

10-ABI-514

12n-90744

**MID-TERM EVALUATION OF THE AGRICULTURAL
MARKETING IMPROVEMENT STRATEGIES PROJECT
(AMIS)**

Submitted to AID/S&T/RD

**Paul Farris
Harold Riley
John O'Donnell**

November 12, 1990

**MID-TERM EVALUATION OF THE AGRICULTURAL
MARKETING IMPROVEMENT STRATEGIES PROJECT**

(AMIS)

CONTENTS

Executive Summary

- 1.0 The AMIS Project**
 - 1.1 Background
 - 1.2 The S&T Contract with Abt Associates
 - 1.3 The Life of the Project Workplan

- 2.0 The Mid-Term Evaluation**
 - 2.1 Purposes
 - 2.2 The Evaluation Team
 - 2.3 Scope of Work
 - 2.4 Methods and Procedures

- 3.0 An Evaluation of Project Accomplishments**
 - 3.1 Summary Evaluation
 - 3.2 Rapid Appraisals
 - 3.2.1 Rapid Appraisal Methods
 - 3.2.2 Field Applications of RA
 - 3.3 Applied Research
 - 3.3.1 Mission Response
 - 3.3.2 Core Funded Support Activities
 - 3.3.3 AID Washington Buy-ins
 - 3.4 Pilot Innovations
 - 3.5 Networking and Dissemination
 - 3.6 Training and Institution Building
 - 3.7 Project Administration

4.0 Issues and Recommendations

- 4.1 Is the AMIS Approach to Agricultural Marketing System Development Still Relevant and Useful in the Context of AID Programming and Country Development Needs?
- 4.2 How Much Emphasis Should be Given to Defining the Private Sector and Public Sector Roles in Market Systems of Developing Countries?
- 4.3 Should AMIS Give Expanded Emphasis to Work on Agribusiness?
- 4.4 Should AMIS Continue to Promote and Contract for Rapid Appraisals Requested by AID Missions?
- 4.5 Should AMIS Project Personnel and AID Administrators Make a Renewed Commitment to Expand and Strengthen the Applied Research Component of the Project?
- 4.6 Should the Project Activity Directed toward Pilot Testing of Market System Innovations be Continued as Specified in the AMIS Contract?
- 4.7 What Combination of Dissemination and Outreach Activities will Make the Greatest Contribution to the Accomplishment of AMIS Project Goals?
- 4.8 Should there be Changes in the Administration of the AMIS Project?
- 4.9 What are the Implications of the AMIS Mid-Term Evaluation for Funding Support During Project Years Four and Five?
- 4.10 What Actions Should be Taken by AID to Ensure Effective Longer-Term Support for the Continued Development of Efficient and Progressive Agricultural Marketing Systems in AID Recipient Countries?

ANNEXES

- A Scope of Work for the AMIS Mid-Term Evaluation
- B The Evaluation Team -- Biographical Briefs
- C AMIS Evaluation Questionnaire Sent to Missions
- D Interview Guide and Summary of Visits in Four Countries
- E List of Individuals Interviewed by the Evaluation Team
- F Classification of AMIS Project Studies Conducted or in Progress as of August, 1990
- G List of AMIS Papers and Reports Reviewed by the Evaluation Team

EXECUTIVE SUMMARY

MID-TERM EVALUATION OF THE AGRICULTURAL MARKETING IMPROVEMENT STRATEGIES PROJECT (AMIS)

Project Purpose and Approach

The purpose of the AMIS project is to enhance the ability of USAID missions and host country institutions to design, implement and evaluate improvements in agricultural marketing systems. The long-term goal is to promote and support the development of more efficient, progressive and equitable agricultural marketing systems within a rapidly changing world environment. The project design was conceived within a "food system framework" and a strategic approach to the development of strong private sectors supported by appropriate public sector policies and programs.

Three sets of field-level activities were to be carried out: (1) Rapid appraisals to diagnose market system constraints, identify opportunities for market expansion, marketing efficiencies and policy reforms; (2) Applied research to deal in greater depth with perceived problems and the design of interventions to promote market system development; (3) Pilot innovations to assist country-level implementation of marketing improvements. At the AID/W level the primary task would be to strengthen the conceptual and operational underpinnings for the field-level activities while networking with other S&T market related projects.

The Contract

The AMIS project contract was awarded to Abt Associates. Sub-contractors are The Postharvest Institute for Perishables at the University of Idaho and the consulting firm, Deloitte, Haskins and Sells. The five-year work plan was initiated in FY88. The level of funding was \$8.6 million with S&T providing \$2.4 million in core funding and a \$6.2 million ceiling for buy-ins.

The Mid-Term Evaluation

The purposes of the mid-term evaluation were to assess progress in achieving project objectives and to determine the types

of activities that would most effectively achieve the overall goals of the project in the two years remaining. Particular attention was given to the effectiveness of the project in assisting host countries to identify and solve current and emerging marketing problems. The evaluation was also concerned with the effectiveness of AMIS in generating knowledge and employing approaches that would be broadly applicable to marketing problems worldwide.

The evaluation was carried out by a team composed of Paul Farris, Purdue University, Harold Riley, Michigan State University, and John O'Donnell, S&T/HR. The team carried out interviews with the AMIS project officer in S&T, the AMIS project staff at Abt Associates, and AID/W bureau staff who were directly involved in buy-ins to the AMIS project. Two members of the Evaluation Team, Farris and Riley, made field visits to Senegal, Niger, Cameroon and Tunisia. Questionnaire responses were received from seven additional country missions where the AMIS project had provided services. In addition the Evaluators received briefing materials prepared by AMIS staff including fact sheets on 32 buy-ins and copies of reports and publications prepared to date.

Summary Assessment

At mid-term AMIS is engaged in a diverse set of activities heavily oriented towards rapid appraisals and short-term assistance to AID missions, mainly in Africa, Asia and the Near East. The RAs have been clustered in three problem areas: commodity subsystem development; promotion of agribusinesses, especially in export marketing; and parastatal restructuring.

The Contractor has made commendable progress in elaborating operational guidelines for the conduct of rapid appraisals and is in a position to deliver very useful publications on RA methods as the project continues towards completion.

The AID missions have been satisfied with the AMIS field work. The results have been relevant and directly useful in country-level programming.

The AMIS core staff have made substantial contributions to the development of a conceptual framework and a strategic approach to actions supporting agricultural marketing programming in two AID regional bureaus. The background papers, the AMIS staff consultations and direct participation in seminars has advanced the acceptance of a strategic "food system approach" to the diagnosis of marketing problems, the identification of needed policy changes, the design of improved institutional arrangements and the implementation of market reform programs.

There has been a notable lack of mission requests for in-depth and longer-term applied research buy-ins to AMIS. Conse-

quently, AMIS has made limited progress in arranging for the five applied research activities specified in the project work plan. There has been a similar lack of mission demand for pilot testing of marketing innovations, although AMIS buy-ins are providing opportunities for monitoring the privatization of the fertilizer distribution system in Cameroon, follow-up assistance for the development of a seed industry in Nepal, a grain market liberalization effort in Tunisia, an agricultural exporting activity in Bolivia, and the establishment of an improved market information program in Kenya.

At mid-term the AMIS project is lagging behind in the delivery of core-funded outputs including case studies, the dissemination of papers and reports on RAs, and in the building of country-level capacity to diagnose marketing problems and to design and implement market system improvements. This is partly due to the heavy workload required by more than 30 mission and AID/W buy-ins.

Overall the AMIS project got off to a good start and has achieved substantial accomplishments in relation to the opportunities afforded by the heavy reliance on funding support from buy-ins. The core professional staff has established a reputation for quality work that is useful to AID both in AID/W and field missions. There is still time during the life of the project to make adjustments that would reinforce contributions to the building of country-level institutional and human resource capacity to effectively strategize and carry forth market system development programs. Also, of considerable importance will be the papers and final reports synthesizing the experience from AMIS and other AID projects. These high priority adjustments will give AMIS staff an opportunity to build on lessons learned and to further elaborate a conceptual framework and operational guidelines useful to AID and developing countries.

Issues and Recommendations

(1) *Is the AMIS Approach to Agricultural Marketing System Development Still Relevant and Useful in the Context of AID Programming and Country Development Needs?*

The "food system framework" and the strategic approach elaborated in the AMIS papers delivered to the Africa and Asia/Near East Bureaus, along with basic materials in the Rapid Appraisal guideline documents provide highly relevant and useful inputs to AID programming. The specific programs to fit individual country needs can be supported by the application of operational procedures being developed and tested through the AMIS project and other S&T projects dealing with agricultural policy and marketing problems.

The AMIS project should receive strong support from AID during the remaining life of the existing project. The AMIS workplan should be adjusted to reflect the experience of the past three years and the constraints of the opportunities afforded by the combination of core funding and buy-ins.

(2) ***How Much Emphasis Should Be Given to Defining the Private Sector and Public Sector Roles in Market Systems of Developing Economies?***

There has been an emphasis in many developing countries on decreasing the role of government and transferring functions of parastatals to the private sector. But as direct government interventions are reduced there arises an increasing need for public sector facilitating services, infrastructure investments and regulations that will stimulate and support the development of an efficient and progressive private sector.

We recommend that AMIS give particular attention to the further development of strategic approaches and the sequencing of specific actions that can bring about more productive private sector oriented agricultural marketing systems. The approaches and actions should be appropriately adjusted to the conditions in countries at different levels of development. Further elaboration of operational guidelines for sorting out and defining the changing roles of public and private sectors should be a continuing priority of the AMIS project.

(3) ***Should AMIS Give Expanded Emphasis to Agribusiness Development?***

The growth of agribusiness capabilities is of central importance in the development of agricultural marketing systems as private firms undertake the necessary functions to achieve more productive commodity systems that can compete in both domestic and export markets.

In looking ahead for the AMIS project the Team weighed the relative merits of enlarging the role of agribusiness within AMIS or alternatively establishing a new and separate S&T project to address Agency agribusiness needs. As the foregoing discussion points out we view agribusiness as a vital element of the overall agricultural marketing system which is best dealt with within the larger "system" context. Thus, it seems to make more sense to expand the agribusiness component in AMIS rather than to initiate a new, more narrowly focused project.

(4) Should AMIS Continue to Promote and Contract for Rapid Appraisals Requested by AID Missions?

During the first three project years AMIS staff have conducted a large number and wide variety of RAs. During the remaining years in the project AMIS should shift relative emphasis away from conducting RAs with core staff and towards the development of in-country capabilities to design and carry out RAs and follow-up applied research. This shift in emphasis can be facilitated by greater use of qualified, non-core, short-term consultants and the ready availability of AMIS publications on rapid appraisal and applied research methods. AMIS core staff should give high priority to further refinement of publications and related training materials on RA methods and to the synthesis of lessons learned from this project activity.

(5) Should AMIS Project Personnel and AID Administrators Make a Renewed Commitment to Expand and Strengthen the Applied Research Component of the Project?

Mission demand for applied research buy-ins has been limited. During the remainder of the project we recommend the following: (a) Completion of the core-funded case studies already planned; (b) Expand research on topics of regional and sub-regional importance. The AFR/SWA buy-in on livestock marketing is an example of the type of work that builds on country-level studies. Funding support could be a combination of regional, mission and AMIS core; (c) Promote a limited number of mission buy-ins for applied research that provides longer-term AMIS involvement in monitoring marketing system reforms and/or in helping design applied research activities to be carried out by a local agency or professional consulting firm; (d) Consider arrangements for additional university faculty and graduate student inputs into AMIS applied research activities.

(6) Should the Project Activity Directed Toward Pilot Testing of Market System Innovations be Continued as Specified in the AMIS Contract?

Because of some inherent problems in preparing a well documented inventory of successful market system innovations, we recommend the following adjustments in the pilot innovation activity: (a) Shift efforts from the preparation of a publishable "inventory of market system innovations" to the preparation of a well documented set of case studies on a more limited number of cases prepared by qualified marketing specialists; (b) Follow up on a small sub-set of existing

opportunities where market system changes are being undertaken following AMIS RAs.

(7) *What Combination of Dissemination and Outreach Activities Will Make the Greatest Contribution to the Accomplishment of AMIS Project Goals?*

The AMIS workplan for the remainder of the project calls for increased emphasis on report writing and the drawing together of lessons learned from field experience. This should be accompanied by seminar presentations at both the AID/W and the field levels. Field level seminars should include return visits to present and discuss the results of RAs with mission staff and key personnel in the public and private sectors. Multi-country seminar/workshops should also be attempted with collaboration from other S&T marketing related projects. The target groups for seminars would be developing country professionals. Carefully prepared training materials could be used by mission staff and host country professionals in follow-up within country training.

The AMIS staff and the AID project manager should take immediate steps to lay out detailed plans for completing publications, conducting seminars and disseminating published reports to a broad group of professionals, both inside and outside of AID.

(8) *What are the Implications of the AMIS Mid-Term Evaluation for Funding Support During Project Years Four and Five?*

The AID and Abt project managers should prepare a work plan and project budget that reflects the need for core funding to support the pattern of activities that the Evaluators have recommended for Project Years Four and Five. This should be submitted to and discussed with S&T administrators to arrive at a budget level that takes into account the trade-offs between a continued high level of mission buy-ins and the recommended synthesis and knowledge building activities that will best meet project objectives given existing funding constraints.

(9) What Actions Should be Taken by AID to Ensure Effective Longer-term Support for the Continued Development of Efficient and Progressive Agricultural Marketing Systems in AID Recipient Countries?

Based upon the apparent long-term nature of market system development and the slow progress being made in many countries, it is recommended that action be taken to plan a five-year extension of the AMIS project with modifications reflecting the mid-term evaluation and similar assessments of other marketing related projects supported by the S&T and regional bureaus.

/ /

**MID-TERM EVALUATION OF THE AGRICULTURAL
MARKETING IMPROVEMENT STRATEGIES PROJECT**

(AMIS)

1.0 THE AMIS PROJECT

1.1 Background

The Agricultural Marketing Improvement Strategies Project (AMIS) was designed to build on the foundation developed during the life of the Small Farmer Marketing Access project (SFMA) that was administered by the S&T Bureau from 1982 through 1985. Both projects were designed to improve the capacities of AID and host countries to diagnose agricultural marketing problems, to determine needed improvements and to promote implementation of marketing innovations. An evaluation team for SFMA recommended that a follow-up project should have a broader scope to address policy relevant issues within a food system framework as contrasted to the narrower focus on marketing problems directly impacting small farmers. It was also recommended that more attention be directed to further development of research methods and that closer linkages be established with other S&T projects relating to agricultural marketing issues. These recommendations were reflected in the AMIS project paper along with a provision that the project would be contracted to an outside institution. Cable responses from missions regarding AMIS indicated relatively greater interest in the Asian, Near East and African countries as compared to Latin American countries.

The AMIS project was authorized as a six-year effort with activities to be initiated in FY88. The approved level of funding was \$8.6 million with S&T providing \$2.4 million in core funding and a \$6.2 million ceiling for mission buy-ins.

1.2 The S&T Contract with Abt Associates

Abt Associates were awarded the AMIS project contract. The subcontractors were The Postharvest Institute for Perishables at the University of Idaho and the consulting firm, Deloitte, Haskins and Sells.

The contract work statement specified that "...the goal of the project is to improve the effectiveness and efficiency of agricultural marketing systems." --- "The purpose of the project is to enhance host country institutions ability to design, implement, and evaluate improvements for agricultural marketing systems. This purpose will be accomplished through improved agricultural marketing strategies as designed for and implemented in developing countries."

The three sets of field-level activities that were to be carried out were as follows:

- Rapid Appraisals to diagnose market system constraints, identify opportunities for market expansion, marketing efficiencies, and policy reforms.
- Applied Research to deal in greater depth with perceived problems requiring more analysis than is normally accomplished with a rapid appraisal.
- Pilot Innovations to assist country-level implementation of marketing improvements identified through rapid appraisals and/or applied research.

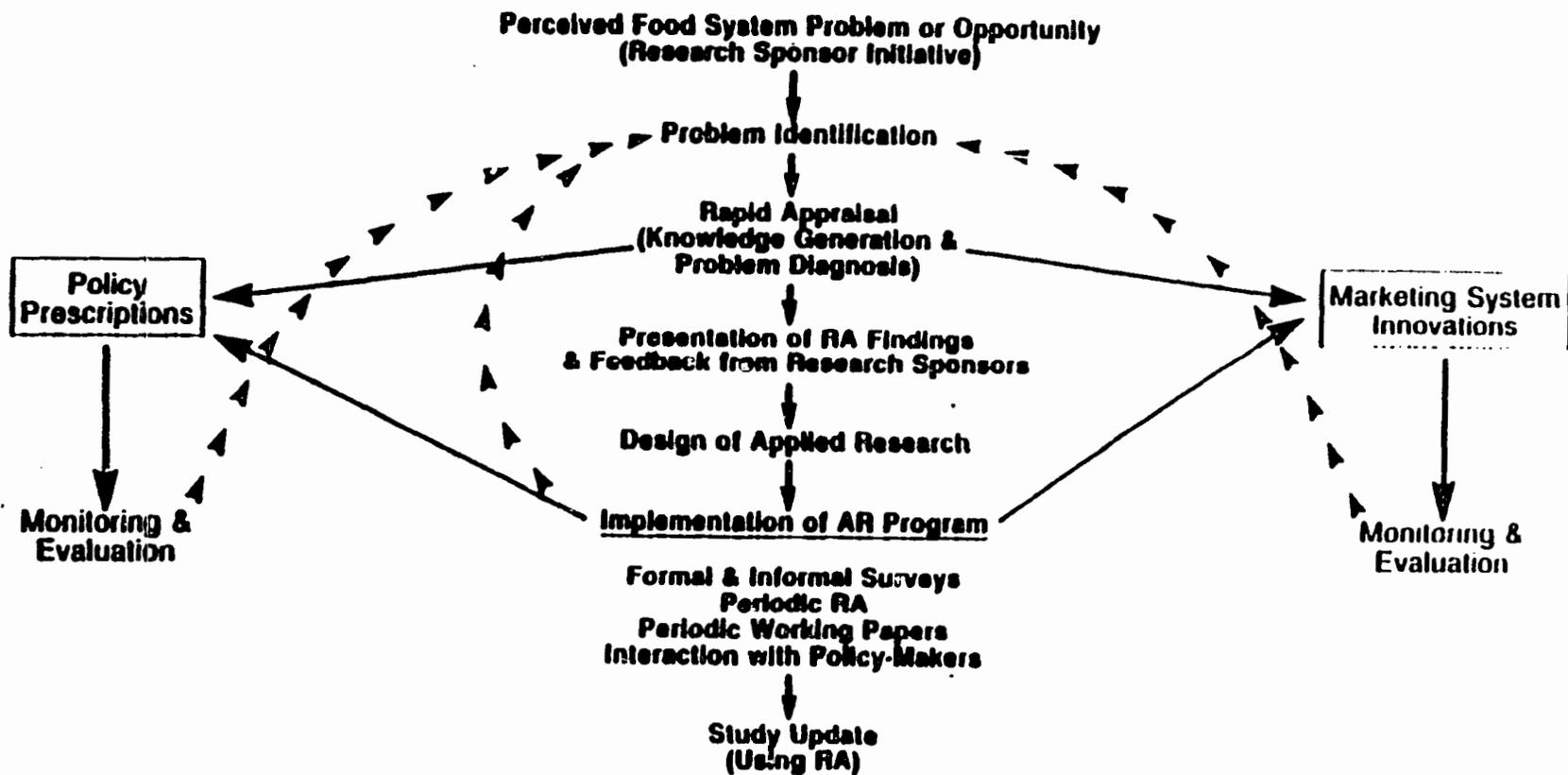
An overview of the linkages between rapid appraisal, applied research and pilot innovations is illustrated in Figure 1.

The PP as well as the contract work statement clearly indicate that AMIS was to have an impact on the capacity of AID to develop more effective marketing strategies at both the AID/W and mission levels. At the AID/W level the primary task would be (a) to strengthen the conceptual and operational underpinnings for the three field-level activities and, (b) to improve the coordination and collaboration among S&T marketing related projects.

There was a general expectation that AMIS would generate, synthesize and disseminate knowledge that would be broadly useful in addressing market system development problems worldwide.

The Evaluators note that the AMIS project documents do not provide explicit statements on training of host country professionals and related efforts to build institutional capacity. Apparently the goal of enhancing country-level capacity was to be achieved through collaborative working arrangements, professional dialogue, workshops, seminars and dissemination of publications.

Schematic Overview of Rapid Appraisal and Applied Research Linkages



Note: Unbroken lines indicate flow of applied research activities. Broken lines indicate feedback loops. Boxed off items are project outputs.

Source: Abt Associates, Inc., Third Annual Activity Work Plan, AMIS, March 2, 1990
 Figure 1

The funding arrangement for AMIS anticipated that nearly all of the country-level activities would be covered by mission buy-ins. The core funding would support networking and dissemination activities at the AID/W level, the further development of research methods and conceptual approaches to marketing system improvements and the contractor's general administrative overhead including the maintenance of a core group of qualified professionals.

1.3 The Life of the Project Workplan

The technical proposal submitted by Abt Associates in bidding for the AMIS project outlined a Four-Stage Workplan to be carried out over a period of five years. The first two stages to be carried out in Year One emphasized project organization, planning and the creation of demand for project services to be funded by mission buy-ins.

The "heart of the project" would be the activities to be carried out during project Years Two through Four and according to the AID contract would include ten rapid appraisals, five applied research activities, the commissioning of 20 papers and/or case studies, the development of an inventory of institutional and organizational innovations in market system development, carrying out five pilot tests of market system innovations, the establishment of an agricultural marketing network to facilitate the exchange of information and collaboration between S&T projects with agricultural marketing components, and the preparation of operational guidelines for conducting rapid appraisals.

The final year of the project was to be one of consolidation of information generated from the rapid appraisals, applied research and pilot innovations culminating in a series of seminars, research reports and a final report to AID detailing the "lessons learned" from the AMIS project.

The work plan as outlined above is viewed by the Evaluators as a general guide to project implementation that continues to be adjusted in annual workplans to accommodate the dynamic nature of AMIS activities and the opportunities afforded through the heavy dependence on buy-ins to support project work.

2.0 THE MID-TERM EVALUATION

2.1 Purposes

The purposes of the mid-term evaluation were to assess progress in achieving project objectives originally set forth and to determine what types of activities, in the time remaining, would most effectively achieve the overall goals of the project. In the evaluation process, particular attention was given to the effectiveness of the project in assisting host countries to identify and solve current and emerging marketing problems faced in those countries. This included not only the contribution of AMIS within particular problem situations, but also the employment and adaptation of a framework that would be of value in determining strategies to deal with other marketing problems. In the process, it was expected that AMIS would perform a training and education function so that host country capacity to deal with future problems would be enhanced.

The evaluation was also concerned with the effectiveness of AMIS in generating knowledge and employing approaches that would be broadly applicable to marketing problems worldwide and ways to enhance this capability. An important general goal of the evaluation was to assess the success of AMIS in defining the continuing and new marketing improvement needs in developing countries and in suggesting programs and approaches to address new generation problems in the future.

2.2 The Evaluation Team

The mid-term evaluation was conducted by Paul Farris, Purdue University, Harold Riley, Michigan State University, and John O'Donnell, S&T/HR, USAID. Farris and Riley visited four African countries, Senegal, Niger, Cameroon and Tunisia, where AMIS activities had been or were being carried out. O'Donnell participated in helping determine the focus of the evaluation and in liaison with USAID agencies. All members collaborated in providing assessments, recommendations and in writing the mid-term evaluation report.

2.3 Scope of Work

The Team's assignment was to evaluate several broad concerns. These dealt with relevance to AID's current policy and strategy and the usefulness to host countries; effectiveness in achieving stated objectives of the project; efficiency of the approach in comparison with alternative approaches;

impact of the project in terms of positive and negative effects; and sustainability, particularly as to project benefits likely to continue to be realized after AID funding has stopped.

Specific topics to be covered in the evaluation included usefulness of rapid appraisals, applied research, pilot innovations and related activities. Attention was also to be given to management concerns and to suggested areas of emphasis for the time remaining under the project. (The detailed Scope of Work for the evaluation appears as Annex A).

2.4 Methods and Procedures

Planning for the evaluation began in Spring 1990. Meetings were held in Washington, D.C. with Thomas Mehen, S&T/RD, project officer for AMIS and representatives of Abt Associates, the contracting organization for the project, in order to determine the agenda for the evaluation and persons, missions and agencies to be contacted.

The Evaluation Team interviewed persons in USAID agencies that had contracted for work under the project. The agencies were the ANE Bureau, the AFR/TR/ANR office of USAID's Africa Bureau, the SWA Office of the Africa Bureau and the Women in Development Office in PPC. The Team was provided reports prepared by Abt Associates for these agencies. The Team also was provided reports that were based on work done under buy-ins from the missions and documents from AMIS core activities. (See Annex E for the list of publications and documents made available to the Evaluation Team.)

The Team's initial visits were with USAID Washington agencies and representatives of Abt Associates. USAID missions in Senegal, Niger, Cameroon and Tunisia were visited by Paul Farris and Harold Riley. These missions were selected in consultation with Thomas Mehen, S&T/RD, USAID and Abt Associates staff as countries in which AMIS had completed work and consideration was being given to undertaking further AMIS activities. The countries also represented different kinds of problem areas and desires for AMIS participation.

USAID missions in each country helped arrange contacts with persons who had participated in the buy-in activities or who had knowledge of them. The persons visited included, in addition to USAID personnel, country government officials and representatives of the private sector. (See Annex E for the list of persons interviewed by the evaluation team.)

In addition to the mission visits, questionnaires were sent to other country missions to gather information about AMIS work. The countries were Burundi, Chad, Gambia, Guatemala, Nepal, Philippines and Somalia. The summarized information provided additional knowledge about the effectiveness, relevance and usefulness of AMIS work. (A copy of the AMIS evaluation questionnaire and summary of results appear in Annex C.)

3.0 AN EVALUATION OF PROJECT ACCOMPLISHMENTS

This section of the report summarizes the Evaluators' assessment of AMIS project accomplishments through Project Year Three recognizing that the first year was essentially a start-up and promotional year for mission buy-ins. During Years Two and Three a great deal has been accomplished in response to a large volume of mission and regional bureau buy-ins. Core funded activities have progressed but at a slower pace reflecting the pressures on AMIS staff to deliver on buy-ins.

We have examined the outputs within each of the three main activity areas: rapid appraisal, applied research and pilot innovations. However, the work accomplished does not neatly break out into these categories. This is especially true for the regional bureau buy-ins. Additional assessments have been made on networking and dissemination, training and institution building and project administration.

Although we have taken the AMIS contract document and the project paper as a benchmark against which to gauge accomplishments, we recognize the dynamic nature of the environment within which the project operates and the need to adjust to the changing conditions and to the fact that funding has been heavily dependent on buy-ins.

This section of our report stops short of making recommendations for the remaining life of the project. These will be presented in Section 4.

3.1 Summary Evaluation

At mid-term AMIS is engaged in a diverse set of activities heavily oriented towards rapid appraisals and short-term assistance to AID missions, mainly in Africa, Asia and the Near East. The RAs have been clustered in three problem areas: commodity subsystem development; promotion of agribusinesses, especially in export marketing; and parastatal restructuring.

The contractor has made commendable progress in elaborating operational guidelines for the conduct of rapid appraisals and is in a position to deliver very useful publications on RA methods as the project continues towards completion.

The AID missions have been very satisfied with the AMIS field work. The results have been relevant and directly useful in country-level programming.

The AMIS core staff have made substantial contributions to the development of a conceptual framework and a strategic approach to actions supporting agricultural marketing programming in two AID regional bureaus, the background papers, the AMIS staff consultations and direct participation in seminars has advanced the acceptance of a strategic "food systems approach" to the diagnosis of marketing problems, the identification of needed policy changes, the design of improved institutional arrangements and the implementation of market reform programs.

There has been a notable lack of mission requests for in-depth and longer-term applied research buy-ins to AMIS. Missions and host country government officials seem willing to rely on short-term RA results as inputs to country-level programming. Consequently, AMIS has made very limited progress in arranging for the five applied research activities specified in the project work plan. There has been a similar lack of mission demand for pilot testing of marketing innovations, although AMIS buy-ins are providing opportunities for monitoring the privatization of the fertilizer distribution system in Cameroon, follow-up assistance for the development of a seed industry in Nepal and a grain market liberalization effort in Tunisia.

At mid-term the AMIS project is lagging behind in the delivery of core-funded outputs including case studies, the dissemination of papers and reports on RAs, and in the building of country-level capacity to diagnose marketing problems, design and implement market system improvements. This is partly due to the heavy workload required by more than 30 mission buy-ins.

Overall the AMIS project got off to a good start and has achieved substantial accomplishments in relation to the opportunities afforded by the heavy reliance on funding support from buy-ins. The core professional staff has established a reputation for quality work that is useful to AID both in AID/W and field missions. There is still time during the life of the project to make adjustments that would reinforce contributions to the building of country-level institutional and human resource capacity to effectively

strategize and carry forth market system development programs. Also, of considerable importance will be the papers and final reports synthesizing the experience from AMIS and other AID projects. This will require a shifting of relative emphasis towards core funding and away from mission buy-ins. This raises a number of issues that will be addressed in section 4.0 in conjunction with a set of recommendations.

3.2 Rapid Appraisals

3.2.1 Rapid Appraisal Methods

During the first stage of the project the Contractor was to develop an operational set of guidelines for making rapid appraisals of marketing systems. The guidelines were to be based on the rapid reconnaissance materials developed by the Small Farmer Market Access Project staff and later published by John Holtzman while employed at Michigan State University as part of the S&T Food Security in Africa Project.

A seventy-page draft of guidelines for conducting rapid appraisals of commodity systems was produced and given limited distribution by the AMIS staff following review by several individuals with professional experience in marketing. This was followed by a companion draft document that focused on rapid appraisals of parastatally dominated agricultural marketing systems. Significant progress has also been made in adapting rapid appraisal methods for investigating agribusiness and export market development opportunities.

Work has now been initiated by AMIS staff to critically review and assess the AMIS experience in using rapid appraisal methods in carrying out numerous field studies. A first draft paper reviews the strengths, weaknesses and lessons learned from RAs in Niger and Nepal. This is followed by suggestions for users of RAs and others conducting agricultural marketing research. This preliminary paper is to be expanded and published by the end of the project. Meanwhile, reports are being prepared for each RA. Selected reports will be further elaborated into a case study format and published.

The Evaluators consider the further development and field testing of rapid appraisal methods as a valuable accomplishment of the AMIS project and its forerunner, the SFMA project. Although initially focused on diagnostic assessments of commodity sub-systems, the food systems framework and the emphasis on methods of collecting and analyzing both quantitative and qualita-

tive information has broad application to agricultural marketing research in support of development planning and programming. The Evaluators share the concerns that have been expressed by AMIS staff that RAs should be considered as a preliminary step in a longer-term process of problem identification, designing policy changes and actions to modify marketing institutions, analyzing alternatives, monitoring and evaluating the changes being implemented. In this context the methods and techniques of RA can be adapted and used in continuing programs of applied research in support of market system development. However, there is the ever-present possibility that policy makers and development practitioners, including AID mission staff, will place too much reliance on the results of rapid appraisals. Therein lies one of its potential weaknesses.

3.2.2 Field Applications of RA

As AMIS approaches the end of its third project year, it had conducted or had in process 32 field studies representing buy-ins from 22 different country missions. (See Annex F). Twenty-four of the 32 field studies utilized RA methods and were clustered in three categories, commodity subsystems, agribusiness opportunities and parastatal restructuring.

More than three-fourths of the RA buy-ins were from missions in Africa, including North Africa. The number of RA buy-ins greatly exceeds the ten specified in the AMIS contract. This reflects the demands from missions and the decisions of AMIS staff and the S&T Project Officer to service these mission requests.

The responses from seven missions through a mail questionnaire and the personal contacts of the Evaluation Team in four African missions confirmed that the AMIS RAs have provided relevant, highly useful diagnostic information. The AMIS teams had satisfactorily addressed the scopes of work, and with very few exceptions the RA team members were judged to be highly knowledgeable and effective in their work including their collaboration with mission staff, professionals in country governments and representatives in the private sectors. All seven of the missions responding by mail noted that important problems had been identified, six out of seven would consider asking AMIS for follow-up or related work while the seventh did not know at the time of the survey. (See Annex C).

The personal visits of the Evaluators in four countries confirmed the pattern of responses from the mail questionnaires. Although there were criticisms of the performance of a few RA team members, it was determined that these individuals were not core AMIS staff but were consultants who had been recruited, some as last-minute additions to fill out a team. In general, the RAs have been performed in a timely manner with useful field level draft reports and related seminars with mission staff. However, there were some complaints about delays in the delivery of final reports. In one instance (Senegal) a preliminary RA report was unacceptable to the mission and to the AMIS core staff. In that case the AMIS core staff took over and with additional work produced a highly satisfactory final report, but the additional costs were covered by the AMIS core budget. In another RA conducted in Niger the AMIS core staff decided on their own initiative to revise and upgrade the final report.

Some of the missions visited would have liked more copies of the AMIS reports. However, in three out of the four missions there had been very limited and delayed distribution of the reports among both public and private sector interest groups that had contributed to the RA. Some of the delay was due to the lack of reports actually translated into French and/or the need to edit out some "sensitive" material.

In two of the missions there had not as yet been follow-up seminars to share and discuss the RA results with public and private sector representatives. In one of these cases, the mission considered itself to be the client and had delayed further dissemination of the RA report until after the completion of a country development strategy paper. In the other mission steps were being taken to buy additional assistance from AMIS to help plan and carry out a series of seminars as a follow-up to the RAs.

None of the four missions visited had complaints about the procedures for arranging buy-ins or the value of services in relation to buy-in costs.

Based upon the results of the mail survey, the personal visits in four African missions and a review of the various reports on field applications of RA, the Evaluators are giving high marks to AMIS' accomplishments in this area of project activity. However, some of our concerns include: (1) the adequacy of RAs as a basis for major policy decisions and the detailed design of agricultural marketing projects; (2) increasing effective

utilization of RA results through additional publications, seminars, and workshops and (3) drawing together lessons learned through AMIS RAs and the various adaptations of the RA procedures and techniques.

3.3 *Applied Research*

3.3.1 Mission Response

By mid-term there had been only limited progress towards the development of five applied research activities as specified in the contract work plan. As indicated previously, mission buy-ins have been for RAs and in a few instances a series of related studies of a short-term nature that would contribute to country level program objectives including the development of longer-term agricultural marketing activities. Requests for longer-term in-depth studies with significant institutional and human resource capacity building dimensions have not emerged as mission buy-ins to AMIS. The results from the mail survey responses of seven missions and personal visits in four African missions uncovered little evidence that requests to AMIS for more in-depth applied research were being considered. However, there is interest in continued involvement of AMIS in monitoring and evaluating market interventions such as the fertilizer privatization project in the Cameroon and in the design of a series of interrelated marketing reforms; e.g. in Nepal and the Philippines.

There was evidence that AMIS staff and the AID Project Officer have made efforts to promote applied research activities with selected AID missions. However, the experience to date raises questions in the minds of the Evaluators about the role of AMIS in promoting and carrying out mission-funded applied research other than relatively short-term investigations, some of which can be linked together into a longer-term involvement in particular countries.

Three questions are posed by the Evaluators and tentative answers are as follows:

1. Has AMIS established a reputation as a competitive source of the technical services required for larger, longer-term market improvement projects?

The answer is probably not yet, but the accumulating performance of AMIS core staff is moving them into a more competitive position.

2. Are AID missions disposed or constrained to go to competitive bidding rather than to an AMIS buy-in when longer-term and larger-scale marketing projects are being initiated?

Here the answer seems to be a qualified yes based upon contacts in missions and in AID/W.

3. When missions send out requests for proposals to potential bidders on "marketing projects" can AMIS submit a legal response or be part of a responding group?

The response of an Abt Associates administrator indicates that AMIS cannot submit a legal bid but the firm, Abt Associates, Inc. could and would be interested in responding.

If our tentative answers to these questions are correct, the implications are that mission buy-ins to AMIS will continue to be largely RAs, short-term applied research and monitoring of institutional innovations.

3.3.2 Core Funded Support Activities

The AMIS project has made commendable progress in drafting and planning the preparation of background papers and case studies that will contribute to an expanding knowledge base on agricultural market system development. The most significant accomplishments will be discussed below under AID Washington buy-ins (Section 3.3.3).

Draft reports on case studies of "successful" export marketing programs in Chile and Thailand have been examined by the Evaluators. These cases focus on the complementary roles played by the public and private sectors in promoting export industries. A preliminary draft of a paper on market liberalization and privatization is under review by AMIS core staff. Several additional staff papers are to be completed during Project Years 4 and 5. These are potentially useful contributions to the body of knowledge on agricultural marketing system development. Several will draw heavily on the information generated and the experience of AMIS staff in carrying out AID Washington and country level activities. The collective experience from other AID and donor supported work should be reflected in these reports.

3.3.3 AID Washington Buy-ins

Among the most notable AMIS accomplishments, other than the RAs, has been their performance in response to AID Washington buy-ins that were not specifically anticipated in the original project work plan.

The Africa Bureau -- The AFR/TR/ANR funded a buy-in under which the AMIS staff, primarily John Holtzman, prepared a paper entitled, "Towards an Africa Bureau Agricultural Marketing Strategy and Action Plan." This was a substantial effort that included a review of USAID and other experiences in agricultural marketing in Africa, consultations with recognized international marketing experts, and inputs from the Michigan State University staff and African doctoral students involved in the Food Security in Africa Project and interactions with staff in the Africa Bureau. The paper outlined a comprehensive food systems approach and stressed the need to determine appropriate roles for the public and private sectors. The process for establishing priorities for investments and other specific steps that would facilitate the achievement of more effectively functioning market systems were addressed. Consideration was given to the differing levels of development among countries in developing strategies and action plans. The final paper was accompanied by a literature review document providing summaries of recently published and unpublished papers on agricultural marketing and policy reform in Africa.

The Evaluation Team found that Africa Bureau staff directly involved in the development of the AMIS paper were very pleased with the final product although the paper was delivered a little late. They complimented Holtzman on his responsiveness to their concerns and the excellent treatment of marketing system development problems and priorities for countries categorized by different levels of development. D.A. Smith and Tom Herlehy of AFR/TR/ANR/PA have recently produced and distributed a review draft of a document entitled, "A Strategic Framework for Promoting Agricultural Marketing and Agribusiness Development in Sub-Saharan Africa." This paper draws heavily on the substance of the AMIS paper. The Smith-Herlehy document has been sent to field missions for input prior to final Bureau review. It's significant to note that the Africa Bureau paper stresses "A Strategic Framework" rather than a particular "strategy" or "plan".

The AMIS Evaluators are impressed with the agricultural marketing development framework incorporated into

the strategy papers, the experience based substance and the pragmatic approach to problems at the regional and country levels. It seems important that AMIS staff continue to have opportunities to be involved in follow-up discussions at the Bureau and Mission levels and in workshops or seminars which may and should be arranged. (See 4.7).

The AFR/SWA contracted an AMIS buy-in to study marketing and trade of selected agricultural commodities in the Mali/Burkina Faso -Cote d'Ivoire corridor. It is believed that market opportunities exist but there are impediments to the achievement of efficiency in the marketing and transportation functions. Major impediments include export taxes and high transaction costs such as bribes and fees at points along the way. While meat imports from abroad are increasing, it appears that the declining market share of Sahelian countries can be reversed if ways can be found to reduce the high marketing and transportation costs in the Sahel.

The AMIS study was to examine the competitiveness of selected Sahelian products in the Cote d'Ivoire market with initial emphasis on constraints to regional trade in livestock. Preliminary findings were presented in early 1990 and an AMIS paper was widely distributed in the Sahel. A broader study of livestock and meat trade including markets in Nigeria, is yet to be completed. AFR/SWA Washington based staff were quite pleased with the quality of work being done by AMIS personnel. Draft summaries of research results were carried to a Club du Sahel meeting in Paris in March, 1990. These research results were also drawn upon during a Cilss/Club du Sahel research planning meeting held in Montpellier in September, 1990. Informal discussions of the AMIS study have occurred at the World Bank.

The Evaluation Team views the work being done under the AFR/SWA buy-in as highly relevant to development in the Sahelian region and that AMIS has a uniquely qualified staff capability to carry out the planned studies. The previous AMIS RA studies in various Sahaelian countries are also valuable inputs to the broader studies of the possibilities for expanded regional trade.

The Asia-Near East Bureau -- The ANE/TR/ANR contracted for two AMIS buy-ins to assist in identifying the most appropriate interventions to support the Bureau's commitment to promote private sector agribusiness development in Asia/Near East countries.

Under the first buy-in the AMIS staff, led by Mark Newman, prepared a draft agribusiness development strategy paper and a literature review which examined public and private agribusiness projects and activities within the ANE region. AMIS staff presentations were made to the ADO conference in Rabat in early 1989 followed by participation in an Agribusiness Roundtable in Washington, D.C. where AID personnel discussed the ANE agribusiness strategy with invited representatives from the U.S. agribusiness community.

Under the second buy-in the AMIS staff conducted a survey of U.S. agribusiness firms and organized two regional agribusiness roundtables, one in Chicago and the other in California. The workshops were designed to stimulate the interests of U.S. businesses trading with and investing in ANE countries and to acquaint them with AID's role in promoting agribusiness growth that would benefit both the developing countries and the U.S. firms.

The AMIS staff have prepared materials for the various roundtables and in the process have continued to further develop their basic paper on agribusiness development in the ANE region. Much of the material on the design of applied research to support agribusiness initiatives is an adaption of the RA approach to focus on export oriented agribusiness development.

The Evaluation Team interviews with an ANE administrator indicates a high level of satisfaction with the AMIS work. Mark Newman has been responsive and effective in helping them think about U.S. agribusiness participation. The paper which the AMIS staff prepared for the July 1989 conference was very well done. The ANE Bureau has directed one of their staff (James Snell) to take the materials prepared by AMIS and convert it into a Bureau document for review and eventually for mission use.

Women in Development -- The PPC/WID initiated a buy-in to AMIS in August 1989 to support studies of the dynamic factors affecting women's roles and participation in agricultural marketing systems and to examine how changes in institutional, organizational and managerial arrangements affect women's roles and functions.

AMIS prepared and delivered a draft literature review document to WID and contracted Dr. Gracia Clark, an anthropologist at the University of Michigan, to write a "State of the Art" paper synthesizing the central themes that are emerging from research focused on women in agricultural marketing systems.

The WID office requested that AMIS incorporate a "Women in Development Marketing Specialist" in three rapid appraisal teams. This is to be supplemented by at least one applied research activity directly related to identifying constraints to women's participation in commodity marketing. One WID analyst recently participated in the design of an Agricultural Marketing and Technology Transfer project in Chad. This was part of the PPC/WID buy-in to AMIS. Another WID analyst is programmed to participate in an AMIS study of coarse grain processing in Mali.

The Evaluator's contacts with four missions suggests that there are concerns about some of the issues regarding the role of women. Mission staff perceptions of past approaches to these issues, especially in the context of traditional socio-economic mores, causes them to proceed cautiously in their programming decisions. The State of the Art paper by Dr. Clark and the draft of suggested additions to the AMIS guidelines for RAS promise to be useful contributions toward the accomplishment of the objectives of the WID buy-in and ultimately to the more effective integration of women into the marketing system.

3.4 Pilot Innovations

The introduction, monitoring and evaluation of marketing system innovations was envisioned as an action oriented project activity. Several outputs were specified in the AMIS contract including an inventory of institutional and organizational market system innovations. The inventory would summarize the most salient factors contributing to the successful introduction of different types of innovations in different country situations. In addition to an inventory of information on market system innovations, guidelines were to be prepared for AID mission and host country professionals to assist in identifying, selecting and implementing innovations in particular countries.

Five pilot tests of innovations were to be carried out at the request of AID missions and related country level institutions. By mid-term actual accomplishments are still far short of earlier expectations.

An attempt has been made to prepare an inventory of innovations but difficulties were encountered. The existing draft inventory is unfinished. As the Evaluators examined a partial draft provided in mid-September we have some questions and suggestions about the entire pilot innovation activity. In preparing an inventory it appears to be difficult to find

reports and publications that adequately document and describe the process of designing, administering and making adjustments over a long enough period of time so as to inform others of the successes and failures, what worked and what didn't work. Furthermore, who is to judge the success of an innovation and when should this be done? Some innovations can initially appear successful but fail as subsidies are pulled away or new problems arise.

There are ongoing AMIS involvements in the Cameroon fertilizer privatization project, the seed industry development project in Nepal, the liberalization of the grain marketing system in Tunisia, the agricultural export development in Bolivia and perhaps others that can and should be written up into case studies during the final year of the AMIS project. Further suggestions can be found in 4.6.

3.5 Networking and Dissemination

It was expected that the AMIS project would establish a networking relationship with personnel in other S&T projects with marketing content. The establishment of formal networking arrangements has not occurred other than occasional in-house seminars and a limited exchange of reports and publications. Effective networking is difficult to arrange and the most effective networking is often informal based upon common interests and personal relationships that are mutually beneficial. Real collaboration is seldom achieved through administrative action unless a funding incentive is provided. However, networking can be encouraged and subtly supported. The Team sees no reason to be critical of AMIS for not establishing a "formal network". We are inclined to believe that informal networking is taking place but could be stepped up in the final years of the project.

The Evaluators are concerned about the lack of obvious provisions for the dissemination of AMIS reports, major project documents and even the AMIS Newsletter. Thus far these items have been produced in very limited quantities and distributed largely in-house, including particular field missions where RAs have been conducted. Budget support and a procedure is needed to expand the dissemination of working papers and eventually the final publishable outputs from the project. (See 4.7 for additional questions and suggestions about publications, workshops and seminars).

3.6 Training and Institution Building

It has been noted in the PP and contract document that a central purpose of AMIS is to enhance USAID and host country

abilities to design, implement and evaluate improvements in agricultural marketing. However, there has been no program activity directly focused on the accomplishment of this goal. The Third Annual Activity Work Plan stated that this goal

"... can be accomplished mainly through effective in-service training of developing country professionals -
- by having AMIS core staff work in an advisory and collaborative mode with local firms or agencies in a limited number of countries over several years."

It also suggested that some short-term training could be accomplished during rapid appraisals, if adequately trained local counterparts were available.

The heavy concentration of AMIS work in conducting rapid appraisals and the low level of buy-ins for applied research has resulted in very limited accomplishments in building human and institutional capacity to address important market system development problems at the country level. In a few countries significant collaborative involvement of local professionals in RA's has occurred, e.g., Niger, Nepal, Philippines. It seems likely that the repeat visits of AMIS core staff in Tunisia and possibly other countries such as Nepal and Cameroon have increased the capabilities of a few high-level professional administrators and private sector leaders. It also appears that the buy-ins by the Africa and ANE bureaus promise to have significant impacts on the further development of USAID staff capability to formulate broad strategies and follow-through on country-level programs focused on agricultural marketing problems.

It was probably unrealistic to expect that the AMIS project would make substantial contributions to increasing the country level human and institutional capacity for diagnosing market system problems, designing, implementing and monitoring market system reforms. Greater AMIS involvement in country-level applied research and sustained follow up by senior staff would be desirable but time is running out on the existing project. So, other means to enhance capacity should be considered within the time remaining and with the available resources (see 4.7).

3.7 Project Administration

AID Project Management -- The AID Project Officer has played a vital role in project implementation as the principal interface between AID missions and regional bureaus and the contractor. As such he has helped to clarify and sharpen mission needs for the contractor and to describe and promote

contractor capabilities to AID clients. He has also performed a critical function in effectively and efficiently shepherding the buy-in paperwork through the AID processes. The high marks that the project has received from missions and regional bureaus are a tribute to his excellent performance in these two roles. The Team believes that the Project Officer's role could have been further enhanced if he had been able to travel to more missions to negotiate longer-term project involvement in ongoing and proposed future marketing activities.

The handling of buy-ins and contract modifications merits special attention. In an attempt to expedite travel under mission buy-ins, the Contracts Office has acted upon buy-in PIO/Ts and verbally authorized work to begin under a contract work order. This is a very helpful and responsive procedure. However, it has resulted in a serious problem for the contractor because the official contract modification which allows them to bill for services rendered is often not effected for several weeks or months after the work has been completed. As a result, the contractor has had as much as \$600,000 to \$700,000 in incurred but unbilled services at any one time. We are told that the AID Contracts Office has recently taken action to correct this unfair situation for the contractor but the testing of the new procedures had not yet occurred as this report was being completed.

Contractor Management Performance -- Team interviews revealed a high level of satisfaction with Abt's performance in providing highly qualified personnel on a timely basis. There were a couple of times when AID clients were not satisfied. In these instances, the fault lay with last minute non-Abt substitutes on a field team. There were several complaints about the delay in getting final reports to field missions. The contractor should improve its performance in this area. However, there was general satisfaction with project management by Jerry Martin and the Abt support staff.

The sub-contractors were judged highly competent in their areas of expertise (Deloitte, Haskins and Sells in the area of privatization and the University of Idaho, PIP in post-harvest handling), although both are a bit thin in full-time staff with French competence. In the case of Idaho, the Team believes that the project would benefit from additional participation by University of Idaho staff members. As AMIS moves into an applied research mode as a follow-on to its many rapid appraisal efforts, it is important to have strong university linkages to make use of their comparative advantage in research and training. This capacity at the University of Idaho has been limited. Dr. Schermerhorn, former chairman of agricultural economics, was a key participant during project start up, but is no longer associated with the University. Other university linkages might strengthen AMIS accomplish-

ments during the remaining years of the projects.

4.0 ISSUES AND RECOMMENDATIONS

Several important issues have emerged during the mid-term evaluation relevant to the planning of AMIS activities for the remaining two years of the project and to longer-term AID programming in support of agricultural marketing system development. This section of the evaluation report poses ten issues coupled with a related set of recommendations.

4.1 *Is the AMIS Approach to Agricultural Marketing System Development Still Relevant and Useful in the Context of AID Programming and Country Development Needs?*

The successful development of efficient, progressive and equitable agricultural marketing systems requires sustained, creative efforts undergirded by continuing applied research in conjunction with institutional and human resource development. It is a long-term process which has only begun in developing countries where market liberalization has been initiated. Although broad policy changes have been made they must now be accompanied by the design and implementation of new institutions supportive of private sector development. This implies changing but continuing roles of the public sector.

AID policies and projects should be conceived within a long-term strategic framework that realistically takes into consideration the dynamic characteristics of an agricultural marketing system as it adapts to the conditions in a rapidly changing world environment.

The "food system framework" and the strategic approach elaborated in the AMIS papers delivered to the Africa and Asia/Near East Bureaus, along with basic materials in the Rapid Appraisal guidelines documents provide highly relevant and useful inputs to AID programming. The specific programs to fit individual country needs can be supported by the application of operational procedures being developed and tested through the AMIS project.

RECOMMENDATION

The AMIS project should receive strong support from AID during the remaining life of the existing project. The AMIS workplan should be adjusted to reflect the experience of the past three years and the constraints of the opportunities afforded by the combination of core funding and buy-ins. The issues and recommendations that follow provide more specific

issues and recommendations that follow provide more specific guidance on future project activities.

4.2 How Much Emphasis Should Be Given to Defining the Private Sector and Public Sector Roles in Market Systems of Developing Economies?

Considerable discussion has occurred in recent years about privatization of marketing systems. There has been an emphasis in many developing countries on decreasing the role of government and transferring functions of parastatals to the private sector. Objectives are to increase efficiency, achieve more rapid technological progress, provide more equitable incomes to various participants and reduce corruption, fraud and inefficiency in government.

The privatization emphasis is a paramount issue in economic organization. It goes to the age-old question regarding areas of comparative advantage of the government in marketing systems, on the one hand, and of the private sector, on the other.

In practice, there is also an important question of timing and the optimum sequence of privatization steps. It is clearly important that as functions are shifted to the private sector, private sector participants be available and capable of undertaking their new and expanded roles. It is also important that the facilitating role and services of the government, on which the private sector depends, be brought into place.

As direct government intervention in agricultural marketing is reduced, there arises an increasing need for government facilitating services. These include market information, development of grades and standards for particular commodities, regulations to deal with fraud, corruption, predatory conduct and monopoly, research and training programs and various types of infrastructure investments that enhance productivity in privatized marketing systems.

RECOMMENDATION

Given the strong current interest in possibilities for privatization in many developing countries, including opportunities for agribusiness development, the Team recommends that AMIS give particular attention to the further development of strategic approaches and the sequencing of specific actions that can bring about more productive private sector oriented agricultural marketing systems. The approach and the actions should be appropriately adjusted to the level

of economic development, the type of agriculture and the capabilities of both the private and public sectors to undertake new roles and responsibilities. The AMIS staff have prepared operational guidelines for the rapid appraisal of parastatally dominated agricultural marketing systems and are drafting a staff paper on market liberalization. This complements the more general guidelines for rapid appraisal of agricultural marketing systems. But, further efforts are needed to bring together a more integrated conceptual and operational approach to market system reform where privatization is a central issue. The AMIS paper prepared for the Africa Bureau and the subsequent adaptation of that paper within the Africa Bureau also provides useful inputs for an end-of-project document prepared by AMIS staff.

4.3 Should AMIS Give Expanded Emphasis to Agribusiness Development?

As indicated in 4.1 and 4.2 above, privatization and market system development brings a larger role to the private sector, with greater opportunities and increased responsibilities for agribusiness. There is much interest in the United States and abroad in expanding work on agribusiness and in facilitating the success of agribusiness firms in serving both domestic and foreign markets. This interest was especially apparent in the AMIS buy-ins by the ANE Bureau, the Africa Bureau and several country missions.

The growing interest in agribusiness logically accompanies the expanding role of marketing with economic development. The migration of people from farm production to urban and industrialized sectors lengthens and expands the food chain. Rising incomes, changing living conditions, and evolving tastes add to complexity in food marketing. Functions that usually grow rapidly and change significantly include food processing, cold storage, transportation, distribution, and retailing. Pricing and exchange functions are vastly altered. Modernization of the marketing system for farm production inputs such as fertilizer, chemicals, machinery, fuel, and seeds, also tends to accompany the development of the farm production sector.

Agribusiness can effectively perform many of the added and expanded marketing functions in collaboration with a public sector that provides incentives, services and regulations to stimulate and encourage competition and dynamic private sector performance.

In practice, the agribusiness role must be considered within the economic and institutional setting and market

opportunities in each country. For example, in addition to the growing opportunities in domestic markets, there may be increasing opportunities in some developing countries to market high value and value added products abroad. Agribusiness firms with expertise can be key participants in helping to expand international markets.

There may be opportunities for agribusiness firms in the United States to form joint ventures with private sector firms in developing countries. They may also participate in the training of private sector entrepreneurs as market opportunities for them appear in their own and other countries.

In looking ahead for the AMIS project the Team weighed the relative merits of enlarging the role of agribusiness within AMIS or alternatively establishing a new and separate S&T project to address Agency agribusiness needs. As the foregoing discussion points out, we view agribusiness as a vital element within the overall agricultural marketing system which is best dealt with within the larger "system" context. Thus, it seems to make more sense to expand the agribusiness component in AMIS rather than to initiate a new, more narrowly focused project.

RECOMMENDATIONS

Although the Evaluation Team is highly impressed with the quality and amount of work accomplished under AMIS, we strongly believe the project has reached the stage where agribusiness should be given additional emphasis in further AMIS work. The activities carried out thus far, along with the expertise of AMIS personnel, provide a strong foundation for launching an expanded thrust in agribusiness. Much can be done in the time remaining under the project. In addition, as the current project enters its final phase of synthesis and dissemination, we recommend that serious consideration be given to the development of a follow-on project which would address both agribusiness and agricultural marketing system needs.

4.4 *Should AMIS continue to promote and contract for Rapid Appraisals requested by AID Missions?*

The RA's have been useful to AID Missions, have directly influenced some country policies, and have assisted a few professionals in specific countries in gaining a more realistic and comprehensive understanding of the problems and the opportunities for promoting the development of improved marketing systems. A main advantage of the AMIS RA approach is that it employs a relatively comprehensive "systems framework" that reduces the risk of making quick, ill-

informed assessments that may lead to disastrous or at best unsatisfactory consequences.

Nevertheless, the AMIS RAs are typically not being followed by additional buy-ins for more in-depth studies. Under these conditions should AMIS continue to promote and contract for new RAs at this stage in the project, or should they curtail this activity? Some might argue that the RA methods have been developed and tested. Hence, they are easily transferred to professionals in developing countries and/or to other providers of technical assistance. The Evaluators hold to the view that the effective use of RA methods requires the leadership of skilled, experienced professionals but the RA team can and should include less skilled country-based professionals who might subsequently be able to continue applied research beyond the completion of the RA.

RECOMMENDATION

Shift relative emphasis away from conducting RA's with AMIS core staff. Give wider circulation to RA guideline publications. Conduct a limited number of regional or country-level workshops. Provide follow-through assistance to task groups formed to carry out RA's in selected countries where there seems to be a serious commitment to pursue program implementation and monitoring research. AMIS core staff should give high priority to further refinement of publications and related training materials on RA methods and to the synthesis of lessons learned from this project activity.

4.5 *Should AMIS Project Personnel and AID Administrators make a Renewed Commitment to Expand and Strengthen the Applied Research Component of the Project?*

We have observed a limited expression of mission interest in buying into applied research and/or program monitoring by AMIS. In many instances the RAs seemed to satisfy the mission's needs for diagnosing problems, identifying policy changes and host country follow-up actions to deal with the problems. The RA results have sometimes been incorporated into other projects involving local and/or other sources of technical support. (See 3.3.2 for further comment on this issue).

Should AMIS, with support from regional bureaus, increase efforts to arrange mission buy-ins supporting applied research, in-service training and institution building as an integrated medium to long-term marketing improvement activity? If attempted this would require a revised staffing pattern for

the AMIS project with professionals located in-country, working in close collaboration with local professionals. This type of project activity is being successfully employed by the S&T/Africa Bureau Food Security Project where Michigan State University combines the resources of experienced faculty with less experienced advanced graduate students and young professionals within the host country. Although this operational approach seems appropriate for a university, it may be less suited to a private consulting firm unless closely linked with the capabilities of one or more universities.

Another possibility would be to reallocate some of the AMIS core funding to the support of research focused on topics of regional importance or which can describe and analyze policies and institutional innovations for dealing with important marketing functions, e.g. grain system supply and price stabilization, and closely coordinated systems of producing and marketing perishable commodities. The AMIS paper, Towards an African Bureau Agricultural Marketing Strategy and Action Plan, provides a useful background for the selection of research topics which would be relevant to groupings of countries having similar basic conditions.

RECOMMENDATION

Four applied research activities should be given priority attention during the remainder of the project.

- (1) Complete the core-funded series of case studies already underway and planned.
- (2) Expand research on topics of regional and sub-regional importance. The AFR/SWA buy-in is an example that can be extended to other problem situations involving two or more countries. Funding could be a combination of AMIS core, regional and mission funds.
- (3) Promote a limited number of mission buy-ins for applied research that provides longer-term AMIS involvement in monitoring marketing system reforms and/or in helping design applied research activities to be carried out by a local agency or professional consulting firm. In both instances AMIS would be afforded opportunities to provide guidance in the conduct of studies and the presentation of results as core staff make several short-term visits over an extended time period.
- (4) Consideration should be given to arranging additional university faculty and graduate student inputs into the AMIS project. This could be a cost

while contributing to the project goal of expanding professional capabilities to work on market system development problems. Preference should be given to students from developing countries who have special interests in the area of marketing and agribusiness. These individuals, with faculty supervision, could undertake short-term, focused assignments or more in-depth studies.

- (5) The chances of arranging such longer-term applied research activities would be enhanced if, (a) the S&T Project Officer could travel to field missions to promote the concept and make the necessary arrangements, and (b) some core funds could be made available as a cost-sharing "sweetner" to encourage mission participation.

4.0 *Should the Project Activity Directed Toward Pilot Testing of Market System Innovations be Continued as Specified in the AMIS Contract?*

At mid-term there had been very few opportunities for pilot testing of innovations through mission buy-ins to the AMIS project. Some possibilities still exist for follow ups to RAS that have been recently completed.

In section 3.4 we expressed doubts about continued efforts to complete an inventory of "successful" market system innovations. We are concerned that "action oriented" administrators and others may quickly decide to introduce an innovation without a feasibility assessment and provisions for follow-up monitoring to guide the implementation decision and the detailed design and management of the innovation.

RECOMMENDATION

The work plan for the pilot innovation activity should be modified in the following manner:

- (1) Shift efforts from the preparation of a publishable "inventory of market system innovations" to the preparation of a well documented set of case studies on a more limited number of cases prepared by qualified marketing specialists.
- (2) Follow up on a small sub-set of existing opportunities where market system changes are being undertaken following AMIS RAS.

4.7 What Combination of Dissemination and Outreach Activities Will Make the Greatest Contribution to the Accomplishment of AMIS Project Goals?

In accordance with the overall AMIS workplan there will be a significant shift towards the completion of reports, publishable papers and monographs and away from the initiation of new field studies during the last two years of the project and especially during the last year. The drawing together of lessons learned from AMIS buy-in experiences will fall heavily on the AMIS core staff and on the core budget.

The analysis and writing activity should be accompanied by a carefully orchestrated program of manuscript reviews by qualified professionals and through seminars, both in Washington and in the field, to disseminate and further refine the conclusions and generalizations drawn from AMIS work.

A monthly seminar series for AID staff is being planned for FY91. Special efforts should be made to attract staff associated with other S&T projects conducting activities in the area of marketing.

Field-level seminars should include return visits to specific countries to present and discuss the results of RAs and applied research with mission staff and key personnel in the public and private sectors. Hopefully this can be promoted and supported by the missions as is planned in Niger. Other field seminars might be arranged for regional or sub-regional groups of mission ADOs, key staff members and AID project personnel directly involved in agricultural sector programming related to market system development.

Efforts should be made to collaborate with the Food Security in Africa Project in conducting one or more multi-country seminar/workshops with invited professionals directly involved in agricultural market system research, teaching and institution building programs. Similar seminar activities may be possible in collaboration with the ANE and LA Bureaus.

All of the above seminar activities can contribute to the enhancement of country and AID capabilities to effectively address agricultural marketing system problems. But, these activities must be accompanied by timely and broad distribution of AMIS publications. To date there had been very limited distribution of draft AMIS reports. As these reports are revised, and as additional case studies and monographs are prepared, there needs to be a wider distribution that will reach professionals in AID and in host country institutions, U.S. university marketing specialists and selected personnel in other donor agencies. If funding is a severe constraint,

then arrangements should be made for commercial sales.

An appeal is also made for AID support of training in agricultural marketing and agribusiness development. AMIS materials could be adapted and used in short-courses, in in-service training and in formal courses being offered in universities in developing countries as well as in the U.S. But, this high priority activity must also be supported by AID programming other than the AMIS project. Over the longer run it is likely to be a crucially important component of the AID program to support agricultural marketing system development at the country level.

RECOMMENDATION

The AMIS staff and the AID Project Officer should take immediate steps to lay out detailed plans for completing publications, conducting seminars and disseminating publications to a broad group of professionals, both inside and outside of AID. Selected items will need to be translated into other languages.

4.8 *Should There be Changes in the Administration of the AMIS Project?*

While the overall administration of the project received high marks, there were areas noted where improvements could be made, such as travel for the S&T Project Officer, accelerated processing of contract modifications and payments on mission buy-ins.

RECOMMENDATIONS

- (1) The S&T Project Officer should be provided enough travel funds to make at least two major trips a year to negotiate arrangements for long-term project involvement with interested missions.
- (2) The S&T Bureau Project Officer should carefully monitor the Contract Office's newly announced procedures for making timely payments to the contractor for work completed under the buy-in arrangement.

4.9 *What are the Implications of the AMIS Mid-Term Evaluation for Funding Support During Project Years Four and Five?*

The mid-term evaluation re-emphasizes the relative importance of drawing together a synthesis of the lessons

learned, the preparation of publications and the conduct of seminars and workshops during the last stage of the AMIS project. However, the projected funding pattern shows the core support being reduced during Year Five. It would seem that during the last phase of the project the need for core funding might actually increase as the AMIS staff shift their efforts away from servicing mission buy-ins to activities that will depend heavily on core funding. If this support is not forthcoming then AMIS staff will continue to allocate a high proportion of their effort to mission buy-ins for more rapid appraisals and short-term applied research and to a neglect of much needed synthesis, writing and education. The Evaluators believe that this is not consistent with the achievement of project goals and it would not do justice to the excellent accomplishments of the project.

RECOMMENDATION

The AID and Abt project managers should prepare a work plan and project budget that reflects the need for core funding to support the pattern of activities that the Evaluators have recommended for Project Years Four and Five. This should be submitted to and discussed with S&T administrators to arrive at a budget level that takes into account the trade-offs between a continued high level of mission buy-ins and the recommended synthesis and knowledge-building activities and that will best meet project objectives given existing funding constraints.

4.10 What Actions Should be Taken by AID to Ensure Effective Longer-term Support for the Continued Development of Efficient and Progressive Agricultural Marketing Systems in AID Recipient Countries?

This is a broader question than can be adequately addressed by the evaluators of the AMIS project. However, the set of problems faced by many developing countries will require major efforts to develop viable market oriented economies. The agricultural and food sub-system is a dominant component within most of these economies. As indicated earlier in this report the market reform programs are just getting underway in many of these countries. Hence, it appears that the AMIS project, along with other marketing related projects, should continue to receive a high priority in AID programming.

RECOMMENDATION

Based upon the flow of results from the AMIS project it is recommended that timely action be taken to plan for a five-year extension of the AMIS project with modifications taking into consideration the results of this mid-term evaluation and similar assessments of other marketing related projects supported by S&T and the regional bureaus. In planning an AMIS project extension consideration should be given to strengthening the participation of university based resources.

ANNEXES

- ANNEX A** **Scope of Work for the AMIS Mid-Term Evaluation**
- ANNEX B** **The Evaluation Team -- Biographical Briefs**
- ANNEX C** **AMIS Evaluation Questionnaire Sent to Missions**
- ANNEX D** **Interview Guide and Summary of Visits in Four Countries**
- ANNEX E** **List of Individuals Interviewed by the AMIS Evaluation Team**
- ANNEX F** **Classification of AMIS Project Studies Conducted or in Progress as of August, 1990**
- ANNEX G** **List of AMIS Papers and Reports Reviewed by the Evaluation Team**

ANNEX A**SCOPE OF WORK FOR THE AMIS MID-TERM EVALUATION****I. ACTIVITY TO BE EVALUATED**

Agricultural Marketing Improvement Strategies
Contract No. DHR 5447-Z-00-7-74000
Project cost: \$8,655,594
Initial FY: 88
Final contract year: PACD 9/30/93

Financing and Contracting Arrangements

S&T provided \$2.4 million in core funding and an additional \$6.2 million ceiling for buy-ins from the missions. This funding arrangement and its emphasis on buy-ins to cover the field work should be taken into account by the evaluators when commenting on and making recommendations regarding purpose: i.e., ways to improve the knowledge generation capability of the project.

Abt Associates was awarded the AMIS project contract. Abt has two sub-contractors: the University of Idaho's Postharvest Institute for Perishables (PIP), and Deloitte, Haskins & Sells.

II. PURPOSE OF EVALUATION

This midterm evaluation will serve three related purposes:

1. Assess project progress toward the goals and objectives set forth in the Project Paper (PP) and the Work Statement in the AID/ABT contract and recommend improvements in management and utilization of remaining project resources.
2. Examine the appropriateness of the project strategy in generating knowledge and creating the capacity to design and implement programs to improve agricultural marketing systems in developing countries.
3. Suggest ways to communicate knowledge and conclusions that will enhance future understanding of market system development by Missions, AID/W and the professional community.

III. BACKGROUND

The Agricultural Marketing Improvement Strategies (AMIS) project was authorized at the end of FY 87 as a six-year effort to be managed by S&T/RD. The project purpose as presented in the PP is to enhance USAIDs' and host country

institutions' ability to design, implement and evaluate improvements in agricultural marketing systems. To improve field activities in marketing, AMIS calls for work in three areas: refinement of techniques for carrying out rapid appraisals of agricultural marketing, identification of key, cross-cutting applied research themes, and assistance to missions in the development and testing of pilot innovations in agricultural marketing systems. As set forth in the PP, project outputs include work at two levels: AID/W and AID missions. Specific outputs include impact in the following areas:

Rapid Appraisals: The PP calls for the development of guidelines for carrying out rapid appraisals of marketing systems which would help practitioners gain an understanding of developing trends in the marketing system, how the marketing system is changing, the causes of changes and judgments of informed people about future prospects. In addition to the operational guidelines which would be generated at the AID/W level, AMIS would also engage itself through Mission buy-ins in carrying out rapid appraisals. A total of ten were to be completed in the field. Each was to have a report/case study undertaken to document findings.

Applied Research: The PP specified as an output the development of a framework to examine marketing issues, and develop a procedure to improve inter-project communications and collaboration on cross-cutting issues. It was envisaged that the AMIS project would establish an information exchange on "lessons learned" with regard to improving marketing. A series of staff working papers and project reports would be disseminated through the network. These activities would be at the AID/W level. Also in the areas of applied research AMIS would work closely with missions on priority research topics. It was estimated that five applied research efforts would be undertaken by AMIS concentrating on analyzing key factors in the marketing system, and/or identifying and evaluating marketing alternatives.

Pilot Innovations: The project design calls for the development of an inventory of innovations at the AID/W level. The focus here would be on changes which contributed to improved performance. At the Mission level the project calls for the involvement by AMIS through Mission buy-ins in the design and monitoring of five pilot innovations.

IV STATEMENT OF WORK

A. General Concerns to be Addressed

AID evaluation requirements stipulates that several broad concerns be addressed in the course of the review by the evaluation team:

1. Relevance: Are the development problems which the project was initially designed to address still relevant to AID's current policy and strategy and to the host countries' economic welfare?
2. Effectiveness: Is the project achieving satisfactory progress toward its stated objectives?
3. Efficiency: Are the effects of the project being produced at an acceptable cost compared with alternative approaches?
4. Impact: What are the positive and negative effects resulting from the project?
5. Sustainability: Are the effects of the project likely to become sustainable development impacts? Will they continue after AID funding has stopped?

B. Specific Questions to be Answered by the Team

Rapid Appraisal Program

1. Should the conceptual framework be made more explicit? If so, how should it be done?
2. Have the operational guidelines had an impact on the way in which the actual field rapid appraisals were carried out? What major divergence, if any, was there? What changes are needed?
3. Has the field experience to date suggested ways in which AMIS should modify its RA efforts?
4. Have the RA field activities had the impact of identifying any marketing constraints? Does it appear that the rapid appraisals were successful in identifying key driving forces shaping the marketing system? If not, why not?
5. Would further categorization of areas for RA be helpful? (currently AMIS has developed guidelines for parastatally dominated systems and privately controlled marketing efforts).
6. How effective do the RAs appear to be in identifying key variables and collecting data on them? Are there alternative approaches which might be more useful than the ones employed? Should the approach which PIP employs in RA of post harvest systems be merged with AMIS?
7. To what extent have the RAs left behind an LDC interest to continue work on market analysis? Has the exercise left behind an LDC capability to continue to work on market diagnosis? In what circumstances did this occur and what are the lesson learned regarding institutionalizing a marketing diagnostic capability?

Applied Research Program

1. What progress has been made in the area of coordination with other S&T projects and institutions in the area of applied research?
2. Are the proposed staff papers identified in the recent FY 90 workplan addressing the most relevant concerns? Are there other topics for staff papers which should be high priority?
3. How effective have the mission-supported field studies been? Are these studies/reports of sufficient quality to provide the basis for assessing marketing constraints?
4. Has applied research followed from AMIS rapid appraisals and field reports as was envisaged in the PP?
5. How effective is the AMIS Newsletter in linking AMIS reports/studies and research interests to either key S&T entities working in marketing? Are other mechanisms needed? Is the Newsletter likely to impact favorably on other practitioners engaged in marketing?

Pilot Innovations Program

1. How useful is the Inventory of Innovations likely to be? Should attempts be made to expand its coverage? Is the present format appropriate for effectively garnering lessons learned in marketing? Are there other ways in which the experiences of successfully improving marketing systems might be written up so as to better provide potential areas to support change?
2. How successfully is the AMIS project moving toward help in developing specific innovations? How useful have the pilot innovations been which have been proposed?
3. What needs to be done to strengthen the process of rapid appraisal/applied research/pilot innovation so that more and better proposals emerge?

General Management Concerns

1. Have field teams been staffed with quality personnel and were they adequately briefed on AMIS aims and objectives? Is this reflected in the field reports?
2. Has the principal contractor (Abt Associates) made effective use of the subcontractors (University of Idaho-PIP and Deloitte, Haskins & Sells)? Have their relative areas of expertise been used when AMIS was called upon to work in those areas?

3. Is the core staff, both technical and support, adequate to administer effectively the high level of buy-ins which was envisaged in the project design and which has materialized during the first two years of operations?
4. Has the workplan, AMIS's principal management mechanism, functioned well? Is it useful in helping to allocate staff time and set reasonable objectives? What modifications are needed?

Project Design: Reassessment

1. Is the AMIS strategy and process likely to lead to relevant knowledge generation? How can the considerable demand and buy-ins from missions be better utilized and shaped so they conform to an effective strategy for systematically learning about agricultural marketing? What changes are needed?
2. Are there ways in which the core funding could be used to more effectively assist the field efforts and shape a research agenda?
3. Can core funding be used to more effectively coordinate with other AID projects and universities in making and advancing a major research agenda?

V. METHODS AND PROCEDURES

The evaluation team will review the basic design documents including the Project Paper, workplans and project publications. The team will also conduct informal interviews with project staff, AID/W and relevant mission staff and counterpart collaborators.

The steps in the evaluation process, and their approximate timing are listed as follows:

1. April: AMIS sends materials for review to evaluators who will organize country study materials. These will include a fact sheet summarizing key points: objectives of the study, people and institutions involved, listing of papers and seminars/workshops. Also to be included will be all of the reports, research planning documents, and scopes of work for the projects to be visited in the field.
2. May: Evaluators will review materials presented by the AMIS staff and raise questions based upon their reviews. During a mid-May visit to Washington, they will meet with AID/W Bureaus which have bought into the project and with the AMIS project officer and contract team for any clarification and/or elaboration which might be needed.

3. Late May: S&T project officer cables missions for feedback. The team will provide issues and questions based upon its review of AMIS materials which will form the basis of a cable soliciting evaluation information from participating country missions. The S&T project officer will coordinate this process.
4. First half of July: Evaluation team visits selected missions in accord with available funds and team interest.
Field visits will be coordinated, to the extent possible, with AMIS staff and resources permitting, the USAID project officer.
5. September: Evaluators prepare draft evaluation report.
6. Late September: AMIS project manager and contract team review report.
The USAID project officer and the AMIS contract team will have an opportunity to review the draft report in late September. AMIS staff will be able to respond in writing to points made in the evaluation report, if this is desired.
7. October: Evaluation team finalizes report and presents findings to USAID in a formal oral briefing.

IV. EVALUATION TEAM COMPOSITION AND LEVEL OF EFFORT

The evaluation team will be obtained through the RUR cooperative agreement with the National Academy of Science. Since the inception of the AMIS project NAS/BOSTID has supported monitoring and oversight activities. It is expected that NAS will select two highly qualified marketing economists to carry out the evaluation. They will have substantial first-hand knowledge dealing with agricultural marketing development and considerable experience in framing research and knowledge generation efforts. AID will provide a third team member: a senior rural development specialist. This person will have considerable experience with AID evaluations.

The level of effort required to carry out the evaluation is expected to be three-person months: four weeks by each team member.

VII. REPORTING REQUIREMENTS

AID's required format for evaluation reports includes an Executive Summary, Body of the report, and relevant Annexes.

The executive summary states the development objectives of the activity evaluated; purpose of the evaluation; study method, findings, conclusions and recommendations; and lessons learned about the design and implementation of this type of development activity.

The body of the report should include discussion of the following:

1. Purpose and study questions of the evaluation.
2. Assessment of accomplishments to date.
 - a. Number and characteristics of countries involved in AMIS project.
 - b. Types of activities carried out (core and buy-ins).
 - c. Status of planning for the remainder of the project.
 - d. What project personnel expect to be the consequences of AMIS, short and long term.
3. Evaluation of the AMIS approach, organization and process.
 - a. What is different about the AMIS approach?
 - b. Criteria and procedure for determining relative emphasis given to rapid appraisals, applied research and pilot innovations within the countries selected.
 - c. Methods of synthesis: workshops, seminars.
4. Evaluation of the institutional procedures for effective operation.
 - a. The contracting organization
 - b. AID/W
 - c. USAID Missions
 - d. In-country institutions
5. Evaluation of resources and capability for productive accomplishments during the remaining years of the projects.
 - a. Amounts of resources available
 - b. Match of resource talents available with needs
 - c. Determination of priorities and commitments of resources to best accomplish the project objectives
 - d. Evaluation of plans to communicate general knowledge and conclusions that will enhance future understanding of market system development by missions, AID/W and the professional community.
 - e. Recommendations:

Ideally, the report should not exceed 40 pages in length. Appendices should include a copy of the evaluation scope of work, the most current Logical Framework, a list of documents consulted, and individuals and agencies contacted. Additional appendices may include a brief discussion of study methodology and technical topics if necessary.

A complete draft of the evaluation report should be delivered to AID project management no later than September 30. The final draft should be delivered as noted above, following receipt of comments on the first draft from AID project management.

ANNEX B**THE AMIS EVALUATION TEAM -- BIOGRAPHICAL BRIEFS**

Dr. Paul Farris is a professor of Agricultural Economics at Purdue University. His academic interests are in marketing, price analysis and public policy. He has recently given attention to marketing problems of developing countries and supervised several graduate student research projects on developing country issues. Dr. Farris was instrumental in the formulation of the AMIS project outline and goals. During the last ten years his international experience included consulting assignments in Korea during parts of 1983, 1984 and 1989 for the World Bank and the U.S. Feed Grains Council; teaching a section of an agricultural marketing course at the International Center for Mediterranean Agronomic Studies in Spain in 1987 and 1989; participating in meetings of the International Association of Agricultural Economists in Spain (1985) and Argentina (1988); visiting Burkina Faso and Portugal in 1981 in connection with AID projects carried out by Purdue University; and participating in symposia on futures markets, sponsored by The Chicago Board of Trade, in Spain (1988), France (1989) and The Netherlands (1990).

Dr. Harold Riley is a professor of Agricultural Economics at Michigan State University in Michigan. Throughout his career, Dr. Riley has devoted a great deal of his career to the training of post-graduate students. He is recognized as a leading authority on food marketing systems in the United States and in developing countries. His international experience includes various research, technical assistance and training activities in Latin America. During the 1960s he was the co-director of a series of path-breaking studies of food marketing systems in Brazil and Colombia. In the early 1970s he served as a marketing adviser in the USAID Mission in Bogota. He has also served as a consultant on World Bank projects in Mexico and Ecuador, and has collaborated with the FAO and the Inter-American Institute for Cooperation in Agriculture in various seminars and project activities. He is currently participating in an AID marketing project in Ecuador and is director of an international fellowship program in food systems financed by the Kellogg Foundation.

Mr. John O'Donnell is the Deputy Agency Director for Human Resources in the Science and Technology Bureau of AID. He has over 25 years' experience in agricultural and rural development programs in Latin America and Southeast Asia. Mr. O'Donnell's most recent international postings were as Chief of the Office of Agricultural and Rural Development in Ecuador, 1985-87, and in Peru, 1977-82.

ANNEX C**QUESTIONNAIRE SENT TO AID MISSIONS****A. Initial Contact with AMIS**

1. Why did your Mission choose AMIS as a part of your ag. marketing program?
 - a. An AMIS representative introduced the program to the Mission personally.
 - b. AMIS had already done work for the Mission.
 - c. The Mission heard about other work AMIS had done.
 - d. Other (please describe)

2. Was the AMIS approach relevant to the existing mission ag. marketing strategy in your country?
 - a. Very relevant.
 - b. Somewhat relevant.
 - c. Not relevant.
 - d. Don't know/question doesn't apply.

Comments:

B. Effectiveness

1. How well does the mission feel the AMIS team addressed the goals set out in the Scope of Work?
 - a. The Mission is satisfied that AMIS delivered what the Mission wanted when we wanted it.
 - b. The Mission feels there were some problems with what AMIS did. Please explain briefly:

2. How well does the Mission feel the AMIS rapid appraisal methodology served as a tool for your mission goals in ag. marketing?
 - a. Fully satisfied.
 - b. Fairly satisfied.
 - c. Not satisfied.
 - d. Quite dissatisfied.
 - e. Don't know/question doesn't apply.

Comments:

3. How effective was the AMIS team in carrying out its assignments?

Comments:

4. How would you rate the effectiveness of individual AMIS professionals?
- Highly knowledgeable and effective in their work.
 - Knowledgeable and fairly effective.
 - Not knowledgeable and/or ineffective.
 - Very ineffective.
 - Don't know/doesn't apply.
- Comments:

C. Coordination/Efficiency

1. Has AMIS been successful in incorporating host country counterparts into their activities?
- Yes.
 - No.
 - Don't know/doesn't apply.
- Comments:
2. If the AMIS work is part of a larger project, have AMIS methods/represent-atives coordinated well with other parts of the other project?
- AMIS is/was not part of a larger project.
 - AMIS has coordinated well with other parts of the project.
 - AMIS has not coordinated well with some or all of the other project components (please explain briefly below).
- Comments:

D. Impact

1. What was the reaction of the host country government to the final AMIS report (or to continuing AMIS work)?
- Very positive.
 - Positive.
 - Indifferent.
 - Somewhat negative.
 - Very negative.
 - Don't know/doesn't apply.
- Comments:
2. What was the reaction of the host country private sector to the final AMIS report (or to continuing AMIS work)?
- Very positive.
 - Positive.
 - Indifferent.
 - Somewhat negative.
 - Very negative.
 - Don't know/doesn't apply.
- Comments:

3. If a seminar or conference was provided in-country by AMIS personnel, what is your judgment of its impact?
Comments:

E. Sustainability

1. Did the work which AMIS has already done have a favorable influence in mission strategy/host country ag. marketing systems?
a. Has been very beneficial.
b. Has had some benefit.
c. Has had little or no impact.
d. Don't know/question doesn't apply.
Comments:
2. Has your mission asked, or would it consider asking, for a return of an AMIS team for follow-up to that already done by AMIS?
a. Has asked.
b. Would consider asking, given the right circumstances.
c. Would not ask.
d. Does not know at this time.
Comments.
3. Has your mission asked, or would it consider asking, for a return of an AMIS team for ag. marketing work unrelated to work already done by AMIS?
a. Has asked.
b. Would consider asking, given the right circumstances.
c. Would not ask.
d. Does not know at this time.
Comments:
4. What lasting benefits does your mission anticipate will be realized from the AMIS project?
a. Helpful changes have been or will be adopted in the marketing system.
b. Important problems have been identified and/or clarified.
c. Training of human resources has been advanced.
d. Proposals for new activities (research and/or training) have been developed.
e. Other:
5. In general, what suggestions would you recommend to improve market system performance in your country:
6. During the next three years, what are your Mission's priority needs for further work on ag. marketing?
7. During the next three years (the duration of the AMIS project), what constraints does your Mission face in procuring further TA in ag. marketing?

EVALUATION OF QUESTIONNAIRE SENT TO MISSIONS

In addition to personal visits to four countries by the Evaluation Team, questionnaires were sent to other country missions that had AMIS buy-ins. The countries were Burundi, Chad, Gambia, Guatemala, Nepal, Philippines and Somalia. The questionnaires sought information on the relevance and effectiveness of AMIS work, the evaluation of AMIS activities by host country governments, lasting benefits likely to be achieved and interest in follow-up work. The responses from the seven countries were, in general, very positive and highly complimentary to AMIS. The missions reported that AMIS work was very relevant, highly effective, well received by host country governments and very beneficial to mission programs. In general, the missions would be in favor of asking for further AMIS work.

AMIS EVALUATION TABULATION OF RESPONSES

A. Initial Contact with AMIS

1. Mission chose AMIS because:
 - (a) 4/7 Recommendation of AID regional office. Gambia was informed about AMIS from the announcement cable.
 - (b) Philippines used RA Method under previous work Small Farmers Marketing Access project.
 - (c) 2/7 Somalia was considering an AMIS staff member in the first place.
2. AMIS' relevancy to existing mission ag. market strategy:
 - (a) 5/7 Very relevant
 - (b) 2/7 Not applicable (Chad and Somalia)

B. Effectiveness

1. Mission's feeling about AMIS addressing the goals in SOW:
 - (a) 6/7 Satisfied, job well done, and timely
 - (b) Chad found problems of friction between 2-person team
2. Mission's view of RA method. to achieve goals in ag. mktg:
 - (a) 3/7 fully satisfied
 - (b) 2/7 fairly satisfied
 - (c) 2/7 don't know/doesn't apply
3. AMIS team's effectiveness in doing assignments:
 - (a) 5/6 missions have good feelings (excellent, effective, professional, committed, well-coordinated, sensitive)
 - (b) Chad noted problems in AMIS team work

4. AMIS individual professionals' effectiveness:
 - (a) 5/7 highly knowledgeable and effective
 - (b) 1/7 fairly knowledgeable
 - (c) Chad separated rating for one member as "very ineffective."

C. Coordination/Efficiency

1. AMIS successful in incorporating host country counterparts?
 - (a) 4/7 yes
 - (b) 2/7 N/A
2. As part of a larger project, AMIS methods or representative's coordination with other parts:
 - (a) 3/7 good coordination
 - (b) 1/7 N/A
 - (c) Chad - not well-coordinated

D. Impact

1. Host country government's reactions to AMIS report:
 - (a) 1/7 very positive
 - (b) 4/7 positive
 - (c) 1/7 N/A
2. Host country private sector's reaction:
 - (a) 3/7 N/A inapplicable
 - (b) 3/7 very positive
 - (c) 1/7 indifferent
3. AMIS in-country seminar/conference's impact
 - (a) 4/7 positive (very good, effective, outstanding)
 - (b) 2/7 N/A
 - (c) 1/7 limited because of scarce resources useful when including business oriented consultant

E. Sustainability

1. AMIS work has/not favorable influence on mission strategy/host-country ag. marketing systems.
 - (a) 4/7 very beneficial
 - (b) 2/7 some benefits
 - (c) 1/7 N/A
2.
 - (a) 4/7 Mission would consider asking AMIS for follow-up, related work
 - (b) 2/7 has asked
 - (c) 1/7 does not know at the time
3.
 - (a) 6/7 Mission would consider asking AMIS for ag. mktg. unrelated work
 - (b) 1/7 doesn't know yet

4. Anticipated lasting benefits from AMIS:
 - (a) All seven noted important problems had been identified/clarified.
 - (b) Guatemala and Gambia felt helpful changes had/would take place
 - (c) Nepal proposals for new activities been developed
 - (d) Philippines have advance training for H.R.

5. Recommendations for improving host country mkt. sys. perf.
 - (a) policy changes/adjustment
 - (b) communication/mkt. infrastructure improvement
 - (c) mkt. info. systems for individual commodity
 - (d) expansion of mkts., esp. export mkt.

6. For next 3 years, Mission's priority needs for further work on ag. market
 - (a) policy reform
 - (b) longer-term ag. mktg. sys. development
 - (c) dissemination, interpretation and synthesis of mkt. information (data)
 - (d) infrastructure improvement

7. Constraints in next 3 years to procure further TA in ag. mktg:
 - (a) shrinking financial resources
 - (b) lengthy system procedures
 - (c) overlapping function of ag. mkt. organization
 - (d) Burundi felt there would be none

ANNEX D

INTERVIEW GUIDE FOR VISITS TO FOUR AID MISSIONS AND SUMMARY OBSERVATIONS

Background Questions

- What activities were actually contracted to AMIS?
- How did you arrive at your "buy-in" decision?
 - Information about AMIS; personal contacts?
 - Mission and Government perceived needs for assistance?
 - The negotiation Process? - scope of work, budget, transaction costs to mission vs. other alternative procurement mechanisms? alternative sources of TA?

Your Assessment of the Work Performed by AMIS?

- Timeliness
- Qualifications of personnel assigned
- Effectiveness in forming a team and working with local collaborators
- Working relations with mission staff during the project?
 - Consultations on work plan?
 - Sharing information during the work period
 - Presentation of preliminary report (draft paper and memo; oral presentation)
- Satisfaction with final report and contracted follow up. Responsiveness of AMIS to comments and requests for revisions and/or further work.

What Follow up Has Been Arranged or is Under Consideration?

- Dissemination of report? Seminars?
- Training?

Will you continue to view AMIS as a prime source of TA for agricultural marketing activities?

- Rapids Appraisals?
- Applied Research?
- Pilot Innovations?

SUMMARY OBSERVATIONS FROM FOUR COUNTRY VISITS

Two members of the Evaluation Team, Paul Farris and Harold Riley, visited four countries where USAID missions had AMIS buy-ins. These were Senegal, Niger, Cameroon and Tunisia. The countries represented different kinds of problem areas and interests in AMIS participation. The first-hand knowledge gained from these visits was very helpful, along with AMIS reports and interviews with AID Washington representatives, in assessing the performance and contributions of the contracting firm and of the AMIS approach to marketing system improvement. The observations from the country visits also helped to point up implications for future emphasis and areas in which the AMIS approach appeared to have a comparative advantage over other arrangements for AID work. Following are brief highlights of the visits:

SENEGAL

The Senegal AID Mission had been involved in two AMIS activities. These were rapid appraisals dealing with rural coarse grain processing and horticult-ural crop marketing.

The coarse grain processing study was focused on the economic feasibility of processing machinery. While the study suffered because the rapid appraisal team did not include a food technologist or engineer, the financial evaluation by the economist was informative and considered to be useful in pointing up constraints to general adoption. Among the constraints were sparse population in rural areas, so that demand was not great enough to use certain types of equipment efficiently. Also fuel and spare parts were costly and not readily available. The processed product was not competitive with imported broken rice, which is preferred by most of the people. Several recommendations that would lead to improved performance in coarse-grain processing were made. A role for applied research was mentioned in the report, but mission personnel indicated any future work would not be considered until after an overall planning process for the mission that was currently underway would be completed.

The horticultural study addressed opportunities and potentials for market expansion, with particular attention to export marketing. Although Senegal appears to have an advantage in serving European markets because of off-season production, its exports have declined in favor of competitive suppliers. Difficulties include quality control and improvement, unreliability in providing timely market supplies, need for more timely market intelligence, and deficient infrastructure development such as cold storage and transportation. The dominant position of Air Afrique in air transport was mentioned as being expensive and complicating the arrangement for air shipments to Europe. There appears to be a

growing opportunity to expand the domestic market, in place of imports, especially for potatoes and onions. Possibilities also appear for selling more of these and other horticultural crops to neighboring African countries.

The AMIS report recommended selected policy changes with respect to product quality improvement, financing and regulations, along with additional research on identified problems. Although the report was considered by the mission to be a valuable contribution, plans for further AMIS activities were being held up until after overall mission planning was completed.

Mission personnel highly complimented the rapid appraisal reports, especially the work and contributions of John Holtzman. Private sector representatives also were very complimentary with regard to their discussions with Holtzman. However, they had not seen copies of the reports nor been informed of their contents.

NIGER

AMIS has had significant work in Niger, including rapid appraisals relating to cowpeas, livestock, hides and skins and onions. Some follow-up work is expected. This could involve regional collaboration with neighboring countries. Plans are being proposed for workshops based on completed reports.

The cowpea study consisted of a two-phase rapid appraisal of opportunities and potentials for expanding cowpea exports to Nigeria. In the first phase marketing deficiencies were highlighted and special attention was focused on the adverse effects of the export tax. The AMIS report was believed instrumental in the removal of the export tax. Examination of other marketing deficiencies was continued in the second phase, with emphasis on strengthening Niger's comparative advantage in cowpea production and export.

A study of livestock trekking and trucking gave attention to patterns, costs and constraints to efficient movement of animals on the hoof or by truck to Nigeria. A component of the study, relating to trends by species of livestock production and marketing in Nigeria, had not been done by July, 1990. This work was to have been done by an economist in Nigeria. The unavailability of this material made it impossible to achieve the overall goals of the study. However, much was learned through the effective work of Nicholas Kulibaba, who was responsible for the field research in Niger and Northern Nigeria.

A study of hides and skins export marketing sought to find ways to increase performance in the export marketing of hides and skins, primarily to Nigeria. While much useful information was assembled, delay in preparation of the final report was of concern to government officials in Niger, who were relying on the report

to help in planning for special emphasis on hides and skin exports.

The onion subsector was examined to evaluate performance in export marketing. It was concluded that the private sector was performing effectively; however, there are marketing impediments and the current export tax reduces both the volume of exports and the price received by producers. Removal of the tax would reduce barriers to entry and increase competition among traders. Market potentials for onions from Niger are believed favorable because of their recognized quality by consumers in neighboring countries.

The AMIS Evaluation Team has the following general observations on activities involving AMIS in Niger:

1. Mission personnel are commended on their planning for workshops, based on AMIS reports, with government officials and private sector representatives.
2. There seems to be an opportunity for productive regional collaboration involving trade between Niger and neighboring countries. Commodities might include livestock, meat, hides and skins, onions and perhaps other crops.
3. The possibility of a project on the opportunities and potential contributions of Niger women in marketing seems useful to consider.
4. The performance of parastatals generally was criticized in terms of marketing efficiency.
5. Inasmuch as several outside agencies, in addition to USAID, are engaged in economic development activities in Niger, it would seem desirable to maintain communication among them in order to enhance the role of each in the overall economic development of the country.
6. A difficulty in adequately compensating local Niger personnel for expenses of field work was mentioned by government officials.

CAMEROON

AMIS work in Cameroon focused on monitoring of fertilizer subsector reform, with emphasis on privatization. Subsidies had been made available to fertilizer importers to lower the cost of fertilizer to producers and facilitate the reform. There were two AMIS buy-ins. The principal objective of the first was to design a monitoring and evaluation system, including assessment of first year progress. Under the second, information on fertilizer use was assembled and surveys were designed to obtain specific information from producers. Arrangements were made with university staff at

Dschang to assist in questionnaire design, field surveys and data analysis. Also, an assessment was made of the second year privatization plan. It is expected that AMIS will be asked to conduct annual assessments of privatization progress in future years.

The Evaluation Team had meetings with USAID mission staff, the university staff at Dschang and representatives of Cameroon government agencies. The work of the AMIS personnel in Cameroon was much appreciated. In follow-up monitoring work it was considered highly desirable if Richard Abbott, who did the first and second year assessments, would be the person assigned for additional assessments.

Following are general observations on AMIS activities and the fertilizer subsector work.

1. The 1985 report by the International Fertilizer Center was a substantial, comprehensive and valuable study of the fertilizer subsector and fertilizer needs in Cameroon. It contained important benchmark material that was useful for the five-year program oriented toward privatization of the fertilizer importation and distribution program.
2. A report by political scientists from Indiana University contained information on the coffee subsector and its needs for fertilizer. The report included a broad classification scheme, oriented toward rules, that especially interested mission personnel.
3. The Technical Supervisory Committee of the privatization program appears to have a valuable role. The Evaluation Team believes it can contribute importantly to the success of the program.
4. In addition to the monitoring work, the team believes there is a need for applied research relating to the privatization program. It would be useful to understand the dynamics and driving forces involved in the fertilizer economy and to determine what policies might be required to assure that the program is carried through to a successful conclusion.
5. In order to achieve economies of scale, greater efficiency, more competition and lower costs in fertilizer importation and distribution, Cameroon and other countries in the region would appear to benefit through collaborative efforts. Consideration might be given to the possibility of a rapid appraisal oriented toward the feasibility of implementing a regional approach.

TUNISIA

The underlying theme in the two AMIS buy-ins is the privatization of Tunisia's cereals sector. The first buy-in included the gathering of data on cereals assembly, grading, imports, legal effects and other information related to marketing and distribution. Implications of a grain marketing reform program were indicated. The second AMIS buy-in was a follow up to the first phase and included the assembling of costs of storage, characteristics of grain grading and regulations. Plans are being made for key Tunisian government officials to visit grain marketing facilities and private sector representatives in selected countries that have effectively functioning marketing systems.

The review team visited AID mission representatives, government officials and representatives of the private sector. There was a general desire and support to move toward a privatized market system. However, it appears that the implications in terms of subsidy removal, financing, market pricing, competition and changed functions of participants in the liberalized system were not fully comprehended. The transition to a privatized market system will likely be a slow process, requiring much education, and continuing enthusiasm on the part of key government officials, to succeed. An education, facilitating and monitoring effort will need to be continued in order to keep the process moving forward. Because of the experience and understanding of AMIS personnel who were involved in the two buy-ins, they would appear to be very useful on a continuing basis. Mark Newman of Abt Associates is highly regarded for his work on these buy-ins in Tunisia.

ANNEX E**LIST OF INDIVIDUALS INTERVIEWED BY THE
AMIS EVALUATION TEAM****Washington, D. C.****USAID**

Tom Mehen	-	S&T/RD
John Lewis	-	AFR/SWA
Dana Fischer	-	AFR/SWA
D. Al Smith	-	AFR/TR/ANR
Thomas Herlehy	-	AFR/TR/ANR
Jim Lowenthal	-	ANE/TR/ANR
James Snell	-	ANE/RE/ARD
Dennis Weller	-	ANE/TR/ARD

ABT Associates

Jerry Martin	-	Project Manager
John Holtzman	-	Director of Research
Mark Newman	-	Director Int'l. Trade and Agr. Research
Richard Abbott		
Merle Menegay		
Tim Mooney		
Kathleen Poer		

Senegal

Julius Coles	-	AID Mission Director
Wayne Nilsestuen	-	ADO
Terry Myers	-	Project Development Officer
Moribadjan Keita	-	Local hire in ADO office
M. Mounir Filfili	-	Private exporter, vegetable producer, and local marketer
Lamine Ndiaye	-	General Manager of SEPROMA a privatized parastatal vegetable production and exporting unit
Ismael Ouedraogo	-	ISRA/MSU Project
Valerie Kelly	-	IFPRI/ISRA

Niger**USAID**

George Callen	-	Program Assistant, Gen. Dev. Office
Lou Ann Douris	-	Acting Program Officer
George Taylor	-	ADO
Erna Kerst	-	Project Development Office
Hararou Djibo	-	Local hire in program office
Jack Slattery	-	General Development Office
Mike Kerst	-	Program Office

Others

Barloumi Malik	-	Director, Office of Internal Commerce, Ministry of Economic Promotion
Hamani Harouna	-	Director, Office of Studies and Programs, Ministry of Planning
Madamo Diallo	-	Nigerian Center for Foreign Trade
Hamidou Amani	-	Technician, Ministry of Agriculture and Livestock
Nicolas Kulibaba	-	Consultant, ABT Associates

CameroonUSAID

Jay Johnson	-	Mission Director
Robert Shoemaker	-	Chief, Office of Program Design and Evaluation
Tjip Walker	-	Economic Analysis and Policy Reform Implementation Unit

University Center at Dschang

Simon Lyonga	-	Director of the Institute of Agricultural Technology
Kamajou Francois	-	Head, Department of Rural Economics
Max Langham	-	University of Florida Project

Members of the Technical Supervisory Committee for the Fertilizer Subsector Reform Program

Mohamadou Talba	-	Secretary General, Ministry of Planning and Regional Development
Felix Nkonabang	-	Ministry of Agriculture

Other

Tom Stillwell	-	AID/IITA Project on Agricultural Research
_____	-	Director of Agr. Statistics Unit in Ministry of Agriculture

TunisiaUSAID

Shirley Pryor - Agricultural Project Officer,
Manager of APAP Project

Other

Badr Ben Ammar - Director of Planning, Ministry
of Agriculture

Ali Debaya - General Director, Office of
Cereals

Alain Sfez - Cargill

Mr. Triki - Manager of CCGC, a grain
cooperative

Mr. Sammoud - Manager of COCEBLE, a grain
cooperative

Mr. A. Ben Ayed - General Manager of POULINA, a
large integrated poultry
enterprise

Mr. S. Makhlouf - Director, Office of Price
Control, Ministry of Finance and
National Economy

Ms. Cheri Rassas - Resident representative, APIP
Project Abt Associates, Ministry
of Agriculture

Dr. Abdallah
Omezzine - Agricultural economist and coor-
dinator of visits by AMIS
evaluators

ANNEX G

LIST OF PAPERS AND REPORTS REVIEWED BY THE
EVALUATION TEAM

ADMINISTRATIVE DOCUMENTS

AID/AFR/TR. A Strategic Framework for Promoting Agricultural Marketing and Agribusiness Development in Sub-Saharan Africa. July 1990.

AID/S&T/RD. Agricultural Marketing Improvement Strategies, Project Paper. April 1987.

Abt Associates, Inc. Proposal for the Agricultural Marketing Improvement Strategies Project to the Agency for International Development, August 1987.

_____, Second Annual Activity Work Plan, AMIS, November 1988.

_____, Third Annual Activity Work Plan, AMIS, March 1990.

AMIS PAPERS AND REPORTS

Abbott, Richard D. Privatization of Fertilizer Marketing in Cameroon: A Second-Year Assessment of the Fertilizer Sub-sector Reform Program. June 1990.

_____. Privatization of Fertilizer Marketing in Cameroon: A Second-Year Assessment of the Fertilizer Sub-sector Reform Program (Technical Report). June 1990.

Abbott, Richard D. and Tjip Walker. Privatization of Fertilizer Marketing in Cameroon: First-Year Assessment of the Fertilizer Sub-sector Reform Program. June 1989.

Abbott, Richard D. Privatization of Fertilizer Marketing in Cameroon: First-Year Assessment of the Fertilizer Sub-sector Reform Program (Technical Report). June 1989.

Gulliver, Aidan. Operational Guidelines for the Rapid Appraisal of Parastally Dominated Agricultural Marketing Systems. 1988.

Holtzman, John S. Preliminary Review of Rapid Appraisal Methods Used by the AMIS Project. August 1990.

- Holtzman, John S., Jerry Martin and Richard Abbott. Operational Guidelines: Rapid Appraisal of Agricultural Marketing Systems. December 1988.
- Holtzman, John S. Coarse Grain Processing in Senegal: Issues, Constraints and Policy Program Options. May 1989.
- Holtzman, John S., Charles J.D. Stathacos, Thomas Wittenberg, and collaborators. Horticultural Marketing and Export in Senegal: Constraints, Opportunities and Policy Issues. January 1990.
- Holtzman, John S. with the collaboration of Thomas Wittenberg, John C. Abbott and Mark D. Newman. Towards an Africa Bureau Agricultural Marketing Strategy and Action Plan. June 1990.
- Johnson, Anthony and Daniel C. Moore. Monitoring and Data Collection System for the Fertilizer Sub-sector Reform Program: Status Report. June 1990.
- Minot, Nicholas. Monitoring and Data Collection System for the Fertilizer Subsector Reform Program of Cameroon. May 1989.
- Minot, Nicholas and Jerry J. Johnson. Fertilizer Utilization Practices and Crop Response Research: Recommendations for the Fertilizer Subsector Reform Program of Cameroon. October 1989.
- Mock, Christopher. Agricultural Marketing in Chad: Preliminary Project Identification Assessment. August 1989.
- Newman, Mark D., James Ladd, Mongi Boughzala and Badr Ben Amar. A Plan of Action for Tunisia's Cereals Sector: First Phase Report. May 1989.
- Newman, Mark D., Richard D. Abbott, Merle R. Menegay, David Hughes, Jim Brown, JoAnne Yeager and Liana Neff. Agribusiness Development in Asia and the Near East: Experience and Implications for AID Strategy. May 1989.
- Newman, Mark D. Agribusiness Development in Asia and the Near East: Strategic Issues and a Plan for Action. July 1989.
- Newman, Mark D. Promoting Agribusiness in Asia, Eastern Europe, the Near East, North Africa, and the South Pacific: A Strategy for A.I.D.'s ANE Missions. January 1990.
- Newman, Mark D. and Jo Anne Cohn. Tunisian Grain Storage Financial Analysis Model: Instruction Manual. May 1990.

Rassas, Bechir, Millie Gadbois, R. Dixon Phillips, John S. Holtzman and Richard D. Abbott. A Rapid Appraisal of the Marketing of Niger Cowpeas. May 1989.

DRAFT DOCUMENTS

AgriSource Co. Ltd. A Case Study of Successful Innovations in Thailand's Fresh Fruit and Vegetable Export Industry. August 1990.

Barriga, Claudio in collaboration with Alejandro Leon, Manuel Saavedra and Richard D. Abbott. The Fruit and Vegetable Export Sector of Chile: A Case Study of Institutional Cooperation. October 1990.

Chambers, Maiko F. and Mark D. Newman. Global Agribusiness Resource Guide: Government Assistance for International Investment, Joint Ventures and Trade. September 1990.

Mooney, Timothy, Soren Nielsen, Andre Benoit and David Benoit in collaboration with Idrissa Seykdou, Gourou Amadou and Hararou Djibo. A Rapid Appraisal of the Hides and Skins Sub-Sector in Niger. April 1990.

Wittenberg, Thomas E. Agricultural Marketing in Africa: A Selective Review of the Literature. April 1990.