

AIMs Semi-Annual Report—Year 2

April 2004 – September 2004

**Malawi Agricultural Input Markets (AIMs)
Development Project**

**Private Bag 353
Capital City
Lilongwe 3
Malawi**

**Telephone: (265) 01 773 109/901
E-mail: hweeks@ifdc.org**

Prepared for

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by

IFDC

*An International Center for Soil Fertility
and Agricultural Development*

**P.O. Box 2040
Muscle Shoals, Alabama 35662, USA**

www.ifdc.org

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Improving access to agricultural inputs

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List of Acronyms and Abbreviations

ADD	Agricultural Development Division
AIMs	Malawi Agricultural Input Markets Development Project
AISAM	Agricultural Input Suppliers Association of Malawi
COP	Chief of Party
CPPs	Crop Protection Products
DFID	Department for International Development
GMOs	Genetically Modified Organisms
GOM	Government of Malawi
ha	hectare(s)
IR	Intermediate Results
IFA	Input for Assets
IFDC	An International Center for Soil Fertility and Agricultural Development
kg	kilogram(s)
M&E	Monitoring and Evaluation
MIDST	Malawi Integrated Decision Support Toolbox
MIS	Market Information System
MOAIFS	Ministry of Agriculture, Irrigation and Food Security
MOU	Memorandum of Understanding
mt	metric ton(s)
NGO	Non-Governmental Organization
PAC	Project Advisory Committee
PCB	Pesticide Control Board
POSAM	Pesticide Association of Malawi
SO	Strategic Objective
SOE	State Owned Enterprise
SPLIFA	Sustainable Productive Livelihoods Project Through Inputs for Assets
STC	Short Term Consultant
TIP	Targeted Input Program
UNADA	Ugandan National Agro-Dealers Association
USAID	United States Agency for International Development

Preface

In October 2003, IFDC submitted the first Annual Report covering inception of the project through Year 1. An accompanying budget and work plan that provided details on Year 2 activities and agreed performance indicators were also submitted. Most of the activities for the Year 2 program have surpassed agreed annual performance indicators. The project continues to gain respect, recognition and interest from both third party donor organizations and the private sector as it focuses on developing a sustainable market driven agri-input network.

During the year IFDC liaised with NGOs and the donor community to ensure their agricultural activities foster and support the development of the AIMs project, specifically:

- Agreement was reached on financial support being provided by the World Bank to distribute agricultural inputs which have been undertaken through the input dealer system established by the AIMs project.
- Support provided to the AIMs effort by the DFID-funded Sustainable Productive Livelihoods Project Through Inputs for Assets (SPLIFA), provided voucher redemption for agri-inputs through the Agri-Input Supplier Association of Malawi (AISAM). Monitoring and evaluation of this project shows that over 60% of all commissions received have been reinvested into agricultural inputs for sale in rural based shops.
- The capacity building efforts of the AIMs project are evidenced by the growth in number of rural outlets. In addition, there is evidence of more appropriate products being sold in rural outlets.
- Administratively the Chief of Party has established and maintains a network of communication with all major donors active within the agricultural community.
- Support and management assistance is continuously provided to the branch offices in Mzuzu and Blantyre as well as ensuring that resources are available to 26 staff members implementing the project.

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Executive Summary

The project has been working during the second year to strengthen open and competitive markets and dealer networks as the primary mechanisms to improve farmer access to appropriate technologies. The project is directly enhancing enterprise development and an improved policy and regulatory setting, both key to improving the efficiency in agri-input supply and facilitating smallholder access to appropriate production technologies. These activities all contribute to achieving the USAID Mission Strategic Objective (SO) 6, “To achieve sustainable increases in rural incomes” and is directly addressing achievement of the intermediate result (IR) 6.1, “sustainable increases in agricultural productivity” by promoting the expansion of a private sector-led economy and the growth of successful small and medium enterprises.

Most of the activities for the Year 2 program have surpassed agreed annual performance indicators. Highlights and achievements during the year are:

- **Training**

Out of 13 training sessions conducted in 2004, 380 input dealers were trained against a target of 250. A total of 83 participants were from large input traders, 182 were small to medium independent dealers and 72 were from other organizations. Thirty-five women dealers were trained representing 16.9% participation rate.

- **Agronomy**

The project implemented a total of 108 demonstration sites countrywide. Out of these, 30 sites were for winter while 78 were established in summer. The basic technologies that were demonstrated were balanced plant nutrition and also use of high-yielding maize varieties among others, such as use of humic acids. So far the results comparing use of NPK and NP have shown remarkable yield differences.

- **Market Information Systems (MIS)**

During the year under review, 61 radio programs were produced and aired benefiting about 51% of the 2.4 million farmers, and over 70% of dealers (>800) benefited from each broadcast. A total of 13 television programs were produced and beamed, and these benefited over 40% of the dealers (>500) each broadcast and more than 300,000 viewers.

- **Agri-Input Suppliers Association of Malawi (AISAM)**

AISAM development is proceeding quickly. Membership has grown tremendously from 15 in the first year of the project to 526 representing about 45% of the targeted 1,158. The southern region has the largest membership representing approximately 56% of the total.

Staff of IFDC, Ministry of Agriculture, Irrigation and Food Security (MOAIFS), and members of AISAM undertook two international study tours:

- To Uganda to explore regional opportunities and study the structure and functioning of the Ugandan National Agro-Dealers Association (UNADA).
- To Tanzania where import and export opportunities through the Northern Corridor route into Malawi were explored.

Both tours built business networking and enhanced an understanding of association development and business opportunities.

- **Policy and Regulatory**

Policy and regulatory activities of the project have been strong, with breakthrough activities setting the stage for government to enact regionally significant legislation in the areas of:

- Genetically Modified Organisms (GMOs)
- Seed Quality and Purity
- Crop Protection Products (CPPs)
- Fertilizers

The national consultative workshop on the assessment of the requirements for establishing a Bio-safety/Biotechnology Regulatory System in Malawi was held June 9-10, 2004. The workshop was attended by a cross-section of participants from different ministries, non-governmental organizations (NGOs), donor community, embassies and the civil society, parastatal bodies and the private sector organizations. The workshop on regulatory framework on fertilizer, seeds and CPPs will be held November 11-12, 2004.

- **Other**

Among project achievements in influencing policy in Year 2 is the successful facilitation of the government's bilateral negotiations with Mozambique to increase participation of the private sector in the management and shareholding of the Nacala Port and Railways system from 0% to 17.5%. The project provided information and advice to government as well as technical support during the negotiations which took place in Malawi as well as in Mozambique. It is important that Malawi's private sector should contribute towards decision-making, especially on rail transport tariff which accounts for approximately 40% of fertilizer imports to Malawi.

Sustainable development of the trade association, AISAM, implementation of regulatory policy reforms for inputs, strengthened policy dialogue to reduce input supply costs, and continued activities to develop input markets through improved farmer access, technology transfer, and market information will form the basis of the third year work plan.

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1. Introduction

The *vision* of the Agricultural Input Markets (AIMs) development project is to improve the productivity and profitability of the agricultural system in Malawi, thus improving household and national food security, reducing rural poverty, and increasing social stability. The project *goal* is “to improve smallholder farmer access to improved quality seeds, fertilizer, and crop protection products through financially sustainable agri-input supply and marketing systems.” The general *objective* of the project is “to significantly increase the supply and use of improved quality seed, fertilizers, and crop protection products (CPPs).”

The project has been working to strengthen open and competitive markets and dealer networks as the primary mechanisms to improve farmer access to appropriate technologies. The project is directly enhancing enterprise development and an improved policy and regulatory setting, both key to improving the efficiency in agri-input supply and facilitating smallholder access to appropriate production technologies. These activities all contribute to achieving the USAID Mission Strategic Objective (SO) 6, “To achieve sustainable increases in rural incomes” and is directly addressing achievement of the intermediate result (IR) 6.1, “sustainable increases in agricultural productivity” by promoting the expansion of a private sector-led economy and the growth of successful small and medium enterprises.

This project is establishing a vibrant private sector-led, agri-input supply and marketing system. It is strengthening the institutional capacity of the government with regard to policy reforms; regulatory system design and implementation; and information collection, analyses, and dissemination. It is developing and implementing a program that is providing alternatives to donor-funded input distribution programs such as the Targeted Input Program (TIP) to include the private sector. The project will continue to implement the core recommendations of the “Action Plan for Developing Sustainable Agriculture Input Supply Systems in Malawi.”

The four core areas are: developing human capacity and dealer network, deepening policy reforms and policy studies, establishing and implementing regulatory systems, and developing a market information system (MIS).

Year 2 activities focused on the consolidation of the activities that were carried out during the first year of the project, including the following:

- Building on the local entrepreneurial base.
- Developing and delivering training programs to improve the technical and business skills of agri-input dealers.
- Consolidating the activities of the association.
- Facilitating the implementation of the reviewed regulations and identifying policy constraints.
- Implementing the establishment of a regional MIS that will enhance knowledge of agricultural inputs availability and pricing and will provide a platform for expansion into related areas.

2. Administration

Infrastructure Development

An aggressive effort has been made to continue the development of a sound and well-functioning infrastructure that allows for the efficient and effective attainment of the project goals and objectives. The following activities have been completed.

- Expanded office communications and logistics.
- Completed hiring of staff.
- Completed the policy and personnel procedures handbook.
- Ensured that all staff members understood the project objectives.
- Consolidated infrastructure in zone offices, Blantyre and Mzuzu.

Management

The following activities were implemented:

- Identify IR targets and definitions in line with USAID SO 6.
- Design a baseline tracking system for IR results and cost contributions.
- Establish contacts and identify areas of collaboration with relevant USAID partners and other donor-funded programs.
- Update scopes of work and job descriptions for staff.
- Identify and confirm with Headquarters on hire of local, regional, and U.S. short-term consultants (STCs) for project assignments.
- Work with Project Advisory Committee to plan and guide project implementation.

Monitoring and Evaluation

The policy unit has been responsible for the monitoring and evaluation of the project activities under the overall direction of the Chief of Party (COP) and the Project Advisory Committee (PAC). Monitoring and performance measurement focused on activities contributing towards achieving the USAID Mission SO 6, “To achieve sustainable increases in rural incomes,” and which directly address achievement of the IR 6.1, “sustainable increases in agricultural productivity,” by promoting the expansion of a private sector-led economy and the growth of successful small and medium enterprises. The project team, in concert with USAID and the Ministry of Agriculture, Irrigation and Food Security (MOAIFS), established benchmarks and quantifiable targets to assess progress. Results will be measured in terms of:

- The number of agricultural inputs dealers.
- Fertilizer importation levels.
- Number of input dealers trained in improved inputs usage methodology.
- Distance to input markets.
- Income of target farmers.
- Cost of agricultural inputs.
- Impact of policy changes.
- Impact of regulatory system on quality control of inputs.
- Quality of market information being made available to entrepreneurs.

Monitoring has been done in accordance with the work plan through appropriate data collection methodology. The following table provides a timeline of activities and corresponding result indicators.

Performance Indicator	Actual Project Result
<p>Cumulative number of independent agri-input dealers.</p> <p>Target for 2004: 800</p>	<p>The actual number of input dealers registered: 1,158 exceeded the target by 45%.</p> <p>The Agri-Input Suppliers Association of Malawi (AISAM) was launched and held its first AGM in February 2004.</p> <p>27 district associations have been established and elected committees are in place.</p> <p>Training needs assessment has been completed and a report is in place. A business management training manual has been developed.</p> <p>Eight AISAM's district associations have been linked with local fertilizer importers and purchased 458 mt fertilizers on cash basis worth 15,615,200 (US \$144,585). Through this arrangement members generated 5% profit margin (MK890,066).</p> <p>One medium dealer obtained a short term loan of 105 mt worth MK3.8mill (US \$34,550) fertilizer to supply on contract to GOM/EU Public Works Program. AIMs project acted as escrow agent in this transaction.</p> <p>Four AISAM District Associations Bank accounts were opened with cumulative deposits of MK96,000 representing 16.6% of the target.</p> <p>Training in Credit Sourcing Procedure has been conducted in collaboration with financial institutions.</p> <p>Fertilizer imports estimated at 224,362 mt exceeding, the target by approximately 5%.</p>
<p>Quantity of fertilizer imported by the private sector.</p> <p>Target 214,000 mt</p>	<p>Fertilizer marketing and distribution in 2004 was expected to be completely under the private sector, i.e., with 100% market share. With increased penetration by small to medium independent dealers and stockists, the share of the largest four firms was expected to decline from 83% to 80 % between 2003 and 2004.</p>
<p>Market share of fertilizer sales by the private sector.</p>	<p>AIMs project estimates as presented in Figure 1 indicate that the private sector controls about 92% of the total fertilizer sales in the country and the share of the largest four has declined from 83% to 80% as indicated in the project's work plan.</p>



Figure 1. Market Share of the Private Sector Fertilizer Sales

1994/95 season: Trade liberalization of fertilizer in Malawi induced private sector participation as parastatals reduced imports.

1999/2000 season: Parastatal imports were increased because of open starter pack program. This negatively affected private sector participation

Input Market Performance

Input market performance is seen as a measure of increased competition and improved delivery of market acceptable benefits such as technical know how and access to inputs.

Performance Indicators	Actual Project Results
Fertilizer prices	<p>Reduction in the average fertilizer price is the project's key market performance indicator. During the planning phase it was anticipated that the project's activities would lead to a reduction in fertilizer prices by approximately 20% from US \$16.35/50 kg bag in 2002 to US \$13.20 per 50 kg bag in 2004.</p> <p>This was not achieved because:</p> <ul style="list-style-type: none"> • Pricing quantum's used are holistic and take into account significant increases in supply chain components beyond the control of this project including • Increases in the world Urea commodity price from approx US \$5 per 50 kg to US \$8.25. • Increase in bulk sea freight costs because of economic growth in China incurring increase in sea freight from US \$2.25 per 50 kg to US \$4.50 • Increase in world fuel prices that have impacted freight rates. <p>Retail Price/FOB ratio has been used to estimate effects of project intervention on fertilizer prices. A reduction in the magnitude of this ratio implies that the rate of increase in domestic prices is less than the rate at which foreign prices are increasing. Estimates of weighted retail/fob price ratios show a decline from 2.70 in 2002 to 1.58 in 2003 and a further marginal decline to 1.53 in 2004.</p> <p>The decline in the retail/FOB price ratio can be attributed to the reduction in the transactions cost, as evidenced by the reduction in the importers' profit margin from approximately MK20/bag in late 1990s to MK10/bag in 2003/04 and that of retailers margin from MK10/bag to MK5/bag, over the same period (see Figure 7). Reduction in transactions cost can be further attributed to the increase in the number of input traders resulting from activities of this project.</p>
Access to inputs.	<p>A proxy measure based on the number of farm families per one input dealer has been used to assess the extent to which the project has facilitated farmers' access to inputs. A decline in the number of households served by one input dealer implies an improvement in service delivery and access. The number of farm families to be served by one input dealer was expected to decline from 3,239 to 3,000 between 2003 and 2004. Project estimates in 2004 indicate that one dealer is serving 2,500 farm families, exceeding the target by approximately 17%.</p>
Input use	<p>Input use is another indicator for assessing access to inputs. The percentage of farmers using improved technologies (fertilizer, improved seeds and CPPs) was expected to rise from 34% in 2003 to 36% in 2004. The project estimates show that the target has been exceeded by 0.6%.</p>

3. Activities by Core Project Components

3.1. Human Capacity Building and Dealer Development

This project component continued to build local capacity to improve the availability and expand the number of agri-input dealers within Malawi by:

- Developing the skills needed for dealers in rural areas to meet the needs of their customers.
- Fostering the development of a network of dealers, and improving their advisory skills and extension services.
- Increasing dealer understanding of business plans, credit access, banking procedures, documentation, and record keeping needed in order to conduct business profitably.

The project assisted Agri-Input Suppliers Association of Malawi (AISAM) in collaboration with Pesticide Association of Malawi (POSAM) to establish the new training needs of the dealers for purposes of consolidating their activities. Technical assistance was provided through demonstration plots and study tours as well as through publications, radio, and television messages. Other activities conducted included a round table discussion aimed at bringing all stakeholders in the agri-input supply system to discuss matters of concern and suggesting the way forward. It is believed that information gathered at this meeting greatly assisted the project in the identification of gaps in the system which would need to be addressed and provided the basis for activities to be carried out during the third year of the project.

Training

A total of 250 participants were targeted to be trained in marketing, business management and product knowledge (fertilizers, CPPs and hybrid Seeds). Out of 13 training sessions conducted in 2004, 380 input dealers were trained of which 83 were from large input traders, 182 were small to medium independent dealers and 72 were from other organizations. A total of 35 women dealers were trained representing 16.9% participation rate.



Figure2: Training Session in Progress

Self evaluations of all formal training sessions were conducted to determine their effectiveness. Overall, 31% rated the courses excellent, 47% rated them very good and 20% rated them good while 3% rated the sessions fair, and none of the participants rated them poor (see Figure 3).

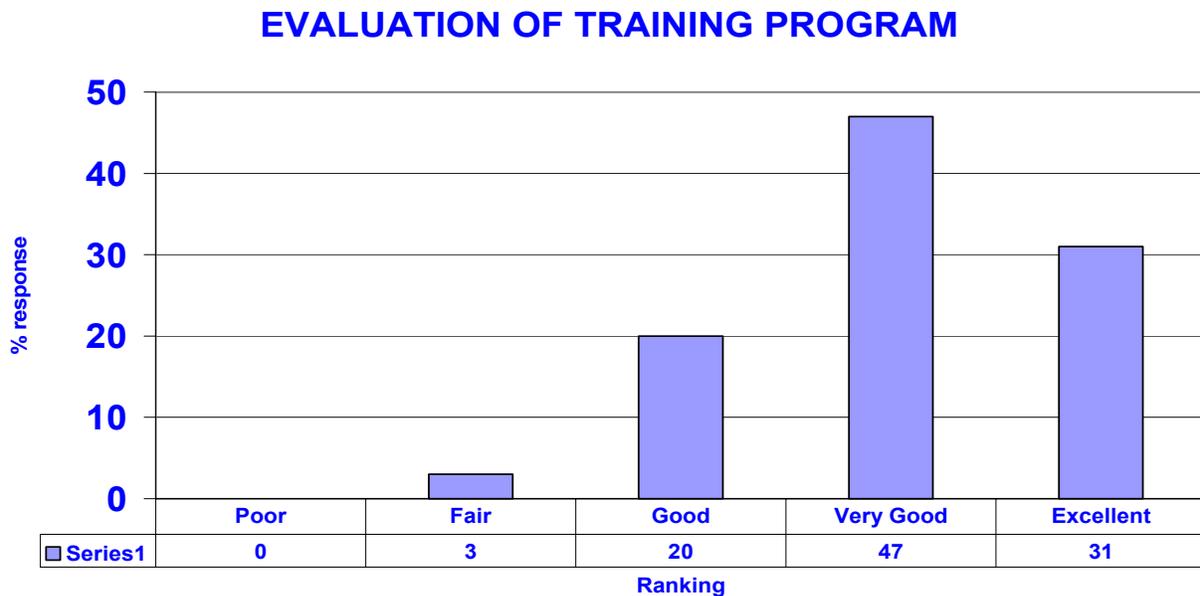


Figure 3. Self Evaluation of Training Courses.

AISAM Membership

Achievement of this project component is clearly tied to a functioning “dealer association” that is actively engaged in their development and aggressively pursuing increasing their level of entrepreneurial efforts. In Year 2 the project planned to make at least 28 contacts with the aim of increasing the first year’s AISAM membership by 10%. The membership drive in the second year has been very successful to the extent that 26 district associations with a targeted potential membership of 1,158 have been established. Membership has grown tremendously from 15 in the first year of the project to 526 representing about 45% of the targeted 1,158. The southern region has the largest number of membership representing approximately 56% of the total.

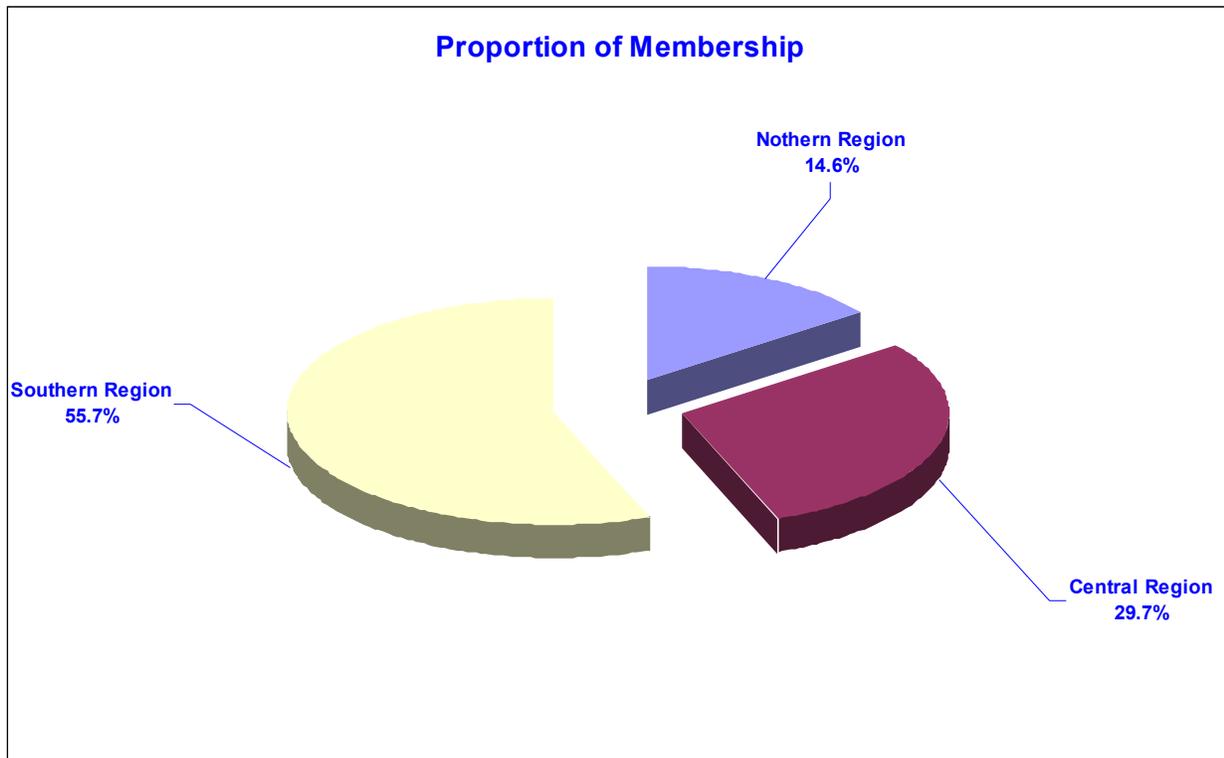


Figure 4. AISAM Membership by Region.

In line with the objectives for the establishment of AISAM, i.e., to promote business linkages of its members to financial institutions and input suppliers, eight affiliate associations have been linked with local fertilizer importers this year enabling them to procure 458.05 mt of fertilizers worth MK15,615,200. Through these arrangements members of the association managed to generate profit margins of about 5.7% of the total transactions which is approximately MK890,066. Further, the

project facilitated the distribution of DFID-funded safety-net project (SPLIFA) worth MK2,228,600. This collaborative programme which involved 48 AISAM dealers created employment opportunities to 192 workers translating to MK384,000. The association continues to create employment that has the potential to reverse migration of the youth to urban areas induced by lack of economic activities.



Figure 5. Improved Product Handling and Storage

Consolidating leadership and business management skills are other project activities carried out in Year 2 in support of capacity development efforts. Three sessions, one in leadership and the other in business development, were conducted. Through these specialised skills development sessions, district associations have been able to mobilise paid up membership and prepare work-plans. Bank accounts for four district associations have been opened and currently AISAM account has MK96,000 representing 16.6% of the targeted MK579,000 bank balance. Signing of a memorandum of understanding (MOU) with a foreign fertilizer supplier OMNIA involving 10,000 mt of fertilizer is further evidence that leadership and business management interventions by the AIMS project are paying dividends.

The successes registered in this project component could have been surpassed if it were not for communication bottlenecks between the secretariat and district associations. Considering that the majority of AISAM members operate from rural areas with poor infrastructure, transportation of inputs continues to be one of the major obstacles. Further, access to credit limits input dealers' capacity to purchase adequate stocks, one of the major constraints being high collateral requirements.

3.2. Deepening of Policy Reforms and Policy Studies

Activities in this project component focused on the need to thoroughly analyze and assess the current policies, through studies, workshops, meetings on how they interact with the current agricultural input supply system, and development of alternative scenarios aimed at supporting sustainable development within Malawi. Through collaborative efforts with donor communities and NGOs the project has established how effectively alternatives to the free distribution of inputs will assist in the marketization of donor/government safety net programs through the voucher system. These efforts have influenced government and one DFD funded safety-net project (SPLIFA) to adopt on pilot basis the voucher system as an instrument for input distribution.

Among major project's achievements in influencing policy in Year 2 is the successful facilitation of government's bilateral negotiations with Mozambique to increase participation of the private sector in the management and shareholding of the Nacala Port and Railways system from 0% to 17.5%. The project provided information and advice to Government as well as technical support during the negotiations which took place in Malawi as well as in Mozambique. It is important that Malawi's private sector should contribute towards decision making especially on rail tariff considering that transport charges account for approximately 40% of fertilizer imports to Malawi.

Preparation of policy briefs and information sharing on regular basis are some of the strategies through which the relationship between the AIMs project and the Ministry of Agriculture, Irrigation and Food Security and other ministries has been strengthened. One of these briefs aimed at creating awareness on policy effects on fertilizer prices and cost structure after some government officials and the media blamed the private sector for skyrocketing fertilizer prices. In a detailed analysis (Figure 6 the AIMs project has shown that prices paid by farmers in Malawi for a 50 kg bag of fertilizer in US \$ terms have remained relatively stable over the past decade.

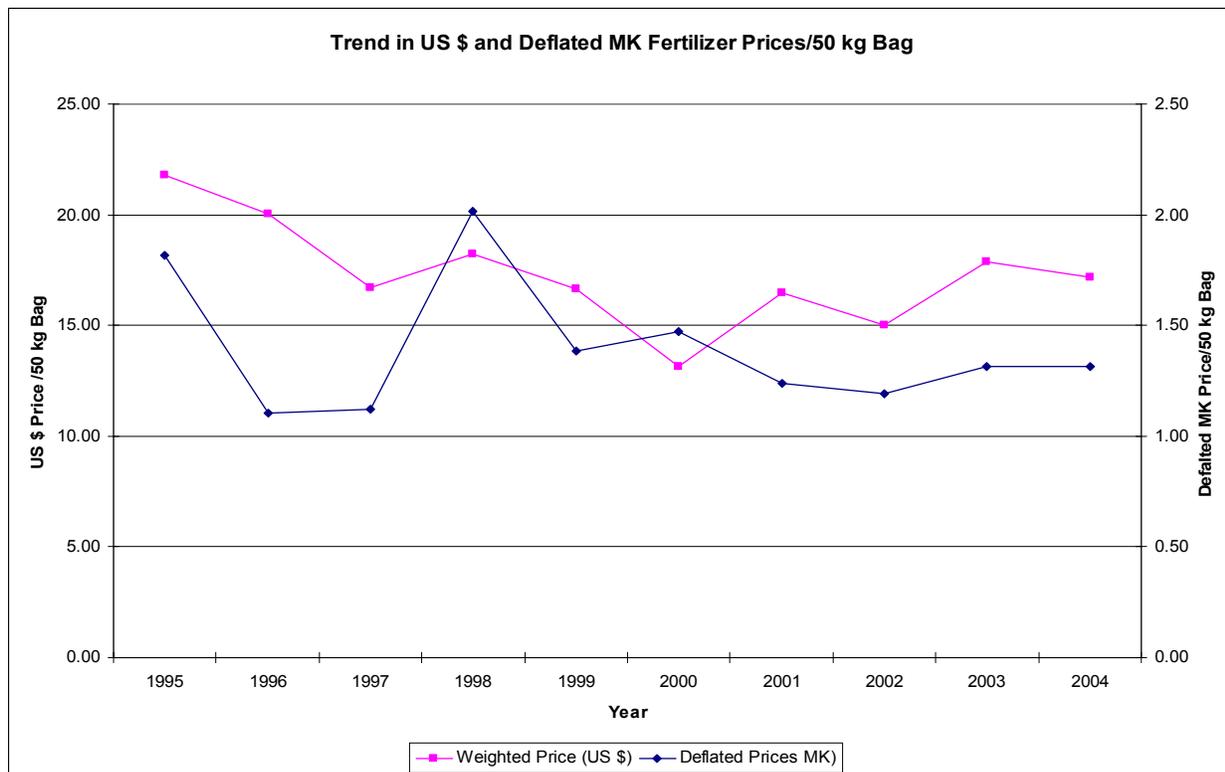


Figure 6. Trends in Foreign (US \$) and Real Fertilizer Prices / 50 kg Bag

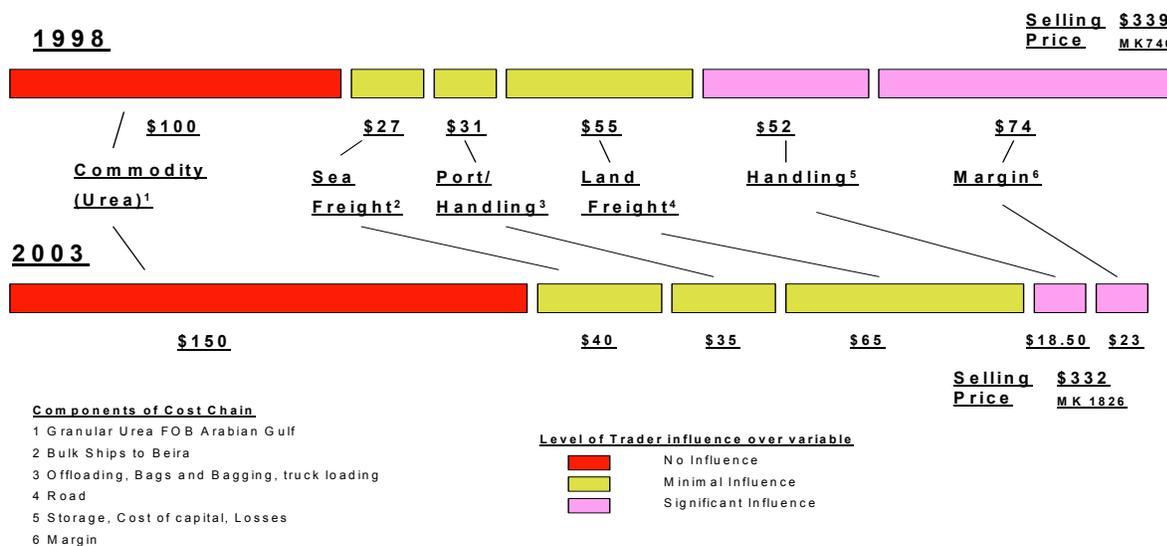


Figure 7. Cost Chain Analysis for Importing Urea Fertilizer – US \$/mt Arabian Gulf through Beira to Lilongwe

However, in Malawi Kwacha terms fertilizer prices have more than doubled largely as a result of currency devaluation from MK44/ US\$1 in 1998 to MK 107 US\$1 over the same period, something that the business community in Malawi has no control over and highlights the impact that

currency devaluation has on imported product pricing. For example, Urea price per 50 kg bag has more than doubled from MK746 in 1998 to MK 1826 in 2003 primarily because of the devaluation of the kwacha against the dollar.

The policy briefs also shed light on components of the cost structure in which the private sector importers have control over and also established that the industry in Malawi is as competitive as any in the developed world, operating on profit margins lower than those generally accepted as sustainable in many business enterprises. For example in Figure 7, the profit margin for fertilizer importers represents less than 10% of the retail price while transport and handling in which they have little control represents more than 48% of the retail price. As a result of this intervention, a positive image on the role of the private sector in input distribution has been created to the extent that government and the donor community are increasingly involving the private input suppliers in the planning and delivery of safety-net programmes.

In line with one of the project's objectives of reducing the cost fertilizer, the AIMs project has supported both government and the private sector to explore alternative and low cost supply routes such as the northern corridor that would allow fertilizer imports through Mbeya. The need to explore the use of the northern corridor is justified on the basis that current demand for fertilizer in the Northern Malawi is estimated at 28,000 mt/year, but currently only 12,000 mt is supplied, leaving a shortfall of 16,000 mt. Reduction in cost of transportation, which is currently 5% higher than the national average, could treble fertilizer consumption to about 60,000 in this region.

3.3. Strengthening Regulatory Systems

The project aims to assist the GOM to review and implement proposed legislation for seeds, fertilizer, and CPPs with the view to strengthening the regulatory framework.

Implementation Strategy

The proposed strategy included the following:

- Holding a stakeholders' workshop where the three legislations are discussed and proposed changes made.
- Presenting draft legislations to parliament for discussion.

- Assenting the draft legislations by the head of state.
- Implementing and enforcing the legislation.

Two key consultancies one on regulatory framework for fertilizer, seeds and CPPs and the other on the requirements for establishing a bio-safety/biotechnology regulatory system in Malawi were completed and submitted to government for internal review in Year 1. The process of internal review and stakeholder consultations on the recommendations from the two draft reports was not completed until this year. The national consultative workshop on the assessment of the requirements for establishing a bio-safety/biotechnology regulatory system, was held on from 9th – 10th June 2004. The workshop was attended by a cross section of participants from different ministries, non governmental organizations, donor community, embassies and the civil society, parastatal bodies and the private sector organizations. At the end of the workshop delegates agreed that:

- A comprehensive Policy embracing plant, animal and human biotechnology should be developed;
- There should be a review of legislature and regulatory framework; and that
- A five man Task Force to oversee and monitor the preparation of the draft Biotechnology Policy chaired by the National Research Council of Malawi be formed.

The process of developing biotechnology policy has been initiated with the appointment of a Task Force of which IFDC/AIMs has been invited to provide technical support.

The internal review by the Ministry of Agriculture on regulatory systems for fertilizer, crop protection products and seeds was completed on 17th September, 2004 and the national consultative workshop will be held from 11th to 12th November, 2004.

3.4. Market Information Systems

Timely and accurate information is the foundation of market transparency and is essential for proper functioning of the markets. This is necessary for assessing the impact of policy reform and enabling the private sector entrepreneurs, commercial banks, government officials, and concerned donors to make timely appraisal of market conditions (i.e., supply, demand, and prices) for agri-inputs.

Activities undertaken to achieve the stated objectives included gathering of relevant data from selected markets throughout the country using a simple questionnaires and data gathering forms. During the period under review, 10 rounds of data collection from 17 market points were accomplished. The data was processed, summarized and disseminated through mass media (newsletter) and an electronically retrievable system (website) for use by the government, donors, clients, and the public at large. The project maintains a regional and national scope of agri-input data. Radio and television programs targeting dealers and farmers were used to disseminate information on appropriate use of inputs.

The project has built capacity to process, transmit and disseminate inputs price data and technically sound and up-to-date information through its MIS and Agronomy Sections as can be observed from a summary performance indicators in Annex 2. Various media such as radio, television, newsletters, leaflets, brochures, field days, bulletins, demonstration plots, training sessions and a web based system were used to improve access to quality information to agricultural inputs market participants, farmers, donors, policy makers, research institutions, NGOs and many other development partners particularly those involved in agricultural activities.

Radio Programs

During the year under review, 61 radio programs were produced and aired benefiting about 51% of the 2.4 million farmers and over 70% of dealers (>800) benefited from each broadcast. A total of 13 television programs were produced and beamed and these benefited over 40% of the dealers (>500) each broadcast and more than 300,000 viewers.



Map of Malawi showing Agricultural Development Divisions (ADDs)

MARKET INFORMATION SYSTEM

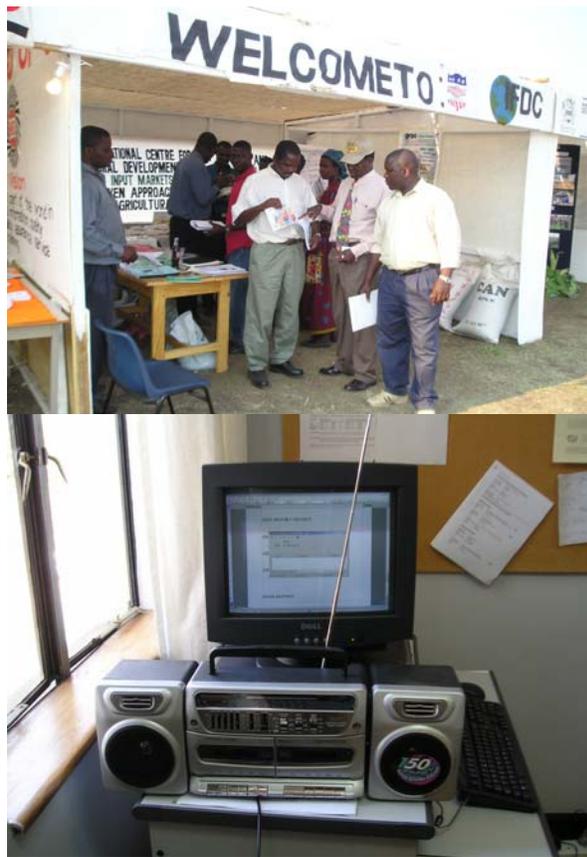
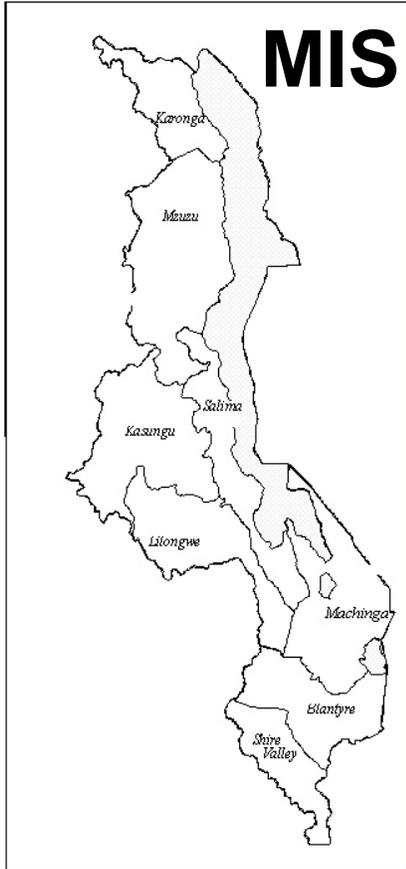


Figure 8. Programmed Activities in Market Training and Market Information System

IFDC-AIMs Newsletter

A total of 12 Issues of Volume 2 IFDC Newsletter were produced and distributed to over 1,000 recipients monthly and over 12,000 copies distributed in the year. The recipients of these newsletters include dealers, importers of agricultural inputs, donors, NGOs, sister projects in other countries such as West Africa, Eastern Europe, Asia and other networks such as IITA.

IFDC-AIMs Monthly Price Bulletin

The MIS section publishes a price bulletin every month carrying a series of local and international price data for some fertilizers. A total of 9 Issues of Volume 1 have been published and over 9,000 copies distributed during the year.

Leaflets

Four technical leaflets were produced and distributed to inputs dealers and other NGOs. These were on Maize Production, Groundnuts production, Cassava Fertilization and Tobacco production. The section has drafted 11 leaflets on various topics for safe use and handling of pesticides. Translation into the vernacular Chichewa language has been done for the drafted leaflets.

Brochures/Posters

Five brochures have been produced and these were on Fertilizer Application Methods, Nitrogen, Phosphorus, Potash and Symbols on Safety Precautions for Pesticides Use (draft). A total of 25,000 copies have been distributed to various stakeholders. One poster on Fertilizer Use Level was also produced.

Website Development

A website is being developed for AISAM. A large database system has been developed and linked to the main domain. The data contained in the system includes fertilizer prices, importation levels, seed prices, plant protection products, crop production estimates, dealership network and other data.

Training Activities

Training of field staff was conducted and a total of 9 training courses have been achieved during the year. The training was provided to 17 enumerators and 5 data managers from Agro-Economic Survey on data collection, processing and management. Two courses were conducted for the enumerators. Another training was offered to Sasakawa with 16 supervisors and 23 farmers on implementation and management of demonstration plots. One training was conducted on inputs demonstrations to 18 dealers and 30 field officers from NGOs. The Lilongwe Living Christian Church (LLCCA) requested for training on grain storage methods and a total of five sessions were conducted with a total participation of 107 men and 102 women (209 participants). One training was provided to an NGO, COOPI, on management and marketing of farm inputs and was attended by 17 shop managers. Two training courses were conducted for SPLIFA field officers. One was on Crop Estimation Methods where 30 participants attended and another on agronomic principles for maize production where 32 participants attended. Another training was provided to the Agro-dealers who

will be involved in inputs distribution and mounting of demonstration plots. A total of 271 with 54 female and 217 men participants attended the course which was split into 7 sessions.

Other Publications

Two Reference/Training Manuals have been developed. One is “Crop Estimates Methodology” and other one is “Field Guide to Crop Production and Land Husbandry Practices.” These reference materials have been distributed to Non-Governmental Organizations participating in agricultural activities.

Field Demonstrations

Field demonstrations formed an integral part of information dissemination and skills development through practice, visual and actual results. The demonstrations were conducted in partnerships with EU Public Works Program, Sasakawa G2000, AISAM dealers, lead farmers, OMNIA Company and Ministry of Agriculture. The project implemented a total of 108 demonstration sites countrywide. Out of these, 30 sites (Annex 4) were for winter while 78 were established in summer. The basic technologies that were demonstrated were balanced plant nutrition and also use of high yielding maize varieties among others such as use of humic acids. So far the results comparing use of NPK and NP has shown remarkable yield differences. Those plots with NPK treatments out yielded those with NP by two to three times more and were economically viable. Average yield difference for NPK treated plots under normal weather condition was 40% higher than those treated with NP. Average yield difference for NPK treated plots under drought weather condition was 60% higher than those treated with NP.

The graphs in Annex 3 indicate the results from different soil fertility treatments. Under normal weather condition, NPK treated plots gave 10 mt/ha grain yield while NP treated plots gave an average of 6 mt/ha. Under drought condition, the average yield for the NPK treated plots was 3.5 mt/ha while NP treated plot gave 1.8 mt/ha. The inclusion of K to plant nutrition was also economically evaluated and results show that the gross margin with and without K gave a difference of 60%. The use of K is therefore for vital for increasing grain yields for maize.



NPK PLOT



NP PLOT



Women dominance during field days

Figure 9. Demonstration Plots During a Field Day

Special field days were conducted in collaboration with AISAM during the season as one way of imparting knowledge to the dealers, field staff and farmers. A total of eleven field days of this type were conducted, 2 in the North, 5 in the Center and 4 in the South. The AIMs project mounted a number of technology displays at the National Agricultural Trade Fair, field days at Bunda College of Agriculture (University of Malawi), Chitedze Research Station and Lilongwe ADD (Mvera).

Project Impact

As a result of radio programs, television, newsletters, leaflets, trainings, meetings and workshops, a number of dealers, farmers, NGOs and the private sector are able to appropriately handle, store and use their inputs. Reports also indicate that farmers shun away from buying

fertilizers and seeds that are not properly stored by dealers. Dealers are also reorganizing shops by inputs dealers after learning from the television and radio messages on proper storage and handling.

Most prominent dealers such as Farmers World, Norsk Hydro, Rab Processors have indicated increased uptake of compound fertilizers with inclusion of potassium such as NPK 10:24:20+6S, NPK 8:18:8+4S, NPK 20:11:5 etc. This is due to the realization of the importance of Potassium by most consumers as a result of messages from the mass media undertaken by IFDC – AIMs MIS component and training activities

ANNEX 1

USAID and AIMs Performance Indicators

Indicator	Base Year 2002	Base Value	2003 Target	2003 Actual	2004 Target	2004 Actual
Average Price		\$14.99	\$13.49	\$17.85	\$12.14	\$18.51
Retail/FOB Ratio		2.70	2.43	1.58	2.19	1.53
Cum No of Dealers Trained		0		505 Male 444 Female 61	250 Male 164 Female 86	380 Male 264 Female 116
No Independent Dealers		38	65	741	800	1158
Outlets		191	382	741 +	800	845
Qty of Fertilizer Imports		174,957t	200,000t	202,742t	214,000t	224,362t
Share of pvt sec		80 %	100 %	90 %	100 %	91%
Share of 4 Firms				83 %	80 %	81%
Access to Inputs	No. farm families/dealer	12,565	6,283	4049	3,000	2,591
Inputs Use	Per cent Using improved inputs	29%	32%	34%	36%-	37.3%
Access to Info	Radio	0	26	26	52	61
	TV	0	-	-	10	13
	Newsletters	0	12	9	12	12
	Brochures	0	3	2	5	6 (30,000 copies)
	Posters	0	5,000	5,000	5000	25,000
No of Studies	Policy	0	1	4	4	4
	Regulation	0	3	0		

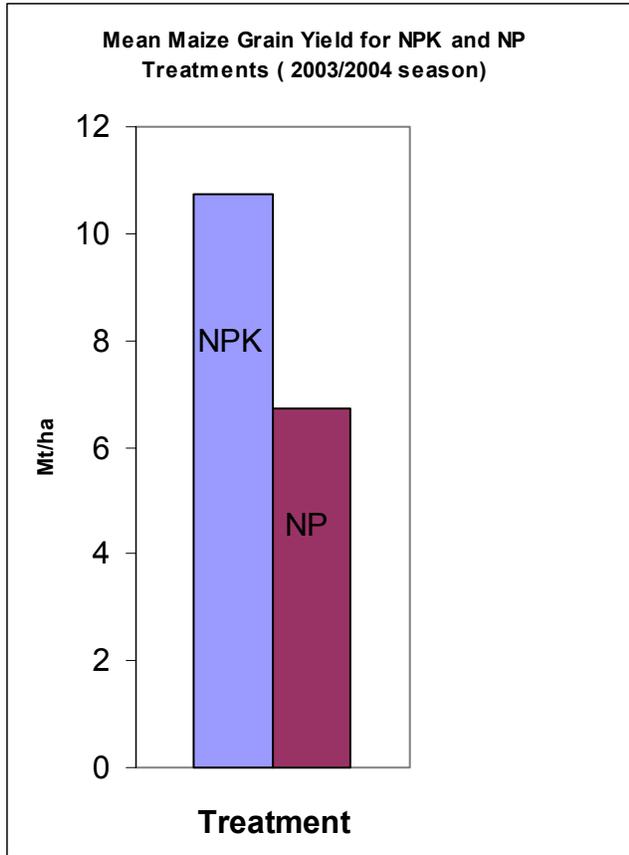
ANNEX 2

Summaries for MIS and Agronomy - October 2003 to September 2004

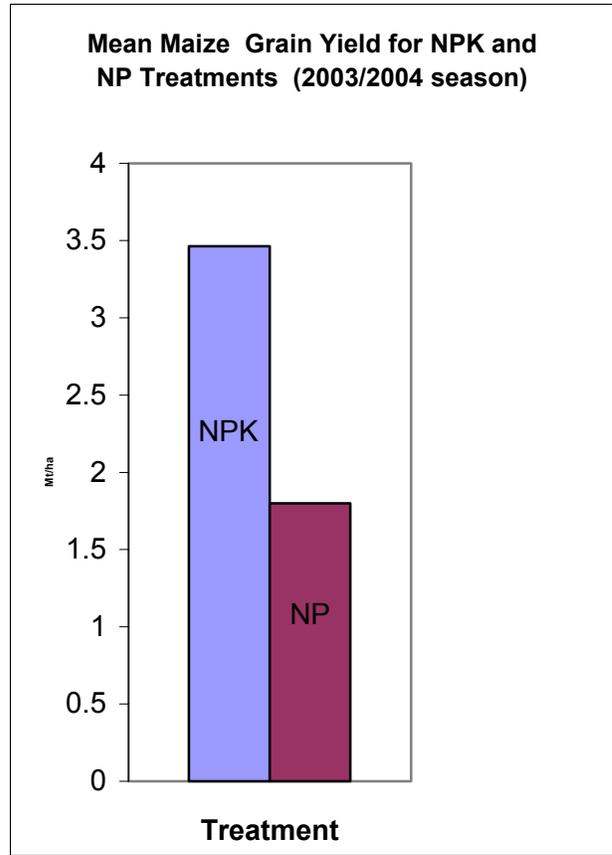
Component Indicator	Project Annual Target	Achieved To Date	Remarks
Radio programs	52 weekly programs	61 programs: 5 programs sponsored by ICRISAT on Saturdays and 4 awarded by MBC on Thursdays in March 04	Target of 52 was surpassed by 9 due to additions made in second quarter. 51% of the farm families (1.22 million) are benefiting from the program
TV programs	10 weekly programs	13 programs with 2 from special interviews and 1 from AISAM launch	Target of 10 was surpassed by 3 due to additions made in second quarter. The programs are targeted to dealers, policy makers and NGOs
Newsletters	12 Issues of Vol.2 monthly productions with over 1,000 copies distributed each month.	12 Issues and over 12,000 copies distributed through print and electronic methods.	The distribution is made to independent agro-dealers, importers, NGOs, donors, govt ministries and departments, sister projects in other countries etc.
Brochures/posters	Quarterly (4) (on Nitrogen, Phosphorus, Potash and fertilizer use)	6 issues with an additional on Fertilizer Application Methods and Symbols on Safety precautions for pesticides use	A total of 25,000 copies have been printed and distribution is on-going
Leaflets	Quarterly (4) with one on G/nuts, 1 on Maize, 1 on cassava and 1 on Tobacco	3 due to low staff capacity and 1 on cassava has not been finalized.	11 leaflets on different topical areas on safe use and handling of pesticides have been drafted.
Bulletins	12 issues of Vol 1 were planned to be produced monthly	9 Issues were produced with over 9,000 copied distributed	The target of 12 was not met because data collection started in Dec. 03 and production started in January 04.
Field days	6 field days were planned to be conducted	11 were achieved with 2 in the North, 5 in the Centre and 4 in the South	The project also participated in other field days at Bunda, Chitedze and Mvera.
Demonstration plots	83 planned across the country.	108 have been achieved with 78 countrywide summer demos and 30 countrywide winter demos	The demos were conducted in partnerships with EU Public Works Program, Sasakawa G2000, AISAM dealers, lead farmers, OMNIA Company and Ministry of Agriculture
Training manuals	-	2 technical training manuals were produced: 1 as a Field Guide for Field Staff and 1 for Crop Estimation Methodology	1 was produced as a reference guide for a consortium of NGOs while the other one of Crop Estimates was produced for SPLIFA field staff
Training	2 were targeted: 1 on demonstration for dealers and 1 on data collection and management for enumerators	9 have been achieved with 3 on request by NGOs, (Sasakawa, LLCCA, and COOPI) and 2 on request by SPLIFA	There is an overwhelming demand for technical training by both NGOs and dealers but constrained by resources and staff
Website development	1 with domain	www.ifdcmw.org has been established. An MIS web based design has been established and linked to main website	Construction of the web site has taken long because of limitation in personnel and skills. However, knowledge gained from a visit made to West Africa has assisted.
Data collection	17 data points with 15 rounds of data collection	17 data points were established and 10 rounds of data have been collected due to late on start of the exercise.	The data are being collected by staff from agro-economic survey of the MOAIFS

ANNEX 3

A Comparison of Maize Grain Yields for Plots Treated With NPK and NP Under Different Weather Conditions



Yields under normal conditions



Yields under drought conditions

ANNEX 4

Winter Demonstration Plots Details for 2003/2004 Season

	FARMERS NAME		VILLAGE	T/A	EPA	RDP	ADD	AEDEC'S NAME
SOUTH	1.Lester Chigamba	D	Kapoloma	Nyambi	Nyambi	Machinga	Machinga	
	2.VH Insa Mponda	F	Insa Mponda	Mponda	Nansenga	Mangochi	Machinga	
	3.Charles M'balika	D	Ng'onga	Nsamala	Bazale	Balaka	Machinga	
	4.Daniel Betchani	F	Mkulira	Nthache	Mwanza	Mwanza	Blantyre	R Thungula
	5.Black Mangawa	F	Mkulira	Nthache	Mwanza	Mwanza	Blantyre	R Thungula
	6.Stewart Gauti	F	Chadula 1	Mulilima	Mitole	Chikwawa	Shire Valley	Chilumphu/Kondwerani
	7.Salima Tchuzi	F	Mphamba	Mbenje	Magoti	Nsanje	Shire Valley	Nkoola/Lipenga
	8. Laston Sadia	F	Matepwe	Kaduya	Naminjiwa	Phalombe	Blantyre	Chifunga/Mwandire
	9. Ishmael Mgodu	F	Mikundi	Malemia	Malosa	Zomba	Machinga	
	10. Diverson Ndemba	D	Mpola	Mpama	Mombezi	Chiradzulu	Blantyre	M.H Salifu
CENTRAL	1.Ausward Kamwiri	D/F	Suwindu	Mlonyeni	Mlonyeni	Mchinji	Kasungu	Chimombo/Phiri
	2.Davies Chisemphere	F	Abraham	K/moto	Mtakataka	Dedza	Lilongwe	Banda/Kalibwanji
	3.Kenneth Chapinga	F	Mbalame	Kalonga	Chinguluwe	Salima	Salima	Gondwe/Chiwayo
	4.Peter Kazozo	F	Bethu	Khombedza	Chinguluwe	Salima	Salima	Nkhoma
	5.John Jeremiah	F	Mangulenje	Mwanzama	Zidyana	KK	Salima	Msiska/Mkandawire
	6.VH George Kaipa	F	Chibothera	Mwanzama	Zidyana	KK	Salima	Msiska/Mkandawire
	7.Kent Rashid	F	Mchemera	Malengachanzi	Linga	KK	Salima	Nkhoma/Kafunda
	8.Leo Nyankhoma	F	Mwaza nduwa	Kanyenda	Nkhunga	KK	Salima	Saka/Mvula
	9.James Kalulu	D	Chikoko	Santhe	Santhe	Kasungu	Kasungu	Phiri/Kabaya
	10.Wingst. Chagomerana	D	Madisi	Chakhadza	Madisi	Mponela	Kasungu	Mbonekera
	11.Ezara Kanyinji	D	Chilira	Mkanda	Mkanda	Mchinji	Kasungu	Chimombo
	12.VH Njoka	F	Ndaula	Malili	Ming'ongo	Lilongwe West	Lilongwe	Damalankhunda
NORTH	1.Mr. Nelson Nkusang'oma	D	Chiphala	Mfukamapiri	Chintheche	Nkhata-bay	Mzuzu	Ishmael Sumani
	2.Teresa Chirwa	D/F	Chiphala	Timbili	Mpamba	Nkhata-bay	Mzuzu	
	3.Gracet Munda	F	Kamwezeka	Mzikubola	Kazombo	Mzimba	Mzuzu	Phillip Kaunda
	4.Principle GVH Mlongoti	D	Mulongoti	Chikulamayembe	Bolero	Rumphi	Mzuzu	Owen Mkandawire
	5.Keepson Nyangulu	D	Chinkoka	Mwankhunikira	Muhuju	Rumphi	Mzuzu	
	6.Mtikwagha club	F	Chigwere	Kyungu	Kapolo	Karonga	Karonga	John Chizimba
	7.Mwalyewo Mtafya	F	Nkombanyama	Mwaulambia	Lufita	Chitipa	Karonga	Good luck Sibande
	8.Mr.Edward Mtambo	F	Yombwe	Mwaulambia	Lufita	Chitipa	Karonga	"

Key:

D = Dealer

F = Farmer

ANNEX 5

SPLIFA SIX-MONTH REPORT JAN – JUNE 2004 – IFDC INPUT

1. Introduction

The report highlights the progress made by the Supporting Productive Livelihoods through Inputs for Assets (SPLIFA) project from June 2003 to June 2004. The project is funded by DFID for the amount of 2,470,000-Pounds Sterling over a period of two years under Accountable Grant No. AG3618. This report also summarizes the major activities planned for the next year (July 2004 to July 2005).

2. Wider Context

As well as the obvious objective of increased food security and better communication links, from IFDCs perspective, the most important objectives of SPLIFA are developing the network of dealers so that they can play a greater role in facilitating access to agricultural inputs and extension messages and promoting the use of vouchers as a means of facilitating welfare transfers so negative impacts on the market are minimized.

Much of IFDCs inputs into SPLIFA have been focused on managing and evaluating the impact of the project's voucher scheme, training of dealer and NGO staff involved in the scheme and liaison with staff from the government of Malawi and other development agencies about the pros and cons of vouchers and the dealer network as a means of facilitating welfare transfers.

By involving dealers in the distribution process, soliciting feedback and facilitating opportunities for beneficiaries and NGO staff to meet with dealers to resolve any problems as well as monitoring project impact, we feel that we will soon be in a position to make valid recommendations to improve the way safety nets are operated in Malawi in the future.

3. Achievements For The Period June 2003 – June 2004

The following are the activities that have been accomplished or initiated over the past year:

- During the period IFDC completed payment of service commissions totaling MK3,296,480 to dealers for participation in the project. This represented 29,968 packs distributed during the first year of the project at MK110 per pack.
- 70 Dealers were trained in the aims and operating systems of the SPLIFA project as well as the way the voucher system worked. Dealers were also given instruction on the storage and use of the inputs provided.
- IFDC facilitated three postseason workshops for dealers in early 2004. During these workshops dealers expressed their views on the strengths and weaknesses of the project and where they and other stakeholders could make improvements to ensure that it ran more smoothly the next year. Staff from NGOs and beneficiaries who participated in the project also attended the workshops and were able to present an alternative angle to the proceedings. A major outcome from the workshop is a redesign of the voucher and a better understanding of roles and responsibilities of the NGOs and the dealers.
- Part of the workshop focused on an exercise where dealers brainstormed on strategies/ways, which would enable them to become more involved in distributing welfare transfers. They agreed on targets for future development and roles and responsibilities of different members of the organization. They also identified areas where they, as an association, would need external assistance. IFDC SPLIFA is working closely with the AIMS project to assist the dealers move forward with these objectives.
- Moves were also made, with the AIMS Programme, to strengthen linkages between dealers and suppliers. This has resulted in some dealers getting access to better prices and in other areas Pannar seed will start painting dealers shops.
- As a result of evaluations of the 1st cycle that showed that the extension methodology was found somewhat lacking, it was decided to involve the dealers in running demonstration plots where the actual process of planting and fertilizers application is demonstrated to beneficiaries. Therefore in May/June 2004 over 200 dealers were trained in how to run this kind of demonstration in

preparation for the 2004/05 growing season. Pannar and Monsanto seed companies have both promised seed for the purposes of running demonstration plots.

- Over 200 dealers have been trained in the voucher process and their responsibilities as participants in SPLIFA in readiness for the second cycle.
- IFDC SPLIFA has been very closely involved in first writing the project proposal for securing World Bank funds and secondly, putting together the tender document necessary for the procurement of commodities to be distributed under the second cycle. This process has been somewhat complicated because of the necessity of working through MASAF and took longer than expected.
- IFDC provided training to staff from all implementing NGOs on crop estimate methodology. This provided the project with another method of measuring the success of the intervention.
- IFDC took delivery of two vehicles and four computers purchased with DFID SPLIFA funds.
- IFDC wrote the terms of reference for and took oversight of the production of a film that will highlight the strengths and weakness of the inputs for assets approach and the role that it can play in safety nets programming.
- We made solid moves towards the recovery of funds equal to the value of goods misappropriated (circa MK300,000) by an unscrupulous dealer in Mangochi. Although we have not as yet received the funds, the dealer's property has been confiscated and sold, in part due to a criminal case bought by IFDC.

4. Problems Encountered

- The drought has had a major impact on crop yields, particularly in the south of the country
- High interest rates and the falling value of the Kwacha against the US dollar have made it more difficult for dealers to buy and keep stocks of agricultural inputs meaning that supplies in rural areas are far beyond the reach of the average farmer.
- The World Bank's procurement criteria meant that a lot of time and effort was wasted organizing a tender process, which was subsequently scrapped.

5. Major Lessons Learnt

- The success of the first round indicated that AISAM dealer network is a viable and efficient medium for the distribution of welfare transfers. Nevertheless, they are still not in a position to be able to tender for national-level distribution contracts because of institutional weaknesses and lack of capital.
- Changes should be made to the way information on the correct use of inputs is disseminated. In many cases dealers did not have time to tell farmers about how to use the inputs such was the rush at their shops during distribution period.

6. Progress Against Project Log Frame

PROJECT STRUCTURE	INDICATORS OF ACHIEVEMENT	PROGRESS	COMMENTS AND RECOMMENDATIONS
P1: Participating retailers store, distribute inputs and provide farmers with instructional messages in accordance with guidelines provided.	PI 1.1 – 80% of retailers correctly disseminating 3 key messages.	Not achieved in 2003-04 cycle	Dealers did not have time to disseminate messages when farmers were collecting their inputs. The extension methodology has been changed for the 2004-05 cycle.
	PI 1.2 – 95% of vouchers redeemed by retailer against agreed/approved register.	Achieved in 2003-04 cycle	
	PI 1.3 – 95% of retailers using adequate storage facilities ¹	Achieved in 2003-04 cycle	
	PI 1.4 – 80% of farmers receiving at least 3 key messages from retailer.	Not achieved in 2003-04 cycle	See above
	PI 1.5 – Increased demand for and supply of agricultural inputs in communities where the project is implemented	Demand is always high. Unfortunately beneficiaries do not have enough cash to buy the inputs they need.	Macro-economic factors including the sale price of maize mitigate against this.
OUTPUT P1.1 – 200 private retailers trained in distribution process and extension messages, and	O11 – Farmers recall source, type and quality of agricultural extension messages.	A survey in February 2004 showed that farmers can recall source and quality of agricultural extension messages	

¹ Adequate input storage facilities defined by the project as: dry, well ventilated, secure and separate from food stuffs or contaminants

² Depends on the location of road works in 2004-05 – undecided at time of logframe development

supplied with inputs2.	OI2 – 80% of beneficiaries report satisfaction with service from retailers	In terms of access to inputs, satisfaction was over 80%. However, the figure was less than 80% regarding delivery of extension messages	Changes are being made to the way extension is done in the 2004-05 season
	OI3 – 80% retailers are able to explain correct use and storage of fertilizer and seed	Achieved in 2003-04 cycle	
	OI4 – Retailers receive and distribute 100% of inputs on time. ³	All dealers received inputs on time. Not all inputs were distributed on time (particularly seed) due to late completion of the road works meaning delayed distribution of the vouchers.	Public works will start earlier meaning that they should be completed in time for the planting season.

³ Input receipt is dependent upon project management team; distribution is dependent on farmer demand. This indicator will assess time delays due to retailer inefficiencies.

7. Work Plan July 2004 – July 2005

ACTIVITY	2004						2005					
	J	A	S	O	N	D	J	F	M	A	M	J
Further training of dealers in preparation for the 2004-05 cycle	X											
Finalisation of dealers to be involved in the 2004-05 cycle and linking with beneficiary communities	X	X	X									
Working with the World bank Procurement division to organise the procurement of 3500MT of urea fertiliser and 700MT of seed	X	X										
Checking location of suitable dealers vis-à-vis selected roads		X	X									
Distribution of seed and fertiliser to network of participating dealers			X	X								
Oversight of the dealer demonstration plot process			X	X	X	X	X					
Printing of vouchers and distribution to participating NGOs.		X	X									
Completion of survey to measure impact of project on participating dealers against the baseline survey completed in August 2004.		X										
Drawing up and signing of service contracts with participating dealers.	X	X	X									
Redemption of Vouchers					X	X	X	X				
Shooting and editing of SPLIFA Film	X	X	X	X	X	X	X	X				
Output to Purpose Review (DFID)			X									
Procurement of inputs for 3 rd Cycle (pending DFID approval)										X	X	X
Government Influencing (safety net transfer modalities and targeting)							X	X	X			
Possible end of project evaluation (pending DFID position on no-cost extension)									X	X	X	X