in reaching related objectives. Geographic and environmental factors are important determinants of the most appropriate approach for agricultural and resource-based value chains in particular because of specific climatic requirements or the proximity of immovable resources. The conclusions incorporate these contextual factors where relevant.

Conclusions

Because there are few projects that focus on value chain development and even fewer distinct approaches, it is difficult to develop overall conclusions about the most appropriate approach in different contexts. Furthermore, without verifiable quantitative evidence of effectiveness, it is difficult to assess the relative effectiveness of alternative approaches. Nevertheless, some broad overall conclusions emerge from the findings:

- The projects that have been most effective in enhancing women's economic participation and empowerment are those that specifically focused on women. These projects identified women as the primary beneficiaries, selected value chains where opportunities existed to engage women, identified barriers to women's economic participation and empowerment, and specifically addressed these constraints. While it is somewhat difficult to categorize these projects under a particular approach, the conclusion is that projects that seek to improve women's economic participation and empowerment will be most effective if they are specifically designed to address these issues within

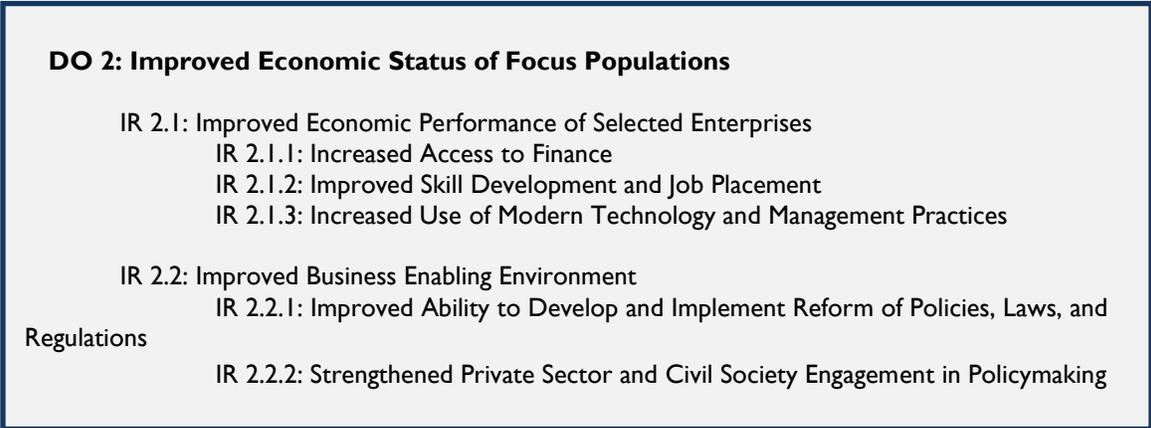
Pakistan's cultural environment. Given that women are employed largely in agriculture or home-based businesses, often the most appropriate approaches may be bottom-up.

- More broadly, the most appropriate value chain development approach will depend on specific project objectives and operating environments. For example, a bottom-up approach will likely be more appropriate for projects that focus primarily on improving the livelihoods of small-scale rural producers with limited (direct or indirect) access to national or international markets. In regions or contexts where small-scale producers can be linked (e.g., as contract farming out-growers or contract piece workers) to larger producers, processors, markets, or exporters, a top-down approach may be appropriate but it must specifically seek to connect small producers to the actors that link them to markets. On the other hand, a top-down approach may be most appropriate for projects that seek to enhance access to larger national or international markets. In these instances, the approach must work with value chain actors capable of developing the capacities to access these markets. These approaches may explicitly attempt to form linkages to small-scale producers or may take it for granted that expanded markets will ultimately benefit small producers. The overall conclusion is that the most appropriate approach is the one that best matches project objectives, the needs and opportunities of the beneficiaries, and existing support infrastructure and services.
- A production-oriented approach is most appropriate when beneficiaries can already reach existing markets or when they have insufficient capacity to meet market demands (e.g., quantity, quality, or other product specifications). In these instances, production capacity is the key constraint to more successful engagement in the value chain. In some cases (e.g., BAP), the approach can shift focus from production to marketing as producers enhance their capacity. A marketing-oriented approach may be more appropriate when producers have or can develop adequate production capacity, but have limited access to markets.

INTRODUCTION

The United States Agency for International Development’s (USAID’s) Economic Growth and Agriculture (EGA) Office aims to facilitate Pakistan’s economic development by improving enterprise productivity (especially in agriculture), enhancing trade, and promoting an enabling environment that supports market-led economic growth. The theory of change associated with these activities is that they will increase economic opportunity by creating jobs, thereby improving the economic status of ordinary Pakistanis. Ultimately, this is expected to lead to increased economic and social empowerment and community change. The EGA results framework articulates the development strategy in terms of one Development Objective (DO), two Intermediate Results (IRs), and five sub-IRs (Figure 2).

FIGURE 2: ECONOMIC GROWTH AND AGRICULTURE RESULTS FRAMEWORK



Key results framework indicators highlight the importance of the EGA office’s value chain and policy oriented work as they focus on building capacity (e.g., increasing agricultural productivity, facilitating market linkages, increasing access to business development services), improved economic performance (e.g., increasing sales and exports), improved policy environment (e.g., new/revised policies, increased political participation), and improved economic status (e.g. increased household income/expenditure, employment). To achieve these results, EGA manages a portfolio of eleven projects worth a total value of \$407.7 million (Table 1).

TABLE I: SUMMARY OF USAID/PAKISTAN ECONOMIC GROWTH PROJECTS

Project Name	Implementing Partner	Value	Project Focus
Agribusiness Project	Agribusiness Support Fund (ASF)	\$39.9 million ⁴	Value chain development
Balochistan Agriculture Project (BAP)	Food and Agriculture Organization of the United Nations (FAO)	\$25.4 million	Value chain development
Dairy Project	Dairy and Rural Development Foundation (DRDF)	\$14.0 million	Value chain development
Entrepreneurs Project	Mennonite Economic Development Associates (MEDA)	\$30.0 million	Value chain development
Firms Project	Chemonics International	\$92.3 million	Value chain development
Gomal Zam Irrigation Project	Water and Power Development Authority (WAPDA)	\$52.0 million	Irrigation
Pakistan Strategy Support Project (PSSP)	International Food Policy Research Institute (IFPRI)	\$22.7 million	Research and policy
Pakistan Trade Project (PTP)	Deloitte Consulting, LLP	\$37.1 million	Trade policy
Satpara Development Project	Aga Khan Rural Support Program (AKRSP)	\$19.8 million	Irrigation
Pakistan Grain Storage Program	International Finance Corporation (IFC)	\$2.5 million	Grain storage capacity
Pakistan Private Investment Initiative	Abraaj Capital Limited Indus Basin Holding JS Private Equity Management	\$72.0 million ⁵	Investment in Pakistani small and medium-sized enterprises (SMEs)

Almost half (5 of 11) of the projects in the EGA portfolio employ value chain development approaches. While many of these focus on agricultural products, a few emphasize non-agricultural sectors (e.g., marble and hand-embellished fabrics). Two projects focus on policy issues that may contribute to a business-enabling environment for value chain development. This analysis covers these seven projects, described in greater detail below.

⁴ This figure represents a reduction in budget to \$39.95 million from the original total value of the Agribusiness project, which was \$89.4 million. This was the result of a reduction in the project's scope that took place in mid-2013.

⁵ Each of the three implementing partners has \$24 million of the total \$72 million in funding.

PURPOSE

The EGA office commissioned Management Systems International's Monitoring and Evaluation Program (MEP) to assist in developing and implementing its learning agenda⁶ activities. Learning agenda research projects are intended to examine EGA's activities at the portfolio level. This particular study consists of a meta-analysis of EGA projects' approaches to value chain development to assess their relative effectiveness. In addition, it examines the actual and potential complementarities between value chain development and policy projects to determine the extent to which policy projects could or do contribute to the effectiveness of value chain development work. The results of the analysis will enable USAID to design more effective value chain projects as well as an integrated portfolio that addresses the range of constraints and opportunities in supporting value chain development.

The value chain meta-analysis is comprised of two distinct phases. Phase I focused on scoping and planning. In particular, the assessment team:

- Documented differences in value chain approaches employed by USAID-funded value chain projects in Pakistan;
- Identified potential complementarities between USAID-funded value chain development and policy projects;
- Developed a taxonomy of value chain development approaches; and
- Proposed a set of common indicators with which to compare effectiveness across all USAID/Pakistan-funded value chain development projects.

Phase II, which is the subject of this report, assesses the relative effectiveness of value chain approaches. In particular it examines:

- The effectiveness of EGA's value chain development approaches relative to a common set of indicators, drawing on those identified in Phase I and the contexts (geographic, economic, cultural, and political) within which the various approaches are most effective; and
- The extent to which USAID-funded policy reform work could or does contribute to effectiveness in value chain development.

Annex I contains the project summary for the EGA Value Chain Meta-Analysis.

⁶ According to USAID's Learning Lab, a learning agenda is a set of questions related to an organization's work that, when answered, will help the organization work more effectively. In the development context, learning agendas are often used to prove or disprove untested assumptions in development hypotheses. Learning agendas help shape research and evaluation plans.

VALUE CHAIN ANALYSIS AND META-ANALYSIS

Kaplinsky and Morris⁷ define a value chain as “the full range of activities which are required to bring a product or service from conception, through the different phases of production (involving a combination of physical transformation and the input of various producer services), delivery to final consumers and final disposal after use.” Value chain analyses may include an array of related types of studies; for example, purely descriptive studies that map product flows through the value chain and may include identifying actors, stages of value addition, margins, volumes, barriers, bottlenecks, etc. Often, descriptive value chain research helps inform the practical work of enhancing overall value chain efficiency or returns to particular value chain actors by identifying inefficiencies, barriers/constraints and opportunities faced by various value chain actors. Current development-oriented value chain activities include work that connects primary producers to existing higher-value markets, identifies or creates new markets, builds the capacities of value chain actors to meet market demands, or reduces inefficiencies along the value chain.

Meta-analyses have typically been used in medical and social science research. Meta-regression analysis, for example, is a subset of meta-analysis used by economists to quantify or distinguish primary effects from background socioeconomic variation and contaminating factors.⁸ Meta-studies of qualitative information involve a rigorous and highly structured synthesis and subsequent analysis of results of previous studies. They also reflect upon the processes involved in previous studies in terms of “where we are and where we are going”⁹ and have been used as a forward-looking approach in ethnography, medicine, public health, and sociology.¹⁰

This meta-analysis diverges somewhat from the approaches discussed above. It integrates both primary qualitative and secondary quantitative data. It can still be understood as a meta-analysis, however, in that it involves a rigorous and highly structured synthesis and subsequent analysis of these data on each of the EGA’s value chain projects. This applies in terms of a common set of indicators to assess the effectiveness of their approaches to value chain development with the ultimate objective of distilling lessons learned about the projects’ value chain approaches under different situations and contexts.

Summary of EGA Value Chain Projects

As noted, the EGA portfolio currently contains five value chain projects, which work on one or more aspects of 33 separate value chains. Drawing on the scoping and planning work conducted in Phase I of this study (see Annex II for the full report), this section discusses the salient features of the value chain approaches used by the five EGA projects.

Agribusiness

The Agribusiness Project’s goal “is to support improved conditions for broad-based economic growth, enhanced profitability, [and] employment opportunities and contribute to poverty alleviation through product and process transformation in selected horticultural and livestock value chains in partnership with all

⁷ Kaplinsky, R. and M. Morris. (2001, p. 4). A handbook for value chain research. International Development Research Center.

⁸ Stanley, T.D., Chris Doucouliagos and Stephen B. Jarrell, 2006. “Meta-Regression Analysis as the Socio-Economics of Economic Research,” Economics Series 2006_21, Deakin University, Faculty of Business and Law, School of Accounting, Economics and Finance.

⁹ Fuhram and Snizek (1990). Cited by Zhao, S. 1991. Metatheory, metamethod, meta-data-analysis: what, why, and how? Sociological Perspectives 34 (3): 377-390.

¹⁰ Noblit, G.W. and R.D. Hare. 1988. Meta-ethnography: synthesizing qualitative studies. Beverly Hills, CA: Sage, and Atkins, S., S. Lewin, M. Engel, A. Fretheim, and J. Volmink. 2008. Conducting a meta-ethnography of qualitative literature: lessons learnt. BMC Medical Research Methodology 8:21.

stakeholders.”¹¹ To accomplish this the project focuses on three outcomes: “strengthen[ing] the capacity in horticulture and livestock value chains to increase sales to domestic and foreign markets; strengthen[ing] the capacity of smallholder farmers and farmer enterprises to operate autonomously and effectively; and increas[ing] agriculture efficiency and productivity through adoption of new farming techniques and technological innovation among (focus) beneficiaries.”¹²

The project takes a holistic approach to value chain development. It seeks to build market opportunities through production-oriented activities, focusing especially on input supply and services and the adoption of new technologies and practices. For a limited number of large-scale producers and processors, the project focuses on export markets; however, its major emphasis is enhancing small and medium-sized producers’ access to local markets. Capacity building takes place both on- and off-farm indirectly through Business Development Services (BDS) on value chains and acquisition of international compliance certifications, such as the Global Good Agricultural Practices (GAP)¹³ protocol, and training small processors to access domestic markets.

While the project focuses on large-scale producers and processors to some extent, small and medium-sized producers are the dominant project beneficiaries in terms of numbers. The project is “designed to increase productivity, product quality, agribusiness development and value addition by removing constraints that occur throughout the product value chains chosen because they show significant market potential.”¹⁴

Therefore, the project’s primary objective is increasing the productivity of small and medium-sized producers and working directly with small-scale processors for commercialization in Khyber-Pakhtunkhwa (KP). In mid-2013, in consort with USAID, the project reduced its scope from 23 value chains to seven. These include: apricots, bananas, red chilies, citrus, meats, seed potatoes and high-value off-season vegetables. High-value off-season vegetables, in particular, provide opportunities to benefit women and the project’s second-year annual report indicates the project is meeting its target that 30 percent of its smallholder farmer beneficiaries will be women.¹⁵ Although project activities take place throughout the country, they are localized through “a subsector cluster approach ... whereby areas with the greatest potential for value addition, employment creation and outreach [are] prioritized and targeted.”¹⁶

The project also has a small policy component through which it has, among other activities, lobbied to amend British-era agriculture laws that have become outdated, such as the Marketing Act of 1935, Cooperative Societies Act of 1925 and Seed Certification Act of 1937.

Entrepreneurs

The primary objective of the Entrepreneurs Project is to “increase the number of predominantly female micro-enterprises and add value to their products and services by helping them reach higher value-added markets.”¹⁷ Although the objective emphasizes the project’s focus on women and their particular needs, men

¹¹ ASF/USAID, “The Agribusiness Project – Second Annual Progress Report (APR-II) October 1, 2012- September 30, 2013,” Dec. 9, 2013.

¹² Ibid.

¹³ The Global Good Agricultural Practice (GAP) objective is to ensure safe, sustainable agriculture worldwide. The organization sets voluntary standards for the certification of agricultural products around the globe, to which an increasing number of producers, suppliers and buyers are harmonizing their certification standards.

¹⁴ Agribusiness Cooperative Agreement (Nov. 10, 2011), Project Description, p. 22.

¹⁵ ASF/USAID, “The Agribusiness Project – Second Annual Progress Report (APR-II) October 1, 2012- September 30, 2013,” Dec. 9, 2013.

¹⁶ Ibid.

¹⁷ USAID/Pakistan. “Amended Activity Approval Document for Empowering Pakistan: Entrepreneurs,” July 31, 2008.

represent approximately 12 percent of all project beneficiaries.¹⁸ The project works on four value chains, which have the potential for substantial growth and development. These include dairy; honey; medicinal and aromatic plants; and hand-embellished fabrics, an activity that is traditionally dominated by women.

The project approach is driven, to a large extent, by the particular needs of women who have limited mobility and thus lack access to markets. Consequently, a major project focus is on linking women to markets through market intermediaries. For the dairy and hand-embellished fabrics value chains, these are Lead Entrepreneurs, mobile women who can interact with markets and thus replace a (usually) male-dominated marketing mechanism. They may play multiple roles, including collecting and transporting products to markets, transmitting information on market demands to producers, and providing support services to build producers' capacities. Activities include working with producer clusters to increase bargaining power and market access efficiency, facilitating links between producers and buyers, connecting producers to large companies, ensuring quality production to meet market demand and obtaining male family members' buy-in for female participation to ensure sustainability. The project provides direct training to Lead Entrepreneurs on assessing market demand and indirect training for producers through BDS providers.

Dairy

The Dairy Project aims to increase the incomes of rural households and create jobs in the project areas. Its specific objectives include:

- Training and building the capacities of a sizeable number of smallholder dairy farmers in best farming practices focusing on fodder and animal nutrition;
- Improving dairy cattle breeds by promoting artificial insemination;
- Developing human resources to provide basic veterinary services at the village level through trained female extension workers who are capable of interfacing with the rural women who rear and manage cattle stock; and
- Promoting entrepreneurship through training and building linkages with input suppliers and clients.¹⁹

The Dairy Project is essentially a capacity-building project and it does not specifically address elements of the value chain beyond production (e.g., processing, transportation, and marketing). Its activities concentrate on the production end of the dairy value chain, including input supply, animal health and breed improvement. The project expects to accomplish its objective by providing direct training to 9,000 dairy farmers and 100 farm managers. The project also focuses on women and plans to train 5,000 (approximately 30 percent of project beneficiaries) unemployed women as Women Livestock Extension Workers (WLEW). Finally, the project plans to train 2,000 entrepreneurially oriented, but unemployed, individuals as Artificial Insemination Technicians (AITs).²⁰

There is a well-developed, pre-existing market for milk with the sector operating village-level chillers for milk collection. The project has linked milk producers to large milk buyers/processors (such as Nestlé) through these local collection centers, but this is not the project's primary focus. Overall, the Dairy Project strengthens one component of the dairy value chain (smallholder production) to work within the broader existing value chain.

¹⁸ USAID Pakistan: Entrepreneurs "Quarterly Performance Report – XVIII (Oct-Dec, 2013)," February 2014.

¹⁹ Dairy and Rural Development Foundation (DRDF), "USAID-DRDF Dairy Project- Annual Progress Report, July 2011-2012," n.d.

²⁰ Dairy Project Quarterly Progress Report – October 1, 2013 to December 31, 2013.

Firms

The objective of the USAID Firms Project is to “improve government service delivery and develop dynamic, internationally competitive private sector small and medium enterprises (SMEs) to accelerate sales, investment and job growth to undercut the basis of extremism.”²¹ It pursues these objectives through two complementary components: value chain development and business-enabling environment activities. The Value Chain Development component emphasizes technical assistance and training to strengthen SMEs as the foundation of a strong private sector. The project works in 11 value chains that include fresh mango farming, mango drying, date farming and processing, peach farming, potato farming, agricultural implement manufacturing, fruit and vegetable pulping, knitted garment manufacturing, fisheries, marble and granite, and wool spinning/weaving.

Except for relatively small activities in KP and FATA, the Firms Project works primarily at the upper end of the focus value chains, i.e., with larger farmers and processors. Although the project emphasizes local markets too, it focuses largely on developing capacities to enter export markets. Using secondary data and analysis, the project identifies promising sectors and then works with progressive SMEs to access identified opportunities in these sectors. It specifically focuses larger, progressive SMEs with the capacity to invest in value chain development as demonstrations. As the project matures, it expects to engage more small farmers by linking them to markets through successful larger farmers or processors. Key activities with larger farmers and processors include establishing linkages with local and international markets (e.g., through visits, conferences and exhibitions), cost-sharing infrastructure investments, and achieving the certifications and compliance (e.g., Global GAP certification) necessary to access international markets. The project aims to build its beneficiaries’ capacity through direct training.

In KP and FATA, the project works more closely with small-producer clusters. It helps producers identify market opportunities; provides technical assistance and training to help them increase production and quality and meet market requirements; facilitates access to credit; trains producers in business skills; and links producers to specific processors/buyers.

In the Business-Enabling Environment component, the project collaborates with provincial governments to review and amend policies that affect value chain development. These include policies affecting agricultural marketing and livestock sector reforms.

Balochistan Agriculture Project

The Balochistan Agriculture Project’s objectives are to significantly improve food and nutrition security and significantly increase incomes for about 50,000 poor rural households (i.e., 400,000 people and 20 percent of the focus districts’ rural population). It expects to accomplish these objectives by improving crop and livestock productivity. The project focuses on poor, rural, agricultural households with a particular emphasis on women (e.g., 40 percent of community organizations are women-only) in eight districts in Balochistan. The project engages women in activities tailored to their roles in the male-dominated culture of Balochistan. These activities focus on food and nutrition security and income generation, with the expectation that increases in women’s economic contribution to the family and household will empower both men and women.

The project implements its activities within a community development context. It first establishes community organizations and builds their organizational capacities, then engages them in a self-assessment and prioritization of community needs. The project then provides technical assistance and shares the costs of designing and implementing productivity-enhancing technologies and practices requested by the communities. As the project has succeeded in boosting productivity, it has increasingly emphasized marketing

²¹ USAID Firms Project. “Annual Progress Report – III: October 2011 – September 2012. October 2012.

to further enhance incomes. The project's three anticipated outcomes reflect its market orientation and focus on value chain development. These include improving the enabling environment for agricultural development, increasing crop and livestock productivity and the value of agricultural products produced, and establishing market linkages for poor communities to increase sales.

The project is just beginning its enabling environment work. It is reviewing provincial policies related to agriculture and recommending reforms that could contribute to agricultural development. The Agricultural Marketing Act is one policy that has hampered project plans in livestock marketing in particular.

The project does not so much work on developing/strengthening value chains as it does helping producers (i.e., the project beneficiaries) understand the specific value chains in which they participate so they can benefit more from their participation. The project's entry point in value chain work is thus project-supported small-scale producers. Project staff and consultants conduct value chain analyses to identify promising opportunities for producers to capture more value from their participation. If a project-supported producers' group is interested in pursuing identified opportunities, the project works intensively with the group to build their capacity to engage more profitably in the value chain. This is done by providing training and access to service providers to build groups' organizational capacity to ensure transparency of accounts and ability to measure production and marketing costs — information that is critical to marketing decisions; demonstrating, through market visits, the demands of different markets and the interactions of various value chain actors so producers can begin forming their own networks and learn how to engage in the markets; and provides technical and other assistance to help producers meet market demands, add value and increase efficiency, or reduce costs.

Projects' Key Characteristics

Based on these project descriptions, which draw to a large extent on the discussion of differences among projects in the Phase I report, the meta-analysis assessment team identified the fundamental characteristics that differentiate the approaches employed by EGA's value chain development projects. These attributes capture key dimensions of value chain work, including where along the value chains the projects intervene, the kinds of markets on which they focus, whether they are oriented primarily toward production or marketing, the size of beneficiary activities, the type of training provided, and the extent to which they emphasize women's participation. These characteristics are defined as follows:

- Bottom-up economic growth occurs when micro/small and medium-sized economic agents (producers or processors) expand their activities;
- Top-down economic growth is when the project focuses on large economic agents with the hope of benefiting small and medium-sized agents through a “trickle-down” effect, wherein small and medium-sized producers will ride on the coattails of larger producers who successfully access markets;
- Export market emphasis occurs when the value chain activities are aimed at increasing access to international markets;
- Local market emphasis occurs when the project activities focus on increasing access to local and regional markets;
- Production-oriented value chain development focuses on increasing the quantity and quality of products. While both production and marketing are critical to value chain development, when production emphasis tends to be high, marketing emphasis is typically low;
- Marketing-oriented value chain development emphasizes developing new markets. When value chain projects emphasize marketing, the focus on production tends to be low;

- Beneficiary activity sizes are characterized as micro/small, medium, and large;
- Women’s participation focuses on whether or not value chain activities specifically focus on women as project beneficiaries; and
- The projects’ approaches to capacity building are consistent with their overall value chain development approach. Projects with a top-down approach generally focus on large economic agents (producers or processors). Likewise, the projects following a bottom-up approach focus on small and medium-sized economic agents. When the projects are production-oriented, the training components typically include training on best pre-and post-harvest techniques, on- and off-farm agricultural practices, and adoption of new technology, for example. Likewise, the projects with a market development orientation tend to emphasize preparation for international quality assurance and compliance certifications (for large producers) and market skills training (for small producers), for example, in their training. Projects generally adopt both direct (i.e., the implementing partner directly training project beneficiaries) and indirect (i.e., the implementing partner outsources the training to another organization, for example, a business development service provider) training approaches, depending on beneficiary capacity-building needs and their own capacity to address those.

While Table 1 provides information regarding EGA’s implementing partners and project budgets, Table 2 summarizes the key characteristics of each value chain project used to define the broad approaches adopted.

TABLE 2: SUMMARY OF PROJECTS' KEY CHARACTERISTICS

Characteristics	Agribusiness	Dairy	Entrepreneurs	BAP	Firms
Economic growth from bottom (bottom-up)*	X	X	X	X	
Economic growth from above (top-down)**					X
Export market emphasis					X
Local market emphasis	X	X	X	X	
Production emphasis – high	X	X			X
Production emphasis – low			X	X	
Marketing emphasis – high			X	X	X
Marketing emphasis – low	X	X			
Micro/small beneficiary	X	X	X	X	
Medium-size beneficiary	X		X		X
Large beneficiary					X
Women’s participation		X	X	X	
Direct training		X	X	X	X
Indirect training	X				

* Small producers grow

** Small producers ride on the coattails of larger producers

Value Chain Approaches

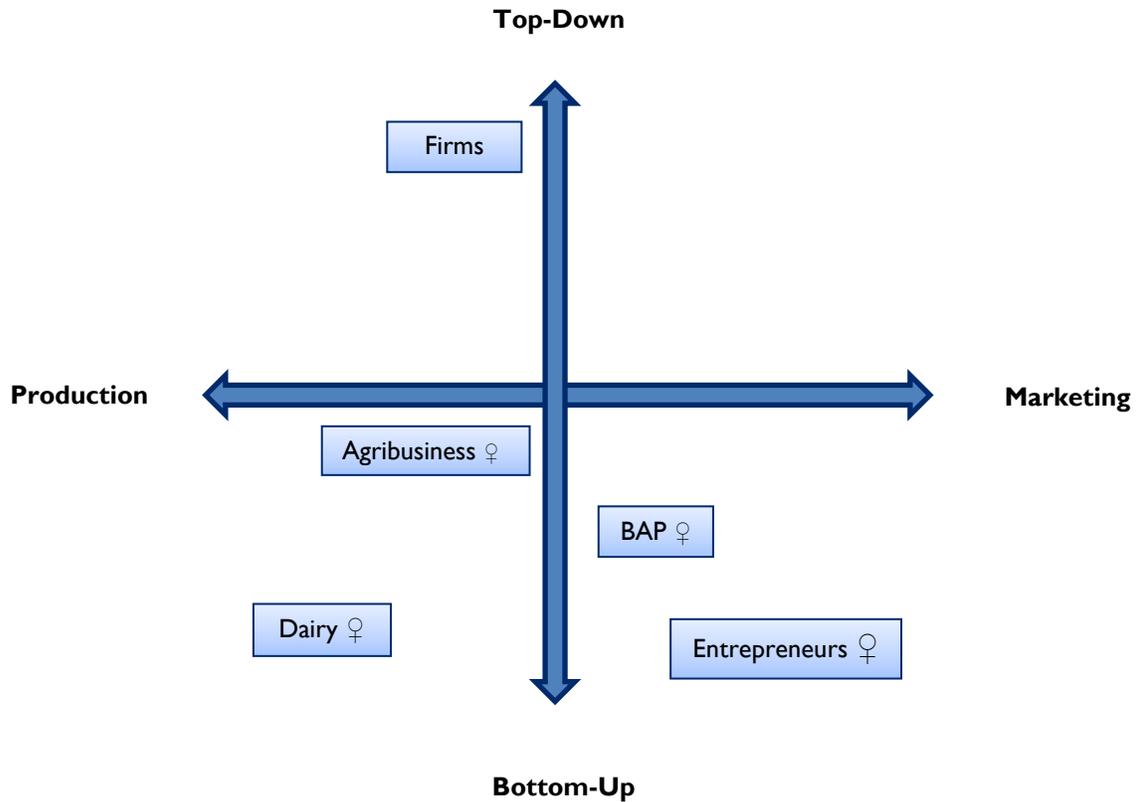
Drawing on the key characteristics that distinguish value chain projects, the assessment team developed a simplified heuristic to classify projects by their approach to value chain development. The identification of approaches used by the projects is based on the type of economic growth aimed for and the balance between emphasis on production and marketing. Figure 3 depicts the classification of each of the EGA's value chain projects' approaches, which can be described as follows:

- **Approach 1:** includes the Dairy and Agribusiness projects. These projects follow a bottom-up approach to economic growth with more emphasis on production than marketing. This approach focuses on small producers or processors with existing markets and emphasizes sales to local markets. These projects emphasize agricultural products, which are essential consumables and therefore have pre-existing market demand. Among the two, the Dairy Project clearly focuses on small producers (bottom-up approach) and strengthening input supply and service provision aspects of the value chain to improve productivity. The Agribusiness Project, on the other hand, follows a more holistic approach to value chain development and therefore also focuses on large producers and exporters. However, the project primarily focuses on small farmers (who form about 95 percent of the total beneficiaries) and its activities are generally more production-oriented (for both small and large producers). The relative positioning of the boxes for the Agribusiness and Dairy Projects in Figure 3 reflects the slight variation in their approaches.
- **Approach 2:** includes the Balochistan Agriculture Project (BAP) and Entrepreneurs Project. These projects also follow a bottom-up approach to economic growth, but place more emphasis on marketing than production. Their approach focuses on small and medium-sized producers or processors requiring new market development and emphasizes sales to local markets. The projects adopting this approach emphasize nonessential consumable products, but also include essential consumables. Both projects clearly follow a bottom-up approach and focus on small-scale producers and farmers. However, the projects approach production and marketing slightly differently. While the Entrepreneurs Project assists its beneficiaries (micro-entrepreneurs) at the production stage, the project at its core follows a marketing-oriented approach. Through the Lead Entrepreneurs, the project links the micro-entrepreneurs with buyers, providing them with access to markets. BAP, on the other hand, initially focuses more on production than marketing, but as the project boosts productivity, it shifts to a marketing emphasis to further enhance incomes. This study primarily on the marketing component of BAP. The reason for this is that the project emphasizes establishing linkages between markets and organized producers. While production is necessarily an implicit part of marketing, BAP works to identify and develop market options. The relative positioning of the boxes for the BAP and Entrepreneurs projects in Figure 3 reflect the slight difference in their approaches
- **Approach 3:** includes the Firms Project, which follows a top-down approach to economic growth with more emphasis on production than marketing. This approach focuses predominantly on medium-sized and large producers or processors requiring new market development and emphasizes sales to international markets.²² Although its activities are aimed at improved linkages and increased acceptance of beneficiaries' products in international markets, they largely focus on improving productivity and product quality. This approach focuses on export-oriented producers or processors who meet or have the capacity to meet international quality standards. The Firms Project clearly follows a top-down approach. The relative positioning of the box for the Firms Project in Figure 3 reflects its value chain approach.

²² Surpluses of export-quality produce are sold in local markets at almost the same price as local produce; however, surpluses of locally sold produce do not reach export markets.

It should be noted that the size of project beneficiaries' enterprises is captured, at least to some extent, in the identification of the project as either bottom-up (typically micro/small and medium-sized) or top-down (generally large-scale). An additional dimension of these approaches, mentioned above, is the extent to which a project focuses on, and benefits, women. The symbol ♀ indicates those projects that specifically focus on women as project beneficiaries. The size of the symbol represents the extent to which the projects focus on women. For example, 88 percent of the Entrepreneurs Project's beneficiaries are women.

FIGURE 3: USAID/EGA VALUE CHAIN APPROACHES



Having set the stage for the meta-analysis by briefly describing EGA's value chain projects, identifying key distinguishing characteristics, and classifying the projects relative to their approaches to value chain development, the report now focuses on the heart of the meta-analysis — measuring value chain approach effectiveness. To that end, the following section identifies and defines the key indicators used in this endeavor.

Meta-Analysis Indicators

The meta-analysis Phase I report (see Annex II) identified five indicators or suggested areas of inquiry for assessing value chain approach effectiveness. These included: Productivity and Income; New Practices and Technologies; Quantity Sold; Buyers; and Women’s Empowerment. Prior to collecting the data necessary to the meta-analysis, the assessment team revised these slightly. Specifically, they dropped “Quantity Sold” because it was already embedded in “Productivity.” In addition, “Income” was separated from “Productivity” to better reflect changes in price and cost. The final set of indicators, which to some extent are interrelated, used in the assessment of value chain approach effectiveness are identified and defined as follows:

1. **Income:** All of the projects seek to increase beneficiaries’ incomes, by either increasing production or facilitating more profitable engagement in markets, or both. Changes in income may result from shifts in prices, production costs, and sales. This indicator focuses on the extent to which value chain development activities have increased beneficiaries’ incomes.
2. **Productivity:** All of the projects also aim to increase beneficiaries’ productivity. Indeed, one of the key mechanisms for increasing incomes is increasing the productivity of their income-generating activities. Changes in productivity are the result of modifications in production per area, animal, or unit of labor, among others. Shifts in productivity may result from changes in the quantity or quality produced, competition, market demand, input quality or quantity, security concerns, energy shortages, weather, diseases, and credit availability. This indicator focuses on the extent to which productivity has increased as a result of project activities.
3. **New Practices and Technologies:** Likewise, all of the projects rely to some extent on beneficiaries adopting new production and marketing technologies and practices—to either increase productivity or meet market demands, or both. This indicator focuses on the extent to which beneficiaries have adopted these technologies and practices.
4. **New Markets and Buyers:** All of the projects expect to link producers to new markets or buyers. Therefore, this indicator focuses on access and barriers to improved or new market linkages, improved market intelligence and information about consumer demand that shapes local and export market linkages. Trends in the number of buyers to whom producers sell, the quantity or proportion of surpluses they sell to project-identified markets, and the geographic reach of their marketing activity are the focus here.
5. **Women’s Empowerment:** Most of the projects seek to incorporate women to some extent. While assessing how and to what extent women are included in project activities is relatively simple, assessing the extent to which women are actually empowered through their incorporation into the project is more challenging. Therefore, in addition to women’s economic participation, this indicator focuses on spatial mobility, self-confidence, and leadership roles.

META-ANALYSIS METHODOLOGY

While project effectiveness is arguably best assessed through quantitative measures, this was not possible for the meta-analysis. The main reason for this is that projects have not collected quantitative data in a consistent or reliable manner. Moreover, the scope of work for this study did not include collection of quantitative data across the value chain projects. Therefore, while the indicators suggested here are quantitative in nature, these were assessed qualitatively rather than quantitatively. To the extent that relevant quantitative measures were available through the projects, they were used to triangulate with the qualitative data collected for this assessment. The methodology used for this assessment is described in detail below.

Data Collection

To ensure that the assessment captured a diverse set of perspectives about the effectiveness of EGA's value chain projects' approaches, the assessment team identified five categories of stakeholders as sources of information. In addition to the projects' implementing partners the team also interviewed other stakeholders who were knowledgeable about the projects' approaches and value chains, but had little or no vested interest in the projects. The objective was to record balanced and diverse perspectives by including those from within the projects and stakeholders external to the projects. The five categories of stakeholders are defined as follows:

- **Implementing Partners (IP):** Independent firms or organizations, typically U.S.-based, who are implementing USAID/EGA's value chain projects. These include their local partners, which are known as Key Facilitating Partners.
- **Independent Value Chain/Sector Specialists (VCS):** Professionals who have sector expertise within the same value chain focused on by USAID/EGA value chain projects, but who are not involved in the project.
- **Autonomous Producer Associations (APA):** Independent associations of farmers/producers producing the same products as the value chains on which USAID concentrates. Although project participants and the project itself may interact with these associations, they are not sponsored by the project.
- **Project-Sponsored Producer Associations (PSA):** Associations of farmers/producers producing the same products as the value chains that are developed or sponsored by the projects (e.g., Farmer Marketing Collectives).
- **Major/Innovative Value Chain Players (VCP):** Organizations/individuals who partner with the projects on a commercial basis (e.g., PepsiCo, which buys potatoes for chips from beneficiaries of the Firms Project).

While IPs, including projects' COPs, represent the individual projects' perspective, other stakeholders were expected to have a broader view and the ability to speak to the distinctive value chain approaches used by the various projects. Among the five categories of participants, the highest representation was from the Independent Value Chain Specialists (17), followed by Major/Innovative Value Chain Players (7), and the Independent Producer Associations (6). The high representation of Independent Value Chain Specialists and Independent Producer Associations indicates a strong focus on data sources external to the projects.

Table 3 shows the types of interviewees who participated in individual and group interviews. The number of interviews per project ranged from six (Dairy) to 12 (Agribusiness), with an average of nine. Five interviews (including one individual and four group interviews) were held with the project COPs and their teams. In addition, 34 individual interviews were held. Apart from group interviews with the COPs and their teams, six

additional group interviews were held: three with independent value chain specialists, two with members of independent producer associations and one with members of a Project-Sponsored Producer Association. In addition to interviews related to the value chain approaches, the team met with the COPs of the EGA policy projects (Pakistan Strategy Support and Pakistan Trade) to address general issues of the Business-Enabling Environment. Including the 45 interviews related to the value chain approaches and the two related to policy, the assessment team conducted 47 individual and group interviews, including approximately 70 people. Whenever possible, female implementers were included in interviews to record their perspective on gender-related issues. This was particularly important given predominantly male representation in the projects and among external research participants. The schedule of interviews and people contacted is included in Annex III.

TABLE 3: INDIVIDUAL AND GROUP INTERVIEWS

Type of Participant	Agribusiness	Entrepreneurs	Dairy	Firms	BAP	Total
COP	1	1	1	1	1	5
<i>Individual Interviews</i>						
Implementing Partner	0	1	0	0	2	3
Independent VC Specialist	6	3	2	2	4	17
Independent Producer Association	2	1	0	3	0	6
Project-Sponsored Producer Association	1					1
Major/Innovative VC Player	1	2	2	2		7
Subtotal	10	7	4	7	6	34
<i>Group Interviews</i>						
2-Independent VC Specialist	1				2	3
3-Independent Producer Association			1	1		2
4-Project-Sponsored Producer Association		1				1
Subtotal	1	1	1	1	2	6
Grand total	12	9	6	9	9	45

To facilitate the collection of consistent information across all participants regarding the effectiveness of EGA value chain projects' approaches, the meta-analysis team developed an interview guide composed of sets of open-ended questions related to each of the effectiveness indicators discussed above. Although the team did not address all questions in every interview due to limits on time and participants' knowledge, they attempted to ask all relevant questions in a consistent manner to ensure comparability of information for each question.

Selection of Value Chains

Two factors shaped the choice of specific value chains (from among the 33 addressed in the five projects) to include in the analysis. The first was ensuring a diversity of value chains across agriculture and non-agriculture sectors. The second was security concerns that could limit access to participants and other practical matters. After considering the diversity of value chains, interviewees were selected based on their availability. In total, 18 value chains were selected to represent the 33 agricultural and nonagricultural value chains in which the five EGA projects engage (see Table 4). Banana, red chili, potato, and high-value off-season vegetables were the selected value chains from the Agribusiness Project. Medicinal and aromatic plants, honey, and hand-embellished fabrics were selected from the Entrepreneurs Project. The dairy value chain is the only one in the Dairy Project. The fresh mango, fruits and vegetables for pulping, potato and marble/granite value chains were selected from the Firms Project.

As the assessment team was not allowed to carry out face-to-face interviews outside the security perimeter in Balochistan, they had limited ability to select interviewees and had to rely on those who could meet with them in Quetta. Therefore, for BAP the study team examined the various individual value chains collectively because the interviewees available in Quetta at the time of the fieldwork were knowledgeable about multiple value chains. For example, the people interviewed for livestock are also involved in or aware of wool marketing. Thus, the team assessed wool and livestock as one value chain. Likewise, apples and grapes were addressed as the fruits value chain, while onion and tomato were examined as the vegetables value chain. Interviews across the five projects and selected value chains provide information about value chain approach effectiveness as well as in relation to the different geographic, economic, social, and cultural contexts within which the projects operate.

TABLE 4: SELECTED VALUE CHAINS BY PROJECT

Included Value Chains by Projects				
Agribusiness	Entrepreneurs	Dairy	Firms	BAP
Banana	Medicinal and Aromatic Plants	Dairy	Fresh Mango	Wool/Livestock
Red Chili	Honey		Fruits and Vegetables Pulping	Apples/Grapes
Potato	Hand-embellished Fabrics		Potato	Onion/Tomato
High-value Off-season Vegetables			Marble/Granite	

Data Analysis

The meta-analysis team employed rigorous analytical methods appropriate to the qualitative data collected. In qualitative research, the first step in data analysis always starts with development of the field notes. During the first stage, the team identified key information as themes for assessing value chain approach effectiveness in terms of the five indicators. In the second stage, the team compiled the lists of themes identified by individual team members and came to a consensus regarding the most important and relevant. The third stage of data analysis entailed coding interview responses according to the most relevant themes. Team members initially worked individually in this stage and then compared their coding in pairs. The entire team then

combined and compared their coding. The fourth and final stage involved a detailed analysis of the combined coded responses to identify the dominant responses regarding the effectiveness of projects' approaches in terms of the five indicators.

Only responses provided by at least three participants representing at least two stakeholder categories were considered as valid evidence for a finding. Clearly, however, the more participants across numerous categories who independently articulated a particular view about an aspect of an approach's effectiveness, the stronger the evidentiary base for that particular finding. Interestingly, only a few participants raised negative points. For the most part, these are not reported because they did not meet the evidentiary criteria established by the team (i.e. the same information being reported by at least three participants across at least two categories). In addition to the qualitative data and analysis that is at the heart of this meta-analysis, the team triangulated findings with quantitative data available through the projects. To the extent that this information is used, however, it should be understood only as additional data points that validate or contradict the qualitative findings.

Methodological Strengths and Limitations

The main strength of the assessment methodology is that it allowed the team to understand the effectiveness of various value chain approaches in a range of Pakistani contexts in a nuanced and complex way. Another strength is the substantial reliance on data collected from sources external to the projects. While the projects' implementing partners were included among the participants for data collection, independent value chain experts formed the largest group of respondents.

The study's extensive reliance on qualitative data can also have the limitation of not being representative and relying on anecdotal information. To address these potential limitations, the team conducted the data collection and analysis in a highly systematic manner by triangulating across multiple sources, methods and investigators to ensure the reliability and validity of findings and conclusions. More precisely, the methodology allows for:

- **Data Triangulation.** Primary data were drawn from across all five stakeholder categories included in the assessment. Only information that was reported by at least three research participants in at least two categories was included in the findings. In addition, to the extent available, relevant quantitative data from the projects was also used to triangulate with the qualitative findings.
- **Methodological Triangulation.** Two different data collection methods were used: individual and group interviews. Additionally, secondary data including project records were also used.
- **Investigator Triangulation.** Data analysis was assigned to two different team members, allowing their analysis results to be compared and harmonized.

Although project-provided quantitative data were used for triangulation purposes, assessing the data quality in terms of collection and analysis methods was beyond the scope of this project.

Another important limitation of this methodology is that results from a purposively drawn sample of respondents may be subject to selection bias. While the approach produces rich data on the mechanisms by which projects are or are not effective, the results are not as easily generalizable to other projects elsewhere in Pakistan or the world as results from a representative sample would be.

Despite these limitations, the team has taken every reasonable available measure to ensure the greatest possible reliability and validity of the meta-analysis findings and conclusions.

FINDINGS AND CONCLUSIONS

Findings for this assessment are divided into a separate section for each of the three value chain approaches. Each section provides detailed analysis of the five indicators — Income, Productivity, New Practices and Technology, New Markets and Buyers, and Women’s Empowerment — used as measures of value chain approach effectiveness. The sub-indicators discussed under each indicator were identified during the data analysis and are based on responses from interview participants. Only those indicators mentioned by at least three interviewees in at least two different categories were included as findings. Based on the findings in each section, the subsequent sections present conclusions about the effectiveness of each value chain approach.

Findings for Approach I: Bottom-Up with More Emphasis on Production than Marketing

Income

The Agribusiness Project, in its quarterly progress report (October–December 2013), cited a 32 percent increase (valued at US\$1.2 million) in beneficiaries’ household incomes, attributable to its interventions over the course of the project. The project also reported creation of 5,616 new jobs (including self-employment) through provision of 204 grants to 6,633 farmers from 547 farmer enterprise groups (FEGs). The project reported that approximately 25,000 rural households benefited from its interventions.

Similarly, the Dairy Project, in its quarterly progress report (October–December 2013), reported a 15 percent increase in household incomes for the 8,710 farmers who participated in project-sponsored training since the beginning of the project. In addition, the project also reports an average income of US\$62 per month for 1,774 project-trained AITs and US\$12 per month for 4,517 project-trained women livestock extension workers (WLEWs). AITs and WLEWs were previously unemployed, so their incomes are a direct result of participating in the project.²³

Higher Prices

Four respondents in three categories responded that the projects’ approach led to increased income through higher prices (VCS-2; IP-1; PSA-1). The projects established linkages with buyers that guaranteed competitive prices for products. For example, the Dairy Project established linkages with Nestlé for milk. The respondents also reported that better-quality seeds and adoption of new techniques such as tunnel farming enable farmers to obtain premium prices for their crops (VCS-2; PSA-1). Additionally, through completion of project-sponsored international certifications, such as Global GAP, the farmers were able to access international markets and obtain higher prices for their products (IP-1).

Decreased Costs

Three respondents in two categories indicated that the projects’ approach led to increased incomes through decreased costs (VCS-2; IP-1). Three reasons were cited for this. First, farmers were able to achieve economies of scale through higher yields resulting in lower per-unit costs (VCS-1). Second, producers were able to reduce transportation costs due to buyers collecting products at producers’ farms (VCS-1). Third, beneficiaries improved efficiency in input use such as decreasing their use of water and fertilizers (IP-1).

²³ The incomes of AITs and WLEWs cannot be formally attributed to participating in the project in a causal sense since there is no counterfactual to determine if they would have become employed without the project.

Productivity

Increase in Quantity of Produce

Eleven respondents in four categories reported that the projects' approach led to increases in quantity produced (VCS-5; VCP-3; APA-1; IP-2). They cited innovations in technology and best practices introduced through training and capacity building as a main reason for increased yields (VCS-1; IP-1). For example, training received by farmers resulted in the adoption of new practices such as tunnel farming, which lead to off-season production and higher yields (VCS-2; VCP-2; APA-1). Additionally, improved fodder management practices introduced by one project ensured higher quality and yields in milk (VCS-1; APA-1).

The Dairy Project reported a 15 percent increase in average monthly milk production per animal owned by project-assisted households. In addition, the project reported a reduction in the incidence of animal diseases (Hemorrhagic Septicemia by 81 percent and Foot and Mouth Disease by 91 percent).

Improved Quality of Produce

Five respondents in four categories reported that the quality of produce improved due to project interventions (VCS-2; APA-1; VCP-1; IP-1). This resulted from improved pre-harvest management, including seed selection, disease control through pesticides, and irrigation management (APA-1; VCP-1; IP-1).

Improved post-harvest management practices, such as improved drying, storage, and processing techniques, were also keys to success here (VCS-2; APA-1; IP-1).

Factors Limiting Effectiveness of Projects' Approach

Although productivity increased for value chain activities adopting this approach, some respondents mentioned factors that worked against it. Three respondents in two categories reported the poor security situation as a factor affecting productivity negatively. Five respondents in four categories reported that unfavorable weather conditions such as frost, rain, and floods adversely affected the quantity produced. Five respondents in two categories reported that crop diseases (e.g., aflatoxin contamination in chili) resulted in decreased quality of produce.

New Technology and Practices

Improved Production and Management Practices

Sixteen respondents in five categories reported that beneficiary farmers adopted the new technologies and practices introduced by the projects. Adoption of new practices improved product quality. For example, green nets used for chili drying resulted in decreased aflatoxin levels when compared to traditional drying methods (on the ground). Consequently, the chilies were suitable for the export markets (VCS-1; APA-1).

The adoption of banana bags to protect against dust, infection by fruit flies and other insects, and extreme temperatures resulted in disease-free, healthier produce (VCS-1). Artificial insemination techniques helped increase milk yields due to breed improvements, while improved farm management practices helped farmers store seeds for long periods of time (VCS-1) and use water and fertilizer more efficiently (IP-1). Respondents also reported that farmers who obtained Global GAP certification had higher-quality produce (VCS-1; IP-1) and those who adopted silage practices increased the quality of animal fodder (even during droughts), resulting in increased quantity and quality of milk (VCS-3).

According to the Agribusiness Project's quarterly progress report (October–December 2013), project-sponsored beneficiaries have obtained 21 certifications (three Global GAP, 17 British Retail Consortium and one International Features Standards) to improve market access since the beginning of the project.

The Dairy Project, in its quarterly progress report (October–December 2013), noted that 97 percent of project-assisted farmers used at least three best practices. It also reported that 37 percent of project-assisted farmers used the services of WLEWs. Similarly, the Agribusiness Project reported that 8,474 farmer entities covering approximately 2,000 hectares of land applied new technologies and practices introduced by the project.

Improved Inputs and Tools

Ten respondents in four categories reported that the projects provided beneficiaries with improved inputs corresponding to the new technical and management practices (VCS-6; APA-1; VCP-1; IP-2). These included high-quality seeds (VCS-2), fertilizer and pesticides (VCS-1; APA-1), concentrates (APA-1), semen, and medication (IP-1).

Similarly, three respondents in three categories reported that the projects provided them with improved tools and equipment (VCS-2; APA-1; IP-1). These included green nets, baskets, and gloves for chili collection (VCS-1), for example, and AIT kits and bikes (VCS-1; IP-1).

According to its annual progress report (FY 2013), the Agribusiness Project provided in-kind support to 547 FEGs (6,633 farmers) in the form of toolkits and improved-quality imported seeds.

Training

Six respondents in four categories reported that projects imparted direct training to beneficiaries on artificial insemination, animal health and extension, leading to improved breeds and increased yields (VCS-2; VCP-2; APA-1; IP-1). Similarly, nine respondents in four categories reported that the projects imparted indirect training to beneficiaries (VCS-4; APA-2; PSA-1; IP-1). This included managerial training on practices such as bookkeeping (VCS-1). Training on pre-harvest practices included improved use of fertilizers, protection from frost, efficient use of water for irrigation and use of modern cultivation techniques (e.g., preparation of planting beds and ridges for potatoes) (VCS-1; APA-1; PSA-1; VCP-1). Training on post-harvest practices covered grading, drying, packing and storing of produce (APA-1; PSA-1).

According to the Agribusiness Project's quarterly progress report (October–December 2013), 8,209 micro, small and medium-sized enterprises received BDS training and technical assistance through project-assisted sources since the beginning of the project. Similarly, the Dairy Project, in its quarterly progress report (October–December 2013), reported training 8,710 farmers in best dairy practices, 1,774 unemployed young men as AITs and 4,517 unemployed women as WLEW over the course of the project.

New Markets and Buyers

Access to Improved or New Local Linkages

Eight respondents in four categories reported that the projects helped beneficiaries establish linkages with new local markets (VCP-6; VCP-1; IP-2). This included access to new buyers by linking beneficiaries with big buyers, such as Nestlé and Engro for milk (VCS-3).

Access to Improved or New External Linkages

Four respondents in three categories reported that the projects helped beneficiaries establish linkages with new external markets through exposure visits to various countries, such as linkages with Germany's Food Plus Company helping them increase exports (VCP-1; APA-2; IP-1).

As of December 2013, the Agribusiness project has reported linking 3,125 micro and small enterprises with large-scale firms. The project also reported increasing beneficiaries' sales by approximately US\$28 million, including US\$11 million in exports.

Women's Empowerment

Increased Economic Participation

Ten respondents in four categories stated that the projects increased the economic participation of women (VCS-6; APA-2; VCP-1; IP-2). Specifically, women participated in field-level activities such as seed selection, weeding and harvesting (VCS-5; APA-2; VCP-1; IP-1).

Respondents reported that women's increased participation resulted in improvement in their status as evidenced by the fact that some women run their households and their men share the financial gains with them (APA-3). Most of the family owned operations are male-driven, but backed up by high participation of women (VCS-2). The project has shown that WLEWs are effective in their communities and are good managers. These WLEWs provide their services in the open market and independently determine the price for their services (IP-1).

According to the Agribusiness Project's quarterly report, 36 percent of the project's beneficiaries were women. Examples of women's participation include 2,291 female beneficiaries receiving goats and kitchen gardening/pickle production tools. Another 1,470 female FEG members received seed/tools for growing high-value off-season vegetables. Women also participated in other project activities.

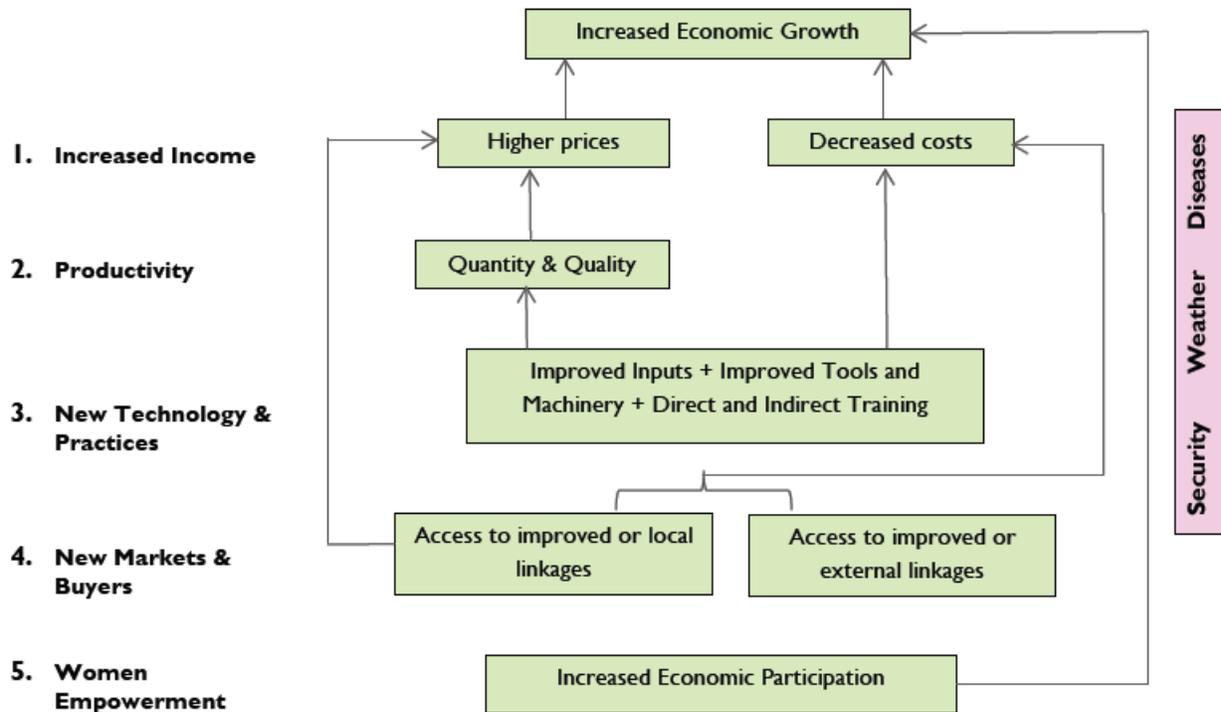
However, these women do not play any leadership roles (VCS-1), nor do they have control over financial decision-making (IP-1). The Dairy Project has been facing resistance to the newly introduced concept of female veterinarians and has not been able to completely modify social behaviors and perceptions (IP-1).

According to the Dairy Project's quarterly progress report, the project trained 4,517 WLEWs since the beginning of the project. Their incomes increased by 100 percent (from US\$6 to US\$12 per month, which is less than the project's target of approximately US\$30). The reason cited for this was cultural barriers, including lack of farming communities' trust in WLEWs' skills, a preference for male service providers, less or sometimes no payment for services and restriction by male family members barring women from visiting neighboring farms.

“Women are trained in providing first aid medication to [livestock owned or managed by] other women. It is a kind of self-employment for women. Since these women are earning more and contributing more to their households, they seem more economically empowered now”

(Individual Interview 4).

FIGURE 4: APPROACH I: BOTTOM-UP WITH MORE EMPHASIS ON PRODUCTION THAN MARKETING



Conclusions for Approach I

This bottom-up, production-oriented approach has been largely effective across most indicators. This is evident in that the approach has been an effective means of increasing small and medium-sized producers' incomes. This was accomplished by introducing and facilitating the adoption of new technology and practices, providing improved inputs, tools and machinery, and imparting knowledge about how to use them to beneficiaries through both direct and indirect training. The result was increased productivity through improved yields and quality of produce. While this approach to value chain development enabled small and medium-sized producers to link with new and larger buyers, this was somewhat limited, as it was not the major objective of the approach. This is especially true of the Dairy Project, which focuses almost exclusively on improving production processes and linked beneficiaries with only a few selected milk buyers located in the immediate project area. Agribusiness, in contrast, took a somewhat more holistic approach, linking its beneficiaries with larger producers, processors and exporters. This approach also successfully increased women's economic participation. However, there is little or no evidence that the approach led to improvements in other indicators²⁴ of empowerment such as increased mobility, confidence, or improved leadership roles.

²⁴ These indicators were reported by the interview respondents during data collection.

Findings for Approach 2: Bottom-Up with More Emphasis on Marketing than Production

Income

Higher Prices

Nine respondents in five categories responded that this approach led to increased incomes due to higher prices (VCS-1; APA-1; PSA-1; IP-4; VCP-2). The reasons cited were new and improved market linkages, such as for the wool value chain by BAP and the hand-embellished fabrics (HEF) value chain by the Entrepreneurs Project (APA-1; PSA-1; IP-3). The projects' interventions also resulted in improved market intelligence, such as understanding market demands and prices (APA-1; PSA-1; IP-2). The quality of products improved due to the adoption of enhanced production techniques such as sorting, cutting, and washing of wool (IP-2; VCP-1) and the use of high-quality inputs, such as high-yielding seeds (VCP-2).

Higher Local Sales

Four respondents in three categories indicated that this approach led to an increase in local sales (VCS-3; IP-1). This included selling products that were previously used primarily for private consumption (e.g., livestock and HEF) (VCS-2; IP-1). BAP helped livestock producers to organize in *mandies* (market), allowing producers and buyers to interact in a common location before *Eid-ul-Adha*,²⁵ which resulted in higher sales. The Entrepreneurs Project improved producers' access to new markets by establishing linkages with high-end buyers (VCS-1).

According to the Entrepreneurs Project's quarterly progress report (October–December 2013), the project's beneficiaries include 68,941 micro-entrepreneurs and 2,584 Lead Entrepreneurs. Similarly, BAP reported incremental sales of approximately US\$1.2 million attributable to the project. The project focuses on 52,705 rural households.

Productivity

Increase in Quantity Produced

Ten respondents in five categories responded that the projects' approach led to an increase in the quantities produced (VCS-5; APA-1; PSA-1; VCP-1; IP- 2). Factors that led to this increase included use of improved inputs such as certified high yielding seeds (for BAP supported farmers) and type of fabric used by hand embellishers (Entrepreneurs) (VCS-3). Improved practices and technologies such as planting grapes on trellises and holding them in cold storage and use of mechanical clippers for wool shearing also resulted in increased yields (VCS-1; PSA-1; VCP-1). Additionally, linking producers with big buyers (e.g., Nestlé and Khaadi²⁶) induced greater demand for products, resulting in increased quantities produced (VCS-2; IP-1).

Traditionally, women in rural settings had no concept of an eight-hour work day and the importance of timely delivery of products to buyers; because of this, they were not able to deliver products on time (VCS-1). The Entrepreneurs Project helped women understand how to use their time efficiently and introduced the concept of the eight-hour work day, which resulted in an increased quantity of HEF due to more hours worked. These women have also shown improvement in timely delivery to buyers (VCS-1).

²⁵ Eid-ul-Adha ("Festival of Sacrifice"), also known as the Greater Eid, is the second most important festival in the Muslim calendar. Muslims all over the world commemorate the prophet Ibrahim's willingness to sacrifice his son when God ordered him to by slaughtering animals and sharing the meat among family, friends and the poor.

²⁶ A Pakistan-based high-end clothing manufacturer and retailer.

Improved Quality of Produce

Seven respondents in four categories reported that the quality of produce or products improved due to project interventions (VCS-3; VCP-1; PSA-1; IP-2). Factors leading to improved quality include better inputs (VCS-3) and improved practices and technology (VCS-1; PSA-1; VCP-1).

Factors Limiting Effectiveness of Projects' Approach

Although productivity increased for value chain activities adopting this approach, some respondents mentioned factors that worked against it. Respondents reported two main reasons for this. Three respondents in two categories reported unfavorable weather, such as excessive or inadequate rainfall (VCS-2; VCP-1). Similarly, three respondents in two categories noted the unavailability of credit, including interest-free credit to small producers, to address short-term cash needs for purchase of inputs and tools (VCS-2; IP-1).

New Technology and Practices

Improved Production and Management Practices

Fifteen respondents in five categories reported that beneficiaries adopted the new technologies and practices introduced by the projects (VCS-7; APA-1; PSA-1; IP-4; VCP-2). Examples of these included adoption of improved pre- and post-harvest management and marketing practices such as picking and packing techniques for grapes and apples (VCS-3; PSA-1; VCP-2). One respondent also indicated the willingness of beneficiaries to use improved equipment such as electric shearers and baling machines for wool production; however, the beneficiaries had not yet received this equipment as the project was still in the process of procuring it (VCS-1). It was also reported that HEF producers adopted improved stitching techniques for producing embellished fabrics (VCS-1).

Respondents reported two factors limiting the adoption and effectiveness of new technology and practices. These included instances where the project built capacity, but the beneficiaries lacked access to new machines, such as sewing machines in remote areas (VCS-1) and, conversely, instances where the project provided equipment, but the beneficiaries lacked the capacity to benefit from them. For example, new equipment was distributed to unskilled beekeepers (VCP-1).

In its quarterly progress report (October–December 2013), BAP reported adoption of new technology or management practices by 12,523 farmers since the project's start. It also reported 2,520 hectares of land under improved technologies or management practices as a result of its interventions.

Improved Tools or Equipment

Three respondents in one category responded that the projects provided improved tools or machinery, which facilitated the adoption of new and improved practices (VCS-3). Examples of these included gloves, scissors, and ladders for harvesting fruits (VCS-1) and improved cartons for packing (VCS-1).

Direct Training

Twelve respondents in five categories reported that projects imparted direct training to beneficiaries (VCS-6; APA-1; PSA-1; VCP-2; IP-2). This included training in product development and marketing practices such as color selection for HEF products (VCS-3; APA-1). Medicinal and aromatic plant (MAP) collectors were trained in best practices for the collection, cultivation and storage of MAP (PSA-1). Other training included training on beehive management for beekeepers (VCP-1) and veterinary services for farmers in the Dairy Project (VCS-1; IP-1).

According to the Entrepreneurs Project's quarterly progress report (October–December 2013), 68,941 micro-entrepreneurs received training on improved production practices across all four value chains since the project's beginning. Additionally, 2,584 Lead Entrepreneurs were trained in basic management, marketing and training of trainers. Similarly, BAP, in its quarterly progress report (October–December 2013), reported training 3,865 farmers on skill development over the course of the project.

New Markets or Buyers

Access to Improved or New Local Linkages

Thirteen respondents in five categories reported that the projects helped their beneficiaries in establishing linkages with new local markets (VCS-7; APA-1; PSA-1; IP-3; VCP-1). This included establishing linkages through exposure visits to national and international markets (VCS-4; APA-1; PSA-1). BAP introduced a community-based approach to marketing, which resulted in economies of scale for community groups (i.e., Farmers Marketing Collectives) who, in negotiation through their leaders, obtained higher produce prices and lower input supply prices (VCS-2; IP-1). The approach also helped producers adapt to market demands (VCS-2) and link with buyers (e.g., Khaadi).

According to the Entrepreneurs Project's quarterly progress report (October–December 2013), the project organized 545 buyer-seller meetings since the project's start in which 1,002 Lead Entrepreneurs participated. The project also organized 182 exposure visits in which 1,172 Lead Entrepreneurs participated. Due to these, 322 backward and forward linkages (e.g., producers with quality input suppliers and big buyers) were established. Similarly, BAP, in its quarterly progress report (October–December 2013), reported linking 32 micro- and small enterprises to large-scale firms over the course of the project.

Improved Market Intelligence or Information about Customer Demand

Eight respondents in four categories reported that the value chain approach led to enhanced use of market intelligence and information about customer demand (VCS-3; APA-1; IP-3; VCP-1). This included greater understanding of market demands, such as prevailing trends in the garment industry and the sizes, colors, grades and packaging that the market demanded (VCS-1; IP-1; VCP-1).

Respondents also mentioned beneficiaries' improved management capacity. For example, they learned to keep the telephone numbers of buyers and intermediaries, as well as collect market information and disseminate it among community groups (VCS-1; IP-1).

We created access to markets where there was none; we have created participation where it was an impossible idea. The idea was that a woman could step out of her house and participate”

(VCP-1).

Barriers to Improved or New Local Linkages

Three respondents in two categories reported barriers to accessing new local markets (VCS-2; VCP-1). Examples of these barriers included the decreased role of the government in organizing exhibitions for increasing exposure of artisans (VCS-1). HEF producers were reported to lack quality control in their products, as their products did not always match buyers' expectations (VCS-1). Another barrier cited was uncertainty associated with regulatory frameworks, such as those overseeing the harvest and commercialization of MAPs (VCP-1).

Women's Empowerment

According to the Entrepreneurs Project's quarterly progress report (October–December 2013), approximately 88 percent of its total beneficiaries are women. Similarly, according to BAP's quarterly progress report (October–December 2013), 39 percent of the BAP's beneficiaries are women.

Increased Economic Participation

Eleven respondents in five categories reported women's increased economic participation due to the projects' interventions (VCS-4; APA-1; PSA-1; IP-4; VCP-1). This included women's participation as market intermediaries or female sales agents (VCS-2; APA-1; PSA-1; IP-1; VCP-1), as HEF producers (VCS-2; APA-1) and in post-harvest or production, such as sorting, cutting, and washing (IP-2).

Factors that limited the women's economic participation included cultural norms restricting women's movement outside the house premises (VCS-2; IP-1) and the limited availability of women suitable for training due to low literacy and numeracy levels (VCP-1).

Increased Mobility

Four respondents in two categories reported that the project interventions led to increased women's mobility despite cultural restrictions (VCS-3; APA-1; IP-3). One respondent reported: *"The project mobilized women in spite of cultural restrictions. I believe [the] project has struggled much to enable the women to access the market. Culturally, it is not easy to talk about gender in Balochistan, but the project has been able to include gender in [the] project's activities"* (VCS-1).

This increase in mobility is circumscribed, however — Entrepreneurs beneficiaries (female sales agents [FSAs] and honey producers) are mobile at the village level, but cannot go outside their own villages (VCS-1; VCP-1). Moreover, men have been involved in project activities specifically to get their buy-in for women's travel (APA-1; IP-1).

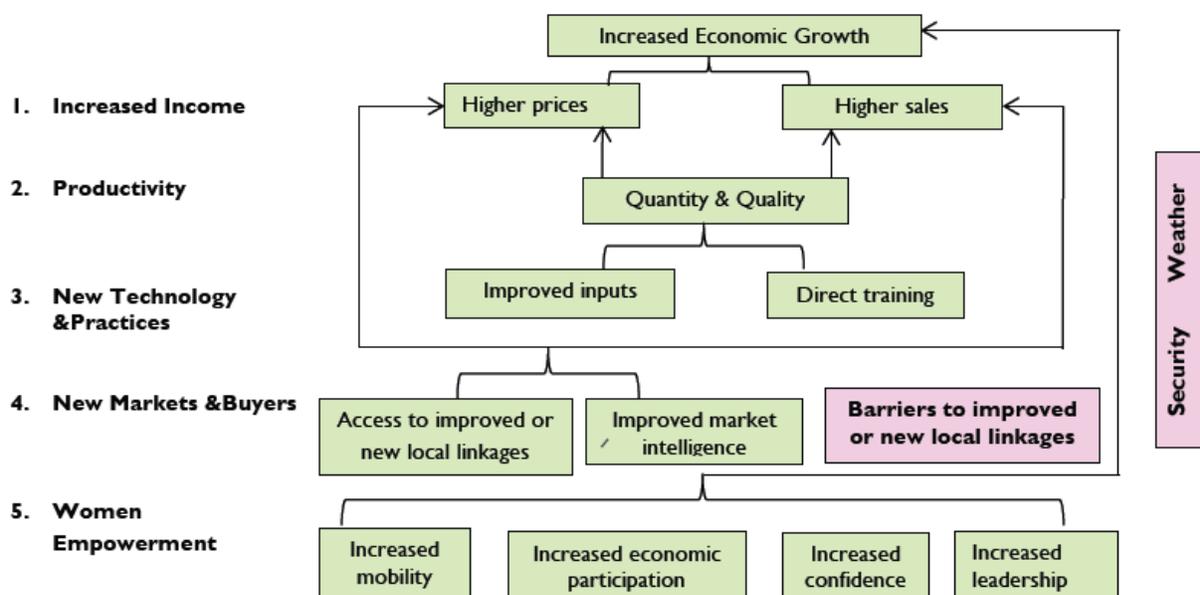
Increased Leadership Roles

Three respondents in two categories reported an increase in women's leadership roles due to the project interventions. An important example of this is the enhanced role of FSAs who are responsible for several producers (VCS-2; IP-1).

Increased Confidence

Six respondents in three categories reported an increase in women's confidence due to the projects' interventions (VCS-3; APA-1; IP-2). The reasons cited were increased economic participation since the FSAs had begun working more independently as entrepreneurs (VCS-1; APA-1; IP-2). Increased exposure to the marketplace, such as visits to exhibitions, increased women's confidence by affording them opportunities to interact with other market players including interactions with buyers and other producers (VCS-2; IP-1). Increased incomes led to greater contribution to — and subsequent financial control over — household expenses (IP-1).

FIGURE 5: APPROACH 2: BOTTOM-UP WITH MORE EMPHASIS ON MARKETING THAN PRODUCTION



Conclusions for Approach 2

This approach has been effective across all indicators. This is evident in that this bottom-up approach focusing more on marketing than production has been an effective means of increasing small and medium-sized producers' incomes through higher prices and quantities sold. This was accomplished by establishing beneficiary linkages to local markets and improved market intelligence, particularly about customer demand. The result was improved productivity by focusing on market demand. Thus, while the approach emphasized marketing, there were production implications as well. While the Entrepreneurs Project is almost exclusively focused on increasing the marketability of beneficiaries' products, BAP took a more holistic approach focusing on both marketability and production. This is evident in that BAP introduced new technology and better practices by providing inputs, tools and machinery and imparting the knowledge necessary to use them. This approach also successfully increased women's economic participation and empowerment, as evidenced by the increased mobility, self-confidence and leadership roles of some project beneficiaries, particularly in the Entrepreneurs Project. One possible reason for this is that the project focused predominantly on female beneficiaries.

Findings for Approach 3: Top-Down with More Emphasis on Production than Marketing

Income

Increase in Exports

Three respondents in one category reported that the project's approach led to increased exports (APA-3). Through completion of project-sponsored international certifications, such as Global GAP (e.g., for

mangoes), farmers were able to access international markets and obtain higher prices for their products (APA-2).

Decrease in Cost

Respondents in two categories reported that the project's approach led to decreased production costs as a result of decreased losses resulting from diseases and wastage (IP-1; VCP-1). Increased yields and reduced losses also resulted from the project's intervention to promote adoption of new and improved farm management practices, such as the optimum use of pesticides, pruning and harvesting, grading, and packing (IP-1; VCP-1).

The Firms Project, in its quarterly progress report (October–December 2013), reported an increase of US\$28.6 million in sales revenue of project-assisted small and medium enterprises (SME) since the project's beginning. The project also reported an increase of exports valued at US\$32 million attributed to the project's interventions. Additionally, the project reportedly created 3,482 new jobs through project-sponsored SMEs.

Productivity

Respondents for this value chain approach reported that the project's interventions led to increased quantity and improved quality of produce.

Increase in Quantity Produced

Five respondents in three categories reported an increase in quantity produced (VCS-1; APA-3; IP-1). The main reason cited was improved capacity of farmers due to knowledge obtained about Global GAP protocols (APA-2). The Firms Project, in its quarterly progress report (October–December 2013), reported that 36 project-assisted SMEs achieved internationally recognized standards/certifications since the project's start.

Improved Quality of Produce

Four respondents in two categories reported that the quality of produce or products improved due to project interventions (APA-3; IP-1). Factors leading to enhanced quality include adoption of improved practices and technology as result of exposure visits. For example, the project took some beneficiaries to factory sites in the Philippines for dried mangoes and Turkey for agricultural implements (APA-1; IP-1). Additionally, product quality improved as a result of farmers' adoption of Global GAP protocols.

Factors Limiting Effectiveness

Despite improved productivity for value chain activities adopting this approach, some respondents mentioned factors that worked against it. Five respondents in four categories reported that unfavorable weather such as frost, rain and floods (APA-3; IP-1; VCP-1) negatively affected productivity. Four respondents in three categories mentioned that the poor security situation discouraged investors from backing industries such as marble production, leading to lower overall levels of production (VCS-1; APA-1). Three respondents in two categories reported electricity shortages and the unreliable power supply adversely affecting productivity because of fewer production hours (VCS-1; APA-1; VCP-1).

New Technology or Practices

Improved Production and Management Practices

Six respondents in four categories reported that the project approach led to adoption of improved production and management practices (APA-3; IP-1; VCP-2). Examples included adoption of improved pre-harvest management practices, such as soil management, pruning, and disease and pest management (VCS-1; APA-1)

and improved post-harvest management such as processing, packing, and transportation (APA-3). Usage of improved inputs such as seed, fertilizer, and pesticides helped farmers improve yields (APA-1).

The Firms Project, in its quarterly progress report (October–December 2013), reported 23,756 hectares under improved technologies or management practices as a result of its interventions since the beginning of the project. According to this project report, Firms also trained 9,998 participants through 482 project-assisted workforce development training events. The project also reported adoption of new technology or management practices by 3,719 SMEs. Furthermore, 1,312 SMEs were using project-funded implements.

New Markets or Buyers

Respondents for this value chain approach reported that the project's interventions led to improved access to local and external market.

Access to Improved or New Local Linkages

Three respondents in three categories reported that the project's value chain approach provided the beneficiaries access to new or improved linkages with local markets (APA-2; IP-1). This included establishing linkages with big buyers, such as Pepsi-Lays (APA-1). The Firms Project, in its quarterly progress report (October–December 2013), reported linking 68 micro- and small enterprises to large-scale firms since the project's start.

Access to Improved or New External Linkages

Five respondents in three categories reported that the project's approach provided beneficiaries access to new or improved linkages with international markets (APA-3; IP-1; VCP-1). This included assisting producers to get Global GAP certification, which resulted in improved access to international markets. For example, the products met international quality standards and are now exported to the U.S., Australia, and Germany (APA-1). The approach also helped beneficiaries identify export markets through exposure visits and facilitated linkages with exporters in China, Iran and the Middle East (APA-3; IP-1; VCP-1). As one respondent stated, *"The project has helped gain access to a new market by taking 12 stakeholders of the marble industry to Saudi Arabia"* (APA-1).

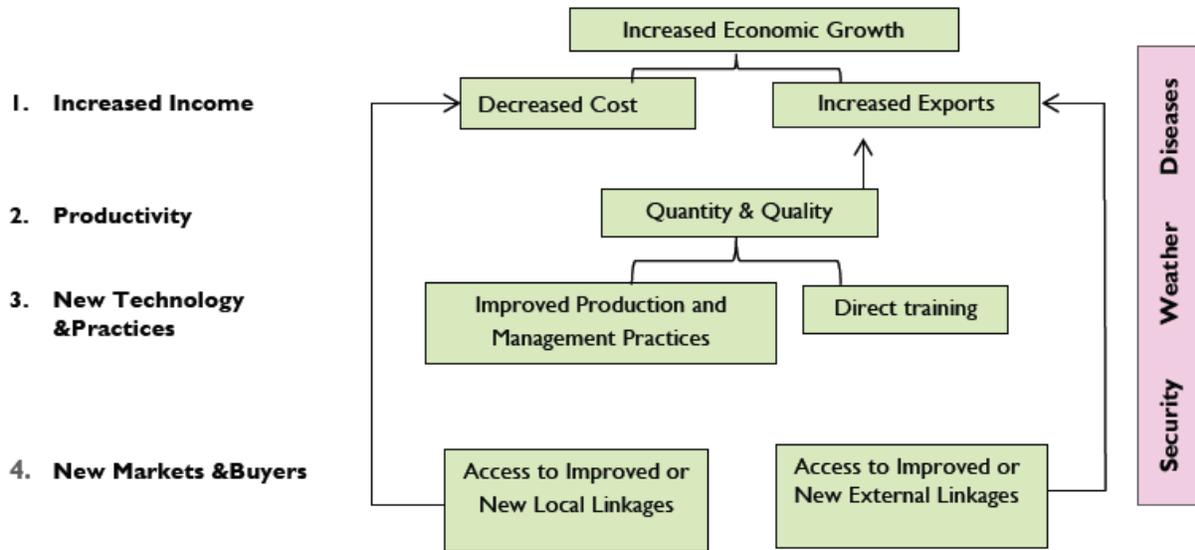
The Firms Project, in its quarterly progress report (October–December 2013), reported that the project conducted 35 marketing events over the life of the project to date to address export opportunities in sectors on which the project is focusing.

Women's Empowerment

Increased Economic Participation

Two respondents in two categories reported that the project did not significantly increase women's economic participation, much less empower them (VCS-1; APA-1; VCP-2). Women's only role in project activities is that they are sometimes employed as seasonal unskilled laborers (VCS-1). Factors responsible for this low level of participation are cultural taboos and barriers (VCS-1; APA-1) and that some industries (e.g., marble) on which the project focuses are not considered appropriate for females (APA-1).

FIGURE 6: APPROACH 3: TOP-DOWN WITH MORE EMPHASIS ON PRODUCTION THAN MARKETING



Conclusions for Approach 3

This approach has been largely effective across four of the five indicators. This is evident in that this top-down approach focusing somewhat more on production than marketing has been an effective means of increasing the incomes of large and medium-sized producers by increasing domestic sales and exports. This was accomplished by introducing and facilitating the adoption of new technology and practices, providing improved inputs, tools and machinery, as well as training beneficiaries in how to use them. The result was increased productivity through improved yields and quality of produce. A key element in the success of this approach was cost sharing between the project and its beneficiaries for procurement of new technologies, which reduced beneficiaries' risk, thereby increasing their willingness to make the necessary investments. Unfortunately, there is little or no evidence that the approach increased women's economic participation, much less contributed to their empowerment because the projects that employ this approach did not specifically focus on women.

Summary Findings by Indicator and Approach

Table 5 summarizes key findings for each of the three value chain approaches relative to the five effectiveness indicators.

TABLE 5: SUMMARY FINDINGS BY INDICATOR AND APPROACH

Indicator	Approach 1:	Approach 2:	Approach 3:
Income	Increased prices by linking with big buyers and setting premium prices on off-season sales Decreased costs by achieving economies of scale	Increased prices and sales by developing linkages with new markets and improved market intelligence	Decreased costs through improved farm management practices Increased exports
Productivity	Improved yields and quality by adoption of new technology and better practices	Improved yields and quality of produce through adoption of new technology and better practices Increased market demand through improved linkages with buyers	Adopted Global GAP protocol
New technology and practices	Adopted new technology and practices, e.g., inputs, tools and machinery Knowledge imparted through direct and indirect training	Adopted new technology and practices, e.g., inputs, tools and machinery Knowledge imparted through direct training	Adopted improved pre- and post-harvest management practices Improved access to inputs, tools and machinery
New markets and buyers	Established linkages with local markets by linking small-scale producers with large-scale buyers	Established linkages with local markets through community-based approach to marketing and linking small-scale producers with large-scale buyers	Established linkages with international markets leading to increased exports
Women's empowerment	Increased women's participation	Increased women's economic participation, mobility, confidence and leadership roles	No evidence of increased women's empowerment

Having assessed the relative effectiveness of each of the approaches adopted by EGA's value chain projects, attention now turns to the business-enabling environment within which they operate. The next section examines how these projects, as well as the two EGA projects that focus specifically on policy issues, address policy-related issues that shape Pakistan's business enabling environment.

Business-Enabling Environment

Enhancing the business-enabling environment focuses on reducing the cost of doing business by improving delivery of government services through policy reforms based on international best practices, increasing private sector involvement, eliminating market distortions, reforming regulatory frameworks, building institutional capacities, and re-engineering business processes at the national, provincial and district levels.

The purpose of this section is to examine the extent to which USAID-funded policy reform work can or does contribute to effectiveness in value chain development. In addition to the five value-chain development projects described in the preceding sections, two EGA projects that are not directly involved with value-chains were designed to deal specifically with policy issues. These projects include the Pakistan Strategy Support Project (PSSP) implemented by the International Food Policy Research Institute (IFPRI), and the Pakistan Trade Project (PTP) implemented by Deloitte Consulting, LLP. The following section examines the role played by both the value chain and policy projects in addressing the business-enabling environment.

Findings from Value Chain Projects

Research participants from all three approaches reported an absence of government regulations, which impedes their activities. These include lack of legislation related to fodder and feed for livestock, which leads to variation in quality (e.g., in absence of regulations standardizing concentrate formula). As a result, farmers cannot be sure of the quality of purchased feed for cattle and poultry (IP-1). Similarly, lack of patent registration for mango and *kinnow*²⁷ varieties limits export opportunities, since international buyers cannot determine whether the products are “true to type” (IP-1). One participant reported that due to uncertainty created by a bill passed by the Drug Regulatory Authority in 2012, investors are reluctant to make large investments in medicinal and aromatic plants (VCP-1). Absence of mining laws in Pakistan was reportedly leading to wastage of natural resources (e.g., marble and granite) (VCS-1). Also, lack of institutional support results in day-to-day operational problems for beekeepers. One respondent reported:

“Large companies have formed a monopoly and take advantage of the beekeepers’ weaknesses. ... [P]eople on the check-posts know that even an hour wasted would result in spoiling honey. They exploit their weakness by stopping them on the check-posts and charging bribes. There is absolutely no support from the [Government of Pakistan] that can take care of the beekeepers’ interests” (VCP-1).

Moreover, some government policies have a direct negative impact on value chain development. Respondents for Approach 2 cited two specific government policies that constrain beneficiaries. The Agricultural and Livestock Produce Markets Act passed by the Government of Balochistan prohibits export of livestock to other countries, reducing opportunities to sell in high-end markets such as Saudi Arabia (IP-1). A recent amendment to a law passed by the Government of Azad Kashmir, a profitable area for honey production, prohibits beekeepers from collecting honey from that area (VCP-1).

To address some of these issues, the Agribusiness Project developed two National Technical Working Groups (NTWGs) for meat and livestock, and fruit and vegetables to share sector-related problems with other Agribusiness stakeholders and as lobbying forums with government ministries. The NTWG for fruits and vegetables has adapted the Global Good Agricultural Practices (GAP) protocol for the Pakistani context. Once complete, this will be a legal document by the name of PAK GAP (IP-1). Officials hope this certification will be less costly than Global GAP and will enable small and medium-sized producers, who do not have the capacity to export, to supply high-quality produce to the national market.

²⁷ *Kinnow* is a type of citrus fruit cultivated extensively in Punjab province of Pakistan.

The Firms Project drafts policies for various provincial government stakeholders after consulting with them. These policies are subject to approval by the National Assembly of Pakistan to be enacted as formal laws. The project also contributes to training Small and Medium Enterprise Development Authority (SMEDA) staff on issues related to the business-enabling environment (IP-1).

Findings from Policy Projects

PSSP assists the Pakistan Planning Commission, but it has not worked with the value chain projects in the EGA portfolio. The project is disaggregating the Social Accounting Matrix of 2007–2008 to the provincial level. This could open an opportunity for some EGA projects to generate better estimates of sales, employment and value-added multipliers in agriculture, livestock, mining, and manufacturing, among others, to better assess economic impacts (IP-1).

PTP has a narrow scope that limits interaction with other EGA projects. Nevertheless, opportunities may exist for collaboration between PTP activities and activities of value chain development projects that focus on accessing markets in India and Afghanistan, focus areas for PTP.

Conclusions

Projects using all three approaches have been involved in business-enabling environment issues at different levels to improve value chain development, and their work has resulted in proposed amendments to outdated acts, review of sectoral policies and suggestions for improving the regulatory frameworks that affect value chain development. Unfortunately, the work has been carried out with little collaboration among EGA's value chain projects. For example, BAP could collaborate with Firms on livestock-related issues; Agribusiness, Firms, BAP, and PSSP could potentially collaborate on agricultural policy reform.

CONTEXTUALIZING EGA VALUE CHAIN APPROACHES

The analysis above indicates that the value chain approaches adopted for EGA projects are largely effective across all indicators except increasing women’s empowerment. In contrast, however, both value chain and policy-oriented projects have identified critical policy issues that limit the effectiveness of all three value chain approaches. To address the question of where and how these approaches might be most usefully applied in the future, the team contextualized the lessons learned from these analyses within some secondary information regarding Pakistan’s labor force structure, basic demographic data on rural households, physical geography and women’s economic opportunities in Pakistan. While EGA undoubtedly has access to and considers this information in project design, coupling it with insight gained from the value chain approach meta-analysis and business-enabling environment analysis should enable the EGA Office to consider how and where it could most effectively use the various value chain approaches in the future within particular geographic, economic, cultural and social contexts. Special attention is given to how EGA might more effectively incorporate women to increase the possibilities of enhancing their empowerment.

Economic Environment – Pakistan’s Labor Force Structure

Agriculture – Pakistan’s Dominant Economic Sector

As depicted in Table 6, the Pakistan Labor Force Survey (2012–2013) found that the three dominant occupational categories, both nationally and at the provincial level, are agriculture, manufacturing and wholesale and retail trade. Nationally, in agriculture — largely a rural-oriented occupation — the dominant labor force categories are skilled agricultural and elementary occupations. In contrast, for manufacturing, which is predominantly urban-oriented, the dominant occupational category is “crafts and related trade workers.” Not surprisingly, in wholesale and retail trade, which is similarly predominantly urban in orientation, “service and sales workers” comprise the dominant labor force category. The agricultural sector is the single largest employer of men and women. However, men’s employment opportunities are much more diverse than women’s, with substantial numbers employed in both manufacturing and wholesale and retail trade (Table 6).

At the provincial level, Sindh most closely mirrors the national trends, with wholesale and retail trade being the second most important labor force category, followed by manufacturing. The trend is the same in KP, where employment in trade is more prevalent than manufacturing compared to both the national level and in Sindh. Balochistan also follows this trend, but agriculture is even more dominant there, employing 47 percent of the labor force.

The dynamics in Punjab are slightly different. Agriculture is still the dominant economic sector, primarily engaging skilled agricultural workers. However, whereas wholesale and retail trade are the second most prevalent economic sectors of employment for Pakistan as a whole and for the other three provinces, manufacturing is the second most dominant in Punjab by a slight margin.

Likewise, the gender breakdown across the five provinces mirrors national trends, with agriculture as the dominant sector of employment for both men and women, but considerably more prevalent for women. Manufacturing is the second most dominant sector for women, employing around 10 percent of the female labor force in every province except Balochistan, where 26 percent of employed women work in the sector. In contrast, less than 2 percent of employed women work in wholesale trade in any province. Male employment is relatively evenly split between manufacturing and wholesale and retail trade, except for in KP and Balochistan, where wholesale and retail trade are at least twice as dominant as employment sectors for men than manufacturing is.

TABLE 6: PAKISTAN'S LABOR FORCE STRUCTURE BY PROVINCE

Major Industry Division	Major Industry Occupation				Male	Female	Rural	Urban	Total
	Services and Sales Workers	Skilled Agricultural, Forestry and Fishery Workers	Crafts and Related Trade Workers	Elementary Occupation					
Pakistan									
Agriculture, forestry and fishing	0.01	37.52	-	5.83	34.50	75.80	59.93	6.10	43.71
Manufacturing	0.25	0.02	10.15	1.38	15.02	10.70	8.84	26.15	14.06
Wholesale and retail trade, repair of motor vehicles, motorcycle transport, storage	11.49	0.01	1.24	0.78	18.09	1.53	8.90	27.13	14.39
Punjab									
Agriculture, forestry and fishing	0.01	37.23	0.00	7.06	33.44	75.39	59.60	6.51	44.67
Manufacturing	0.16	0.03	11.46	1.52	16.94	11.05	10.63	27.44	15.36
Wholesale and retail trade, repair of motor vehicles, motorcycle transport, storage	11.07	0.01	1.12	0.90	18.32	1.78	8.97	26.47	13.89
Sindh									
Agriculture, forestry and fishing	0.02	38.10	0.00	4.42	36.32	78.04	70.57	5.22	42.92
Manufacturing	0.56	0.01	9.03	1.55	15.60	9.02	5.21	27.31	14.56
Wholesale and retail trade, repair of motor vehicles, motorcycle transport, storage	12.33	0.00	1.47	0.62	17.95	0.95	6.35	27.41	15.26
KP									
Agriculture, forestry and fishing	0.01	33.92	0.00	2.66	28.11	76.78	43.30	4.90	36.79
Manufacturing	0.15	0.01	7.39	0.66	9.28	7.8	7.76	15.17	9.01
Wholesale and retail trade, repair of motor vehicles, motorcycle transport,	11.88	0.01	1.44	0.66	18.47	0.78	12.26	30.25	15.31

Major Industry Division	Major Industry Occupation				Male	Female	Rural	Urban	Total
	Services and Sales Workers	Skilled Agricultural, Forestry and Fishery Workers	Crafts and Related Trade Workers	Elementary Occupation					
storage									
Balochistan									
Agriculture, forestry and fishing	0.02	47.05	0.00	5.04	50.63	66.52	63.59	10.97	52.31
Manufacturing	0.03	0.00	5.66	0.21	3.90	25.85	4.64	12.00	6.22
Wholesale and retail trade, repair of motor vehicles, motorcycle transport, storage	11.55	0.00	1.15	0.45	15.46	0.98	9.72	29.34	13.93

Source: Pakistan Bureau of Statistics. 2013. Labor Force Survey 2012–13. Government of Pakistan, Islamabad.

The Pakistan Agricultural Census (2010) indicates that agriculture is Pakistan’s most important economic sector and illustrates its importance to the Pakistani economy. According to the census, agriculture accounts for more than 21 percent of Pakistan’s gross domestic product (GDP) and provides employment to 45 percent of the country’s labor force. Moreover, 64 percent of the population lives in rural areas and earns its livelihood, directly or indirectly, from agricultural activities (e.g., crop cultivation, livestock rearing, labor in agriculture).

With the exception of Balochistan, the census indicates that most farms in Pakistan tend to be fairly small in size (see Table 7). Given the harsh climate in Balochistan, larger farms do not imply more productivity.

TABLE 7: LANDHOLDING SIZE NATIONALLY AND BY PROVINCE

Landholding Size (acres)	Pakistan			Punjab			Sindh			KP			Balochistan		
	Farms (%)	Farm Area (%)	Cultivated area (%)	Farm (%)	Farm Area (%)	Cultivated area (%)	Farms (%)	Farm Area (%)	Cultivated area (%)	Farms (%)	Farm Area (%)	Cultivated area (%)	Farms (%)	Farm Area (%)	Cultivated area (%)
Small Size landholding <1.0-<5.0	64	19	22	64	22	23	56	15	18	81	33	37	36	3	7
Medium Size Landholding 5.0-<25.0	32	47	52	34	56	57	35	40	44	17	43	46	48	23	40
Large Size Landholding >25.0	4	35	26	2	22	20	8	44	39	1	23	17	16	73	52

Source: Pakistan Bureau of Statistics. 2010. Agricultural Census. Government of Pakistan, Islamabad.

These findings clearly indicate the dominance of agriculture in the Pakistani economy. Moreover, it is evident from these data that most agriculture in Pakistan takes place on relatively small landholdings. These findings suggest that agricultural value chain development pursued through bottom-up approaches are likely to continue to be relevant to EGA programming.

In the agricultural context, Approach 1 is likely to be most appropriate when production capacity, rather than market access, is a key constraint to increasing incomes. This scenario can occur when markets are accessible or when producers lack the capacity to meet the demands of markets for specific products (often differentiated by product characteristics). Given that small and medium producers dominate Pakistan’s agricultural sector, particularly for staple crops, this approach will be most appropriate where it focuses on these types of households.

Approach 2 is appropriate for value chains where market access rather than production capacity is a key constraint to increasing incomes. Since markets for staple agricultural commodities are often relatively well developed, the approach may often be most appropriate for nonessential consumables, such as hand-embellished fabrics, honey, medicinal and aromatic plants, and wool. It can also work well for essential consumables, such as dairy, fruit, vegetables and livestock, which are focused primarily on limited local markets but have the aim of enhancing market access. Whereas Approach 1 will likely emphasize almost exclusively agricultural value chains, Approach 2 could be applied productively to both agricultural and

nonagricultural ones. However, like Approach 1, given its bottom-up methodology, it primarily focuses on small to medium-sized enterprises, thereby focusing on people with low incomes and literacy levels.

Approach 3 is more appropriate for large and medium-scale producers or processors as they are more likely to already meet or have the capacity to meet international quality standards such as Global GAP. The top-down focus implies that the approach will be most effective when relatively high-capacity producers, processors or exporters exist to organize production and market access. These actors may also work to develop the capacity of small producers to contribute to the market (or not). The approach may also be appropriate for projects that work directly with organized groups of small or medium-sized producers in culturally homogeneous communities willing to embrace collective action.

Cultural Environment – Increasing Women’s Economic Empowerment

Women’s Labor Force Participation

Women’s labor force participation rates in Pakistan are among the world’s lowest, at 28 percent, compared with 82 percent for men (World Bank, 2013). This is largely shaped by the cultural practice of *purdah*.²⁸ Nonetheless, economic opportunities exist for women, particularly in some areas of the country. Table 8 from the World Bank Pakistan Policy Note by Jamil and Mete (2013), “Enhancing Labor Market Conditions for Vulnerable Groups,” shows the breakdown in women’s employment in rural and urban areas at the provincial level.

TABLE 8: PERCENTAGE OF WORKING-AGE WOMEN’S EMPLOYMENT BY PROVINCE 2007–08

Type	Punjab	Sindh	Khyber Pakhtunkhwa	Balochistan
Urban, all	10%	5%	6%	5%
Urban, paid	8%	4%	5%	3%
Rural, all	31%	27%	18%	12%
Rural, paid	11%	1%	6%	1%

As noted, the dominant sectors of employment for women across all provinces in Pakistan are agriculture and manufacturing. The data in Table 8 reveal that a larger proportion of women report labor market activity in Punjab and Sindh than in KP and Balochistan. This reflects the different opportunities for agricultural employment in these areas, as Sindh and Punjab are the agricultural heartland of the country.²⁹

In addition to provincial differences, there is a significant urban-rural divide. In rural areas, one of every three women works, while in urban areas only one in 12 joins the labor force. This holds true despite higher education levels among urban females.³⁰ Rural females are actively involved in agriculture, unlike their urban counterparts, whose employment opportunities tend to be predominantly in unskilled service jobs such as

²⁸ According to Merriam-Webster dictionary, *purdah* is “a custom among Muslims and some Hindus in which women stay separate from men or keep their faces and bodies covered when they are near men.”

²⁹ Jamil, Rehan and Mete, Cem. (2013). Enhancing Labor Market Conditions for Vulnerable Groups.

³⁰ Ibid.

personal and household services.³¹ Beyond those jobs, women may be involved in home-based manufacturing work. As one study demonstrated, there has been a dramatic increase since the 1980s in the proportion of urban females engaged in informal, home-based work, mostly in handicrafts.³² These occupations are much more likely to keep women close to or inside their homes, as required by *purdah*.³³ To the limited extent that urban women are engaged in white-collar jobs³⁴, which often require greater spatial mobility, they tend to be concentrated in the health and education sectors.

The selected beneficiaries for Approach 1 belong to the low-income class in rural Punjab, Sindh, KP and Gilgit-Baltistan (GB). Since many women in rural areas are engaged in agricultural production, value chain development projects based on Approach 1 seem particularly relevant to women. Punjab and Sindh are the agricultural heartland of the country, but there may be substantial potential for engaging women in agriculture in the north (KP and GB), where about 80 percent of the farmers are females. Farming is less technical there, given the smaller landholdings compared to Punjab (VCP-1; IP-1).

The Dairy Project aims to empower women belonging to the low to medium socioeconomic class by training them as input suppliers and veterinary service providers. Beneficiaries occupy three types of leadership roles: female social mobilizers and master trainers; female district-level field operations managers; and veterinary service providers. They are quite effective in their villages and exercise their discretion in the price they charge for their services (VCS-1). In a nutshell, one project employing Approach 1 aims to increase women's economic participation, while the other works to also empower them.

The projects under Approach 2 have strong female-focused objectives. BAP selects female beneficiaries from the low-income class of Balochistan and trains them in culturally appropriate activities such as sorting, cutting, washing and spinning wool, carpet weaving and raising livestock and poultry (VCS-1; IP-2). In line with the traditional social norms in Balochistan, these women do not break *purdah*, but have acquired the confidence to travel and negotiate prices with large buyers in Lahore and Karachi (IP-2). Women are also trained for leadership positions including business support service provision, market intelligence gathering and recordkeeping (IP-1). There has been considerable cultural resistance to women's participation, however. BAP has tried to break through these barriers by ensuring people that the project staff help and by delivering high-quality results (VCS-1; IP-2; VCP-1). Moreover, communities have great trust in the project's gender specialist (IP-2; VCP-1).

Seventy percent of the Entrepreneurs beneficiaries are women, while men are also involved to gain buy-in for women's participation (IP-1). These women belong to the low- to medium-income class and are trained in cleaning, drying and sorting of medicinal and aromatic plants (MAP), embellishing fabrics, dairy and extraction of honey. Out of HEF beneficiaries, 10 percent of women are mobile at the village level, are trained in marketing skills and business management and have access to the market (VCS-1; APA-1; PSA-1; VCP-1). These FSAs, some of whom are literate, create market linkages for homebound women embellishers to increase their incomes "in a culturally acceptable fashion" (VCS-1; APA-1; IP-1; VCP-1). Products for the dairy, honey, and MAP value chains are sold through the male family members of beneficiaries (APA-1; IP-1; VCP-1). Overall, beneficiaries fall into two categories: those who are homebound and do not break their *purdah*, and those who are mobile within the limited space of their villages.

³¹ International Finance Corporation. 2007. *Gender Entrepreneurship Markets (GEM) Country Brief, Pakistan*.

³² World Bank. 2005. *Pakistan Country Gender Assessment: Bridging the Gender Gap – Opportunities and Challenges*.

³³ Ibid.

³⁴ These are defined as office jobs.

Economic Opportunity and Women's Spatial Mobility

A United Nations Development Program report (1996) points to a strong inside/outside dichotomy in Pakistan, according to which women are confined to the “inside” of their households, which restricts their access to outside employment, education and social services.³⁵ As shown in Table 8, women's greatest economic opportunities in rural areas are in agricultural production. This reflects the proximity of homes to agricultural fields, which ensures women's access because they are able to maintain *purdah*. For many urban women, the lack of proximity to female-friendly workspaces reduces their chances for employment.³⁶

In rural areas, women take up work opportunities in “a very geographically circumscribed manner,³⁷” restricting their work to within their villages. These limitations are rooted in concerns for female safety and family honor. Traditional families worry about damage to their reputations if females venture outside, particularly to earn money, as it is considered an indication of the household belonging to a lower income class. In other words, it implies that men in the household cannot adequately provide for the economic needs of their family members.³⁸

For these reasons, it is also difficult for women to cross the boundary of their village to undertake work in a neighboring village. Almost 80 percent of women engaged in agricultural wage labor and 60 percent of those engaged in nonagricultural labor report working within their own villages. Interestingly, these restrictions are more stringent for women from wealthier families, who can most afford to sacrifice income to maintain the status of the household.³⁹

The burden of household chores and childcare is another impediment. In households with younger children, women are much less likely to participate in paid work. This is more pronounced in urban areas, where children cannot be taken to workplaces as they can in the fields.⁴⁰

Table 9 summarizes some of the contextual factors that may influence the effectiveness of value chain development projects designed to increase women's economic participation and empowerment. The table is based on data from this assessment and the secondary research discussed above. Economic opportunities are examples of occupations in which women might be productively engaged that could increase their economic participation and empowerment. Cultural context indicates some of the factors such projects may need to consider to effectively engage women.

³⁵ International Finance Corporation. 2007. *Gender Entrepreneurship Markets (GEM) Country Brief, Pakistan*.

³⁶ Jamil, Rehan and Mete, Cem. (2013). *Enhancing Labor Market Conditions for Vulnerable Groups*.

³⁷ World Bank. 2005. *Pakistan Country Gender Assessment: Bridging the Gender Gap – Opportunities and Challenges*.

³⁸ Ibid.

³⁹ World Bank. 2005. *Pakistan Country Gender Assessment: Bridging the Gender Gap – Opportunities and Challenges*

⁴⁰ Ibid.

TABLE 9: OPPORTUNITIES FOR ENGAGING AND EMPOWERING WOMEN

Opportunities	Increased Women’s Participation ⁴¹	Increased Women’s Empowerment ⁴²
Economic opportunities	<ul style="list-style-type: none"> • Agriculture • Livestock • Hand-embellished fabrics • Honey 	<ul style="list-style-type: none"> • Veterinarians • Livestock extension workers • Female sales agents • Female entrepreneurs
Cultural context	<ul style="list-style-type: none"> • Low to medium socioeconomic status⁴³ • Homebound or work in fields in rural areas⁴⁴ • Women do not remove <i>purdah</i> 	<ul style="list-style-type: none"> • Low to high socioeconomic status • Women can break <i>purdah</i> and are mobile within their own villages • Women are educated

Conclusions – Cultural Environment: Women’s Empowerment and Value Chain Approaches

Among the three value chain approaches assessed for this analysis, women’s empowerment is most likely to be effectively addressed through Approach 2, which is bottom-up and market-oriented. This reflects the kind of economic opportunities that are likely to exist for women in adopting this value chain approach, specifically occupations that require them to have a certain amount of spatial mobility and to take on leadership roles. These occupations are more likely to enhance women’s self-confidence, a key determinant of empowerment. The approach that is the next most likely to provide opportunities to increase women’s empowerment is Approach 1, which is bottom-up and production-oriented. Given that this approach focuses on small and medium-sized producers, it will generally focus on home-based economic activities in which women might be engaged. However, it should be noted that simply increasing women’s economic participation will not necessarily increase their empowerment in the short term. Over the long term, however, women’s increased economic participation might afford them greater opportunities for participating in household decision-making, which would indicate increased economic empowerment. Only Approach 3 is unlikely to have much, if any, effect on women’s empowerment. This reflects the top-down nature of the approach, which focuses on large and medium-sized producers and processors. These types of firms are

⁴¹ An increase in women’s economic participation is when the project trains female beneficiaries to participate in activities that they have traditionally been involved in, e.g. agriculture in Punjab and Sindh. These activities are carried out in a domain in close proximity of the place women call their homes. This may not translate into greater mobility, decision-making power about use of their own money or leadership positions for women.

⁴² An increase in women’s empowerment is when the project introduces new economic activities for women that are different from the traditionally established patterns of female occupations, e.g. female veterinarians. Beneficiaries are considered empowered when the project trains them to lead in their field, increases their decision-making power, and/or project activities result in greater mobility beyond the domain in close proximity of their homes.

⁴³ According to World Bank Pakistan Gender Country Assessment (2005), there is a trade-off between incidence of household females working outside home and the socioeconomic status of that household; Traditional families worry about damage to their reputation if their females venture outside, particularly to earn money. It is considered an indication of that household belonging to lower income class. In other words, it implies that men in the household cannot adequately provide for the economic needs of their family members.

⁴⁴ According to Jamil, Rehan and Mete, Cem. (2013), in rural areas the proximity of homes to agricultural fields ensures they are accessible for females and allow them to maintain *purdah*. For many urban women, this lack of proximity to female-friendly workspaces reduces their chances for employment.

unlikely to include many women and therefore will not provide opportunities for enhancing their empowerment.

Physical Geographic Environment – Identifying Value Chains

Geographic environment refers to Pakistan’s physical geography, including the landscape; natural resources; climate; and, to the extent that it is not part of the value chain development work, the infrastructure and services necessary to support the value chain. These factors are particularly important to the extent that USAID continues to focus on agricultural and resource-based value chains. While any of the approaches could be effectively deployed in any region of Pakistan, the determining factors of effectiveness are at least to some extent related to the specific value chains of interest. For example, top-down approaches will be applicable only for those value chains where some large-scale producers and/or processors already exist.

Moreover, some regions are more conducive to certain products than others. For example, many agricultural products have specific climatic requirements that restrict their production to particular regions. Similarly, any value chain based on the availability of a particular natural resource, such as marble or other minerals, would necessarily have to be located in reasonably close proximity to where that resource can be found. Access to infrastructure (e.g., roads, cold chains, processing facilities, ports) and support services may also be critically important to the extent that the value chain work does not invest in these components of the supply chain.

Political Environment – Security Concerns and the Business-Enabling Environment

The meta-analysis of the various value chain approaches’ effectiveness indicates that in some areas, particularly Balochistan and KP, security issues can disrupt production. This is one critical element of the political environment that affects the success of any of the approaches, particularly if the specific value chain activities are located in areas prone to disruption.

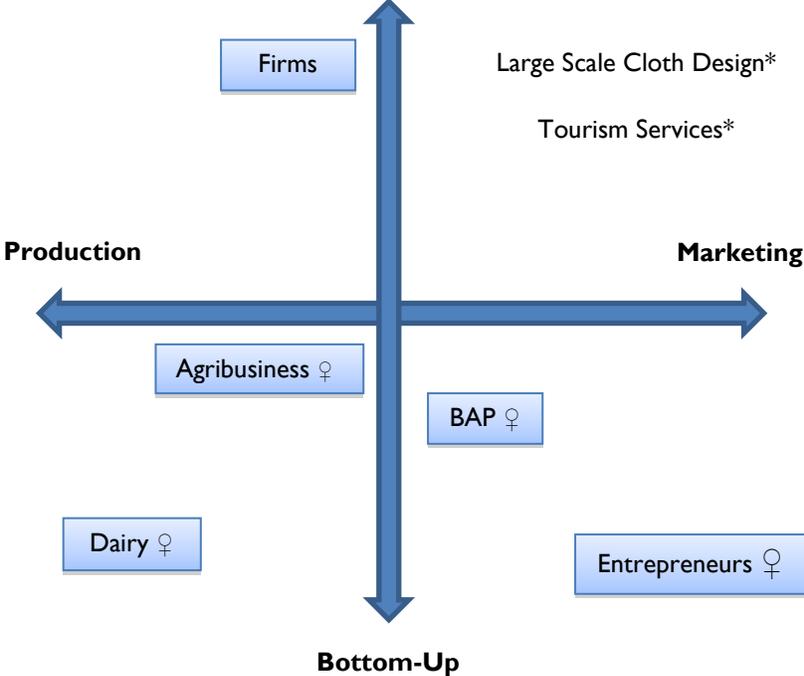
As indicated, the business-enabling environment is another critical element of the political environment that impacts the potential effectiveness of all three approaches. Outdated legislation and restrictive regulations limit the production and marketing capacity of most of the value chain activities pursued. Irrespective of which approach is adopted, addressing business-enabling environment issues will potentially enhance the effectiveness of any of the value chain development approaches. As indicated in the analysis above, this can most effectively happen through collaboration among value chain projects working in the same domains and between value chain and policy projects.

Hypothetical Fourth Value Chain Approach: Top-Down with More Emphasis on Marketing than Production

The EGA project approaches examined here reflect three distinct methodologies for implementing value chain projects. The fourth quadrant of the simplified heuristic (Figure 7) was unoccupied, as EGA currently does not have any projects that adopt this approach. This section describes a hypothetical fourth approach, which would be top-down with more emphasis in marketing than production. This approach could include, for example, tourism services that start up under Approach 2. After five or 10 years, the approach could shift into the upper quadrant as enterprises grow or new enterprises emerge. For example, small hotels, restaurants, tour providers and the like could come together to expand their businesses through a bottom-up, marketing-oriented approach. After some time, a large hotel chain such as The Serena could come into the area and integrate these small-scale service providers into their tourism services, at which point a shift from a bottom-up to a top-down approach would be in order. This would presume that the provision of services is not a limiting factor and more efforts are invested in establishing linkages with markets for tourism services. Another example could be a scaled-up version of Entrepreneurs’ HEF with large-scale production of clothes.

While these examples highlight value chains wherein one approach would be used initially and it would then shift to the hypothetical Approach 4, it is possible that value chain development could start through Approach 4 as well.

FIGURE 7: VALUE CHAIN APPROACHES WITH HYPOTHETICAL SCENARIOS



CONCLUSIONS

Because there are few projects that focus on value chain development, and even fewer distinct approaches, it is difficult to develop overall conclusions about the most appropriate approach in different contexts. Furthermore, without verifiable quantitative evidence of effectiveness, it is difficult to assess the relative effectiveness of alternative approaches. Nevertheless, some broad overall conclusions emerge from the findings.

- The projects that have been most effective in enhancing women’s economic participation and empowerment are those that specifically focused on women. These projects identified women as the primary beneficiaries, selected value chains where opportunities existed to engage women, identified barriers to women’s economic participation and empowerment, and specifically addressed these constraints. While it is somewhat difficult to categorize these projects under a particular approach, the conclusion is that projects that seek to improve women’s economic participation and empowerment will be most effective if they are specifically designed to address these issues within Pakistan’s cultural environment. Given that women are employed largely in agriculture or home-based business, the most appropriate approaches may often be bottom-up.
- More broadly, the most appropriate value chain development approach will depend on specific project objectives and operating environments. For example, a bottom-up approach will likely be more appropriate for projects that focus primarily on improving the livelihoods of small-scale rural producers with limited (direct or indirect) access to national or international markets. In regions or contexts where small-scale producers can be linked (e.g., as contract farming out-growers or contract piece workers) to larger producers, processors, markets or exporters, a top-down approach may be appropriate but it must specifically seek to connect small producers to the actors that link them to markets. On the other hand, a top-down approach may be most appropriate for projects that seek to enhance access to larger national or international markets. In these instances, the approach must work with value chain actors capable of developing the capacities to access these markets. These approaches may explicitly attempt to form linkages to small-scale producers, or may take for granted that expanded markets will ultimately benefit small producers. The overall conclusion is that the most appropriate approach is the one that best matches project objectives, the needs and opportunities of the beneficiaries and existing support infrastructure and services.
- A production-oriented approach is most appropriate when beneficiaries can already reach existing markets or when they have insufficient capacity to meet market demands (e.g., quantity, quality, other product specifications). In these instances, production capacity is the key constraint to more successful engagement in the value chain. In some cases (e.g., BAP), the approach can shift focus from production to marketing as producers enhance their production capacity. A marketing-oriented approach may be more appropriate when producers have, or can develop adequate production capacity but have limited access to markets.

ANNEXES

Annex I: Study Task Summary

USAID / Pakistan Monitoring and Evaluation Program (MEP) Economic Growth and Agriculture – Learning Agenda: Meta-Analysis Task Summary

1. Date of MEP MER Request: January 8, 2013
2. USAID/ Pakistan Requesting Office: Economic Growth and Agriculture Office
3. USAID/Pakistan Task Manager: Michael Wyzan
4. Proposed Duration of the Technical Assistance (Start/End dates): 2013-2014
5. Description and Purpose of Technical Assistance

USAID/Pakistan is funding 10 projects with value chain or policy components. As part of its learning agenda, USAID's Economic Growth and Agriculture (EGA) office wants to examine 09 of these projects to learn what approaches to developing or strengthening value chains work best in different contexts. The enabling environment is an important contextual factor influencing the effectiveness of value chain work. Some of the value chain projects have policy components and other USAID-funded projects work exclusively on policy which may affect the value chain projects. The comparative analysis will explicitly consider policy as a contextual factor and specifically explore the influence of USAID-funded policy work on the effectiveness of value chain projects. The results of the analysis will contribute to developing future value chain projects and, perhaps, coordinating programming in value chains and policy to enhance effectiveness.

6. Tasks and Work Sites

The analysis will require 1) identifying the dimensions of the alternative “approaches” employed by different value chain projects; 2) ascertaining the likely complementarities or intersections between value chain projects and policy projects, including policy components of value chain projects; 3) deciding on a set of common indicators of effectiveness that are relevant to all value chain projects; 4) assessing the effectiveness of the value chain projects in terms of the common indicators; and 5) analyzing data on context, dimensions of approaches, and policy to extract lessons about which approaches work best in different contexts and the importance of policy work as a complement to value chain development.

MEP proposes to conduct the analysis in two distinct phases: a scoping and planning phase and an effectiveness assessment phase.

Phase I: Scoping/Planning: In the scoping phase, MEP will review project documents and conduct individual interviews with implementing partner (IP) and USAID staff to identify value chain project objectives, map out the dimensions of value chain approaches, and identify the likely complementarities between value chain and policy projects. Based on the results of the scoping phase, and in collaboration with USAID, MEP will determine the dimensions of value chain “approaches” to guide the remainder of the analysis and develop a set of common indicators against which to assess project effectiveness. In the scoping/planning phase, MEP will also identify key stakeholders who can speak to project effectiveness during the effectiveness assessment phase.

Phase II: Effectiveness Assessment: In the effectiveness assessment phase MEP will review project documents and conduct individual interviews with USAID and IP staff and with selected stakeholders. The interviews will collect data on the rationale for choosing particular approaches, documenting project effectiveness, understanding how external contextual factors (including the enabling environment) and characteristics of the project approach (including policy) influence effectiveness. The MEP team will then analyze the data to map measures of effectiveness against contextual factors and dimensions of the implementation approaches.

Phase I of the analysis will require travel to IP offices in Islamabad and Lahore.

The analysis is a discrete study which will require no follow-up or additional work.

7. Deliverables

One report will be produced and submitted to USAID at the end of Phase I and another at the end of Phase II.

8. Priorities and Timeline

Activity	June	July	August	Sept	Oct	Nov	Dec
Task Summary							
Phase I: Scoping/Planning							
-Document review							
- individual interviews with IPs, USAID							
-Report writing							
Team recruitment							
Phase II- Effectiveness Assessment:							
-Document review							
-individual interviews with IPs, stakeholders, USAID							
-Analysis							
-Report writing							

9. Staffing

This exercise will be undertaken by an external team composed of two MSI staff members and a consultant (possibly an expat). Doug Krieger, Technical Director at MSI will complete Phase I which includes undertaking document review, conducting interviews with implementing partners and USAID and producing a report. The consultant who will be a value chains specialist and will have considerable experience in research and value chains development will be recruited specifically for Phase II. S/he will be responsible for designing interview guides for USAID, IPs and other stakeholders, conducting interviews, undertaking document review and writing the report at the end.

Annex II: Phase I Report: EGA Meta-Analysis of Value Chains



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ECONOMIC GROWTH AND AGRICULTURE META-ANALYSIS OF VALUE CHAIN PROJECTS

PHASE I: SCOPING AND PLANNING

MAY 30, 2014

This publication was produced for review by the United States Agency for International Development. It was prepared by Management Systems International (MSI) under the Monitoring and Evaluation Program (MEP) by Douglas Krieger and Sara Azmat Zaidi.

ECONOMIC GROWTH AND AGRICULTURE META-ANALYSIS OF VALUE CHAIN PROJECTS

PHASE I: SCOPING AND PLANNING

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ACRONYMS

AIT	Artificial Insemination Technician
AKRSP	Aga Khan Rural Support Program
ASF	Agricultural Support Fund
BAP	Balochistan Agriculture Project
BOI	Board of Investment
CGIAR	Consultative Group on International Agricultural Research
CIMMYT	International Maize and Wheat Improvement Center
DO	Development Objective
DRDF	Dairy and Rural Development Foundation
EGA	Economic Growth and Agriculture
FAO	Food and Agriculture Organization
FATA	Federally Administered Tribal Areas
FBA	Farmer Business Association
FEG	Farmers' Enterprise Group
FMC	Farmers' Marketing Collective
FY	Fiscal Year
GB	Gilgit-Baltistan
GDP	Gross Domestic Product
GOP	Government of Pakistan
HACCP	Hazard Analysis and Critical Control Points
IFPRI	International Food Policy Research Group
IPC	Investment Promotion Council
IR	Intermediate Result
ISO	International Organization for Standardization
IUA	Infrastructure Upgradation Agreement
KFS	Kissan Field School
KP	Khyber Pakhtunkhwa
KPCCI	Khyber Pakhtunkhwa Chamber of Commerce and Industry
LBE	Livestock Business Entrepreneurs
LHW	Livestock Health Workers
M&E	Monitoring and Evaluation
MEDA	Mennonite Economic Development Associates
MEP	Monitoring and Evaluation Program
MSI	Management Systems International
NGO	Non-governmental Organization
PaRRSA	Provincial Reconstruction Rehabilitation and Settlement Authority
PSSP	Pakistan Strategy Support Project
PTP	Pakistan Trade Project
SME	Small and Medium Enterprise
SMEDA	Small and Medium Enterprise Development Authority
USD	U.S. Dollar
USABBA	United States Assistance to Balochistan Border Areas
USAID	United States Agency for International Development
VCD	Value Chain Development
VCP	Value Chain Platform
WAPDA	Water and Power Development Authority

EXECUTIVE SUMMARY

The United States Agency for International Development's (USAID's) Economic Growth and Agriculture (EGA) Office manages a portfolio of nine projects, five of which employ value chain approaches. These five projects pursue a common goal; to increase the incomes of beneficiaries, but employ somewhat different approaches to value chain development. Differences include specific project objectives (the mechanisms by which they expect to increase incomes), characteristics of intended beneficiaries, geographic scope, and the markets on which the projects focus. Given the magnitude of USAID's investment in value chain development (over \$200 million in these five projects), EGA asked Management Systems International (MSI) to identify salient differences in value chain development approaches and assess the relative effectiveness of the different approaches. The results of the assessment should help USAID select the most appropriate context-specific approach for future value chain development work.

The enabling environment (i.e., policy) may also influence the effectiveness of value chain development work. Several of the projects that employ value chain development approaches have small policy reform components but two other EGA projects focus primarily on policy reform. A secondary question is the extent to which the policy-oriented projects do or can support the projects that employ value chain development approaches. Answers to this question will help USAID develop a comprehensive programming approach to value chain development work.

MSI approached the value chain development assessment in two phases. Phase I (Scoping and Planning) documents differences in value chain approaches employed by USAID-funded value chain projects in Pakistan; identifies intersections between USAID-funded value chain and policy projects; develops a taxonomy of value chain approaches; and crafts a set of common indicators with which to compare effectiveness across all USAID/Pakistan-funded value chain projects. Phase II will build in this background to assess the relative effectiveness of value chain approaches.

Parameters of Value Chain Development Approaches

The primary findings of Phase I are the characteristics of the value chain development approaches employed by EGA projects. The conclusions are the parameters that define general approaches; that is, the commonalities and differences between the approaches. Prior to exploring these findings and conclusions, however, it is helpful to have a brief understanding of the major objectives of the five value chain development projects at the heart of this meta-analysis.

The Agribusiness Project works throughout the horticulture and livestock value chains to build the capacities of smallholder farmers (30 percent of whom are expected to be women), medium and large farmers, processors, and exporters to identify export and local market opportunities and produce the quality and quantity of products demanded in the market. The project disseminates information on new farming techniques and technological innovations designed to increase agriculture efficiency and productivity and helps beneficiaries reach new markets.

The Balochistan Agriculture Project (BAP) seeks to increase incomes of poor, rural, agricultural households in Balochistan by improving crop and livestock productivity. The project first develops community organizations (40 percent of which are women's organizations), and then builds their capacities to address issues identified by the organization. The project shares the costs of designing and implementing productivity-enhancing technologies and practices requested by the communities. As productivity rises, the project focus shifts to marketing; improving the enabling environment for agricultural development and establishing market linkages to increase sales.

The Dairy Project concentrates on the production end of the dairy value chain, focusing on increasing dairy productivity among smallholder dairy farmers. In addition to working directly with farmers to disseminate productivity-enhancing technologies and practices, it also trains artificial insemination technicians (to improve herd quality) and seeks to establish women (31 percent of beneficiaries) as trained livestock health workers or livestock business entrepreneurs who can provide inputs and services to dairy farmers. The project is essentially a capacity building project focused almost exclusively on training. The project does not specifically address elements of the dairy value chain beyond production.

The Entrepreneurs Project focuses almost exclusively on value chains that are traditionally dominated by women (i.e., dairy, hand embellished fabrics, honey, and medicinal and aromatic plants). The project addresses the limited mobility of women by training mobile female (usually) sales agents to connect those with less mobility to markets. The agents may play multiple roles, including collecting and transporting products to markets, transmitting information on market demands to producers, and providing support services to build producers' capacities.

The Firms Project focuses primarily on small and medium enterprises (SMEs) in 11 value chains and works with value chain actors to connect them to broader markets, primarily export markets. The project also works with a number of small-producer clusters in Khyber Pakhtunkhwa (KP) Province and the Federally Administered Tribal Areas (FATA) but anticipates that most of the benefit to small producers will come from linking them to successful larger farmers or processors.

The five projects that employ value chain approaches share at least two common design elements. The all **recognize and address, through training, the limited business skills (e.g., financial management, marketing, organizational management and leadership) of value chain actors.** The Firms, Dairy, and Entrepreneurs Projects train beneficiaries directly, although Entrepreneurs trains only its Female Sales Agents directly. The Balochistan Agriculture Project, the Agribusiness Project, and the Entrepreneurs Project (for beneficiaries other than Female Sales Agents) all work through private sector Business Development Service providers and link them to project beneficiaries.

All five projects also **employ market-led approaches that assess opportunities and build capacities of beneficiaries to meet market demands.**

The projects differ in the **specificity of the value chains on which they focus.** The Firms and Agribusiness Projects work largely at the sub-sector level (e.g., mangos, peaches, marble and granite, farm equipment, citrus) to build the capacities of the sub-sector (as represented by larger actors in the sector) to reach broadly defined markets (e.g., international/export). These projects anticipate that benefits that accrue to larger producers will trickle down to smaller producers as successful value chain actors seek to expand their supply chains.

BAP and the Entrepreneurs Project work directly with small producers' groups and connect them to specific marketing opportunities and buyers. One difference between the two projects is that Entrepreneurs focuses on marketing agents (as opposed to producers) while BAP works directly with producers' groups. The Agribusiness Project also works with more specific value chains in Gilgit-Baltistan (GB). In this instance, it builds capacities of producers' clusters to sell to specific processors it has identified.

The projects also differ in their choice of **value chain entry points** (i.e., the stages of the value chain in which they actively intervene) and the activities they employ in their interventions. BAP and the Dairy Project are similar in the sense that they work directly with small producers, intervening in the input supply and services aspects of their respective value chains. The primary difference in their approaches is that the Dairy project focuses exclusively on production while BAP extends its value chain intervention to all aspects of marketing.

The Entrepreneurs Project entry point is sales agents. While the Agribusiness and Firms Projects work directly with small producers' groups, they focus primarily on SMEs and larger processors and exporters as their primary entry point.

The projects also differ in the specific objectives that motivate their value chain development approaches. The Firms and Agribusiness projects' objectives focus largely on broad sector-level outcomes. In general, these projects focus work largely at the higher ends of their respective value chains (e.g., processors) and focus on broad markets rather than specific buyers. BAP and the Entrepreneurs and Dairy projects seek to increase incomes of small, rural producers with little market experience. Consequently, these projects work most closely with producers to increase productivity, and then work on the market development end of the value chain as beneficiaries begin to generate meaningful surpluses.

Policy. BAP, the Firms Project, and the Agribusiness Project all identified the Marketing Act of 1935 (now the Provincial Marketing Act) as a constraint to developing their respective value chains, an area where PSSP could potentially help. Projects that focus on export markets (i.e., the Firms and Agribusiness Projects) could potentially benefit from the work of the Trade Project.

Candidate Indicators of Effectiveness

This analysis does not recommend actions. Instead, it recommends candidate indicators to guide the Phase II comparison of the relative effectiveness of value chain approaches. The recommended indicators fall into five broad categories; productivity and income, new practices and technologies, quantities sold, marketing activity, and women's empowerment. As work begins on Phase II the team will collaborate with USAID to refine these indicators in light of available data.

INTRODUCTION

Through its Economic Growth and Agriculture (EGA) programming, the United States Agency for International Development (USAID) seeks to boost Pakistan’s economy by improving enterprise productivity (especially in agriculture), enhancing trade, and promoting an enabling environment that supports market-led economic growth. Enhanced economic performance should ultimately create jobs and improve the economic status of ordinary Pakistanis. The EGA results framework articulates the development strategy in terms of one Development Objective (DO), two Intermediate Results (IRs), and five sub IRs (Figure 1).

FIGURE 1: ECONOMIC GROWTH AND AGRICULTURE RESULTS FRAMEWORK



Key results framework indicators focus on building capacity (e.g., increasing agricultural productivity, facilitating market linkages, increasing access to business development services), improved economic performance (e.g., increasing sales and exports), improved policy environment (e.g., new/revised policies, increased political participation), and improved economic status (increased household income/expenditure, employment).

To achieve these results, EGA manages a portfolio of eleven projects with a total value of \$409.2 million (Table 1).

TABLE 1: SUMMARY OF USAID/PAKISTAN ECONOMIC GROWTH PROJECTS

Project Name	Implementing Partner	Value	Project Focus
Agribusiness Project	Agribusiness Support Fund (ASF)	\$89.4 million	Value chain development
Balochistan Agriculture Project (BAP)	Food and Agriculture Organization of the United Nations (FAO)	\$25.4 million	Value chain development
Dairy Project	Dairy and Rural Development Foundation (DRDF)	\$14.0 million	Value chain development
Entrepreneurs Project	Mennonite Economic Development Associates (MEDA)	\$30.0 million	Value chain development
Firms Project	Chemonics International	\$92.3 million	Value chain development
Gomal Zam Irrigation Project	Water and Power Development Authority (WAPDA)	\$52.0 million	Irrigation
Pakistan Strategy Support Project (PSSP)	International Food Policy Research Institute (IFPRI)	\$22.7 million	Research and policy
Pakistan Trade Project (PTP)	Deloitte Consulting, LLP	\$37.1 million	Trade policy
Satpara Development Project	Aga Khan Rural Support Program (AKRSP)	\$19.8 million	Irrigation
Pakistan Grain Storage Program	International Finance Corporation (IFC)	\$2.5 million	Grain storage capacity
Pakistan Private Investment Initiative	Abraaj	\$24.0 million	Investment in Pakistani SMEs

Five of the eleven EGA projects focus directly on developing value chains, many for agricultural products. Two others focus on policy that may contribute to an enabling environment for value chain development. This analysis covers the seven projects that focus on either value chain development (five projects) or potentially related policy (two projects). In consultation with USAID, the assessment team excluded the Gomal Zam Irrigation Project and the Pakistan Private Investment Initiative from the assessment because their primary objectives do not involved direct applications of a value chain approach.

Value Chain Analysis

Kaplinsky and Morris⁴⁵ define a value chain as “the full range of activities which are required to bring a product or service from conception, through the different phases of production (involving a combination of physical transformation and the input of various producer services), delivery to final consumers, and final disposal after use.” The term “value chain analysis” refers to a variety of related types of studies or analyses that examine value chains. At one end of the continuum are purely descriptive studies that map flows of products through the value chain and may include identifying actors, stages of value addition, margins, volumes, barriers, bottlenecks, etc. Most value chain analyses include some level of descriptive research. From a practical perspective, descriptive value chain research is a prelude to identifying inefficiencies, barriers/constraints, and opportunities faced by various value chain actors. The objective of these studies may be to enhance the overall efficiency of the value chain, which may then produce higher margins for value chain actors or lower prices for consumers. Other value chain development work may focus on improving outcomes for specific value chain actors.

Current value chain work in development may cover both of these practical applications. Examples include work that tries to connect primary producers to existing higher value markets, identifies or creates new markets, builds the capacities of value chain actors to meet market demands, or reduces inefficiencies along the value chain. Descriptive value chain analyses contribute to this practical work by identifying untapped opportunities and constraints (e.g., human or physical capacity, infrastructure, or enabling environment) to exploiting opportunities.

Value chain analysis is, however, only a development tool. The purpose of this analysis is to document the way EGA projects have used the tool to tease out conclusions about substantive differences in approaches, and to make recommendations about indicators relevant to comparing the effectiveness of alternative applications of the value chain approach under a variety of situations and contexts.

⁴⁵ Kaplinsky, Raphael and Morris, Mike. (2001). A handbook for value chain research. Prepared for the IDRC. Downloaded from <http://www.value-chains.org/dyn/bds/docs/424/Value%20Chain%20Handbook%20Kaplinsky.pdf>

PURPOSE

As part of its learning agenda, the EGA office commissioned Management Systems International's Monitoring and Evaluation Program (MEP) to assess the relative effectiveness of projects' approaches to value chain development. The analysis will also examine the actual and potential complementarities between value chain development and policy projects to determine the extent to which policy projects do or can contribute to the effectiveness of value chain development work. The results of the analysis will help USAID design more effective value chain projects as well as an integrated portfolio that addresses the range of constraints and opportunities in supported value chains.

The value chain assessment consists of two distinct phases. In Phase I, MEP will focus on scoping and planning. In particular, the assessment team will:

- Document differences in value chain approaches employed by USAID-funded value chain projects in Pakistan;
- Identify intersections between USAID-funded value chain and policy projects;
- Develop a taxonomy of value chain approaches; and
- Craft a set of common indicators with which to compare effectiveness across all USAID/Pakistan-funded value chain projects.
- Phase II will assess the relative effectiveness of value chain approaches. In particular, it will:
 - Assess the effectiveness of each project in terms of the common indicators identified in Phase I, and extract lessons for how best to design and conduct value chain development work to improve project effectiveness; and
 - Examine the extent to which USAID-funded policy reform work does or can contribute to effectiveness in value chain development.
- Annex 1 contains the project summary for the EGA Value Chain Meta-Analysis.

METHODOLOGY

Phase I relied entirely on interviews with stakeholders associated with each of the seven projects covered in the assessment (see Table 2), and a review of project documents. Between June 24 and June 28, 2013, a team of three MEP staff⁴⁶ met in Islamabad with key personnel⁴⁷ from five of the seven projects.⁴⁸ Also, during that week, the team conducted telephone interviews with personnel from the Firms and Dairy projects which are based in Lahore. Table 2 summarizes the individual interviews the team conducted.

TABLE 2: INDIVIDUAL INTERVIEWS

Date	Project	Personnel
June 24, 2013	Entrepreneurs	Susan Slomback, Chief of Party Daniel Lee, Deputy Chief of Party Iftikhar Ur Rahman, Strategic Planning Advisor Imtiaz, Monitoring and Evaluation (M&E) Specialist
June 25, 2013	Pakistan Trade Project	Hussan Bano, Deputy Chief of Party
	Agribusiness Project	Shad Muhammad, Chief of Party Michael Schwartz, Deputy Chief of Party Inamullah Khan, M&E Specialist
June 27, 2013	Firms Project	Donald Hart, Chief of Party Mehboob Khan, Component Leader Ihsan ul Haq Qazi, Office Director
	Balochistan Agriculture Project	David Doolan, International Project Manager Ahmed Jan Essa, Deputy Chief of Party
June 28, 2013	Pakistan Strategy Support Project	Stephen Davies, Chief of Party
	Dairy Project	Hassan Goreja, M&E Manager

⁴⁶ Douglas Krieger, MSI Technical Director; Sarah Azmat Zaidi, MEP Evaluation Specialist; and Tariq Husain, MEP Director of Evaluation.

⁴⁷ The MEP team met stakeholders from Agribusiness Project, Entrepreneurs, Balochistan Agriculture Project Pakistan Strategy Support Project and Pakistan Trade Project.

⁴⁸ The five value chain projects include: Firms Project, Entrepreneurs, Dairy Project, Agribusiness Project and Balochistan Agriculture Project. The two policy projects are Pakistan Strategy Support Project and Pakistan Trade Project.

The team also collected and reviewed project documents. The lists key documents referenced in this report are included in the annexes.

The annexes contain the interview guides for value chain and policy projects. Prior to each interview, the assessment team customized the guides by adding information from the document review to contextualize the interview and identify project-specific questions and issues.

The team determined that the methodology could have produced results that reflected projects' planned applications of value chain approaches and not necessarily their actual implementation. Project agreements, progress reports, and implementation plans usually describe planned approaches but rarely reflect on the limitations of a particular design or how the project adapted its approach to the realities of the operating environment. The interviews with project staff served to ameliorate this limitation to some extent. The interviews gave the team the opportunity to ask detailed questions about actual implementation and the rationale for a particular approach.

The nature of the data did not lend itself to rigorous qualitative analysis methods. The reports' authors drew on data from document reviews and interviews to compile descriptions of projects' approaches to value chain work.

FINDINGS

Findings for this assessment consist of seven detailed project profiles. The profiles emphasize identifying the dimensions of each project's work on value chain development. These include the project's objectives, focus value chains and beneficiaries, entry point(s) in the value chain, and specific activities the project conducts to develop value chains. The subsequent conclusions section summarizes findings by creating a taxonomy of approaches organized around the dimensions identified in the findings section. The recommendations section proposes indicators of effectiveness that will guide Phase II of the assessment.

Findings – Agribusiness Project

The five-year (November 2011 through November 2016) Agribusiness Project is implemented by the Agribusiness Support Fund (ASF) through a \$89.4 million cooperative agreement with USAID.⁴⁹ The project utilizes a value chain approach to the extent that it conducts analyses to identify agricultural sub-sectors or products with potential for competitive growth, and works with selected actors within these value chains to address constraints and capitalize on opportunities.

Project Objectives, Focus Beneficiaries, and Activities

The Agribusiness Project aims to “support improved conditions for broad-based economic growth, create employment opportunities, and contribute to poverty alleviation by increasing the competitiveness of horticulture and livestock value chains.”⁵⁰ It plans to achieve these goals by:⁵¹

1. Strengthening capacity in horticulture and livestock value chains to increase sales to domestic and foreign markets;
2. Strengthening the capacity of smallholder farmers and farmer enterprises to operate autonomously and effectively; and
3. Increasing agriculture efficiency and productivity through adoption of new farming techniques and technological innovation among selected beneficiaries.

The project analyzed 16 products to identify those with the greatest potential to contribute to these goals and objectives.⁵² Near the end of its second year, in consultation with USAID, it focused remaining activities on seven value chains – apricots, bananas, red chilies, citrus, meats, seed potatoes, and high value off-season vegetables. High value off-season vegetables, in particular, provide opportunities to benefit women and the project anticipates that 30 percent of its smallholder farmer beneficiaries will be women.⁵³

Geographically, the Agribusiness Project activities are spread across Punjab, Sindh, Khyber Pakhtunkhwa (KP) and Gilgit-Baltistan (GB). Livestock and horticulture sub-sectors are naturally geographically clustered, and the project focuses its activities in the cluster areas that have the greatest potential for competitiveness and growth.

⁴⁹ Interview with Mr. Shad Muhammad, Chief of Party, The Agribusiness Project. June 25, 2013

⁵⁰ ASF/USAID, “The Agribusiness Project- First Annual Progress Report (APR-I) November 10, 2011- November 9, 2012,” December 10, 2012.

⁵¹ Presentation titled, “The Agribusiness Project- Overview,” dated June 25, 2013.

⁵² ASF/USAID, “The Agribusiness Project- Annual Work Plan (Project Year 2) October 2012-September 2013,” December, 2012

⁵³ ASF/USAID, “Performance Monitoring Plan: USAID’s Agribusiness Project,” December 2011.

The project works directly with value chain actors of different sizes, capacities, and roles within the focus value chains. It tailors specific activities to the needs and opportunities associated with each actor and value chain. Activities include:⁵⁴

- **Improving agribusinesses' access to markets.** The project implements a variety of activities aimed at improving agribusinesses' access to markets. For products with export market potential, the project provides international technical assistance to help businesses (largely processors and exporters) secure the international certifications and compliance necessary to enter the European Union, United States, and other markets. These include Global Gap certification (European Union requirement), ISO (International Organization for Standardization) 22000, Hazard Analysis Critical Control Point certification (U.S. requirement), and a certification for social environment within the processing unit. The project also organizes exposure visits to international trade fairs and exhibitions and provides technical assistance in agricultural marketing and brand development to help establish market linkages for local products in high-price foreign markets.
- **Capacity building, training, and awareness.** To help agribusinesses improve their operations and competitiveness, the project trains external Business Development Service providers in value chain analysis and international quality certifications. It has also established Value Chain Platforms that bring all the specific value chain stakeholders together to develop value chain road maps, identify gaps, and agree to a common vision and strategy.⁵⁵
- **Increasing farm productivity and access to markets.** To increase on-farm productivity, the Agribusiness Project has established Kissan Field Schools (KFSs) based on FAO's Farmer Field School model. The project implements the KFSs through subcontracts with local non-governmental organizations (NGOs) and Rural Support Programs. Kissan Field Schools focus on disseminating productivity-enhancing technologies and practices to farmers organized in project-established Farmer Enterprise Groups (FEGs) of about 15 members, helping them understand and attain market requirements, and linking them to market opportunities. The project aggregates successful FEGs into clusters of about 100 members, and eventually aggregates the clusters into Farmer Business Associations (FBA) with an average of 700 members who can register themselves as businesses. The idea is to group the individual farmers so they can act as a medium-sized enterprise and take advantage of market opportunities.
- **Partnership Window Cost-sharing Grants.** The project provides various cost-sharing grant products for different players along the value chain such as agribusinesses, individual farmers and FEGs,⁵⁶ exporters, marketers, Business Development Service providers, universities and research institutions, transporters, processors, NGOs, Rural Support Programs, and small and medium enterprise (SME) associations. The grants aim to strengthen agribusinesses' domestic and international market linkages by focusing on the 'off-farm' aspect of the value chain such as marketing and processing.
- **Enabling environment.** The project is also lobbying through Value Chain Platforms to amend British-era agriculture laws such as the Marketing Act of 1935, Cooperative Societies Act of 1925, and Seed Certification Act of 1937 which have become outdated.

⁵⁴ ASF/USAID, "The Agribusiness Project- First Annual Progress Report (APR-I) November 10, 2011 - November 9, 2012," December 10, 2012

⁵⁵ Interview with Mr. Shad Muhammad, Chief of Party, The Agribusiness Project. June 25, 2013

⁵⁶ Small farmers are grouped together into FEGs and are given grants to support value added activities such as processing, grading, picking, storage and marketing. This activity supports quality production and procurement of quality inputs for enterprises. These are being implemented through NGOs, Rural Support Programs (RSPs) and other community organizations.

Value Chain Development Approach

The project implements a “holistic approach of value chain-wide interventions from production to marketing starting with assessment of the market demand, and then supporting producers/farmers/processors to produce the quality and quantity demanded in the market.”⁵⁷ The Agribusiness Project works along the entire value chain from production to marketing and with various actors from farmers to agribusiness entrepreneurs. At the farmer level, the project works with smallholder farmers with limited production capacity as well as medium and large farmers who may have substantial surpluses as well as processing capacity and well-established market connections. The project tailors its activities to the different needs and requirements of these various actors.⁵⁸

Findings – Entrepreneurs Project

Rural poor micro-entrepreneur producers in Pakistan face many obstacles to moving beyond subsistence and becoming viable microenterprises. These barriers include limited awareness of how markets work; lack of appropriate credit products; and, for women in particular, limited physical access to markets.⁵⁹ The implementing partners’ (Mennonite Economic Development Associates) previous work with handicraft value chains in Pakistan suggests that there are substantial domestic and international markets, but that microentrepreneurs often lack the information, mobility, and resources to access these markets profitably. The five-year (fiscal year (FY) 2009 through FY 2015) project was designed to address these issues for selected value chains.

USAID redirected project activities twice to respond to crises, which prompted changes in the project approach and geographic focus relative to the original work plan. From being focused on increasing incomes of (largely women) microentrepreneurs by developing specific value chains, the project shifted focus to livelihood rehabilitation in response to the massive internal displacement in 2009 following the conflict in the Swat Valley. Then, following the floods in mid-2010, the project expanded livelihood recovery (and asset replacement) activities to flood-affected areas. The project was not able to commit itself entirely to its original work plan activities and value chains until 2011.⁶⁰

Project Objectives, Focus Beneficiaries, and Activities

The objective of the Entrepreneurs project is to increase “the number of predominantly female micro enterprises and add value to their products and services by helping them reach higher value added markets.”⁶¹ The objective emphasizes the project’s focus on women and their particular needs. The project works in four value chains that are traditionally dominated by women and which have the potential for substantial growth and development. These include dairy, hand embellished fabrics, honey, and medicinal and aromatic plants.

The project approach is driven, to a large extent, by the particular needs of women who have limited mobility and thus access to markets. Consequently, the project focuses on creating market linkages and changing the terms on which women engage with markets. Market intermediaries (Female Sales Agents) are a key component of this transformation in market access. Market intermediaries are mobile women (usually) who can interact with markets and thus replace a (usually) male-dominated marketing mechanism. They may play multiple roles, including collecting and transporting products to markets, transmitting information on market demands to producers, and providing support services to build producers’ capacities.

⁵⁷ ASF/USAID, “The Agribusiness Project- Annual Work Plan (Project Year 2) October 2012-September 2013,” December, 2012

⁵⁸ Interview with Mr. Shad Muhammad, Chief of Party, The Agribusiness Project. June 25, 2013

⁵⁹ USAID/Pakistan. “Amended Activity Approval Document for Empowering Pakistan: Entrepreneurs,” July 31, 2008.

⁶⁰ Unpublished Final PPR Report, 2010.

⁶¹ USAID/Pakistan. “Amended Activity Approval Document for Empowering Pakistan: Entrepreneurs,” July 31, 2008.

The approach is market-driven in the sense that it identifies market demands (e.g., products, quality, packaging, etc.), transmits this information to producers, and helps producers develop the capacities to meet identified demands. The project also supports strengthening value chain actors such as Business Development Service providers and input suppliers who can help build the capacities of producers.

In addition to market intermediaries, the project looks for opportunities to strengthen other elements of the value chain to better serve the needs of producers. Examples include supporting private sector collection centers where producers can aggregate their products, add value, and link to buyers (e.g., provide a single source where buyers can interact with producers). With medicinal plants and hand embellished fabrics, these are collection centers that may provide services such as collection, quality control, drying, packaging, etc. With dairy, they take the form of chillers where producers can aggregate their milk for collection by a buyer. This backward investment by large, formal buyers is important to sustainability.

The project does not work directly on policy issues and has not collaborated with policy projects. Project staff reported encountering a district-level policy that restricted the sale of medicinal and aromatic plants across district boundaries. They will first try to solve the problem by working within the system (e.g., learning whether a permit is all that is required, and if so, how to obtain the permit). If that approach does not work, they may pursue more active advocacy for policy change.

Value Chain Development Approach

The project objective is to increase the incomes of specific (largely women with restricted mobility and access to markets) entrepreneurs. This objective determines important elements of the project approach including the emphasis on producers, the focus on creating market linkages, and the choice of value chains. The project approach focuses primarily on forming links between producers and markets. The market linkages serve two purposes. They provide an outlet for micro-entrepreneurs' products, and they transmit information about market requirements back to the producers. The project then helps develop producers' capacities to meet market requirements and build and manage their businesses as profitable enterprises. The project also seeks opportunities to (indirectly) leverage private sector investment in the value chain to facilitate project-supported entrepreneurs' access to markets. Examples include milk processors' backwards investments in the cold chain to create local milk collection centers, and joint investments by producers and buyers to establish aggregation, processing, and packaging centers for medicinal and aromatic plants.

Findings – Firms Project

Pakistan's economic growth rate has stalled since 2007. Pakistani firms are becoming increasingly uncompetitive, and consequently, export growth rates are falling. Reasons for the recent poor performance include few dynamic, growing enterprises; a weak manufacturing base; an undeveloped business service provider sector; low productivity; an unsupportive business enabling environment; and a widening trade deficit, particularly with Afghanistan.⁶²

To help address these issues, USAID/Pakistan awarded a four-year, \$92.3 million contract to Chemonics International to implement the Firms Project. In July 2010, USAID revised the project's goal in response to crises associated with violent extremism. In particular, it changed the project focus from improving productivity and competitiveness overall to promoting economic development – and thus employment and incomes – in vulnerable areas.⁶³

⁶² USAID/Pakistan. Activity Approval Document for "Productive Firms." July 14, 2008.

⁶³ Office of Inspector General. Audit of USAID/Pakistan's Firms Project. Audit Report No. G-391-12-001-P. November 3, 2011.

Project Objectives, Focus Beneficiaries, and Activities

The objective of the USAID Firms Project is to “improve government service delivery and develop dynamic, internationally competitive private sector SMEs to accelerate sales, investment, and job growth to undercut the basis of extremism.”⁶⁴ It pursues these objectives through two complementary components:

1. **Value Chain Development.** This component emphasizes technical assistance and training to strengthen SMEs as the foundation of a strong private sector. The project works in value chains that include fresh mango farming, mango drying, date farming and processing, peach farming, potato farming, agricultural implement manufacturing, fruit and vegetable pulping, knitted garment manufacturing, fisheries, marble and granite, and wool spinning/weaving.
2. **Business Enabling Environment.** Activities in this component build the capacities of governments (district, provincial, and national) to support SME-led economic growth. Activities at the national level focus on strengthening existing institutions such as the Small and Medium Enterprises Development Authority (SMEDA) to support SME development and the Board of Investment (BOI) to streamline business processes and investment. At the provincial level, the project works with the Provincial Reconstruction Rehabilitation and Settlement Authority (PaRRSA) in KP; the Investment Promotion Council (IPC) in KP and FATA, and the KP Chamber of Commerce and Industry (KPCCI) to develop strategies and promote investment and policy reform.

With the exception of relatively small activities in KP and FATA, the project works primarily with larger farmers and processors in its value chain development component. Project staff described the implementation strategy as a pilot model that selects beneficiaries with the size and capacity to successfully demonstrate value chain development strategies. In fact, project staff reported that participating SMEs must have the capacity to cover 50 percent of the cost of infrastructure and other project interventions, and have the capacity to meet the quality and production standards required to access high-end markets. Over the course of its implementation, it expects to engage more small farmers by linking them to markets through successful larger farmers or processors. Activities with larger farmers and processors include:

- Helping them develop linkages to domestic and foreign buyers, retailers, and wholesalers through visits, conferences, exhibitions, etc.;
- Providing loans to farmers/processors to upgrade infrastructure necessary to access international and domestic markets, designing and testing installations, and training beneficiaries in their use;
- Helping processors attain certifications and compliance necessary to access export markets, e.g., developing a sanitary and phytosanitary manual documenting compliance requirements for mango importing countries; assisting Infrastructure Upgradation Agreement (IUA) signatories⁶⁵ to obtain Pack House Hazard Analysis and Critical Control Points (HACCP) certification;
- Piloting new processes and markets;
- Training beneficiaries in improved production techniques and practices; and
- Facilitating linkages between project-assisted producers and buyers.⁶⁶

In KP and FATA, areas that USAID added to the project during the redirection, the project works more closely with small producer clusters. It helps producers identify opportunities; provides technical assistance

⁶⁴ USAID Firms Project. “Annual Progress Report – III: October 2011 – September 2012. October 2012.

⁶⁵ Fifteen farmers/processors who have received loans from the project to upgrade infrastructure for mango processing, storage, and export.

⁶⁶ USAID Firms Project. “Annual Progress Report – III: October 2011 – September 2012. October 2012.

and training to help them increase production and quality and meet market requirements; facilitates access to credit; trains producers in business skills; and links producers to specific processors/buyers.

In the Business Enabling Environment component, the project has collaborated with provincial governments to review and amend policies that affect value chain development. These include policies affecting agricultural marketing and livestock sector reforms. Project staff reported that they had collaborated with other USAID-funded projects to advocate for policy reform. One example was discussing reform of the Agriculture Marketing Act with the Balochistan Agriculture Project.

Value Chain Development Approach

The Firms Project works primarily at the upper end of the focus value chains, i.e., with larger farmers and processors. It also focuses largely on developing capacities to enter export markets. Using secondary data and analysis, the project identifies promising sectors and then works with progressive SMEs to access identified opportunities in these sectors. It specifically focuses on larger, progressive SMEs with the capacity to invest in value chain development as demonstrations. As the project matures and selected SMEs gain capacity and scale, the project expects benefits to trickle down to smaller farmers who will gain market access through the project-assisted SMEs.

Findings – Balochistan Agriculture Project

The Food and Agriculture Organization of the United Nations (FAO) implements the Balochistan Agriculture Project (BAP) in northwestern Balochistan. BAP grew out of the pilot Food Security/Poverty Alleviation in Arid Agriculture Balochistan Project, which began in December, 2004 in three districts of Balochistan – Mastung, Killa Saifullah, and Loralai. In January, 2009, USAID funded the follow-on United States Assistance to Balochistan Border Areas (USABBA) project to continue project activities through December, 2012 in the three original districts, and extend activities into two new districts – Quetta and Zhob. In July, 2012, USAID provided additional funding to extend project activities until 2015, and expand the project into three new districts – Musakhel, Pishin, and Sherani.

In the project's pilot phase, it focused largely on community development, capacity building, adaptive research to improve production technologies and practices, knowledge dissemination, supporting community organizations to implement productivity-enhancing crop and livestock activities, and marketing. As the project shifted into a post-pilot phase (USABBA) with some mature community organizations, marketing (e.g., helping community organizations identify and access markets) ascended in importance. Now, under BAP, the project places an even greater emphasis on capacity building, technological innovation and management, and promoting adoption of new and improved production and marketing practices that were researched and developed under prior phases.⁶⁷ Project activities, particularly with mature community organizations, increasingly focus on using value chain approaches to identify and access more remunerative markets for agricultural and livestock products.

Project Objectives, Focus Beneficiaries, and Activities

BAP's objectives are to significantly improve food and nutrition security and significantly increase incomes for about 50,000 poor rural households (i.e., 400,000 people and 20 percent of the rural population of the focus districts). The project focuses on poor, rural, agricultural households with a particular emphasis on women (e.g., 40 percent of community organizations are women-only organizations). The project engages women in activities tailored to women's roles in the male-dominated culture of Balochistan. These activities focus on food and nutrition security and income generation, with the expectation that increasing women's economic contribution to the family and household will empower both men and women.

⁶⁷ Food and Agriculture Organization, FAO/ Government Cooperative Program: Project Extension.

Agriculture and livestock form the basis of Balochistan's economy. Together, they account for an estimated 65 percent of the provincial Gross Domestic Product (GDP) and employ about two-thirds of the labor force. BAP, therefore, focuses primarily on increasing crop and livestock productivity as pathways to improved nutrition security and livelihoods.

BAP implements its activities within a community development context. It first establishes community organizations, builds their organizational capacities, and then engages them in a self-assessment and prioritization of community needs. When identified needs intersect with project-supported activities in crops, water, or livestock, BAP helps community organizations develop proposals for the required interventions and provides a cost-share. As the project has succeeded in boosting productivity, it has increasingly emphasized marketing to further enhance incomes. BAP's three anticipated outcomes reflect the project's market orientation and focus on value chain development:

1. Improved enabling environment for developing provincial agricultural policies and legal and regulatory frameworks, market-led and community-driven investments, strategies and processes, and women's empowerment in agricultural development;
2. Increased crop and livestock productivity and value of agricultural products produced, through improved technological innovation and management practices and improved community-based irrigation development and water management practices in project-assisted villages and their value chains; and
3. Small local agri-business enterprises established and market linkages strengthened for selected poor communities to increase sales of their surplus produce and improve competitiveness and sustainability of their value chains.

Value Chain Development Approach

BAP began working on marketing in its pilot phase by working with district governments to establish and promote *Eid* livestock *mandis* (markets). The intervention taught producers to raise and fatten livestock especially for the high value *Eid* market, established markets infrastructure in selected district centers, and promoted the markets to potential sellers and buyers. The intervention introduced producers to the concept of meeting market demands and established the infrastructure, support services, and volumes necessary to attract buyers to the producers, as opposed to producers incurring the cost and risk of transporting their animals to distant provincial markets.

BAP does not so much work on developing/strengthening value chains as it does helping producers (i.e., the project beneficiaries) understand the specific value chains in which they participate so they can benefit more from their participation. BAP's entry point in value chain work is thus project-supported producers. In broad strokes, BAP works with value chains in the following manner:

- Project staff and consultants conduct value chain analyses to identify promising opportunities for producers to capture more value from their participation. To date, BAP has conducted value chain assessments for 14 agricultural products, i.e., almonds, apples, apricots (fresh), apricots (dried), chilies, carrots, cauliflower, grapes, okra, potatoes, tomatoes, watermelon, live sheep and goats, and wool.⁶⁸ The assessments are specific to each of the project districts.
- If a project-supported producers' group is interested in pursuing identified opportunities, BAP will work intensively with the group to build their capacity to engage more profitably in the value chain. BAP support to the group may include:

⁶⁸ Project document.

- Providing training and access to service providers to build groups' organizational capacity to ensure transparency of accounts and ability to measure production and marketing costs – information that is critical to marketing decisions.
- Demonstrating, through market visits the demands of different markets and the interactions of various value chain actors so producers can begin forming their own networks and learn how to engage in the markets.
- Providing technical and other assistance to help producers meet market demands, add value, and increase efficiency/reduce costs.

The project is just beginning its enabling environment work. It is reviewing provincial policies related to agriculture and recommending reforms that could contribute to agricultural development. The Agricultural Marketing Act is one policy that has hampered project plans in livestock marketing in particular.

Example – Wool

A value chain analysis of wool in Balochistan estimated that relatively minor changes in wool handling could substantially increase incomes from wool. Pre-washing sheep prior to shearing, sorting, and grading the wool by body location and color, and machine shearing can increase production and value. Transporting wool to buyers in bales can reduce costs.

Interested project beneficiaries formed three Farmers' Marketing Collectives (FMCs) to focus intensively on increased incomes from wool. BAP staff worked with these FMCs to research, test, and disseminate technologies and practices for improving wool value. These activities included field testing a variety of shearing machines/technologies (adaptive research); training in pre-washing, sorting, and grading; a two-week trip to Australia (with 15 farmers, government staff, and project personnel) to observe first-hand the management of sheep for wool production; and a return visit from two Australian master shearers to teach shearing and grading practices in Balochistan.

Future planned work with the wool value chain will likely include deciding on a business model for shearing services – probably one based on promoting itinerant shearers as private-sector service providers to farmers; training women in sorting and grading; and identifying and testing high value niche markets for a portion (20 percent) of the wool.

Findings – Dairy Project

Pakistan, and especially the province of Punjab, has tremendous potential for milk production. Much of this potential, however, is untapped because a large share of production takes places on small farms with few animals; limited knowledge of, or access to, modern productivity-enhancing technologies or practices; and animals and breeds that are poorly suited to milk production. As a result, the growth in milk and meat production is not keeping pace with increases in demand.⁶⁹ To address productivity issues in Pakistan's dairy sector, USAID funded the three-year, \$14 million Dairy Project implemented by the Dairy and Rural Development Foundation (DRDF). The project began in July 2011 and will end in July 2014. Dairy Project activities focus on Punjab because it is the center of Pakistan's dairy sector. However, the project also has a limited footprint in the provinces of Khyber Pakhtunkhwa, Sindh, and Balochistan.

⁶⁹ Dairy and Rural Development Foundation (DRDF), "USAID-DRDF Dairy Project- Annual Progress Report, July 2011-2012," n.d.

Project Objectives, Focus Beneficiaries, and Activities

The Dairy Project aims to increase the incomes of rural households and create jobs in the project areas. It expects to accomplish these objectives by increasing livestock and dairy sector productivity. Project activities focus largely on small farmers. Fifty-six percent of anticipated farmer beneficiaries own two to three animals, and 41 percent have four to seven animals.⁷⁰ The project also focuses on women (31 percent of intended beneficiaries) who can potentially be trained as Livestock Health Workers (LHWs) or Livestock Business Entrepreneurs (LBEs). Finally, the project aims to train 2,100 entrepreneurially oriented, but unemployed, individuals as Artificial Insemination Technicians (AITs) or farm managers.⁷¹

At its core, the Dairy Project is a capacity building project focused almost exclusively on training. It concentrates its activities at the production end of the dairy value chain, i.e., input supply and production. Its specific objectives include:⁷²

1. Training and building the capacities of a sizeable number (8,700) of smallholder dairy farmers in best farming practices focusing on fodder and animal nutrition;
2. Improving dairy cattle breeds by promoting artificial insemination;
3. Developing human resource to provide basic veterinary services at the village level through trained women extension workers (5,000) capable of interfacing with rural women who rear and manage cattle stock; and
4. Promoting entrepreneurship through training and building linkages with input suppliers and clients.

Taken together, achieving these objectives will improve dairy productivity by increasing milk production (through better management practices and breed improvement) and reducing animal mortality (through better animal health services).

Value Chain Development Approach

The Dairy Project focuses its activities at the production end of the dairy value chain. Its training and support for LHWs, LBEs, and AITs improves smallholders' access to productivity-enhancing inputs and services (e.g., medications, feed supplements, artificial insemination services). Training to farmers and potential farm managers focuses on promoting on-farm technologies and practices to increase milk production.

The project does not specifically address elements of the dairy value chain beyond production, e.g., processing, transportation, marketing. Project staff reported that a well-developed market for milk already exists with the private sector operating village-level chillers for milk collection. The project has linked project-supported milk producers to large milk buyers/processors such as Nestle through these local collection centers, but this is not the project's primary focus. Overall, the Dairy Project strengthens one component of the dairy value chain (smallholder production) to work within the broader existing value chain.

⁷⁰ Dairy Project Annual Implementation Plan – Year Two August 2012.

⁷¹ Dairy Project Annual Implementation Plan – Year Two August 2012.

⁷² Dairy and Rural Development Foundation (DRDF), "USAID-DRDF Dairy Project- Annual Progress Report, July 2011-2012," n.d.

Findings – Pakistan Strategy Support Project

The Pakistan Strategy Support Project (PSSP) does not employ a value chain approach. Instead, it is a policy support project that can potentially address constraints identified by USAID-funded projects that work to develop or strengthen specific value chains. The International Food Policy Research Institute (IFPRI) implements the four-year, \$22.7 million project through a cooperative agreement with USAID. The project started in July 2011 and is scheduled to end in July 2015.

Project Objectives and Activities

The primary purpose of PSSP is to “contribute to pro-poor economic growth and enhanced food security through evidence-based policy reforms.” The project has a goal to “enhance agricultural growth by strengthening the nation’s capacity for developing, advocating and implementing effective policies.”⁷³

The project aims to achieve its purpose and goal through the following expected outcomes:⁷⁴

- Enhanced capacity among “knowledge providers” in academia and research to produce policy research results to fill knowledge gaps as needed, and to have positive impact on the design and implementation of the country’s development strategy.
- Enhanced capacity among policymakers and implementers to demand and utilize research results for policy dialogue and formulation. This includes working with provincial governments and departments who have revised roles under the 18th Amendment.
- A wider and well-connected “knowledge community” consisting of researchers, policymakers, civil society and private-sector stakeholders to back pro-poor policy dialogue and strategic prioritization at various governmental levels.

Policy research focuses on four basic priority areas:⁷⁵

1. **Macroeconomic markets and trade:** To date, work in this policy area has focused on exchange rates, energy subsidies, and agricultural productivity effects. In the future, the project plans to work with the Government of Punjab on policies to improve Pakistan-India trade. The project’s work in market regulations has focused on seed industry regulation, agriculture marketing regulation, and fertilizer policies.⁷⁶ Primary project outputs in this area include training Pakistani researchers in Computable General Equilibrium Modeling, developing a social accounting matrix,⁷⁷ drafting four Computable General Equilibrium studies for presentation, and publishing two studies on cereals production.^{78,79}

⁷³ International Food Policy Research Institute (IFPRI), “Pakistan Strategy Support Program-Cooperative Agreement AID-391-IO-00002; Annual Report July 2011 – September 2012 (FY 2012),” December 10, 2012

⁷⁴ International Food Policy Research Institute (IFPRI), “Pakistan Strategy Support Program-Cooperative Agreement AID-391-IO-00002; Annual Report July 2011 – September 2012 (FY 2012),” December 10, 2012

⁷⁵ International Food Policy Research Institute (IFPRI), “Pakistan Strategy Support Program-Cooperative Agreement AID-391-IO-00002; Annual Report July 2011 – September 2012 (FY 2012),” December 10, 2012

⁷⁶ Interview conducted with Chief of Party Pakistan Strategy Support Program, Stephen Davies, dated June 28, 2013

⁷⁷ International Food Policy Research Institute (IFPRI). September 2012. A 2007-08 Social Accounting Matrix for Pakistan. Working Paper No. 001

⁷⁸ International Food Policy Research Institute (IFPRI). October 2012. Supply and Demand for Cereals in Pakistan, 2010-2030. Working Paper No. 005

⁷⁹ International Food Policy Research Institute (IFPRI). October 2012. Review of Input and Output Policies for Cereals Production in Pakistan. Working Paper No. 006

2. **Water management and irrigation:** This policy area deals with governance of institutional and financial arrangements within the water sector. It includes experiments such as determining how farmers and/or heads of farmer organizations might react to better information on water availability. To date, work has focused on modeling exercises using the Indus Basin model managed by the Water and Power Development Authority. The project is also using the model to analyze operational rules for hydro-electricity in the Indus Basin. Specific outputs include: conducting a series of meetings, workshops and Netmap exercises to assess Pakistan's water management and irrigation situation; designing and implementing a detailed farm survey on irrigation management; assessing transfers of irrigation water to urban/industrial uses as a result of potential groundwater salinization in Pakistan's major cities; initiated a review of the scope of irrigation management reforms; analyzed operational rules options for Satpara Dam; drafted papers on the impacts of climate change on water and food security in Pakistan; and conducted an analysis of the impact of water management practices and climate change on the overall Pakistan economy.
3. **Poverty reduction and social safety nets:** This policy area explores opportunities for improving the focus of social safety net programs. A large scale rural household survey, and related reports,^{80,81} represents the primary activity in this area to date. Future activities include potentially evaluating safety net programs such as the Benazir Income Support Program.⁸²
4. **Agricultural production:** Current research in this policy area includes work on Bt⁸³ cotton,⁸⁴ bio-safety standards, and improving the biotechnology regulatory agency.⁸⁵ The project's primary outputs in this area include conducting an independent, third-party evaluation of the Pakistan Agricultural Research Council (PARC); advising on the design of governance and management systems at PARC and across the research system; conducting stakeholder consultations at the federal and provincial levels on promoting science and innovation in agriculture; submitting, with the head of the International Maize and Wheat Improvement Center (CIMMYT), a proposal to re-engage the Consultative Group on International Agricultural Research (CGIAR) in Pakistan at a larger scale than present; and developed a report on agricultural value chains.⁸⁶

In addition to working directly on policy-related research, PSSP conducts training and workshops to build the capacities of local researchers in government and non-government institutions. Specific capacity building activities include trainings and workshops, seminars and conferences, and a competitive grants program that has awarded grants to 40 researchers to conduct policy research.⁸⁷ The project also supports knowledge sharing networks to connect researchers, institutions, and policy makers with other researchers, civil society organizations, and private sector stakeholders⁸⁸ and disseminates research to provincial-level stakeholders through a network of universities throughout the country.⁸⁹

⁸⁰ International Food Policy Research Institute (IFPRI). November 2012. Pakistan Rural Household Panel Survey 2012 (Round I): Household Characteristics. Working Paper No. 008

⁸¹ International Food Policy Research Institute (IFPRI). November 2012. Pakistan Rural Household Panel Survey 2012 (Round I): Methodology and Community Characteristics. Working Paper No. 007

⁸² Interview conducted with Chief of Party Pakistan Strategy Support Program, Stephen Davies, dated June 28, 2013.

⁸³ A genetically modified variety of cotton that produces an insecticide internally.

⁸⁴ International Food Policy Research Institute (IFPRI). September 2012. Bt Cotton Adoption and Wellbeing of Farmers in Pakistan. Working Paper No. 004

⁸⁵ Interview conducted with Chief of Party Pakistan Strategy Support Program, Stephen Davies, dated June 28, 2013.

⁸⁶ International Food Policy Research Institute (IFPRI). December 2012. Food Value Chain Analysis. Working Paper No. 010

⁸⁷ Interview conducted with Chief of Party Pakistan Strategy Support Program, Stephen Davies, dated June 28, 2013

⁸⁸ International Food Policy Research Institute (IFPRI), "Pakistan Strategy Support Program-Cooperative Agreement AID-391-IO-00002; Annual Report July 2011 – September 2012 (FY 2012)," December 10, 2012

⁸⁹ Brochure provided by PSSP during Interview conducted with Chief of Party Pakistan Strategy Support Program, Stephen Davies, dated June 28, 2013.

Findings – Pakistan Trade Project

The Trade Project does not employ a value chain approach in its work. Instead, it focuses on policy reform and other support to facilitate trade between Pakistan and its neighbors. To the extent that EGA value chain projects select international markets, improving trade can potentially enhance results.

While Pakistan has made substantial gains in improving the trade and business environment, export growth declined in 2007 as imports increased. The increasing trade deficit put pressure on Pakistan's economy at a time when it could ill afford additional challenges. The Trade Project Year 1 Implementation Plan describes the problem in the following terms: "At a moment when Pakistan needs most to boost its exports, persistent trade constraints, limited trade relationships and a lack of diversified export capacity are limiting the impact of trade as an engine of sustainable economic growth."

To address these issues, USAID awarded a four-year, \$37.1 million contract to Deloitte Consulting, LLP. The project began in June 2009 with an anticipated end date in June 2013.

Project Objectives and Activities

The Trade Project provides technical assistance to the Government of Pakistan (GOP) and the private sector to "resolve trade challenges and support 'second generation' trade reform" with the goals of "encouraging improvements in customs and trade facilitation, eliminating anti-export bias in trade policy and enabling increased bilateral and regional trade with Pakistan's neighbors through the facilitation of trade and transit agreements and border improvements."⁹⁰

The project has two primary components:

Component 1 – Improved Trade Environment: Activities in this component are expected to increase the efficiency of trade (i.e., reduce the complexity, cost, and time required to move goods across borders) and thus contribute to increased trade volumes. To achieve this objective, the project provides technical assistance to help the GOP and private sector stakeholders build capacities and implement policy, regulatory, procedural, and other reform efforts that affect trade. Activities under this component include:

- Helped identify gaps between current Pakistani customs procedures and the provisions of the Revised Kyoto Convention to which Pakistan acceded in 2004. Results will contribute to developing a "reform roadmap";
- The Women in Trade Management Training and Mentorship Program which seeks, by providing internships, to increase opportunities for women in the trade sector;
- Research to raise public awareness and support fact-based decision making with regard to liberalizing trade between Pakistan and India;
- Training public and private sector stakeholders in practices to enhance exports of agricultural products;
- Developing an electronic trade portal to promote and facilitate trade between Pakistani firms and potential trading partners; and
- Increased the capacity of the Board of Investment by upgrading information and communication infrastructure which will facilitate future automation efforts and streamline trade and investment.

⁹⁰ Pakistan Trade Project. Annual Report: June 2011 - June 2012.

Component 2 – Cross Border Trade: Activities under this component directly address the constraints to trade and transit traffic with neighboring countries. They focus on establishing infrastructure, procedures, and other reforms to reduce transaction costs associated with moving goods across borders. Activities under this component include:

- Technical assistance to establish and strengthen Electronic Data Interchange capabilities between Pakistan and Afghanistan which will speed movement of trade goods between the two countries;
- Facilitating discussions between the GOP and Pakistani insurance companies to develop an acceptable mechanism for providing the insurance guarantees required to export goods to Afghanistan;
- Facilitating negotiations to locate import and export weighbridges at the Torkham border crossing with Afghanistan which will speed movement across the border;
- Assessing existing and proposed customs stations at Pakistan-India border crossings to identify infrastructure and procedural improvements that could increase the efficiency of trade across the border;
- Supporting Federal Board of Revenue/Customs efforts to develop a Risk Management System which will reduce lengthy cargo inspections and increase efficiency at border crossings; and
- Supporting work to develop a Single Business Window to simplify customs clearance and processing formalities and thus improve the efficiency of trade.

CONCLUSIONS

The conclusions in this phase of the value chain meta-analysis document substantive differences in the way EGA projects have employed value chain approaches and the conditions or contexts that may determine the choice of approach. Determinants of value chain approaches, and differences in approaches across projects, that emerged from the findings include:

1. The five projects that employ value chain approaches share at least two common design elements.
 - a. **Recognize and address limited business skills of value chain actors.** All five projects recognize that value chain actors in Pakistan have weak business skills, and address this deficiency in their implementation. The Firms, Dairy, and Entrepreneurs Projects train beneficiaries directly, although Entrepreneurs trains only its Female Sales Agents directly. The Balochistan Agriculture BAP Project, the Agribusiness Project, and the Entrepreneurs Project (for beneficiaries other than Female Sales Agents) all work through private sector Business Development Service providers and link them to project beneficiaries. Relevant skills include financial management, marketing, organization management and leadership.
 -
 - b. **Employ a market-led approach that assesses market opportunities and builds capacities of beneficiaries to meet market demands.** It is not surprising that the five projects share this approach since it underpins the value chain methodology as it is usually applied in development work.
2. **Specificity of the value chain.** A value chain may be very narrowly defined as the linkages between a particular geographically specific group of producers and the (limited) market opportunities available to them. At the other end of the spectrum, a value chain may be defined on the basis of connecting a sector (e.g. mango farmers) to a broadly defined market (e.g., export markets.) The five projects that employ the value chain approach define their respective value chains somewhat differently.
 - a. The Firms and Agribusiness Projects work largely at the sub-sector level (e.g., mangos, peaches, marble and granite, farm equipment, citrus) to build the capacities of the sub-sector (as represented by larger actors in the sector) to reach broadly defined markets (e.g., international/export). To a large extent, these projects anticipate that small producers will ride on the coattails of larger producers who successfully access markets, increase their marketing capacity, and seek to expand their supply chain.
 - b. The Agribusiness Project also works with more specific value chains in Gilgit-Baltistan. In this instance, it builds capacities of producers' clusters to sell to specific processors it has identified.
 - c. BAP and the Entrepreneurs Project work directly with small producers' groups and connect them to specific marketing opportunities and buyers (e.g., connecting a specific apple Farmers' Marketing Collective to a sales agent or supermarket chain.) The primary difference in the two approaches is that Entrepreneurs focuses its efforts on Female Sales Agents (one step up from producers) while BAP works directly with producers' groups.

- d. The Dairy Project largely takes it as a given that their farmer beneficiaries have access to markets for raw milk and focuses almost exclusively on increasing production to sell into the existing market.
3. **Value chain entry points.** The projects differ in their choice of value chain entry points (i.e., the stages of the value chain in which they actively intervene) and the activities they employ in their interventions.
- a. BAP and the Dairy Project are similar in the sense that they focus predominantly on increasing the productivity of small producers – their primary entry point. They both actively intervene in the input supply and services aspects of their respective value chains. The primary difference in their application of the value chain approach is that BAP extends its value chain intervention to identifying and accessing specific markets/buyers and building the capacities of producers’ groups to meet the demands of these markets, including solving problems with packaging, transportation, negotiation, etc. The Dairy Project, on the other hand, largely confines its activities to production and does not put much effort into linking producers to markets. Dairy Project staff contends that the market for raw milk is well developed and market access is not an issue for most producers. This is not the case for BAP producers.
 - b. The Entrepreneurs Project also works to increase the productivity of small producers. However, its primary entry point is forming market linkages through Female Sales Agents. The sales agents are largely responsible for developing value chain components backwards from market linkages while the Entrepreneurs Project focuses on training sales agents on market demands and facilitating linkages between sales agents and buyers.
 - c. While the Agribusiness and Firms Projects also work directly with small producers’ groups, they focus primarily on SMEs and larger processors and exporters as their primary entry point.
4. **Project objectives.** The value chain development approach adopted by each project reflects project objectives and characteristics of the focus beneficiaries. The Firms and Agribusiness projects’ objectives focus largely on broad sector-level outcomes. These include:
- a. Strengthening capacity in horticulture and livestock value chains to increase sales to domestic and foreign markets (Agribusiness Project);
 - b. Strengthening the capacity of smallholder farmers and farmer enterprises to operate autonomously and effectively (Agribusiness Project);
 - c. Increasing agriculture efficiency and productivity through adoption of new farming techniques and technological innovation among selected beneficiaries (Agribusiness Project); and
 - d. Improving government service delivery and develop dynamic, internationally competitive private sector SMEs to accelerate sales, investment, and job growth to undercut the basis of extremism (Firms Project).

In general, these projects focus work largely at the higher ends of their respective value chains (e.g., processors) and focus on broad markets rather than specific buyers. They also work on policy and institutional aspects of the value chains (e.g., improving the trade environment) and invest more in infrastructure (e.g., processing, freezing, cold chain) than do the projects that focus more on small producers.

BAP and the Entrepreneurs and Dairy Projects' objectives are to increase incomes of small, rural producers with little market experience. Consequently, these project work most closely with producers to increase productivity and then work on the market development end of the value chain as beneficiaries begin to generate meaningful surpluses.

5. BAP is the only project that applies the value chain approach within the context of a **community development** project. It focuses first on developing viable community organizations and then uses value chain analysis to improve access to markets when applicable to community priorities. The Agribusiness, Entrepreneurs, and Dairy Projects all work with producers' groups to some extent, but primarily to ensure sufficient volumes to facilitate marketing efficiencies. It remains to be seen whether the BAP approach that relies on community organizations to determine when they are ready to engage more actively in markets, and how, produces different results than projects that take the desirability of market access as a given.
6. **Policy.** BAP, the Firms Project, and the Agribusiness Project all identified the Marketing Act of 1935 as a constraint to developing their respective value chains. Collaboration to affect policy reform may be more effective and efficient than individual action since it would bring in a wider range of stakeholders. Furthermore, the research to support proposed reforms falls well within the mandate of the Pakistan Strategy Support Project. The Marketing Act is now The Provincial Marketing Act, so reform will have to occur at the provincial level. This may reduce the opportunities for collaboration somewhat, but there is still substantial provincial overlap between projects and the Pakistan Strategy Support Project works in all provinces.

Projects that focus on export markets (i.e., the Firms and Agribusiness Projects) could benefit from the work of the Trade Project. However, the more pressing immediate international market access issues seem to involve certification and compliance issues rather than the efficiency of cross-border movement. In the future, as more firms are able to meet the demands of international markets, border issues may become more important, and the Trade Project's work more relevant, to the other EGA projects.

Annex 4 summarizes key elements of the five projects' approaches to value chain development.

RECOMMENDATIONS

This analysis does not recommend actions. Instead, it recommends candidate indicators to guide the Phase II comparison of the relative effectiveness of value chain approaches. The indicators suggested in this section should provide a foundation for discussion with USAID to select a final set of indicators for Phase II. Phase II will not collect primary quantitative data from project beneficiaries. Instead, it will rely on secondary data, document review, and individual interviews to document effectiveness.

This section presents candidate indicators in quantitative terms. To the extent that projects, or secondary sources, can provide accurate and reliable quantitative measures of the proposed indicators, Phase II will rely on quantitative formulations of the indicators. However, in cases where consistent quantitative measures are not available, the Phase II analysis will have to rely on qualitative formulations. In the context of the proposed data collection methodology (i.e., document review and individual interviews), qualitative formulations are likely to be experts' assessments of the indicators triangulated with project-reported values and anecdotal or case studies. For example, if quantitative measures of productivity are not available, a qualitative formulation may be experts' opinions of the extent to which the project has increased productivity and incomes combined with project-reported results and case studies.

It is, perhaps, best to view the recommendations in this section not as indicators per se, but as suggested areas of inquiry for Phase II. They represent common anticipated outcomes for projects that employ value chain approaches. Quantitative evidence in each area is preferable but, given the limitations noted above and the relatively short timeframe for the assessment, the evaluator may have to rely on more general qualitative assessments of each "indicator." Phase II will draw from whatever data are feasibly available and triangulate across methods and data sources to the extent possible to produce reliable assessments of projects' effectiveness.

Because projects have not collected or analyzed quantitative data in a consistent or reliable manner, it will be difficult to compare effectiveness on the basis of quantitative indicators. The indicators suggested here are quantitative in nature, and the Phase II analysis will formulate quantitative indicators to the extent possible. However, it is likely that Phase II will rely largely on quantitative formulations of the indicators.

1. **Productivity and Income:** All of the projects seek to increase the incomes of focus beneficiaries, either by increasing production, facilitating more profitable engagement in markets, or both. Changes in production and income are thus natural common indicators on which to assess project effectiveness. Both, however, are difficult to measure accurately, and doing so quantitatively is beyond the scope of the Phase II activity. Whether these are feasible or not will depend on the quality of available quantitative measures or the feasibility of qualitative formulations (see discussion above). The Phase II analysis will first assess project-reported quantitative measures of changes in productivity and incomes. If they are sufficiently accurate and reliable, the analyst may decide to use them in the analysis. In the absence of feasible quantitative measures, however, qualitative or anecdotal evidence of changes in productivity or incomes may serve as useful indicators if they are sufficiently reliable and representative.
2. **New practices and technologies:** All of the projects rely to some extent on selected beneficiaries adopting new production or marketing technologies and practices – either to increase productivity, meet market demands, or both. The extent to which selected beneficiaries have adopted these technologies and practices may be a useful common indicator. Most projects should have quantitative data on the number of selected beneficiaries trained in new technologies or practices, and may have measured adoption as well.

3. **Quantity Sold:** The value chain work of all five projects aims to improve market access. Therefore, the percentage change in the quantity of products sold, either in total or to selected markets may also be a useful common indicator.
4. **Buyers:** All of the projects expect to link producers to new markets or buyers. Trends in the number of buyers to which producers sell, the quantity or percentage of their surpluses they sell to project-identified markets, or the geographic reach of their marketing activity may be useful indicators if data are available. Another potential indicator is access to new buyers, i.e., buyers or markets to whom beneficiaries have sold before.
5. **Women's Empowerment:** Since all of the projects focus on women to some extent, Phase II should include a common indicator of women's empowerment. Simple, but relatively meaningless, indicators include the number of women participating in the project. More nuanced indicators, if data are available, include sex-disaggregated measures of the previous indicators, or qualitative or anecdotal evidence of social or economic empowerment.

One challenge in identifying a standard set of indicators for this particular set of projects is that many work in the agricultural sector. Many external factors can affect agricultural production, and therefore the surpluses available to sell and prices. These factors will affect many of the proposed indicators independently of the effects of the project. Furthermore, some projects work in non-agricultural value chains, and even the agriculturally-focused projects work on different products in different regions. Therefore, the impact of external factors will not be uniform across supported value chains. This will make it very difficult to assess relative effectiveness across projects or value chains. The confounding effect of external factors is not unique to agricultural products, but it is probably more acute there than in other sectors.

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Annex IV: Individual Interview Guides

Interview Guide Value Chain Projects

Review project documents prior to the interview and answer the questions below to the extent possible.

1. What value chains does your project support?
 - a. Products
 - b. Beneficiaries
 - c. Geographic locations (of all value chain actors)
2. How or why did you select these value chains?
 - a. What were the criteria for selecting particular value chains (e.g., opportunities to focus on women, agriculture, etc.)?
 - b. If applicable: Within these criteria, how did you select particular value chains? Did USAID or others dictate the choice or express strong preferences or was it based on your analysis?
3. What are your objectives in working with these value chains? (Reference to PMPs and project documents)
 - a. Probe to understand whether objectives focus on individuals (e.g., producers) or more broadly on a sector.
4. How do you work with your value chains?
 - a. With whom do you work (e.g., producers, sales agents, markets, buyers, etc.)?
 - b. What specific activities do you conduct?
5. Summarize dimensions of the “approach” to ensure accuracy of understanding. Possible dimensions may include:
 - a. Objectives (increased producer income, strengthen sector, ...)
 - b. Beneficiaries (producers, ...)

Interview Guide Policy Projects

1. Introduction
 - a. Assessing USAID’s work using the value chain approach. Part of assessment will examine the extent to which coordinated policy work can support value chain development. Perhaps guide USAID in designing future coordinated programming.
 - b. Interested in intersection between value chain development and policy
 - i. Individual projects may identify policy constraints (local)
 - c. What are the intersections between USAID-funded projects with a policy focus and USAID’s value chain work?
2. Can you briefly describe the focus of your policy work and how you work?
 - a. What are your project’s objectives?
 - b. What are your projects’ activities?
3. To what extent do, or might, your activities support other USAID-funded projects?
 - a. Was it designed to directly support other projects – direct coordination or collaboration? Explain.
 - b. Do you interact with other projects in terms of coordinating complementary activities? Explain.
 - c. To what extent, if at all, do you think your activities might support development of value chains in agricultural products, meat, dairy, embellished fabrics, or medicinal and aromatic plants? Explain.

Annex V: Taxonomy of Value Chains

Project (Location)	Beneficiary Group(s)	Value Chain Approaches							
		Project Objectives	Assessing Market Opportunities	Specificity of Value Chain	Entry Points	Activities	Capacity Building	Community Development	Policy
Agribusiness Project (Punjab, Sindh, KP, GB)	<ul style="list-style-type: none"> - Farmers (small/medium/large) - Agribusiness entrepreneurs (small/medium/large) 	<ul style="list-style-type: none"> - Focuses on higher end of value chains - Focuses mostly on broad markets as opposed to specific buyers - Works on policy and institutional aspects of value chains - Invests relatively more on infrastructure as opposed to projects working with small producers 	<ul style="list-style-type: none"> - Carried out rapid market assessments before entering any value chain to determine market gaps and requirements 	<ul style="list-style-type: none"> - Operates at sub-sector level with larger players to reach broadly defined markets (international/export) - Benefits expected to trickle down to smaller players - Exception: In GB, project works with small producers' groups to sell to specific processors identified by the project 	<ul style="list-style-type: none"> - Focuses largely on increasing productivity of SMEs, large processors and exporters - Also works directly with some small producers' groups with aim of commercialization 	<ul style="list-style-type: none"> - Intervenes at input supply and services stage - Works with small producers' groups (in geographic clusters) to take advantage of market opportunities as a group and build capacity to form agribusiness associations - Helps producers who want to set up private businesses establish proper processes and procedures - Focuses on responding to the needs of processors, exporters and farmers to meet market requirements 	<ul style="list-style-type: none"> - Indirect training to beneficiaries through private sector business development service (BDS) providers <i>Includes:</i> - Capacity building of large producers on 'on-farm' and 'off-farm' (ex. certification, marketing, packaging) aspects of value chain to access international markets - Capacity building of BDS providers in value chains and certification - Capacity building of small producers to meet market 	No	<ul style="list-style-type: none"> - Identifies important policies that need to be formulated such as National Agribusiness Policy and Provincial Horticulture Policy - Identifies certain acts that need to be amended such as Act of Marketing 1935, Cooperative Act 1925 and Seed Certification Act 1937

Project (Location)	Beneficiary Group(s)	Value Chain Approaches							
		Project Objectives	Assessing Market Opportunities	Specificity of Value Chain	Entry Points	Activities	Capacity Building	Community Development	Policy
Entrepreneurs Project (Punjab, Sindh, Balochistan, KP)	- Micro entrepreneurs, predominantly women	- To increase incomes of small, rural producers with little market experience	- Carried out assessment of all four value chains to determine market gaps and requirements - Ensures product is in high market demand before investing in it	- Links small players (producers) to specific markets and buyers through female sales agents (FSAs)	- Focuses on market linkages through female sales agents - Increasing productivity of small producers	- Lead entrepreneurs are selected on basis of mobility and status in community They work with producers organized in clusters to increase their bargaining power and efficiency of market access - Facilitates links between producers and FSAs and FSAs and buyers - Also connects producers to large private companies - Key Facilitating Partners ensure quality and production meet market requirements - Buy-in is obtained from	demand - Direct training to FSAs on assessing market demand - Indirect training to beneficiaries through private sector business service providers	No	No

Project (Location)	Beneficiary Group(s)	Value Chain Approaches							
		Project Objectives	Assessing Market Opportunities	Specificity of Value Chain	Entry Points	Activities	Capacity Building	Community Development	Policy
						male family members to ensure sustainability			
Firms Project (Punjab, Sindh, Balochistan, KP)	<ul style="list-style-type: none"> - Small and Medium Enterprises (SMEs) - Small farmers in KP only 	<ul style="list-style-type: none"> - Focuses on higher end of value chains - Focuses on broad markets as opposed to specific buyers - Works on policy and institutional aspects of value chain - Invests relatively more on infrastructure as opposed to projects working with small producers 	<ul style="list-style-type: none"> - Gathers market-based secondary data and input/output requirements for specific value chains - Conducts meetings with sector specialists to identify gaps and market requirements - Conducts pilots with development hypothesis in collaboration with private sector 	<ul style="list-style-type: none"> - Operates at sub-sector level with larger players to reach broadly defined markets (international/export) - Benefits expected to trickle down to smaller players 	<ul style="list-style-type: none"> - Increasing productivity of SMEs, large processors and exporters, primarily - Works directly with small producers with aim of commercialization 	<ul style="list-style-type: none"> - Co-finances infrastructure investments with large producers - Small farmers are grouped into clusters so they can collectively supply quantities demanded by the market - Collaborating with Telenor on developing ICT tools for better market information and practices for farmers 	<ul style="list-style-type: none"> - Direct training to beneficiaries <i>Includes:</i> - Capacity building of large producers to access international markets (ex. certification acquisition and meeting production and quality standards) - Capacity building of small producers to meet market demand - Capacity building of SMEDA on providing demand-responsive services to SMEs 	No	<ul style="list-style-type: none"> - Working on agriculture, market liberalization policy and livestock policy for Sindh, Punjab, and Balochistan - Identifies outdated Marketing Act of 1935 as a barrier
Dairy Project (Punjab, KP,	- Dairy farmers (small/medium/large but	- To increase incomes of small, rural	- Designed to address productivity at	- Focuses on input supply and production	- Increasing productivity of (mostly) small	- Focuses almost entirely on capacity	- Direct training limited to increasing	No	No

Project (Location)	Beneficiary Group(s)	Value Chain Approaches							
		Project Objectives	Assessing Market Opportunities	Specificity of Value Chain	Entry Points	Activities	Capacity Building	Community Development	Policy
Sindh)	<p>primarily small)</p> <ul style="list-style-type: none"> - Unemployed men and women trained as artificial insemination technicians and Livestock Health Workers - Established entrepreneurs and unemployed but educated women trained as extension service providers 	producers with little market experience	the production end of dairy value chain to increase quantity of milk producers can sell in existing, and widely accessible, milk markets. Very little focus on value chain components beyond production	for (mostly) smallholder dairy farmers	dairy producers	<ul style="list-style-type: none"> building/ training - Intervenes at input supply and services stages - Links producers to processors when opportunity arises but not a major project focus - By-in is obtained from male family members to ensure sustainability for female producers w.r.t work 	<p>production</p> <p><i>Includes:</i></p> <ul style="list-style-type: none"> - Training for small, medium, and commercial farmers on production practices - Training for artificial insemination technicians, extension workers, and livestock health workers - Participants are provided with tool kits as part of training - All trainings have follow-ups 		
Balochistan Agriculture Project (Balochistan)	- Small Farmers	- To increase crop and livestock productivity, and thus incomes, of small, rural producers with little market experience	See: Community Development	- Works directly with small producers' groups helping them identify opportunities and build capacity to meet demands of specific buyers	- Works directly with community organizations and producers' groups - Collaborates with district governments on livestock markets and market	- Works primarily with community organizations which come together to become Farmers Marketing Collective for commercialization	- Training producers in productivity-enhancing technologies and practices. - Indirect training to marketing collectives through private sector	- Focuses on developing community organizations - Uses value chain analysis to improve market access based on community priorities put forth by community	- Maintains all outdated agricultural acts of British times should be amended such as Act of Marketing 1935 - Currently, reviewing

Project (Location)	Beneficiary Group(s)	Value Chain Approaches							
		Project Objectives	Assessing Market Opportunities	Specificity of Value Chain	Entry Points	Activities	Capacity Building	Community Development	Policy
					infrastructure	<ul style="list-style-type: none"> - Project assists beneficiaries identify and access markets and buyers - Producers gain first-hand knowledge of the market via market visits and meetings with buyers - Producers mostly work through middlemen 	business development service providers to build business skills and transparency	organizations	federal and provincial agricultural laws and analyze their strengths and shortfalls which will be shared with all stakeholders

Annex VI: EGA Meta-Analysis Phase II, Guidelines for Interviews with Key Stakeholders

Before the interview we must communicate the following:

“We work for Management Systems International (MSI), a USAID contractor that monitors and evaluates the work of various development projects in Pakistan. We are assessing the USAID Economic Growth and Agriculture Office’s approach to Value Chain Development projects in order to help them better understand what approaches are likely to work best in various contexts. As a knowledgeable and independent person or organization we value your input to our assessment. Your answers to a series of questions will enhance our understanding and analysis. Could you allow us to record our conversation to support our notes? Your answers will be strictly confidential and kept by MSI for data analysis purposes only. No participants will be identified by name in the report therefore your input will also be strictly anonymous. This meta-analysis is not an evaluation of the project, but an assessment of the effectiveness of USAID’s approaches to its value chain work in Pakistan.”

Questionnaire

0 Project’s Value Chain Approach

Prompts

<p>For IPs:</p> <p>0.1 Please describe how the project works?</p> <p>For other Stakeholders:</p> <p>0.2 Describe your understanding of how the project works and give some examples?</p> <p>Note: If s/he doesn’t know about the project’s value chain approach, the interviewer will provide a brief summary.</p>	<ul style="list-style-type: none"> • What are the key elements/characteristics of this value chain approach? • What are the objectives of the project? • Beneficiary groups <ul style="list-style-type: none"> ○ Farmers ○ Entrepreneurs ○ Processors ○ Community organizations ○ Scale: small/medium/large ○ Men/women/both ○ Unemployed people • Product area <ul style="list-style-type: none"> ○ Field crops/horticulture ○ Livestock/dairy/fishery ○ Honey/MAP ○ Manufacturing (HEF/jewelry) • High/low end of value chain • Local/export • Market assessment <ul style="list-style-type: none"> ○ Rapid ○ In-depth (secondary data/sector specialist/pilot studies) • Capacity building <ul style="list-style-type: none"> ○ Direct /Indirect ○ Onsite/offsite • Bottom-up/top-down • Market access <ul style="list-style-type: none"> ○ Direct ○ Indirect (intermediaries) • What are the main activities of this project’s value chain approach?
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1. Productivity and income

Prompts

<p>1.1 In your opinion, in what ways has the project changed beneficiaries'/ participants' productivity and income?</p>	<p>Income:</p> <ul style="list-style-type: none"> • Higher/ lower incomes • Higher/ lower costs • Higher/lower prices • More/fewer sales to the same buyer • More/fewer sales to new buyers <p>Productivity:</p> <ul style="list-style-type: none"> • More/ less production • Availability of inputs • Technology • Training • Output per area • Output per animal • Output per unit of time • Efficiency of labor allocation
<p>1.2 What factors affected the income and productivity potential of this value chain approach?</p>	<p>Internal Factors:</p> <ul style="list-style-type: none"> • The project's approach and management • Selection of value chain • Selection of beneficiaries • Training <p>External Factors:</p> <ul style="list-style-type: none"> • Availability of: <ul style="list-style-type: none"> ○ improved plant varieties or animals ○ agrochemicals, vaccines or medicines, advice on organic agriculture ○ labor (competition for labor from other activities) • Access to credit • Demand in final markets • Access to quality inputs • Alternative technologies • Improved practices • Market intelligence (seasonality of supply and demand, trends in domestic and international markets) • Location
<p>1.3 What factors could enhance beneficiaries' income and productivity?</p>	<p>Internal Factors:</p> <ul style="list-style-type: none"> • The project's approach and management • Selection of value chain • Selection of beneficiaries • Training

	<p>External Factors:</p> <ul style="list-style-type: none"> • Availability of: <ul style="list-style-type: none"> ○ improved plant varieties or animals ○ agrochemicals, vaccines or medicines, advice on organic agriculture ○ labor (competition for labor from other activities) • Access to quality inputs • Access to credit • Demand in final markets • Alternative technologies • Improved practices • Market intelligence (seasonality of supply and demand, consumer preferences, trends in domestic and international markets) • Location
1.4 Where else might this approach be effective in enhancing income and productivity?	<ul style="list-style-type: none"> • Physical geography/ topography • Political <ul style="list-style-type: none"> ○ Suitable trade policy ○ Stability • Economic <ul style="list-style-type: none"> ○ Available technology ○ Market intelligence ○ Links to existing producers and buyers ○ Market liberalization • Social/ Cultural norms
1.5 Where else might this approach NOT be effective in enhancing income and productivity?	<ul style="list-style-type: none"> • Physical geography/ topography • Political-lack of: <ul style="list-style-type: none"> ○ Suitable trade policy ○ Stability • Economic-lack of: <ul style="list-style-type: none"> ○ Available technology ○ Market intelligence ○ Links to existing producers and buyers ○ Market liberalization • Social/ Cultural norms

2. New Practices and Technologies

Prompts

2.1 In your opinion, what new production technologies have been introduced by this project?	<ul style="list-style-type: none"> • Productivity enhancing <ul style="list-style-type: none"> ○ improved inputs ○ integrated use of inputs • Mechanization
2.2 In your opinion, how has the project affected adoption of new technologies/practices?	<ul style="list-style-type: none"> • Factors affecting the acceptance/non-acceptance <ul style="list-style-type: none"> ○ Research backs up production technology ○ Demonstrations • Why acceptance/non-acceptance? • To what extent are the new technologies and practices appropriate to the context?

	<ul style="list-style-type: none"> • How have the new practices facilitated understanding market demand and the ability to meet it? • What changes in productivity have resulted from adoption of new production technologies? • Were new production technologies part of a development package? • Did the project improve outdated technologies? • Was it provided upon farmer's request?
2.3 What have been the outcomes of the introduction of new technologies and practices?	<ul style="list-style-type: none"> • Changes in income • Changes in productivity <ul style="list-style-type: none"> ○ Output per area cultivated/animal ○ Stocking rates ○ Outputs per input/cost • Changes in market knowledge • New marketing practices <ul style="list-style-type: none"> ○ sorting/classification, ○ packing, cooling, storing, ○ transporting and ○ exporting • Meet market demands • Access new markets
2.4 What factors could enhance beneficiaries' adoption of new technologies and market practices?	<ul style="list-style-type: none"> • Demonstration of: <ul style="list-style-type: none"> ○ Increased income ○ Increased productivity ○ Both • Dissemination of knowledge about: <ul style="list-style-type: none"> ○ Market needs (demands) ○ New production technologies ○ New market practices
2.5 Where else might this approach be effective in enhancing beneficiaries' adoption of new technology and market practices?	<ul style="list-style-type: none"> • Physical geography/ topography • Political <ul style="list-style-type: none"> ○ Suitable trade policy ○ Stability • Economic <ul style="list-style-type: none"> ○ Available technology ○ Market intelligence ○ Links to existing producers and buyers ○ Market liberalization • Social/ Cultural norms
2.6 Where else might this approach NOT be effective in enhancing beneficiaries' adoption of new technology and market practices?	<ul style="list-style-type: none"> • Physical geography/ topography • Political-lack of: <ul style="list-style-type: none"> ○ Suitable trade policy ○ Stability • Economic-lack of: <ul style="list-style-type: none"> ○ Available technology ○ Market intelligence

	<ul style="list-style-type: none"> ○ Links to existing producers and buyers ○ Market liberalization ● Social/ Cultural norms
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3. Quantity sold

Prompts

3.1 In your opinion, what factors associated with the project changed beneficiaries'/ participants' quantity sold?	<ul style="list-style-type: none"> ● Technology ● Marketing practices <ul style="list-style-type: none"> ○ sorting/classification, ○ packing, cooling, storing ○ transporting ○ exporting ● Market intelligence <ul style="list-style-type: none"> ○ seasonality of supply and demand ○ consumer preferences ○ trends in domestic and international markets ● Access to market ● Quantity sold to the existing buyers/ Emergence of new buyers ● Training
3.2 What factors could enhance beneficiaries' quantity sold?	<ul style="list-style-type: none"> ● Increase productivity ● Incentivize producers to meet market demand ● Improve market access ● Market intelligence provides: <ul style="list-style-type: none"> ○ Knowledge of buyer's needs ○ Seasonality of production of market demand ○ Basis for business plan development
3.3 Where else might this approach be effective in increasing quantity sold?	<ul style="list-style-type: none"> ● Physical geography/ topography ● Political <ul style="list-style-type: none"> ○ Suitable trade policy ○ Stability ● Economic <ul style="list-style-type: none"> ○ Available technology ○ Market intelligence ○ Links to existing producers and buyers ○ Market liberalization ● Social/ Cultural norms
3.4 Where else might this approach NOT be effective in increasing quantity sold?	<ul style="list-style-type: none"> ● Physical geography/ topography ● Political- lack of: <ul style="list-style-type: none"> ○ Suitable trade policy ○ Stability ● Economic- lack of: <ul style="list-style-type: none"> ○ Available technology ○ Market intelligence ○ Links to existing producers and buyers ○ Market liberalization ● Social/Cultural norms

4. New Markets/Buyers

Prompts

<p>4.1 In your opinion, in what ways has the project identified or improved access to new markets/buyers?</p>	<ul style="list-style-type: none"> • Dissemination of knowledge about: <ul style="list-style-type: none"> ○ Market needs (demands) ○ Improved products ○ Improved market practices • Market access <ul style="list-style-type: none"> ○ Direct/indirect ○ New/existing • Infrastructure/utilities <ul style="list-style-type: none"> ○ Storage/cooling facilities • Market research
<p>4.2 How can the project's approach be improved to better facilitate reaching new markets/buyers?</p>	<ul style="list-style-type: none"> • Improved market intelligence • Dissemination of knowledge about: <ul style="list-style-type: none"> ○ Market needs (demands) ○ Improved products ○ Improved market practices
<p>4.3 Where else might this approach be effective in enhancing beneficiaries'/participants' access to new markets/buyers</p>	<ul style="list-style-type: none"> • Physical geography/ topography • Political <ul style="list-style-type: none"> ○ Suitable trade policy ○ Stability • Economic <ul style="list-style-type: none"> ○ Available technology ○ Market intelligence ○ Links to existing producers and buyers ○ Market liberalization • Social/Cultural norms
<p>4.4 Where else might this approach NOT be effective in enhancing beneficiaries'/participants' access to new markets/buyers</p>	<ul style="list-style-type: none"> • Physical geography/ topography • Political-lack of: <ul style="list-style-type: none"> ○ Suitable trade policy ○ Stability • Economic-lack of: <ul style="list-style-type: none"> ○ Available technology ○ Market intelligence ○ Links to existing producers and buyers ○ Market liberalization • Social/ Cultural norms

5. Women empowerment

Prompts

<p>5.1 In your opinion, how has the project's approach changed women's participation?</p>	<ul style="list-style-type: none"> • Participation: <ul style="list-style-type: none"> ○ Increased ○ Decreased ○ Did not change • Focus on: <ul style="list-style-type: none"> ○ Women only ○ Both men and women ○ No women • Roles included: <ul style="list-style-type: none"> ○ Managers/ entrepreneurs
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	<ul style="list-style-type: none"> ○ Market intermediaries ○ Trainers ○ Backstopping/support ● Changed women participation in community based organizations ● Women participation more/less culturally accepted
5.2 In your opinion, how has the project's approach changed women empowerment?	<ul style="list-style-type: none"> ● Increased/Decreased ○ Self-esteem ○ Respect from males ○ Control over finances ○ Access to health and education ○ Mobility
5.3 How can the project's approach improve women's participation?	<ul style="list-style-type: none"> ● Employment opportunities for women ● Potential for women's professional growth ● Sensitize men in the VC about the potential benefits for their families having women involved in the VC
5.4 How can the project's approach improve women empowerment?	<ul style="list-style-type: none"> ● Foster women's professional growth in the VC (from laborers to managers) ● Create options for savings and encourage women to launch VC related businesses ● Provide counseling or workshops to families in which the spouses do not accept women's empowerment
5.5 Where else might this approach be effective in improving women's participation/empowerment?	<ul style="list-style-type: none"> ● Geographical ● Political ● Economic ● Social/Cultural norms
5.6 Where else might this approach NOT be effective in improving women's participation/empowerment?	<ul style="list-style-type: none"> ● Geographical ● Political ● Economic ● Social/Cultural norms

6.0 General question

6.1 In your opinion, how effective has the approach been and why?	<ul style="list-style-type: none"> ● What do you appreciate the most? And why? ● What would you change about the approach to make it more effective? And why? ● How would you make it more effective? And why? ● Why does this approach work in this area? ● What factors limit the effectiveness of this value chain approach in your area? And why?
6.2 What unforeseen events have affected the effectiveness of this value chain approach?	<ul style="list-style-type: none"> ● Natural disasters (drought, floods, earthquakes, landslides, plagues and diseases, etc.)

	<ul style="list-style-type: none"> • Security issues (social unrest, criminal activity, terrorism, counterinsurgency, etc.) • Economic issues (devaluation, inflation, etc.)
6.3 What other measures/indicators will you recommend to assess the effectiveness of the project's value chain approach?	
6.4 Is there anything you would like to say that we did not ask?	

At the end of the interview we must thank the interviewee:

“We thank you for your time and efforts to provide us with the information we need for our assessment of the Value Chain Development in EGA projects.”

Annex VII: List of Individuals and Agencies Contacted

Sr. #	Date	Name	Title	Location of Interview
1	5-Mar-14	Shad Muhamamd	Chief of Party	Islamabad
2	5-Mar-14	Inamullah Khan	M&E Specialist	Islamabad
3	5-Mar-14	Asim Mushtaq	Independent VC Expert	Islamabad
4	6-Mar-14	Abid Bukhari		Islamabad
5	7-Mar-14	Dr. Khalid Farooq	Seed Production Specialist	Islamabad
6	7-Mar-14	Dr. Arfan Yousaf	Professor (Vet. Department)	Rawalpindi
7	10-Mar-14	Dr. Saqib Arif	Senior Scientific Officer	Karachi
8	10-Mar-14	Dr. Mubarik Ahmad	Director General	Karachi
9	10-Mar-14	Muhamamd Saleem	President	Karachi
10	10-Mar-14	Shakeel Abro	Regional Coordinator (Sindh)	Karachi
11	11-Mar-14	Amneh Shaikh	Program Manager	Karachi
12	11-Mar-14	Dr. Viqar Hussain	Professor	Karachi
13	10-Mar-14	David Brunell	Independent VC Expert	Islamabad
14	10-Mar-14	Susan Slomback	Chief of Party	Islamabad
15	10-Mar-14	Dr. Shabbir Hussain	Implementing Partner	Islamabad
16	10-Mar-14	Shameem Akhtar	Implementing Partner	Islamabad
17	10-Mar-14	Daniel Lee	Deputy Chief of Party	Islamabad
18	11-Mar-14	Dr. Sobia Naheed	Deputy Chief of Party	Lahore
19	11-Mar-14	Ahmed Tahir	M&E Specialist	Lahore
20	11-Mar-14	Mudassar Safdar	Independent VC Expert	Lahore
21	11-Mar-14	Zaheer Abid	Independent VC Expert	Lahore
22	11-Mar-14	Dr. Ahmad Ali	Consultant	Lahore
23	12-Mar-14	Mr. Haqeeq Ahmed	CEO, Haqeeq Marble and Granite	Lahore
24	12-Mar-14	Mr. Amir Abdullah	Director, Sapphire	Lahore
25	13-Mar-14	Mr. Khalid Javed	Independent VC Expert	Lahore
26	13-Mar-14	Mr Imran Lateef	President and CEO	Lahore
27	13-Mar-14	Mr. David Doolan	Chief of Party	Lahore
28	13-Mar-14	Shaoukat Arain	Agriculture Expert (Trainer)	Hyderabad
29	13-Mar-14	Ghulam Sarwar Dars	Honorary Secretary	Hyderabad
30	13-Mar-14	Ghulam Sarwar Abro	Managing Director	Hyderabad
31	14-Mar-14	Sonnya Valencia	Chief of Party	Lahore
32	14-Mar-14	Mohammad Iqbal	Nat Post-Harvst	Lahore

Sr. #	Date	Name	Title	Location of Interview
			Manager, Advisor	
33	14-Mar-14	Asma Gulistan	Gender Specialist	Lahore
34	14-Mar-14	Wagar Ahmad	Head, Corporate Affairs	Lahore
35	15-Mar-14	Ghulam Ali Nizamani	Banana Grower	Hyderabad
36	17-Mar-14	Dr. Khair Muhamamd Kakar	Ph.D Wheat. (Consultant-Agriculture)	Quetta
37	17-Mar-14	Faiz Muhamad Kakar	Manager Balochistan Program	Quetta
38	17-Mar-14	Dr. Kalim Ullah	Veterinary Officer (Livestock)	Quetta
39	17-Mar-14	Tariq Malik	Plant Pathologist	Multan
40	17-Mar-14	Asma Sittar	M&E Officer, MEDA	Bahawalpur
41	18-Mar-14	Zahid Munir Alvi	Chief Director	Multan
42	18-Mar-14	Sayed Zahid Hussain Gardezi	President	Multan
43	18-Mar-14	Naveed Ahmad	Research Officer (Agriculture)	Quetta
44	18-Mar-14	Abdul Salam Baloch	Director Field Operations	Quetta
45	18-Mar-14	Muhamamd Ibraheem	Product Designer/Engineer	Quetta
46	12-Mar-14	Hadi Bux Leghari	Technical Manager	Sindh
47	20-Mar-14	Nawab Ali	Professor (Agriculture)	Peshawar
48	20-Mar-14	Muhammad Munir	Progressive Farmer	Peshawar
49	20-Mar-14	Abdul Wahab Khan	General Secretary and Bee Farmer	Peshawar
50	20-Mar-14	Khan Muhammad + 2	Sale agent, Head MAP collectors	Peshawar
51	21-Mar-14	Muhammad Awais	VC player: buyer of MAP	Peshawar
52	23-Mar-14	Grant Stephen Vinning	Intl. Marketing Specialist	Islamabad

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The Agribusiness Project

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- USAID's Agribusiness Project, The Agribusiness Project- First Annual Progress Report, November 2011, Islamabad
- USAID's Agribusiness Project, Agribusiness Project- Project Approval Document, August 2011, Islamabad
- USAID's Agribusiness Project, Performance Monitoring Plan- USAID's Agribusiness Project, December 2011, Islamabad
- USAID's Agribusiness Project, Annual Work Plan, 2011-12, Islamabad
- USAID's Agribusiness Project, Annual Work Plan, 2012-13, Islamabad
- USAID's Agribusiness Project, Interview notes-Agribusiness by Sara Azmat, MSI, Islamabad-August 2013

Quarterly Progress Reports

- USAID's Agribusiness Project, Quarterly Progress Report, January-March, 2012, Islamabad
- USAID's Agribusiness Project, Quarterly Progress Report, April-June, 2012, Islamabad
- USAID's Agribusiness Project, Quarterly Progress Report, July –September, 2012, Islamabad
- USAID's Agribusiness Project, Quarterly Progress Report, October-December, 2012, Islamabad
- USAID's Agribusiness Project, Quarterly Progress Report, January-March, 2013, Islamabad
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- USAID's Agribusiness Project, Quarterly Progress Report, July-September, 2013, Islamabad
- USAID's Agribusiness Project, Quarterly Progress Report, October-December, 2013, Islamabad

Balochistan Agriculture Project

- USAID, United States Assistance to Agriculture in Balochistan Border Areas- (USABBA - GCP/PAK/113/USA), Work Plan 2009, Quetta
- USAID, United States Assistance to Agriculture in Balochistan Border Areas- (USABBA - GCP/PAK/113/USA), Work Plan 2010, Quetta
- USAID, United States Assistance to Agriculture in Balochistan Border Areas-(USABBA - GCP/PAK/113/USA), Work Plan 2011, Quetta
- USAID, United States Assistance to Agriculture in Balochistan Border Areas- (USABBA - GCP/PAK/113/USA), Work Plan 2012, Quetta

Quarterly Progress Reports

- USAID, United States Assistance to Agriculture in Balochistan Border Areas- Quarterly Progress Report (October-December) 2010, Quetta

- USAID, United States Assistance to Agriculture in Balochistan Border Areas (USABBA)- Quarterly Progress Report (January to March) 2011, Quetta
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- USAID, United States Assistance to Agriculture in Balochistan Border Areas- Quarterly Progress Report (July-September) 2012, Quetta
- USAID, United States Assistance to Agriculture in Balochistan Border Areas- Quarterly Progress Report (October-December) 2012, Quetta
- USAID, United States Assistance to Agriculture in Balochistan Border Areas- Quarterly Progress Report (January-March) 2013, Quetta
- USAID, United States Assistance to Agriculture in Balochistan Border Areas- Quarterly Progress Report (April-June) 2013, Quetta
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- USAID, United States Assistance to Agriculture in Balochistan Border Areas- Quarterly Progress Report (October-December) 2013, Quetta

Dairy Project

- USAID Pakistan: Dairy Project, Annual Progress Report-1(July 2011 – July 31st 2012), Dairy and Rural Development Foundation (DRDF), Lahore
- Annual Implementation Plan, Dairy and Rural Development Foundation (DRDF), Lahore, 2012
- USAID-DRDF Pakistan- Small Holders Dairy Project Year 1 Annual Implementation Plan- Dairy and Rural Development Foundation (DRDF), Lahore, 2012

Quarterly Progress Reports

- DRDF, Dairy Project- Quarterly Progress Report; October-December 2011, Dairy and Rural Development Foundation (DRDF), Lahore
- DRDF, Dairy Project- Quarterly Progress Report, January–March 2012, Dairy and Rural Development Foundation (DRDF), Lahore
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- DRDF, “Dairy Project- Quarterly Progress Report, October-December 2013, Dairy and Rural Development Foundation (DRDF), Lahore

Annual Progress Reports

- Dairy and Rural Development Foundation (DRDF), USAID-DRDF Dairy Project- Annual Progress Report 2011-2012, Lahore
- Dairy and Rural Development Foundation (DRDF), USAID-DRDF Dairy Project- Annual Progress Report 2012-2013, Lahore

Entrepreneurs

Annual Implementation Plans

- USAID, Entrepreneurs, Annual Implementation Plan January-December 2012, Islamabad
- USAID, Entrepreneurs, Annual Implementation Plan, January-December 2013, Islamabad

Quarterly Progress Reports

- USAID Pakistan: Entrepreneurs Quarterly Performance Report, January-March 2012, Islamabad
- USAID Pakistan: Entrepreneurs Quarterly Performance Report, April-June 2012, Islamabad
- USAID Pakistan: Entrepreneurs Quarterly Performance Report, July-September 2012, Islamabad
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- USAID/Pakistan Firms Project, Quarterly Progress Report, Jul.–Sep., 2010, Lahore
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Pakistan Strategy Support Project

- USAID, Pakistan Strategy Support Project, Activity Approval Document, April 2011, Islamabad
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- USAID, Pakistan Strategy Support Project, Quarterly Progress Report, Jul. –Sep., 2013, Islamabad
- USAID, Pakistan Strategy Support Project, Quarterly Progress Report, Oct. –Dec., 2013, Islamabad

Pakistan Trade Project

- USAID: Pakistan Trade Project, Intra-Industry and Intra-Firm Trade and the Internationalization of Production: A Case of Pakistan and India in Certain Sectors-October, Islamabad, 2012
- USAID: Pakistan Trade Project, Quarterly Progress Reports (Year 1, 2009 to Year 4, 2012), Islamabad

Annual Progress Reports

- USAID: Pakistan Trade Project, Annual Progress Report 2010, Islamabad
- USAID: Pakistan Trade Project, -Annual Progress Report 2011, Islamabad
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Annex XI: Study Team Bios

Mr. Abelardo Rodríguez is an agricultural and natural resource economist, and a community economic development specialist with more than 25 years of experience in West Asia, North Africa and the Americas. His experience includes program design, implementation and evaluation of agricultural marketing, community governance of protected areas, rural development and research projects in tropical/subtropical areas and highlands. He worked for the International Center for Agricultural Research in the Dry Areas stationed in Pakistan, Syria, Peru and Egypt as Research Scientist, Regional Coordinator and International Facilitator. He has been a consultant to various rural development projects in Afghanistan and Pakistan (USAID), the Afghan National Risk and Vulnerability Assessment and the United Nations Office on Drugs and Crime. Mr. Rodríguez holds a PhD in Range Economics from Colorado State University and a Biology Degree from the National Autonomous University of Mexico.

Mr. Abdul Razzaq Saleemi is a value chain expert. He is an agriculturist by training with long standing field experience in community based development initiatives. His field of interests and capability combines project planning, project management, development, implementation and monitoring & evaluation, training of line departments, grass root level beneficiaries, organizing workshops/ seminars. He is currently a freelance consultant to several international and national economic development organizations, as technical advisor at International Relief & Development (IRD) Islamabad, Pakistan. He has over 37 years of experience in diverse institutional and geographic settings. He has worked on different sectors i.e., agriculture, livelihood, natural resource management and rural development. He has worked for most of the donor agencies active in Pakistan, federal and provincial governments. He has also worked in all the five provinces of Pakistan including FATA, and in Sudan and Nigeria. Mr. Saleemi holds a M.Sc. (Hons) in Agriculture from Agricultural University Faisalabad. Pakistan.

Mr. Ghazanfar Ali Khan Hoti is a full-time staff Senior Evaluation Specialist at MEP Evaluation. He has expertise in bank examining and project evaluations. He has managed and participated in several evaluations of USAID funded projects in Pakistan. Previously, he worked as a consultant with the Independent Evaluation Group of the World Bank in Washington DC. He holds a Master's in Public Administration (Economic Policy Management) and Master of Science (Operations Research) from Columbia University, USA.

Ms. Fatima Abbas is a full-time Evaluation Specialist at MEP. She has worked at national and international organizations, and commercial banks in Pakistan, Singapore, and Thailand. Her areas of research and policy analysis include poverty alleviation and aid governance across the sectors of health, energy, water and sanitation, education, gender and security studies. As part of her experience with MEP, Ms. Abbas has managed and participated in evaluations, special studies and assessments of USAID funded projects in Pakistan.