

FWC SERVICES FOR THE IMPLEMENTATION OF EXTERNAL AID (SIEA) 2018

Lot 2 - Infrastructure, sustainable growth and jobs

Mid Term Evaluation EU-EAC MARKUP

FWC SIEA 2018- LOT 2

EuropeAid/138778/DH/SER/multi

SIEA-2018-4216

Final Report

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14 June 2022



This project is funded by
the European Union



Project implemented by
Luvent Consulting



CONSORTIUM
SAFEGE FWC-Lot2

Project Title:	Mid Term Evaluation EU-EAC MARKUP		
Project No.:	FWC SIEA 2018- LOT 2 EuropeAid/138778/DH/SER/multi Request: SIEA-2018-4216		
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This evaluation is supported and guided by the European Commission and presented by Luvent Consulting GmbH and Suez. The report does not necessarily reflect the views and opinions of the European Commission.

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List of abbreviations

AFA	Agriculture Food Authority
AFCA	Africa Fine Coffee Association
AfCFTA	African Continental Free Trade Area
AfDB	African Development Bank
AGRIFI	Agricultural Finance Initiative
ARFIC	Regulatory Authority of the Burundi Coffee Sector
ASSP	Agriculture Sector Strategy Plan
B2B	Business to Business
BBN	Burundi Bureau of Standards and Quality Control
CEPAR	Coffee Exporters and Processors Association of Rwanda
CfP	Call for Proposals
CNTA	Centre National de Technologie Alimentaire
CWSs	Coffee Washing Stations
DPV	Direction de la Protection des Végétaux
EABC	East African Business Council
EAC	East African Community
EATA	East African Tea Trade Association
EC	European Commission
EDF	European Development Fund
EDPRS	Economic Development and Poverty Reduction Strategy
EPA	Economic Partnership Agreement
EQs	Evaluation questions
ESA-IO	Eastern and Southern Africa and the Indian Ocean
EU	European Union
EUD	European Union Delegation
FA	Financing Agreements
FAO	Food and Agriculture Organization
FPC	Fresh Produce Consortium of Kenya
FPEAK	Fresh Producers Export Association of Kenya
GEACAI	Growing East African Community Agribusiness Investment Initiative
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GLP	Good laboratory practice
GOB	Government of Burundi
HCD	Horticultural Crops Development
IO	Indian Ocean
ISABU	Institut des Sciences Agronomiques du Burundi
ISO	International Organization for Standardization
ITC	International Trade Centre
KCTA	Kenya Coffee Traders Association
KEBS	Kenya Bureau of Standards
KEPHIS	Kenya Plant Health Inspectorate Service
LDCs	Least Developed Countries
MAAIF	Ministry of Agriculture, Animal Industry and Fisheries
MARKUP	Market Access Upgrade Programme
MMEF	MARKUP Monitoring and Evaluation Framework
MMES	MARKUP Monitoring and Evaluation System
NFP	National Focal Point

NIP	National Indicative Plan
NQ	National Quality
NQI	National Quality Infrastructure
NTC	National Technical Committee
ODECA	Office pour le Développement du Café du Burundi.
OECD	Organisation for Economic Co-operation and Development
OTB	Burundi Tea Office
PAGoDA	Pillar assessed grant or delegation agreement
PCPB	Pest Control Products Board
PND	National Development Plan
PS	Partner States
PSC	Programme Steering Committee
PSTA	Strategic Plan for Agriculture Transformation
RAB	Rwanda Agricultural Board
RBS	Rwanda Bureau of Standards
RIA	Regulatory Impact Assessment
RIP	Regional Indicative Programme
RSC	Regional Steering Committee
RTC	Rwandan Trading Company
SA	Southern Africa
SCT	Single Customs Territory
SDGs	Sustainable Development Goals
SME	Small and medium-sized enterprise
SPS	Sanitary and phyto-sanitary standards
TBT	Technical barriers to trade
TFP	Trade Facilitation Portal
TISIs	Trade and Investment Support Institutions
ToC	Theory of Change
TORs	Terms of Reference
UCDA	Uganda Coffee Development Agency
UN	United Nations
UNIDO	United Nations Industrial Development Organisation
WTO	World Trade Organisation

1 Introduction

1.1 Context

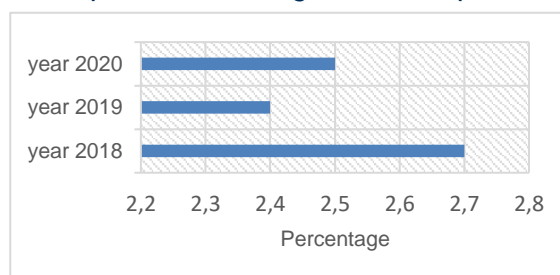
The East African Community (EAC) represents one of the fastest growing regional economic communities in the world with the agricultural sector being one of the region’s most important sectors¹, and about 80% of the region’s population living in rural areas² and depending on agriculture for their livelihood. Agriculture is dominated by smallholders’ mixed farming³ and is essentially rain-fed. It includes people working together across all agricultural levels, from cross-border traders and SMEs to government policy makers and international exporters.

Even though the outbreak of the COVID-19 pandemic has exposed EAC’s food insecurity and vulnerabilities to trade disruptions of food imports on which the whole African continent depends, the EAC region is a “hot spot” for agriculture and agribusiness growth⁴. Over recent years, East African countries were able to achieve impressive growth rates (4-8%)⁵, attracting a substantial increase in foreign investors’ interest in East Africa, in part because of an emerging middle-class with a purchasing power that increasingly adopts western consumption patterns. This trend, along with high population growth, is leading to strong demand for more, higher quality, better processed and packaged agricultural products.

A significant proportion of intra-and extra-EAC trade is in agricultural commodities, with tea, coffee, cocoa, spices, avocado and horticultural products being of special importance. The sector provides an avenue for product and market diversification and attraction of investment; it is labour intensive, generating needed employment, especially among women and the youth.

Figure 1 shows the trend of EAC agriculture exports as a proportion of world agriculture export since 2018.

Figure 1: Proportion of EAC agricultural exports of world agricultural exports



Source: ITC Trade Map 16.06.2021

One way to unlock the potential of trade with the key EAC commodities to drive industrial growth, diversification and inclusive development, is by increasing trade of agro-based products intra-regionally, with the EU, and with other international markets. A recent OECD-FAO study⁶ shows that agricultural demand will continue to outstrip agricultural supply over the 2019–2028 period. Agribusinesses are not only important for the EAC economies because of the high potential of labour intensive and income-generating activities for producers, farm and food-processing workers, but they are key to the

1 AGRI-FOOD TRADE STATISTICAL FACTSHEET EU - EPA East African Community (EAC), DG Agriculture & Rural Development. https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/farming/documents/agrifood-epa-east-african-community-eac_en.pdf

2 USDA-supported Trade of Agriculture Safely and Efficiently in East Africa (TRASE) project

3 East African Business Council (EABC) <https://eabc-online.com/sectoral-desks/>

4 Growing East African Community Agribusiness Investment Initiative (GEACAI)

5 The value of Africa’s agriculture and agribusiness industry is expected to more than triple to reach USD 1 trillion by 2030, compared to 2010. World Bank. 2013. Growing Africa: Unlocking the potential of agribusiness. Washington, DC. 162 pp.

<http://documents1.worldbank.org/curated/en/327811467990084951/pdf/756630v10REPLA0ffrica0pub03011013web.pdf>

6 OECD/FAO. 2019. Agricultural Outlook 2019-2028. Paris, and Rome, <http://www.fao.org/3/ca4076en/ca4076en.pdf>

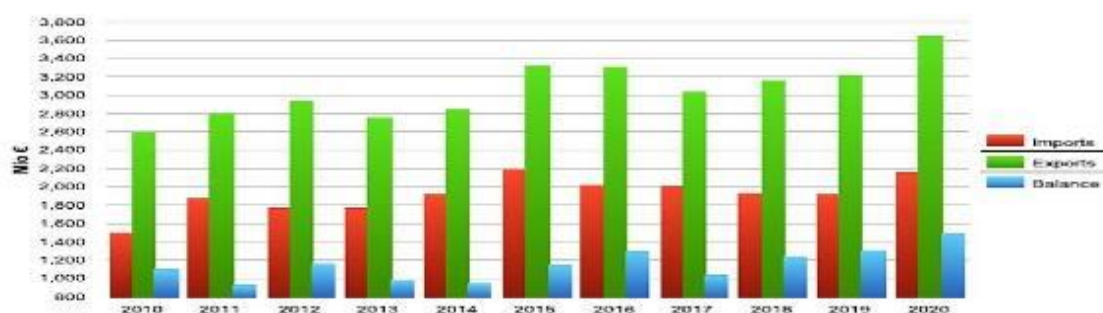
food and nutrition security situation in EAC, a major concern, marked by both chronic and acute poverty and vulnerabilities. Agricultural commodities markets have a fourfold relation inherently complex with food and nutrition security: (i) availability through diversification of sources, (ii) physical and economic access triggering food prices stabilization, (iii) utilisation inducing increased food safety through enforcement of international standards governing agriculture trade (see Codex Alimentarius) and (iv) stability, de-risking production shortfalls and stabilizing food prices and availability of nutritious food-stuffs all year-round.

Last but not least, the context of this evaluation must acknowledge the need for consideration of both gender-sensitive and youth-oriented support. Agriculture is the most important source of employment for women in sub-Saharan Africa. The share of women who are economically active in agriculture remains stable in Eastern Africa, while it follows a downward trend in all other African subregions⁷. Additionally, women make a significant contribution (60% to 70%) to trade, especially cross-border trade⁸, with youth representing the dominant group in the informal sector (90% of informal workers being women and youth)⁹. Empowering young African entrepreneurs to participate in value chains and benefit from international trade would allow them to take advantage of economies of scale through the structuring of value chains and business / sectoral organisations. Small and medium-sized agribusinesses (A-SMEs) are a key driver of inclusive agriculture-led economic growth, but they face constraints such as inadequate financing, lack of market information, lack of market orientation, limited market linkages and limited connections to quality service providers that can help them achieve sustainable business growth. A cornerstone of bilateral support to private agribusiness is the provision of “returnable” and venture capital¹⁰ through direct investment to local businesses to compensate for the reluctance of commercial banks to finance agriculture and SMEs.

1.2 The EU relations with the EAC

In the East African Community, Burundi, Rwanda, South Sudan, Tanzania, and Uganda are on the UN’s list of Least Developed Countries (LDCs), while Kenya is a non-LDC. The countries in the EAC are members of the WTO except for South Sudan.¹¹

Figure 2: EU – EAC Trade flows and balance – Total Goods – 2010/2020



Source: https://webgate.ec.europa.eu/isdb_results/factsheets/region/details_acp-east-african-community-eac_en.pdf

7

https://www.ilo.org/shinyapps/bulkexplorer4/?lang=en&segment=indicator&id=EMP_2EMP_SEX_GEO_ECO_DT_A International Labour Organization (ILO). 2020. Employment distribution by economic activity (by sex and rural/urban areas). In: ILOSTAT explorer

⁸ Afrika, J.G. & Ajumbo, G. (2012). Informal cross border trade in Africa: Implications and policy recommendations. Africa Economic Brief, 3(10): 1-13.

⁹ UNECA. 2015. Harnessing the Potential of the Informal Sector for Inclusive Growth in Africa. Addis Ababa. Available at <https://www.un.org/en/ecosoc/integration/2015/pdf/eca.pdf>

¹⁰ Growing East African Community Agribusiness Investment Initiative (GEACAI)

¹¹ South Sudan became the sixth member of the EAC in September 2016

Exports to the EU from EAC are mainly coffee, cut flowers, tea, tobacco, fish and vegetables. Imports from the EU into the region are dominated by machinery and mechanical appliances, equipment and parts, vehicles and pharmaceutical products.

The evolution of bilateral trade figures is summarized in Figure 2. The data reveal that exports from the EU to the EAC region have grown steadily during the last 10 years, with a net growth in value of about 40%, while imports from the region have grown 47% during the same period. However, the trade balance remains negative to the EAC (about €1,500 million in 2020).

The EAC countries finalised the negotiations for an Economic Partnership Agreement (EPA) with the EU on 16 October 2014. Kenya and Rwanda signed the EPA in September 2016, and Kenya has ratified it. For the EPA to enter into force, the three remaining EAC members need to sign and ratify the agreement¹².

The EU-EAC EPA covers trade in goods and development cooperation. It also contains a chapter on fisheries, mainly to reinforce cooperation on the sustainable use of resources. The agreement provides room for further negotiations on services and trade-related rules in the future. The deal is in line with the EAC Common External Tariff. It bans unjustified or discriminatory restrictions on imports and exports. This helps the EAC's efforts to get rid of non-tariff barriers in intra-EAC trade.

EU-EAC cooperation under the 11th EDF was planned as a part of the programming exercise of the Regional Indicative Programme (RIP) for the wider Eastern and Southern Africa and the Indian Ocean (ESA-IO) Region. Its focus was on supporting EAC organs and institutions to pursue their core mandates, and on actions aimed at directly assisting partner states to domesticate regional commitments. Consequently, in accordance with the provisions of the Cotonou Agreement, the priorities of the EAC 4th Development Strategy, and the requests expressed by the EAC Secretariat and partner states, the 11th EDF EAC sub-RIP has been primarily dedicated to supporting regional economic integration, with complementary activities in support of peace and security and sustainable management of natural resources.

The RIP took into consideration the EU-EAC EPA initialled in 2014. The choice of specific objectives was founded on priority criteria such as project maturity, articulation between the global, regional and national levels, EU added value and feasibility of implementation within the 11th EDF period. The indicative allocation reserved for the EAC region amounted to €85 million. Expected results, their corresponding indicators and sources of verification agreed between the EAC and the EU were included in the intervention framework annexed to the RIP.

The EAC is the duly mandated regional organisation for the implementation of the RIP-specific objectives. The governments of the EAC partner states, other regional and international organisations and other stakeholders were also considered to be involved. Implementing partners were to be jointly defined by the EU and the EAC during project identification.

1.3 The EU-EAC MARKUP Programme

The EU-EAC Market Access Upgrade Programme (MARKUP), financed under the 11th EDF RIP for the ESA-IO region (EAC Secretariat sub-component), was developed to enhance EAC's capacity to exploit its trade-driven growth potential by addressing both supply-side and market access constraints of some key export-oriented sectors, namely agro-industrial crops (coffee, tea and cacao) and horticulture; and supporting participation in regional and global value chains – with a particular focus on exports to the EU.

The programme is structured around two intervention levels:

¹² <https://ec.europa.eu/trade/policy/countries-and-regions/regions/eac/>

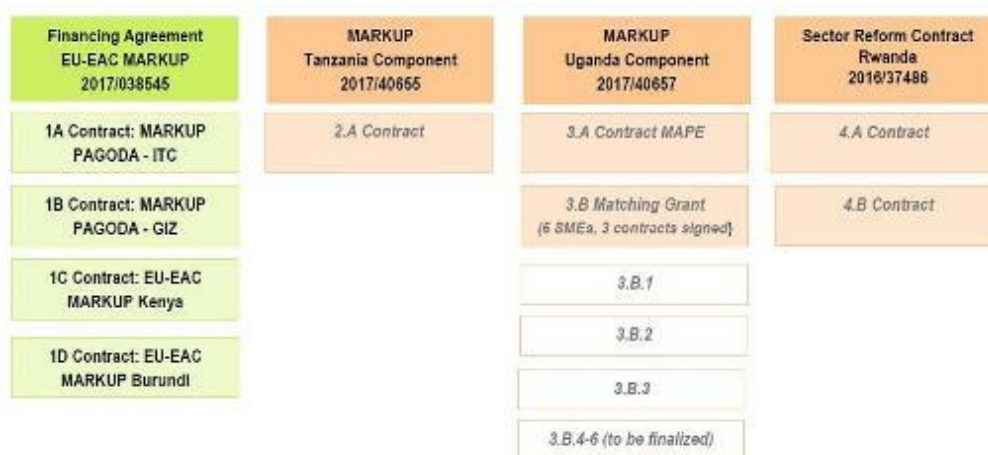
- ◆ The EAC Window supports EAC efforts to improve the regional trade and business enabling environment for the selected commodities, through enhanced capacity to advocate for the removal of sector trade barriers and improved sector standards and sanitary and phyto-sanitary (SPS) measures harmonisation. It also supports the private sector in enhancing its export competitiveness, by increasing awareness and compliance with destination market requirements as well as with improved access to finance and business development opportunities (including reinforcement of business support organisations' capacities).
- ◆ The Partner States' Window includes national interventions tailored to the countries' specific requirements, complementing the EAC Window where any single country needs it most. Interventions focus on one or more areas, among them, reduction of trade barriers and quality assurance, enhancement of SME export competitiveness and business promotion.

MARKUP has been operationalized through four Financing Agreements (FA)¹³:

- ◆ "EU-EAC MARKUP" RSO/FED 2017/038545;
- ◆ "MARKUP Tanzania Component" FA 2017/40655;
- ◆ Rwanda's "Sector Reform Contract to enhance the agriculture sector's sustainable use of land and water resources, value creation and contribution to nutrition security", FA 2016/37486; and
- ◆ "MARKUP Uganda Component", FA 2017/40657

For implementation, and in consonance with the provisions of the RIP¹⁴, these four FAs have been split into 7 contracts. These include a variety of means for implementation such as indirect management through pillar assessed grant or delegation agreement (PAGODA); matching grants through calls for proposals; and other types of contracting modalities.

Figure 3: MARKUP Interventions and Contracts



In brief, this complex net of interventions prioritises the promotion of SMEs as drivers of the target value chains but also strives to ensure long term sustainability through capacity building at business support organisation and institutional levels. In addition, the interventions aim to improve the business environment through trade facilitation, reduction of non-tariff barriers and enhancement of the national quality infrastructure systems.

¹³ The first two listed FAs are managed by the EUD in Tanzania; the third one by the EUD in Rwanda; and the fourth one by the EUD in Uganda.

¹⁴ Direct involvement by the EAC Secretariat, the governments of the EAC partner states, other regional and international organisations, and other stakeholders.

The breakdown of EDF funding allocated to MARKUP (around € 33.1 million), taking into consideration commitments already made through ongoing contracts, is portrayed in Table 1:

Table 1: MARKUP Financing Agreements and Contracts

CRIS Contract #	Title / Contracting party	Start date / Contractor signature	End date of Activities	Amount (€)
Financing Agreement: EU-EAC MARKUP, CRIS No. 2017/038545				
EAC Window				
FED/2018/397-627	MARKUP PAGoDA with ITC (EAC R1-3-4; PS Tanzania R1) / ITC	7/1/2018	6/27/2022	13,500,000
FED/2018/398-674	MARKUP PAGODA with GIZ (EAC Window R2) / GIZ	8/1/2018	7/31/2022	3,720,000
PARTNER STATES Window				
FED/2018/397-867	EU-EAC MARKUP programme, Kenya National Window / UNIDO	12/19/2018	1/31/2023	3,680,000
FED/2018/397-932	'EU-EAC MARKUP: Burundi intervention under the PARTNER STATES WINDOW" / ITC	7/25/2018	7/24/2022	3,680,000
Financing Agreement: MARKUP Tanzania Component, CRIS No. 2017/40655				
FED/2019/413-895	To certification and beyond: "Market access for sustainable coffee, horticulture and tea from Tanzania " / STICHTING SOLIDARIDAD NEDERLAND	2/14/2020	9/30/2023	2,680,000
Additionally, the PARTNER STATES Window Tanzania Component (Result 1) is covered under the contribution agreement with ITC (Contract 2018/397-627 - see above) for an amount of €1 million				
Financing Agreement: MARKUP Uganda Component, CRIS No. 2017/40657				
FED/2019/408-880	Multi Annual Programme Estimate (MAPE)	1/13/2020	7/12/2022	206,000
Matching Grant contracts with SMEs in coffee and cocoa are being finalised (see below):				
FED/2020/419-935	Development of a vibrant and sustainable cocoa value chain in Bundibugyo district / AINEA & SONS COMPANY LIMITED	(to be finalised)		400,000
FED/040-657	Increasing Market-orientated Production of Arabica Coffee Together (IMPACT) / UGACOF Ltd	(to be finalised)		600,000
FED/2020/420563	Enhancing smart agricultural practices, traceability, for value addition and sustainable market access for smallholder speciality Arabica coffee farmers in Kabarole, Bunyangabu and Ntoroko districts in Rwenzori Mountain range / NEW BUKUMBI COFFEE PROCESSORS LIMITED	(to be finalised)		600,000
Other 3 grants applications should be contracted soon				
Financing Agreement: Sector Reform Contract to enhance the agriculture sector's sustainable use of land and water resources, value creation and contribution to nutrition security, CRIS No. 2016/37486 (Rwanda)				
2019/414-048	Sustainable livelihoods in horticulture value chains / OXFAM IRELAND	1/20/2020	1/22/2024	2,002,924
2019/413-820	A market-driven approach for value chain improvements and the expansion of the Rwandan coffee market (ICU-ISTITUTO PER LA COOPERAZIONE UNIVERSITARIA-ONLUS)	1/29/2020	2/2/2024	2,000,000
Only part of the outputs of such two grants have been ring-fenced as pertaining to MARKUP (as defined under the ToR)				

2 Answered Questions / Findings

2.1 Relevance

2.1.1 Alignment with overall EAC needs and priorities

As per EAC Vision 2050, it is stated that more emphasis will be put on expanding intra-African trade with value-addition in selected value chains. EAC also aspires to further increase intra-Africa and inter-regional trade by removing bottlenecks, strengthening backwards and forward linkages and widening industrialisation. The evaluation found a high level of alignment of MARKUP with these EAC aspirational objectives.

Concerning the instrument designed by EAC to implement the vision, the evaluation found that the intervention is aligned with the 5th EAC Development Strategy and specifically one of its main objectives of “accelerating and consolidating sustainable production, productivity, value addition, trade and marketing in key regional growth and productive sectors, with particular emphasis on rural development, agriculture, fisheries, livestock, food and nutrition security and high-value Industrialisation”.

The programme is highly relevant for the broader Eastern Africa Regional Integration Strategy Paper (RISP) (2018-2022); for the 11th EDF support to the EA-SA-IO region (2014-2020), the Regional Indicative Programme (RIP) for Eastern Africa, Southern Africa and the Indian Ocean as it reinforces the strategic plans adopted by the EAC and the other RECs to achieve greater competitiveness and inclusive sustainable growth in particular through the promotion of agricultural exports, strengthening of agricultural value chains, reduction of trade barriers, and harmonised standards.

In line with other regions’ goals and in addition to these, MARKUP specifically contributes to the EAC sub-envelope of the above RIP, concerning both the above mentioned EAC Development Strategy and the EAC Vision 2050 targets of advancing intra, interregional and international trade through a stronger private sector, upgraded and harmonised standards across the countries of the region conducive to improved agricultural productivity and increased competitiveness and exports. Ultimately, MARKUP is a stronghold of the EU strategic cooperation priorities with EAC and the RECs as it provides tangible benefits to the regional economic integration agenda. As such, the programme is greatly coherent with the EU’s support for the African Continental Free Trade Area (AfCFTA). MARKUP is also in line with the AfDB’s Strategy for Agricultural Transformation in Africa (2016-2025) and one of its four goals in particular to develop export-orientated value chains in production where the continent has a comparative advantage.

Throughout implementation, with the advent of new priorities, policies and strategies of the EU, MARKUP became also aligned with the EU-SSA Multiannual Financial Framework and other programmes including the Global Europe programming process, which started in November 2020 and was concluded in December 2021.¹⁵ Team Europe globally supports its partners in achieving the objectives of the EU Green Deal, the EU Circular Economy Action Plan, Farm to Fork, and Biodiversity Strategy. All these interventions are geared towards unlocking the potential of agricultural value chains and positively transforming the livelihoods of rural communities.

2.1.2 Coherence with specific EAC Partner States’ policies and strategies

Burundi

Both MARKUP regional and the country window contribute to the priorities of the National

¹⁵ https://ec.europa.eu/international-partnerships/global-europe-programming_en

Development Plan (PND) 2018-2027 of employment maintenance and creation with appropriate regional development, given the role of agri-business value chains in job creation. The programme is also relevant for the CSP 2019-2023 with a large degree of continuity with the previous CSP 2012-2016. MARKUP is a particularly important intervention not only for its relevance to the agricultural sector development but also as a window in the current context of limited dialogue between the EU and the GoB. As such, the regional and the national component allow for a certain level of engagement with GoB, which is otherwise difficult due to the application of the Art 96 of the Cotonou Convention. Thus, MARKUP provides a unique opportunity for the EU cooperation with Burundi. It also adds value to the EU work in the country which continues through support to NGOs in resilience, health, and agriculture, as well as on other regional programmes in infrastructure and trade.

Kenya

MARKUP is highly aligned with national policies and EU cooperation priorities. The EU provides more than €200M of financial support to the agricultural sector, food security and resilience to climatic shocks. EU Cooperation includes the AGRIFI €100 million project, aimed at helping Kenya's smallholder farmers and pastoralists (access to finance and value chains).

Rwanda

The Action, both under MARKUP regional and the country window, integrates the Government's strategic goals as set in its Vision 2020 and Economic Development and Poverty Reduction Strategy II (EDPRS 2) 2013-2018 where Rural Development and Economic Transformation are two specific objectives of its four strategic thematic areas. In addition, the action reflects the objectives of the National Indicative Programme (NIP) of the 11th European Development Fund 2014-2020 (EDF) in Rwanda in the achievement of pro-poor economic growth and rural economic development. Sustainable Agriculture and Food Security is one of the three focal sectors of the NIP together with Sustainable Energy and Accountable Governance. With an allocation corresponding to 43.5% of the NIP total budget, this priority supports the strengthening of the agriculture sector's capacity to adopt a legislative framework and standards conducive to improved productivity and increased exports, regionally and internationally; this includes stronger coordination with the EAC. Relevance is also confirmed in the Budget Support to the Sector Reform Contract (€ 205 million), specifically its component to support Rwanda in the implementation of its strategy for the agriculture sector (PSTA-3) and thematic Calls for Proposals, both corresponding to an allocation of 10% of the total programme budget. In general, the overall relevance is high with regard to building capacity and awareness of improved standards and market linkages. The envisaged support programme "Quality Infrastructure to NAEB¹⁶" will benefit MARKUP activities and beneficiaries in the coffee sector once the planned sensory laboratories equipped with coffee sensors are available.

Tanzania

MARKUP is aligned with Tanzania's Agriculture Sector Development Programme II ¹⁷ (ASDP ii) where Component 3 is focused on Commercialization and Value addition aimed at improving and developing marketing infrastructure for accessing domestic and export markets. The ASDP II and the Zanzibar Strategy for Agricultural Development are the policy frameworks that guide the EU's support to the agriculture sector in Tanzania. Their aim is to transform the agricultural sector (crops, livestock & fisheries) towards higher productivity, commercialization level and smallholder farmer income for improved livelihood, food and nutrition security and contribution to the GDP. The program strategy is to gradually transform subsistence smallholders into sustainable commercial farmers by enhancing sector drivers, increasing the productivity of target commodities within sustainable production systems, and forging

¹⁶ <https://www.naeb.gov.rw/index.php?id=1>

¹⁷ <https://asdp.kilimo.go.tz/>

sustainable market linkages for competitive surplus commercialization and value chain development. This is complemented by Tanzania's Trade Policy aimed at promoting domestic and international trade¹⁸. Institutional reforms are also underway to improve the business environment and attract investors. Furthermore, by the time of conducting the mid-term evaluation, the MARKUP programme was aligned with the conclusions of the "Blue Print for Regulatory Reforms to improve the Business Environment"¹⁹ study, which, among other findings, addressed notorious constraints posed by non-trade barriers. The proposed reforms aim to address the remaining hurdles to doing business, including (i) the existence of high compliance costs in monetary terms and time in starting and operating a business; (ii) cumbersome pre-approval procedures, which create rent-seeking opportunities; (iii) presence of a multiplicity and duplicity of processes; (iv) loopholes in some of the laws and regulations that are applied by regulatory authorities; and (v) high costs of compliance and enforcement to both the government and private sector. The Government adopted the recommendations of the Study to introduce a number of legislative changes to implement priority areas in the FYDP III²⁰, including initiatives to strengthen local markets and take advantage of regional and international marketing and business promotion opportunities.

Uganda

By the time of conducting MARKUP's mid-term evaluation (late 2021), the programme remains aligned with the Uganda Vision 2040, which aims to transform the Ugandan society into a modern and prosperous society. The National Development Plan (NDP) is the third in a series of six NDPs that will guide the nation and deliver the aspirations of the people of Uganda, as articulated in Uganda Vision 2040. NDPIII (2020/21 – 2024/25) aims to build on the progress made, learn lessons from the planning and implementation experiences of NDPI and NDPII, and also seek to surmount some of the challenges encountered. At the end of its implementation, the expectation is that the country will be halfway through Vision 2040 30-year's timeframe. Consequently, this Plan has been drafted with this context in mind. In particular, MARKUP is aligned with the Agriculture Sector Strategy (ASSP)²¹. The interventions highlighted in the ASSP are focused on 12 priority commodities, namely bananas, beans, maize, rice, cassava, tea, coffee, fruits and vegetables, dairy, fish, livestock (meat), and four strategic commodities, namely, cocoa, cotton, oil seeds, and oil palm. Among these priorities, the MARKUP's Uganda window addressed the priorities established in the Uganda Coffee Roadmap²², which was the outcome of the 12th Annual Stakeholder Meeting (April 2019) of the Ugandan Coffee Platform. The Uganda Coffee Roadmap outlined how in 15 years, Uganda's coffee production could increase from the current (2019 data) 4.7 million bags to 20 million bags in 2030, and triple the income of 1.2 million smallholder coffee farmers.

2.1.3 Collaboration of EAC Partner States in areas of common interest

The collaboration of EAC Partner States in areas of common interest promotes the regional economic integration agenda in the agricultural sector. The evaluation found that there is a high degree of participation and capacity building in enhancing the regional and national value-chains to promote the regional economic integration agenda in the agricultural sector.

The EAC approach to policy making through the Sectoral Council and Council of Ministers is the adequate method for MARKUP to ensure harmonised approaches in the region. An important implication of this aspect is the added value with regard to modalities which are found

¹⁸ <http://www.tzonline.org/pdf/tradepolicyforacompetitiveeconomy.pdf>

¹⁹ The study was funded under MARKUP Tanzania window and conducted by ITC.
<https://www.mit.go.tz/uploads/files/BLUEPRINT-BOOK-compressed.pdf>

²⁰ Tanzania's Third Five Year Development Plan "Realising Competitiveness and Industrialisation for Human Development" - <https://mof.go.tz/docs/news/FYDP%20III%20English.pdf>

²¹ <https://www.agriculture.go.ug/agriculture-sector-strategic-plan-assp/>

²² <https://ugandacoffee.go.ug/coffee-roadmap>

to be working in providing assistance to the EAC to achieve the envisaged regional coordination in the adoption of harmonised standards. MARKUP has a high standing in these council meetings, especially on the Trade, Standards Committee. Interviews revealed that there is also a collaboration with the private sector in the elaboration of strategies, policies and regulations, but also to conceive and implement capacity building on standards-related issues. MARKUP interventions remain relevant in strengthening core factors for value chain development, such as improvement in quality infrastructure, food safety and phytosanitary standards, and support to SMEs and farmers' associations to integrate into export-oriented value chains.

2.2 Effectiveness

2.2.1 Summary of key achievements to date

The regional and national agricultural sectors and the agribusiness enterprises involved in MARKUP have received tangible benefits from the programme implementation. Progress is at different stages for each country and the regional window as well as in the different result areas. This section contains an overview of overall performance and a more detailed assessment at the country level.

The assessment of effectiveness takes into account both external and internal factors impacting MARKUP performance, bearing in mind the influence of environmental aspects as well as the complexities involved in a programme of this size and nature. In particular, the impact of the COVID-19 crisis slowed down the pace of implementation in 2020. Most of the activities from the second quarter of the year were delivered remotely, via webinars, hybrid events and, where possible, in person. By the time of this mid-term evaluation's field mission (August / September 2021), some presential work had been resumed according to the situation prevailing in the particular specific contexts, which varied from country to country.

On its whole, the programme has so far seen the advancement of targeted reforms and implemented activities. These have been designed to support, inter alia, institutional capacity building, advocacy, training, harmonisation of standards and improvement of Quality Infrastructure, market linkages through improved market intelligence, participation in trade fairs and investment promotion events, and regional/international auctions and competitions. Moreover, MARKUP has facilitated enhancing inter-institutional dialogue as well as public-private dialogue, also through the involvement of EABC, for example in the WTO Trade Facilitation Agreement workshops held in each country in January 2021.

For accessing to finances, MARKUP made funding available for two rounds of Access to Finance Bootcamps in September 2020, which included the presentation by selected firms of business cases to regional and international impact investors and financial institutions.

The development of trade portals in all EAC countries also shows progress, bringing an important contribution to the provision of consistent harmonised trade-related information to the regional business community, including support for awareness-raising through marketing campaigns across the Partner States.

As of August 2021, the programme has produced four monitoring reports. The latest one, dated June 2021, covers the entire period of implementation (three years). Table 2 summarizes the main accomplishments of the programme:

Table 2: Progress made between July 2018 / June 2021

Who is involved	MARKUP results	
<ul style="list-style-type: none"> EAC Secretariat 5 Partner States 7 implementing Agencies Trade Support Institutions SMEs Private sector <p>Priority sub-sectors</p> <ul style="list-style-type: none"> Coffee Tea Cocoa Avocado Horticulture Spices 	<p>Advocacy for Reducing Trade Barriers</p> <p>697 private sector representatives trained in business advocacy</p> <p>5 positions/recommendation papers, reflecting private sector views on how to improve regulatory and market access procedures produced</p> <p>1 additional trade information portal established and operationalised in EAC</p> <p>5 Trade Support Institutions coached in developing effective advocacy strategies</p> <p>5 sector trade barriers' studies undertaken for MARKUP products</p> <p>563 beneficiaries trained and/or sensitised on research studies on tariff and non-tariff barriers</p> <p>302 SMEs trained on EU market requirements, demand, and market opportunities</p>	<p>Improving Standards, SPS Measures and National Quality Systems</p> <p>4 harmonised standards and SPS measures updated (and /or domesticated at the national level)</p> <p>3 new harmonised standards and SPS measures developed</p> <p>4 private sector associations participating in food standardisation</p> <p>1 manual developed for training of stakeholders on standards development and harmonisation</p> <p>142 Stakeholders trained on standards development and harmonisation from 6 EAC Partner States</p> <p>1 harmonised Food Safety system</p>
	<p>Communication & Visibility</p> <p>10 Communications Working Group Meetings</p> <p>1 Website developed and regularly updated</p> <p>7 Flagship events organized</p> <p>5 e-newsletters published</p> <p>40 articles in print and electronic media</p> <p>2 social media platforms operational</p>	<p>Enhancing Business Capacities for Export Competitiveness</p> <p>7 supply/demand and market studies conducted and/or updated</p> <p>1698 beneficiaries participated in training/awareness-raising campaigns on standards/SPS and market requirements</p> <p>632 SMEs trained on introducing traceability, industry certifications, processing and value addition</p> <p>151 SMEs receiving new equipment</p> <p>432 SMEs and TISIs trained on access to finance</p> <p>54 SMEs securing finance with project support</p> <p>16 companies supported for Rainforest Alliance/HACCP and other certifications</p>

Table 3 shows the progress of performance indicators in the four result areas with activities under the EAC and Partner States (PS) Windows grouped into 4 clusters:

Table 3 – Overview of progress²³

Objective / Result Clusters		% Achievement July 2018 – June 2021		
		Overall	EAC Window	PS Window
Overall Objective	Contribute to economic development in the EAC region	28%		
Specific Objective	Improve EU and regional market access for EAC countries, in selected sub-sectors	43%		

²³ Sources consulted: Elaboration of the Consolidated Annual report July 2020 – June 2021; and MARKUP PCU Monitoring Report July 2018-June 2021 v1.

Result 1	Enhanced capacity to advocate for the removal of sector trade barriers			81%	72%	90%
Cluster 1	Analysis, Debate and Advocacy for Reducing Trade Barriers					
Performance Indicators			Target Y4	Actual	% On target to date	Rating
Number of private sector representatives trained in business advocacy			300	697	100%	Achieved
Number of positions/recommendation papers, reflecting private sector views on how to improve regulatory and market access procedures			10	5	50%	On track
Number of Trade Support Institutions coached in developing effective advocacy strategies			10	5	50%	On track
Number of additional trade information portals established and operationalized in EAC; Milestone indicators to be introduced			1	0.84	84%	On track
Number of additional product-specific procedures guides covered by national and regional trade facilitation portals			30	24	80%	On track
Performance by Result					72.8%	On track
Composite performance for Cluster					81.5%	On track
Result 2	Improve sector standards and SPS measures harmonisation			70%	74%	66%
Cluster 2	Improving Standards, Sanitary and Phytosanitary (SPS) Measures and National Quality Systems.					
Number of private sector associations participating in food standardization			5	4	80%	On track
Types (number) of contaminants for which there is an agreed-upon mechanism for data generation, standards and SPS measures			4	4	100%	Achieved
Number of harmonised standards and SPS measures updated (and /or domesticated at the national level) as a result of the programme support			5	4	80%	On track
Number of harmonised standards and SPS measures developed as a result of the programme support			5	4	60%	On track
Number of Private Sector self-Regulatory Systems			4	0	0%	Off-track
Number of harmonized Food Safety or Plant Health systems			1	1	100%	Achieved
Number of sector-specific studies evaluating compliance and domestication in selected value chains			2	3	100%	Achieved
Performance by Result					74.2%	On track
Performance by Partner States Window					66.7%	On track
Composite performance for Cluster					70.4%	On track
Result 3	Enhance export competitiveness for sector SMEs			64%	98%	31%
Cluster 3	Enhancing Business Capacities for Export (Products) Competitiveness					
Number/coverage of supply/demand and market studies conducted and/or updated			5	7	100%	Achieved
Number of participants having attended training/awareness-raising campaigns on standards/SPS and market requirements			500	1698	100%	Achieved
Number of SMEs trained on introducing traceability, industry certifications, processing value addition			420	632	100%	Achieved
Number of SMEs receiving new equipment			80	151	100%	Achieved

Number of SMEs and TISIs trained on access to finance		400	432	100%	Achieved
Number of SMEs securing finance with the support of the project		60	54	90%	On track
Performance by Result (EAC Window)				98.3%	On track
Performance by Partner States Window				31.3%	Likely to be achieved
Composite performance for Cluster				64.8%	On track
Result 4	Improve Business development for Sector SMES			60%	100%
Cluster 4	Improving the business development capacities for SMEs.				20%
Number of SMEs benefitting from support to participate in trade and investment fairs and other B2B events, strategic counselling on exports		60	352	100%	Achieved
Number of business and investment transactions negotiations generated with B2B events (leads)		250	456	100%	Achieved
Number of business and investment transactions generated		25	41	100%	Achieved
No. of participants in training events for TISIs to provide better business development services to SMEs		200	194	100%	Achieved
No. of TISIs trained to provide better business development services to SMEs.		30	90	100%	Achieved
Performance by Result				100%	Achieved
Performance by Partner States Result (R3, U2 & U4)				20%	Likely to be achieved
Composite performance for Cluster				60.0%	Likely to be achieved

The latest available progress report for the period June 2020 / July 2021²⁴ indicates that performance is on track, showing a range between 39% to 62%, specifying that a full assessment of the overall and specific objectives “could not be fully assessed because of insufficient data”. The evaluation acknowledges this hindrance, illustrating below progress recorded in the individual national windows to highlight more specific outputs to date.

Burundi²⁵

Major contributions under both the EAC and the Burundi windows have been observed in terms of awareness creation and improved quality management, coupled with the ongoing institutional strengthening of governmental agencies. For example, the Trade Information Portal, developed by ITC experts under the regional window, is already operational and useful for businesses to access practical information in real-time; the challenge is to get it regularly updated to remain efficient. The support of the private sector has also been supported by increasing international exposure. This in turn strengthened the position of Burundian companies with regard to its international clients, increasing coffee and tea sales. The challenge remains to place more focus on the horticultural sector.

The Burundi window (€3.68 M) is implemented by ITC. It consists of three expected results: B1 (Strengthened national Quality Infrastructure framework, inspection and certification

²⁴ The field mission of this evaluation took place between August / September 2021.

²⁵ Information was collected through virtual meetings and questionnaires sent out as guidance to the discussions to maximize the participant's feedback; and to be used by each stakeholder for more comprehensive feedback to the MTR – Sent out: 13. Response: 50%, including 1 in follow up interview and 6 respondents from CNTA, Cococa, EAC Affairs, Kalico, Matraco, ODECA and Prothem.

services) B2 (Laboratory testing capacities improved for coffee/tea); B3 (Strengthened quality-related extension services).

By July 2021, the actual expenditure amounted to about 48% of the total budget for the project²⁶. There is potential to absorb the entirety of the resources by the end of the project considering that the evaluation was informed (in early September 2021) that a request for a 12-month extension was in course of negotiation.

Progress on planned reforms: the National Quality Policy was validated at the technical level at the end of 2019 and not translated into the legislative framework as it needs to be endorsed by the Government; progress since consists of submission to the Ministry of Finance in May 2020 and transmission to the Ministry of Trade (for quality); in March 2021, the Office of the Prime Minister sent it back to Ministry of Trade for improvement before resubmission to Cabinet for final approval and adoption. In March/April 2021, good governance guidelines were finalized for key national quality infrastructure (NQI) institutions and the development of their strategic plans; training on the use of the guidelines was implemented. Furthermore, a relating Directory of NQI services was published and disseminated.

Concerning market access, as of September 2021, 7 selected companies had been assisted in branding and marketing. Equipment has been supplied to 7 laboratories – 6 government institutions and 1 private lab⁶ government laboratories (2 laboratories of BBN, 1 lab of CNTA, 1 of ISABU, 1 of ODECA and 1 of OTB), and 1 private laboratory (Prothem). These investments in equipment are expected, eventually, to facilitate export-readiness, hence increasing trade.

Activities also concentrated on strengthening a management systems certification scheme to better support the coffee, tea and horticulture sectors. This was adopted in line with international management standards. The technical assistance provided capacity building such as training on management systems; conducted diagnostics in 14 enterprises, which also included an internal audit of selected factories to implement a priority quality standard; and facilitated training and coaching for inspection bodies working in the tea and coffee sector. With regards to Technical Barriers to Trade (TBT), training on developing and promoting standards in accordance with the World Trade Organization (WTO) TBT agreement that was delivered in July 2020.

Under Cluster 3, the strengthening of quality-related extension services has been the objective most affected by COVID-19 related delays. Activities implemented include a study tour for representatives of two companies (Prothem and OTB) in Kenya for experience exchange in the tea sector, including training on tea tasting techniques and tea-making standards in March 2020 for 12 participants. These two companies were further assisted with the implementation of the Rainforest/SAN 2017 standard and Good Manufacturing Practices (GMP) training. A tea processing manual was produced and translated into Kirundi (Burundian national language) for tea growers. Several different trainings followed these initiatives (on tea growing, management of post-harvest production, assessment of tea tasting, manufacturing standards; on standards Map and training of trainers; etc.). Training materials were developed and a Training on Entomology of Pests responsible for potato taste was conducted.

Rwanda

The Rwandan agricultural sector and the agribusiness enterprises involved in MARKUP have received tangible benefits from the programme. The Rwanda window (€3.68M) is being implemented by two international NGOs. Initially, it consisted of three Results: R1 (Strengthening of the national food safety system), R2 (Support to horticultural/agricultural high-value chains, SME and agribusiness development), and R3 (Coffee value chain development). R1 was subsequently abandoned. ITC is responsible for linking the EAC regional and the Rwanda national windows. Activities have addressed the need to establish a

²⁶ See narrative report Partner States Window: Burundi (January 2020 – July 2021)

stronger adequate knowledge of the regional and international markets, allowing to improve the otherwise limited capacity to participate in business-to-business (B2B) international events. Regardless of COVID-19 restrictions, the evaluation has assessed that the newly acquired understanding by enterprises of market requirements is a successful deliverable of the programme.

Under the regional window, MARKUP supported the review and update of three standards in the coffee sector, including national consultations in Rwanda and Burundi. Through ITC, assistance was provided to enhance investment, access to export markets through capacity building for the beneficiaries, and support to take part in international events, such as coffee auctions and B2B meetings. Also, a workshop in Kigali on post-harvest management was organised for Rwandan avocado exporters. The avocado sector also received a maturity meter placed at NAEB and was made available to the Rwanda exporters.

In the period 2020-2021, the Rwanda Standards Board (RBS), in partnership with ITC, provided support to 12 coffee and horticulture exporters to comply with international quality standards, involving 26 Quality Champions. A total of 20 coffee companies received moisture meters to enhance product quality.

In terms of advocacy, through MARKUP, progress has been observed also with regard to taxation issues. In Rwanda, VAT is not being applied to parchment, and tax on coffee cherries is being withheld. Evidence was found in several cases in which trade-related policies and/or strategies and/or regulations have been improved with business sector input as a result of ITC's support. Campaigns were also carried out at the beginning of 2021 for the national Trade Facilitation Portal (TFP). However, the Export Guide for the Rwanda Horticulture was still under production at the time of the evaluation.²⁷

MARKUP has also provided a tangible contribution as visible in outputs such as the reported strengthening of beneficiaries' credentials, assistance with market intelligence, improvement of the coffee quality, and an improved understanding of how to position the Rwandan companies while accessing financial and non-financial BDS.

At the Rwanda window level, MARKUP contributed funding to the Budget Support to the Sector Reform programme, launched at the beginning of 2019 by the Government. This programme aims to unlock the potential of Rwanda's horticultural and coffee value chains to ensure the supply of safe products to local, regional and international markets. MARKUP funding was allocated through a Call for Proposals (CfPs). The two selected applications aim at improving productivity and export of selected horticultural produce from Rwanda over 4 years. These projects are under implementation by two NGOs as lead applicants, namely the *Istituto per la Cooperazione Universitaria (ICU-Italy)* and *Oxfam Ireland*. Both interventions started by mid-2020 with some delay due to COVID-19 movement restrictions. For both, the EU co-funding amounts to €2M.

The Action by ICU, "A market-driven approach for value chain improvements and the expansion of the Rwandan coffee market", targets the Rwandan coffee value chain with the specific objective of assisting coffee growers and coffee washing stations (CWS) to access the regional and international market. Among the major outputs, CWSs were selected in collaboration with the National Agricultural Export Development Board (NAEB) and the final list of 20 CWSs was approved by the Contracting Authority in June 2020. Before the end of 2020, agreements were signed with 10 CWSs. To date, tangible outputs show an increase of approximately 10% in income, and production growth, which is recorded at 5 kgs from the initial 2.5 kgs. These results have been possible also as a result of the study on the coffee market requirements.

²⁷ Final Yr3 Annual Narrative Report EAC-TZ Window.

In the Oxfam-led Action “*Sustainable livelihoods in the horticulture value chain 2*”, the overall goal is to contribute to unlocking the potential of Rwanda’s horticultural value chains to ensure the supply of safe and high-quality products to local/regional/international markets. With this aim, the intervention targets increased investments, returns, and capacity and strengthened regulatory frameworks to support smallholder farmers’ productivity, income and marketing improvements. Progress at the time of the evaluation consisted of more than 3,500 farmers having accessed seedlings of selected crops, e.g., chilli, avocados, onions/garlic, tomatoes, and recorded a slight increase in selling prices; small equipment supplied to more than 3,000 farmers grouped in cooperatives; and training and capacity building to access a market of quality seeds/seedlings, including horticulture best practices and linkage systems.

In summary, both MARKUP EAC-regional and Rwanda’s national windows show tangible contributions to an improved capacity of line Government agencies, such as NAEB, RAB, and RTC, as well as to strengthened trade and investment support to farmers and private sector associations.

Kenya²⁸

The MARKUP Kenya window (€3.4M) consists of two result areas: K1 (Strengthened National Quality Infrastructure’s regulatory framework and capacities.) aligned under Cluster 2 of the regional EAC window (Improving Standards, SPS Measures and National Quality Systems); and K2 (Support sector smallholders, cooperatives and enterprises to better integrate into export-oriented value chains) aligned with EAC window under Cluster 3 (Enhancing Business Capacities for Export Competitiveness) and Cluster 4 (Improving the business development capacities for SMEs) 29. The Kenya national window is implemented by UNIDO.

The evaluation assessed that progress made has been slow³⁰, as implementation started in the last quarter of 2019 and was negatively affected by the ban on domestic travelling during the COVID-19 lockdown in 2020. Nine out of the twelve target counties had been visited by the MARKUP team by then. Activities are directed towards enhancing capacities: training of extension officers to be started once the identification of officers has been completed; training for trainers of selected farmers which is ongoing; and, at a slow pace, trainings for auditors and inspectors³¹. Trainings are also directed to farmers of MARKUP products not covered by GLOBALG.A.P. – a Trademark and Set of Standards for Good Agricultural Practices³² (such as herbs, spices, chillies, French beans & peas) and laboratories. Moisture Meters were directly procured by ITC and distributed to 37 Coffee SMEs for quality consistency. Smallholder Cooperatives and SMEs received equipment and moisture measurement tools

The Kenya Accreditation Service (KENAS)³³ will conduct in-person trainings (capacity building exercises for 75 laboratory staff) on various aspects/tops linked to ISO17025, which will lead to labs enhancing their scope of accreditation. Other assistance consists of the supply of both GLOBALG.A.P. and moisture meter equipment, procured through UNDP Kenya for farmer

²⁸ Interviews were conducted both virtually and in person; in addition, a questionnaire was mailed to reach various stakeholders. Few responses were received. Among them, for the record, the evaluation wants to mention A. Harris, a coffee farmer; Wylde International, a business development support entity (BDSP), 1 Consultant working with MARKUP EAC window on advocacy; 2 Quality Champions from the Kenyan Bureau of Standards (KEBS); the East African Tea Trade Association; KEBS officers; and Bio-farm (an avocado processor/exporter who is also the Fresh Produce Exporters Association of Kenya (FPEAK)’s CEO.

²⁹ See Kenya Annual Progress Report, July 2020/June 2021: this also includes *Output 3 - Visibility and outreach on key quality and safety issues in horticultural sectors*.

³⁰ Assessment based on above mentioned report.

³¹ Reported progress on this activity is at 30%.

³² https://www.globalgap.org/uk_en/

³³ <https://www.kenas.go.ke/>

groups linked to 8 avocado exporters as a requirement for GLOBALG.A.P. Certification³⁴. In addition to smallholders, cooperatives and SMEs that received equipment and moisture measurement tools, the Kenya Bureau of Standards (KEBS) received Certified Reference Materials (CRMs) for laboratories that will be used in proficiency testing schemes regionally as well as locally in an endeavour to build and strengthen the capacity of the testing facilities. SMEs receiving equipment for moisture measurement show improvements in increased quality and processing standards. In K1, progress on planned reforms, technical regulations and standard frameworks include: draft National Plant Protection policy, review of the National Food Safety policy, Pesticide Residue Monitoring and implementation plan being developed and relating Monitoring Unit to be established at the Kenya Plant Health Inspectorate Service (KEPHIS)³⁵ and composed also of officials from the Pest Control Products Board (PCPB)³⁶, the Horticultural Crops Directorate (HCD)³⁷ and KEBS.

Support was provided to the drafting subsector value chains strategies for fruit and vegetables, spices, culinary herbs, and nuts, including a market study; and to an impact regulatory assessment of Phytosanitary Regulations on harmful organisms/pests for selected commodities and preparatory work for the establishment by KEPHIS of pest-free areas. Furthermore, technical regulations on food safety and quality are being reviewed to be aligned with regional and international requirements; food safety surveillance procedures are being developed with TA to the Agriculture and Food Authority (AFA) and KEBS, including risk profiling for operators; 3 inspection protocols and 3 industry guides for inspection on food safety and phytosanitary risks were developed; KEBS is being supported to participate in Codex Standard Committee meetings in cooperation with GIZ, and capacity building activities for KEBS and KEPHIS laboratories are under way.

To improve access to markets and market linkages, Quality Champions negotiated and signed deals with buyers in Russia for over 46 tons of avocados and succeeded in shipping samples; contacts were also made with other potential investors from the EU. Urban Fresh work by Quality Champions helped them adjust their operations to supply. This falls under EAC Window and is part of the work done by ITC.

Additionally, under the EAC Window and with support provided by ITC, the Kenya Coffee Traders Association (KCTA) partnered with MARKUP and the East African Business Council (EABC) to produce the “Coffee Trade Obstacles Paper”, which identified several procedural complications, technical (TBT) and SPS barriers, and general trade policy obstacles that negatively impact regional and international trade for coffee. The added value of this initiative is visible in the public-private dialogue conducted on the paper at the EAC Coffee Business Forum in Mombasa in February 2020³⁸. KCTA has been assisted to reduce the number of steps to register new exporters from 88 to 55, a satisfactory result given the period, which needs further review for reduction to fall at par with other EAC countries.

Visibility activities were carried out by UNIDO under the Kenya window, including a Photography Competition in April 2021 targeting the youth to create awareness around MARKUP’s support to farmers, media coverage through press articles, TV, and radio broadcasting.

The main challenges that the evaluation found in Kenya which affect the performance of both the EAC and the Kenya windows are:

³⁴ GLOBALGAP equipment procured through UNDP Kenya for farmer groups under Option II linked to the EAC Window too

³⁵ <https://www.kephis.org/>

³⁶ <https://www.pcpb.go.ke/>

³⁷ <https://horticulture.agricultureauthority.go.ke/>

³⁸ <https://www.eac.int/press-releases/141-agriculture-food-security/1672-eac-coffee-business-forum-kicks-off-in-mombasa>

- ◆ Lack of implementation of the presidential task force on coffee causes uncertainty in the sector.
- ◆ Political support to the institutional framework on food safety: UNIDO to work closely with the government to address related issues in order to capitalise on the available technical know-how (e.g., on inspections, controls, market access) and ensure the needed progress also at the level of the regulatory frameworks.
- ◆ Advocacy in the coffee sector inhibited by inflexibility in old and new rules yet to be implemented in addition to having too many regulations (more than the other EAC countries). Several coffee producers and traders interviewed still feel inhibited by the current regulations.

Tanzania

The Tanzania Window Result 1 (enhanced awareness of sector enablers through market analysis and research) is implemented by ITC; Result 2 (Certification and Beyond: Market Access for Sustainable Coffee, Horticulture and Tea products from Tanzania) is implemented by Solidaridad East Africa and by Tanzanian public and civil society partners. Complementarity of interventions takes place through sharing of information of SMEs targeted along the value chain. The two actions focus on coffee, tea and horticulture value chains.

Collaboration between ITC and Solidaridad takes place, primarily, on the implementation of Voluntary Sustainability Standards (VSS)³⁹. The evaluation assessed this practice as a positive example of the programme's effectiveness.

ITC interventions are implemented at the enterprise level along the value chains. They focus on assisting SMEs in building and/or strengthening the Internal Management System (IMS) for multiple VSS certification and with the essential documentation that is needed by external auditors and third-party certification service providers. Solidaridad interventions are implemented through cooperatives and their farmers' members, e.g., supporting farmers in compliance with VSS, Good Agricultural Practices and extension services/farm advice. This provides an opportunity of collaborating to ensure all actors in the various value chains are reached as well as increase coverage area and number of beneficiaries in the agriculture sector.

With that approach, there is a very limited chance of overlap; moreover, the complementarity of planned interventions is primarily achieved through sharing of information about which SMEs are targeted by ITC so that Solidaridad complements with interventions in those SMEs' supply chain.

As a major achievement reported to the evaluation, an important success story of MARKUP under the Tanzania Window (Result 1-ITC) is the production of the report together with the Tanzanian Parliament on "Business Perspectives on Tanzania: Invisible Barriers to Trade".

Furthermore, in collaboration with the Ministry of Industry and Trade, ITC organized a stakeholders consultative meeting to communicate the findings of the Non-Tariff Measures (NTM) Survey which was also conducted in collaboration with the Ministry of Industry and Trade. The event was convened from 9th to 10th of March 2021 in Dar es Salaam with an average of 150 participants per day who participated online and physically. Stakeholders from both the private sector and public institutions deliberated on the agenda and provided their inputs for the improvement of the report. During the NTM Survey stakeholder workshop, local trainers trained by ITC trained participants on using Market Analysis Tools for Market Access.⁴⁰

Similarly, under the Tanzania Window Result 1, in February 2021, a series of four trainings on EU market requirements, demand, opportunities and sustainability aspects were organised for

³⁹ <https://unctad.org/topic/trade-analysis/voluntary-sustainability-standards>

⁴⁰ <https://ntmsurvey.intracen.org/TanzaniaNTM>

the Tanzanian SMEs in the avocado, spices, coffee and tea sectors. The four trainings were held over four consecutive days. The trainings were designed to provide the participants with the needed information on the EU market with regards to the future growth prospects, the channels for opportunities, the market niches that are accessible, what specific requirements they need to meet (to work towards obtaining them) as well as sourcing preferences and sustainability standards which would increase their chances to export.

After ITC delivered a training of trainers to raise awareness and use ITC tools, such as the Trade Map and the Market Access tool, to beneficiaries in Tanzania, the Dean of the University of Dar es Salaam Business School (UDBS) sent a written confirmation that such tools will be used as part of their courses. This includes but is not limited to international business courses, economics courses, entrepreneurship courses and project management courses. Further details are expected. Additionally, three ITC-certified instructors from Tanzania Trade Development Authority (TANTRADE)⁴¹ and UDBS led a MARKUP workshop and trained around 50 private sector representatives on the use of ITC tools. This development speaks in favour of the sustainability of the capacity building activities undertaken under the programme so far. In March 2021, the same experts trained private and public sector representatives during the NTM Survey Stakeholder workshop which was presented the NTM report for Tanzania.

The main challenges that emerged during the field mission interviews are posed by internet connectivity, which has precluded beneficiaries and stakeholders to participate in online activities.

Another challenge seems to be affecting MARKUP's work under the Tanzania Window Result 2 (Solidaridad): The Ministry of Agriculture has issued a directive that each grantee is supposed to register its cooperatives to avoid duplication of efforts. Although justified, the implementation partner faces practical problems with the integration of MARKUP and AGRI-CONNECT actions⁴².

The AGRI-CONNECT is the EU flagship programme in Tanzania that supports sustainable agriculture, funded through the 11th European Development Fund (EDF) for a total amount of €100M. The Programme (2020 – 2024) contributes to inclusive economic growth, promotes private sector development and job creation in the agricultural sector, and aims to increase food and nutrition security in Tanzania. The AGRI-CONNECT programme aims to reach 150,000 smallholders in the Southern Highlands Regions of Tanzania and Zanzibar. This will be achieved through four results areas namely (i) improvement of sector enablers and business environment; (ii) support of small-scale farmers in production, value-addition and marketing/support to private sector agro-business projects for tea, coffee and horticulture value chains; (iii) improvement of selected rural roads; and (iv) raising awareness of good nutrition practices. Indeed, the MARKUP TZ Window Result 2 constitutes in effect additional funding for the work that the implementing partner Solidaridad is also carrying out under AGRI-CONNECT.

ITC strengthened its collaboration with AGRI-CONNECT to focus on forging synergies between the projects' implementations, bearing in mind the projects' different areas of focus. It was agreed to further explore the possibility to collaborate in organising events engaging public and private sector stakeholders (one example was the NTM stakeholder validation workshop). Another area of collaboration lies in the access to finance component, whereby MARKUP's activities to support SMEs processing and value addition facilities could be linked to AGRI-CONNECT's support to SMEs through blending finance solutions. An additional connection emerged in the area of certification, whereby AGRI-CONNECT supports capacity building for extension officers to ensure the sustainability of MARKUP's interventions.

⁴¹ <https://www.tantrade.go.tz/>

⁴² <https://agri-connect-tz.com/>

Under the EAC regional window managed by ITC, is also worth mentioning the joint venture between a Dutch investor and a Tanzanian business in a spices processing facility/factory in Muheza (Trianon Investments)⁴³. This constitutes a clear example of MARKUP's contribution to the Government's ten-year Agricultural Sector Development Programme with a focus on commercialization and value addition, to improve capacity building, investment phasing, supply chains and market access.

Uganda⁴⁴

The Uganda window consists of four expected results: U1 (Resistant varieties are developed and brought to market); U2 (Reduced production, harvest and post-harvest losses and increased marketing); U3 (Increased smallholders' price incentive through diversification into higher value export markets); and U4 (Strengthen institutional capacities for trade analysis, market surveillance and project management).

U1, U2 & U3 are aligned with cluster 3 of the regional EAC window. Implementation is carried out by the Ugandan Coffee Development Authority (UCDA)⁴⁵ in collaboration with various public and private sector institutions; the two value chains targeted by the programme are cocoa and coffee. U1 and U4 are funded through a Programme Estimate (€ 200,000); U2 and U3 are to be implemented through Actions under a Call for Proposals (€ 3,480 M). The Financing Agreement (FA) also provided for a TA component, for the period October 2018 to June 2021, to support UCDA in three specific Result Areas namely (i) Improved policy and regulatory framework for cocoa value chain; (ii) Improved production, post-harvesting and marketing of coffee and cocoa value chains; and (iii) Market-led research in coffee and cocoa, trade analysis and market surveillance strengthened.

Effectiveness in general is low, as recorded in reports made available to the evaluation team. In this regard, and as illustrated in the section on efficiency, the assessment is impaired by the lack of alignment across the different progress reports, namely the EAC regional and Uganda country window, and the one produced by the Technical Assistance (TA). The latter provides an overview of how the two components, i.e., the country window and the technical assistance, converge as in the table below.

Table 4 – Table on the convergence between National MARKUP and the TA⁴⁶

National MARKUP expected results (FA)	Technical Assistance
<p>UG-R1 Resistant varieties developed and brought to market for multiplication</p> <p>It may include: support research in pest and draught resistant coffee and cocoa varieties; bring the newly developed varieties to the market, ensuring the establishment of sustainable extension and seedling delivery services, provided by the private sector.</p>	<p>1. Improved policy and regulatory framework for cocoa value chain</p> <p>3. Market-led research in coffee and cocoa, trade analysis and market surveillance strengthened (programme estimate)</p>
<p>UG-R2 Reduced production, harvest and post-harvest losses and increased market opportunities for small-holders</p> <p>It may include: strengthening coffee and cocoa farmer' associations, with a special focus on gender and youth responsive groups, to support farmers with bulking the produce, processing, storage, transport and linking with markets and</p>	<p>2. Improved production and productivity, reduced harvest & post-harvesting losses and marketing of coffee and cocoa value chains (matching grants)</p>

⁴³ <https://www.eacmarkup.org/news/country-updates/trianon-investment-a-new-opportunity-for-tanzanian-spices>

⁴⁴ The main document used as basis for the assessment is the progress report available at the time of the field mission, namely Uganda Annual report – Y3, July 2020/June 2021.

⁴⁵ <https://ugandacoffee.go.ug/>

⁴⁶ See 4th Interim Report, Technical Assistance, April – October 2020, page 11.

financial institutions; and supporting farmers to adopt more climate-resilient systems and practices.	
<p>UG-R3 Increased small-holders price incentive through diversification into higher value export markets</p> <p>It may include: supporting certification schemes for sustainable and organic coffee/cocoa, including where relevant the promotion of Geographical Indication systems; traceability systems and supporting access to market information through modern technologies.</p>	<p>1. Improved policy and regulatory framework for cocoa value chain</p> <p>2. Improved production, post-harvesting and marketing of coffee and cocoa value chains (matching grants)</p>
<p>UG-R4 Strengthened institutional capacities for trade analysis, market surveillance and project management</p> <p>It may include: developing trade analysis and intelligence skills, and improving regulatory capacity for market surveillance and inspection, monitoring and follow up of project implementation.</p>	<p>3. Market-led research in coffee and cocoa, trade analysis and market surveillance strengthened (programme estimate)</p>

Progress is very slow in the components of the programme estimates U1 and U4, as well as in the start of the CfP actions, under components U2 and U3. The disruptive impact of COVID-19 is duly taken into account. Under U1 and U4, the Cocoa Regulatory Impact Assessment (RIA) produced by the TA and sent to UCDA for approval in October 2019, was formally approved by the Ministry of Agriculture, Animal Industry and Fisheries (MAAIF)⁴⁷ in April 2021.

From the consultations carried out by the evaluation, it can be inferred that activities will intensify towards the elaboration of a law on cocoa with beneficial effects on further developments.

Training was implemented in institutional managerial and operational capacity of Trade Investment Support Institutions (TISIs), on coffee trading and risk management training, quality management coaching, post-harvest processing principles and techniques. The accreditation procurement process of laboratory equipment (as part of the upgrading process of labs to attain ISO 17025) is ongoing. An evaluation team was appointed in September 2021 to assess tenders received.

Under U2 and U3, the CfP process was in the process of completion at the time of this evaluation, with contracts awarded to three out of the six selected applicants (four in the coffee and two in the cocoa value chains), for a total of about €3.1M out of a total allocation of almost €3.5M.

Under Cluster 3 EAC Regional Window, which covers U1, U2 and U3, progress is reported on: 10 coffee wet mills coached to develop their resource efficiency and circular production strategies and implementation plan (1st group of 5 companies in 2020, 2nd group of 5 companies in 2021); moisture meters (43) for coffee and cocoa SMEs and fermentation kits for 6 Cocoa SMEs/cooperatives, 14 SMEs in the cocoa sector, and 29 SMEs the Coffee sector.

As it concerns market access and linkages, MARKUP assisted Uganda's partners with the facilitation of their participation in the Cocoa Exhibition in the Netherlands in February 2019 and the Africa Fine Coffee Association (AFCA) business conference in Mombasa (2020)⁴⁸. More specifically under U3, four standards were developed in cocoa beans, cocoa powder & cocoa powder mixtures, cocoa butter, and chocolate. Specification standards and national stakeholder consultations were undertaken while regional engagements are ongoing. Training was delivered to producers in marketing & branding, packaging, and IMS certification quality management, among others.

⁴⁷ <https://www.agriculture.go.ug/>

⁴⁸ <https://afca.coffee/conference/>

2.3 Efficiency

The MARKUP programme has been so far a valuable instrument to help strengthen some key enablers to agricultural trade and value addition, such as improvement in quality infrastructure, food safety and phytosanitary standards, and to some extent, support to SMEs to integrate into export-oriented value chains.

Consequently, in terms of efficiency, MARKUP is visibly contributing to enhancing the quality of the targeted commodities and increasing the opportunities for growth in exports; it is less efficient yet on expanding intra-African trade. In this regard, it is observed that some of the current implementing mechanisms have the potential to reach more visible achievements once strengthened with a more targeted coordination among the EAC countries and a larger involvement of sector/ product specific business associations. Addressing these aspects would also have positive implications on effectiveness. The parameter to assess how conducive the chosen implementation mechanisms are for achieving the expected results (incl. choice of implementation modalities, entities and contractual arrangements).

Expansion should be achieved once changes have taken place at the necessary level of value-addition in the targeted value chains. Different levels of efficiency were found in the five countries visited by the evaluation, and is also different for the targeted products, with a possibility to determine an optimum level of achievement closer to the end of the programme also based on the points of strength emphasized in this review.

The answers to the specific question, *“How well are the different components coordinated between each other, and how synergic are they (i.e., how well have they worked together to reach the intended results and objectives)?”* point to weaknesses in the current synergy and coordination of the activities across the different components and country windows. In this regard, due consideration is given to the challenges intrinsic to the nature of the intervention, with a multiplicity of stakeholders from five countries and international organizations, with different contractual frameworks resulting in different numerous reporting lines.

Notwithstanding these challenges, the remaining time of the programme can build on the strengths observed to date in order to ensure improved efficiency. For example, all the work in certification and standards shows a fair level of efficiency to capitalize on. Such programmes like “Quality Champions” have strong traction with certified quality trainers and are likely to be sustainable.

Work at macro and meso levels is progressing at a slow pace and its acceleration depends largely on external factors as well as on strengthened coordination across the partners' states and the existing MARKUP governance structures. Through the latter, the programme has a strong potential to unlock business environment obstacles, ensure multiplier effect and sustainability, for instance, through work with Business Support Organisations (BSOs) as well as directly at micro-level (SMEs). For example, deepening the interface with sector-specific BSOs and also EU based ones such as the Chambers of Commerce and trade associations is an area requiring more efficient coordination.

Business to Business (B2B) activities have been quite successful and with a remaining unmet demand. For example, the positive experiences from the EAC Coffee Business Forum and EAC Invest could be a way to maximise efficiency in the connections to potential business. It would be also beneficial to advocacy activities which, to be efficient, require a structured involvement of private sector representatives as well as farmers' associations as the ultimate beneficiary and agents of agricultural development.

In this regard, there is room to improve the current approach which should also benefit from a better-concerted implementation in the different EAC partner states and the adoption of an inclusive approach geared towards involving companies with the highest impact at the local level. For example, those firms involved in MARKUP and additional ones to be involved that

are practising a policy of profit redistribution and re-investment in local realities in line with poverty reduction strategies as implemented by the EU, the African Union (AU), and the individual countries. The assistance through the MARKUP programme to the participation of selected companies at B2B events is an optimum channel to upgrade emerging businesses to the mainstream through targeted market linkages and partnerships.

Examples of interventions aimed at improving efficiency in trade facilitation are the Trade Facilitation Portals and online auctions to be coordinated with national and regional initiatives (i.e., in Rwanda with MARKUP support to CEPAR to take part in an international coffee auction; Tanzania, supported by the EU through AGRI-CONNECT; etc.). These events are also an example of how a more systematic involvement of local organisations would contribute to both efficiencies and a strengthened ownership, adding to improved sustainability of interventions critical to successful delivery.

Concerning coordination as a core element of improved efficiency in delivery, MARKUP can capitalise on the existence and work performed by the GIZ-managed Project Coordination Unit (PCU), which ensures the overview and follow-up of the whole programme, as well as the buy-in of regional institutions and EU Delegations in the Partner States.

Efficiency also appears hindered by a limited representation and drive from the private sector, which participates to different degrees although not systematically in implementation. One of the areas where the private sector can bring an efficient contribution is in targeted coordination with the PCU and the MARKUP National Focal Points (NFPs) by sharing the workload between the former and specific private sector associations. These could oversight projects and facilitate improvement in specific value chains, at national and regional levels.

With regards to the NFPs, implementation seems to be also constrained by the fact that there are EAC partner state cases where the NFP is hosted by the Ministry of Finance while the Ministry involved in operations is a different one, e.g., the Ministry of Commerce or Agriculture. Such aspects reinforce the finding that, on the whole, efficiency will benefit from targeted institutional coordination and more systematic public-private dialogue to be articulated with upstream and downstream support, as more activities are focused on market access and linkages – i.e., from the washing station onward in the case of coffee, or the first processing plant. So far, the programme has not been efficient as needed in providing farmers with more support on agronomic, organizational and access to finance.

The availability and supply of seedlings are tangible examples: improvement of quality needs to go hand to hand with the increase of quantity, including addressing capacity constraints. In this area, the evaluation has observed that the current coordination with the local environment all the way to the district level is not adequate to ensure that the necessary capacity and logistics are in place as needed for efficient delivery. In other words, the assessment of efficiency shows the lack of a holistic approach to the concept of “value chain” as constituted of 5 nodes – 2 upstream, including, (a) inputs selection/supply; and (b) production process including extension services support, capacity building, modelling, access to finance, innovations, development and technology application; and 3 downstream, which comprises, (c) distribution, transport, aggregation and warehousing; (d) processing, value addition, branding, packaging; and (e) marketing and support services, including market information/market specifications/ standards, BDS/ enterprise development linkages⁴⁹.

The potential to transform all the strength into an efficient delivery mechanism depends largely on the extent to which the lessons learnt, illustrated in the next chapter of this evaluation, will be applied to the remainder of implementation and how timely these corrective measures will be adopted.

⁴⁹ See the Annex to the Concept Note on MARKUP Value Chain Analysis, delivered by this evaluation team to EUD Tanzania on 5 November 2021.

2.4 Expected Impacts

This evaluation asked the questions: Are there early signs indicating the outcomes delivered by MARKUP are being translated (or are expected to be translated) into the desired/expected impacts, namely in terms of achieving the strategic objectives/priorities to “Contribute to economic development in the EAC region, by increasing the value of both extra and intra-regional agricultural exports, with main focus on exports towards the European Union”?

The first, and obvious answer is that, as in all mid-term evaluations, it seems too early to measure the impacts of MARKUP interventions. However, interviews during field work revealed that, in early 2020 and early 2021, GIZ measured perceptions of companies supported under MARKUP with an “Ease of Market Access Perception Survey” in relation to national, regional and international markets for MARKUP commodities. While (supposedly due to pandemic related policies) access to markets is perceived to have slightly worsened at the regional and national level, access to international markets has improved according to the feedback received. Nevertheless, access to international markets is still estimated to be harder than access in the EAC and nationally. Second, the GIZ team also informed the evaluation that the objective to increase intra-EAC trade was not well articulated as a priority in MARKUP (and thus in terms of impact pathway and means). Indeed, to date, there is no systematic mechanism to measure quality compliance within EAC and other markets as rejection data is not consistently captured and reported.

This section presents a selection of cases of benefits (grouped by examples in the five partner states) so far delivered by the programme across the different country windows as well as regionally. The outputs include the adoption of policy documents, guidelines and/or standards. Preliminary answers are inferred from several success stories recorded in the successive MARKUP reports which, in some cases, could be visited and interviewed by the evaluation during the field mission of August / September 2021.

Burundi

First, in Burundi, it was assessed that the private sector has recorded tangible benefits in the area of access to credit – two MARKUP-assisted companies, COCOCA and Rudeca, secured USD 2,900,000 and 150,000 respectively. Also, Kalico, a well-established coffee company, expressed high appreciation for the support received with branding and graphic assistance with the website, as well as having started an interaction with laboratories whereas before there was no activity. This is very important as it allows the company to do more checks at the national level and follow up on the Burundi Coffee Board certification on the quality and number of defects, the grade, cupping notes, enhancing the release of the international certification which adds to the origin and to the selling price (industry was not informed about Mark Up it is through the MTR).

Kenya

Second, in Kenya, GLOBAL G.A.P. and other self-regulating certification schemes such as FSSC22000, HACCP were adopted; and work is in progress to support Kenya on KS1758, with emphasis on traceability along the entire supply chain (and aligned with the EU from-farm-to-fork strategy)⁵⁰. Under GLOBALGAP there are 36 farm assurers, to be used to roll out the GLOBALGAP system at selected farms (1000) across five value chains (macadamia, passion fruit, mango and groundnuts). Certified Reference Materials were delivered to the labs at KEBS while procurement for the same was finalized for labs at KEPHIS. The East African Tea Trade Association (EATTA) was guided in a self-assessment benchmarking exercise which was subsequently validated by the participating institutions followed by the development of the

⁵⁰ https://ec.europa.eu/food/horizontal-topics/farm-fork-strategy_en

EATTA Performance Improvement Roadmap (PIRM) which identified four key areas for improvement, translated into targeted Impact and Outcome statements.

Under the result K2, there are also a number of success stories generated by MARKUP: Biofarm, an avocado exporter, received a loan worth \$250,000 as working capital from Rabobank Foundation and Ksh 23,000,000 loan from equity to build and stock a warehouse with processing equipment that will be an aggregation/value-added for avocado exports. Furthermore, an avocado smallholder farmer received \$150,000 from a USAID project to support linkages with extension services and inputs. Train Champions supported various SMEs, cooperatives and smallholders to access new markets, (e.g., Urban Fresh in Russia, Kuwait and Dubai; Biofarm in China and Netherlands). Contacts with buyers were also developed through selected companies' participation at trade fairs. A beneficiary business, Direne, produced evidence to have met reliable buyers due to MARKUP in the Netherlands: one for the Dutch market and another re-exporting to Malaysia. Attributed to physical presence in trade fairs and the opportunity to do visits to buyers' promises, Makueni Mangoes are now exported to EU countries due to frequent testing of and control of pesticides and microbial diseases.

Rwanda

Third, in Rwanda there is strong participation and commitment by national stakeholders, namely MinCom, MinAgri, National Agricultural Exports Board (NAEB), Rwanda Bureau of Standards (RBS), Rwanda Agricultural Board (RAB), Private Sector Foundation (PSF), Ministry of Foreign Affairs/ EAC, and MinEcoFin. These stakeholders are also involved in other interventions targeting agricultural development and MARKUP offers an additional platform for the exchange of information and coordination among the key role players.

BAHO, a Rwandan company, sold 4 containers (76,800 Kgs) for a total of \$251,904 to a Swiss buyer, as a result of participation in the online mini-auction and B2B event during the EAC Coffee Business Forum. The Coffee Exporters and Processors Association of Rwanda (CEPAR) and its members received support in institutional strengthening, with training on portfolio management, the preparation of a strategic plan and increased market exposure through the coffee auction with the establishment of market linkages. CEPAR's participation in the above-mentioned coffee auction was possible through the MARKUP ITC 50% co-funding with the Association. MARKUP brought a tangible improvement to packaging and branding which are central to a stronger presence in the market.

In terms of access to finance (Rwanda), investors and financial providers met 10 selected SMEs which presented their business plans, with many women some below the age of 30.

ITC also concluded a 2-year contract with a local BDS provider, Inkomoko, for the implementation of boot camps and coaching sessions with 30 selected SMEs in Rwanda from both the coffee and horticulture sectors to be trained on financial accounting, sales and business planning. This example is a clear sign of a positive early impact by MARKUP.

Tanzania

Fourth, in Tanzania, examples of early impacts can be illustrated with two success stories of private enterprises supported by MARKUP.

The first one is Frank Horticulture, a small avocado and fresh produce exporter from Njombe. The region, part of the Southern Highlands of Tanzania, is a hilly and fertile land in the south-western part of the country. The altitude and cool temperatures make it the perfect place for avocado production.⁵¹ Sometimes referred to as the 'green gold of Tanzania', avocados are the new rising star in the country. While only some seven years ago domestic production was close to zero, the crop has now become a key export for Tanzania, making the country one of

⁵¹ <https://intracen.org/news-and-events/news/the-rising-star-of-tanzanian-horticulture>

the leading African avocado exporters, preceded only by South Africa and Kenya. In general, avocado growers and exporters struggle to access international markets because their products often do not meet quality standards, buyer requirements and product regulations. But Frank Horticulture is not only exporting its avocados to large regional buyers in Kenya but also contributing to trade within the EAC. New opportunities for Frank Horticulture emerged when the company began receiving support through MARKUP. Participation in the international trade fair Fruit Logistica 2020, where the firm's owner met interested buyers from the European market, marked a turning point. In addition, attending the Global Good Agricultural Practices (GAP) standards training has been particularly helpful for Frank Horticulture. It trained farmer groups, linked through the supply chain to exporters. The hands-on training is aimed at increasing awareness about the importance of internationally recognised certifications and preparing farmers' groups to become eligible for the certifications. Frank has remained an active part of these efforts to connect farmers with exports to create a win-win situation. Just last year the company provided a platform to 500 farmers, representing multiple farmer groups from the Njombe region, to receive a similar training on Global GAP certification. The will to export to the European market is strong. An example is the Njombe South Highlands Development Association (NSHDA) which also connected its farmer members to this training. As a result, about 5,000 farmers joined forces and hired an agronomist to work with the association. Tapping into the interest shown by those engaged in agribusiness in the area, the farmers from NSHDA collaborated with agricultural input suppliers and solar energy suppliers for irrigation systems. It is now just a matter of months before Frank Horticulture and the farmers apply for Global GAP certification so that they can start selling to the European market. With support from MARKUP, Frank Horticulture has also learnt about quality requirements, pest management, and disease identification. Now offering products of higher quality, Frank Horticulture has managed to re-invest some of the profits in a small pack house.

The second example of an early impact in Tanzania is the launch of the Tanzania spices label, a significant step forward for marketability, quality assurance and sustainability.⁵² The purpose of the label is to improve the reputation, quality and output of the spices industry across Tanzania. All farmers who take on the label are supposed to adhere to set standards, namely the standards specifications of the Tanzania Bureau of Standards (TBS), registration with ISO as well as production standards such as the use of Good Agricultural Practices (GAP). The spices label has been created by the Tanzania Trade Development Authority (TanTrade) and the private sector represented by the Tanzania Spices Association (TASPA) with the support of the International Trade Centre (ITC) within the framework of MARKUP.

TASPA Chairperson, Mr Edward Rukaka, during an interview with the evaluators, said that spice producers now can grow, market and sell their products on a more equal stage. In addition, Mr Rukaka informed the evaluation about a Dutch-Tanzanian joint venture, Trianon Investments, which is one of his endeavours as a private entrepreneur in processing and exporting high-quality spices from Tanzania.⁵³ This collaboration is another result of efforts organized through MARKUP's facilitation of participation of programme beneficiaries in events in Europe such as the European Spices Association (ESA) General Assembly, the Food and Ingredients Trade Fair in Paris and visits to spices factories in Rotterdam. Trianon Investments was formed as a result of this exposure. It is a joint venture between Mr Rukaka, chairperson of the Tanzania Spice Association (TASPA) and Bapa Trading, a Netherlands spices company represented by Mr Paul de Rooij, the president of the Dutch Spices Association. Trianon Investments was officially registered on the 22nd of November 2019. The company aims to achieve 800,000 USD in revenues in 2020 and 2 million USD in revenues by 2022 from its sales. The Dutch investor has mobilised \$100,000 to upgrade the infrastructure of the warehouse and purchase equipment for processing spices, as well as additional working capital to get the business started. The founders shared that the support from the MARKUP

⁵² <https://allafrica.com/stories/202107100100.html>

⁵³ <https://www.trianon.co.tz/the-team/>

team was fundamental to enable Trianon to become a world-class spice processing company and at the same time contribute to improving the livelihood of smallholder farmers in Tanzania.

Uganda

Finally, in Uganda, examples of success stories as a consequence of MARKUP interventions are reported on the website. Uganda Coffee Development Authority (UCDA) only unveiled in December 2021 (three months after the conclusion of the evaluation's field mission) the names of the six companies that will benefit from the €3.48 million MARKUP grant.⁵⁴ Out of the six companies, four are in the coffee sector while two are in the cocoa sector. The companies are; Rubanga Cooperative Union, Ainea and Sons Company Ltd (Cocoa), UGACOF Ltd, New Bukumbi Coffee Processors Limited, Outspan Agric. Ltd (Cocoa) and Uganda Coffee Farmers' Alliance. The companies are expected to use the funds to scale up operations and support smallholder coffee and cocoa farmers in Uganda to improve production and productivity, reduce harvest and post-harvest losses, and increase market access to the European Union and the East African Community (EAC).

2.5 Sustainability

Interviews with the PCU-GIZ team informed the evaluation that MARKUP's approach is to build sustainability in effective standards development and harmonisation (through the development of training manuals; training of trainers; supporting effective participation of the private sector-good practice, and supporting evidence-based orientation to standards development by data analysis).

In general, the evaluation believes that sustainability is linked to the improvements targeted by the programme, given the centrality of the envisaged increase in exports to the regional GDP. as demonstrated by the assessment of the progress of the three indicators at the overall objective level⁵⁵:

Table 5 – MARKUP Progress in achieving indicators

	Indicator	Progress at June 2021
Overall Objective	Change in intra and extra regional trade and exports to Europe	17% growth rate was recorded for EAC's exports of the sectoral commodities to the EU in the year 2020 compared to statistics for 2018 while intra-regional trade in EAC dropped for the second year (Source: ITC Trade Map 16/06/2021)
	Contribution of Trade to regional GDP (value of EAC's agricultural exports to the world as a percentage of EAC's GDP)	Agricultural food exports from the five Partner States recorded an average contribution to GDP of 0.48 in 2020 compared to a percentage of 0.47 of GDP in 2019. Kenya shows the highest contribution with a percentage of 1.1 of GDP from agri-food exports to European markets in 2020 (Source: ec.europa.eu 16/06/2021)
	Share of EAC countries in global agricultural goods trade	The year 2020 shows an improvement compared to 2019 in the proportion of EAC agricultural exports to World agricultural exports which however was still lower than the baseline statistics recorded in 2018 of 2.7%. (Source: ITC Trade Map 16/06/2021)

MARKUP contributes to addressing the setbacks hindering a stronger growth of the agricultural food exports regionally and nationally. As a result, the programme also acts as a catalyst to

⁵⁴ <https://businessfocus.co.ug/six-ugandan-coffee-cocoa-firms-get-shs14bn-eu-funding/>

⁵⁵ See Monitoring Report July 2018 to June 2021, PCU

attract additional support thus reinforcing the potential for sustainability of activities supported under MARKUP.

On sustainability, the evaluation found that it is stronger in Result 2, in light of MARKUP's positive approach to building sustainability in effective standards development and harmonisation (through the development of training manuals; training of trainers; supporting effective participation of the private sector-good practice; and supporting evidence-based orientation to standards development by data analysis). With regards to the other three Results, sustainability is highly dependent on developments at a broader level which are also dependent on the degree of complementarity actualised with other interventions funded in the same domains as illustrated in sections 2.7.1 and 2.7.2 These developments relate: improving the investment climate; strengthening manufacturing capacity and value chains in the region; consolidating and strengthening regional integration initiatives; capacity rebuilding of trade and investment facilitation institutions; enhancing trade facilitation; promotion of EAC exports to external markets; prioritising key services sectors for trade development and investment; supporting agriculture and food security and sustainability.

In general, the evaluation believes that sustainability is linked to the improvements targeted by the programme, given the centrality of the envisaged increase in exports to the regional GDP. This increase is beyond the programme's activities as it is the result of a variety of factors, external to the intervention and that normally impact on the overall performance, for example, governments' policy measures in each member state, EAC initiatives related to the result areas of the programme and other external factors, such as the costs of production inputs such as fuel linked to international events. In some cases, complementary EU-funded programmes at the country level, in the pipeline or to be started, also contribute to enhancing the continuation of a number of interventions, e.g. in Rwanda a €2,9M programme for quality infrastructure; in Uganda, an €8M for Green-Up, Enhancing the Production and Productivity of Coffee and Cocoa which includes the provision of Technical Assistance to UCDA; in Kenya, a €25 M for the Business Environment and Export Enhancement Programme (BEEEP); in Tanzania, the ongoing Business Environment, Growth and Innovation (BEGIN) programme and AGRICONNECT, the most important bilateral agricultural programme of the EU. In Burundi, a plan on sustainability was developed and institutional sustainability can be addressed as a platform for stakeholders' coordination and contribution to stakeholders' dialogue. On the other hand, hindering factors to sustainability are the assisted laboratories' capacity to sustain their operations, e.g., availability of the required staff, building and budget for operation (to be addressed in the period of no-cost extension).

Finally, a consideration raised by the evaluation during exchanges with the GIZ EAC unit in Arusha was in relation to GIZ's piloted peer learning approach towards building sustainability (e.g., the 'Regional Fund for Triangular Cooperation in Latin America and the Caribbean')⁵⁶, which could be adapted as a delivery mechanism for the EAC region under a follow-up action to MARKUP. The GIZ "triangular cooperation" scheme functions as follows:

- ◆ Triangular cooperation arrangements between Germany and partner countries are aimed at strengthening public policies for sustainable development in the targeted region.
- ◆ Projects are jointly planned, financed and implemented by a beneficiary partner according to the list of countries from the Development Assistance Committee (DAC) that has requested support in dealing with a specific challenge; a main partner, which has already confronted the challenge in a similar context and shares knowledge, expertise and resources; and a supporting partner (facilitator), which provides financial or technical support to the partnership.

⁵⁶ <https://www.giz.de/en/worldwide/12942.html>

- ◆ The roles are not strictly assigned to certain countries. More than three partners can be involved, and supra-regional triangular cooperation arrangements between partners in Asia, Africa, the Middle East or Latin America are also conducted.
- ◆ Triangular cooperation enables flexible, innovative and context-sensitive solutions for specific development challenges and strengthens partnerships in line with the 2030 Agenda. This also includes multi-stakeholder partnerships with the private sector, civil society and academia. By taking advantage of complementary strengths and mutual learning effects, they also offer added value compared with bilateral projects conducted between two countries.
- ◆ The Regional Fund enables the participating countries to mutually learn about the opportunities and limits of triangular cooperation in a systematic way. In the EAC, all partner states could participate as cooperation partners. Partner countries in other regions could also be recipients.
- ◆ The EAC Partner States could submit proposals for triangular cooperation arrangements in tender procedures held every six months. Although there are no thematic restrictions, the added value for all those involved and the demand in the recipient country must be clearly evident. Furthermore, the objectives must align with the partners' development-policy priorities. The focus of this scheme in the EAC context should be on passing particular success stories in value chain development to other countries.
- ◆ As in the example quoted for Latin America and the Caribbean⁵⁷, Germany supports the joint development and implementation of triangular cooperation arrangements, in particular through German and regional experts, knowledge management and networking, training and further education measures, and supplies of materials and equipment.

2.6 Governance and Monitoring Mechanisms

MARKUP governance is structured around the Programme Coordination Unit (PCU), the National Steering Committees (NSCs) and the EAC Regional Steering Committee (RSC).

The PCU, based in Arusha, is composed of a Programme Coordinator, an ITC Regional Coordinator, a GIZ senior trade advisor, one M&E/visibility/communications expert, a Quality Standards and SPS expert, and one Administrative Assistant. It reports to the DG Customs and Trade Director at the EAC Secretariat and is accountable to the MARKUP RSC. The PCU's main task is to support the programme with the coordination of its different components and stakeholders in accordance with a previously agreed work plan; this includes monitoring the activities and related reporting. The PCU also acts as Secretariat for the RSC. It supports the work of the NSCs in the PS. The reports of the RSC are presented to the EAC Sectoral Council on Trade, Industry, Finance and Investment (SCTIFI) and the Sectoral Council on Agriculture and Food Security. In addition to the SCs, there are regional and national technical committees (TCs).

The first points of contact for MARKUP in all Partner States are the National Focal Points, (NFPs). They work hand in hand with the PCU and the implementing partners, namely the Ministry of Finance Budget and Economic Development in Burundi; State Department for Trade in Kenya; Ministry of Trade and Industry in Rwanda; Ministry of Finance and Planning in Tanzania; and the Coffee Development Authority in Uganda. The NFP is a member of the NSC in each EAC partner state.

⁵⁷ The TL of the MARKUP Mid-Term evaluation acted between 2017 and 2018 also as the TL of two rounds of evaluations of GIZ triangular cooperation schemes. One example is summarized in <https://www.giz.de/en/worldwide/35946.html>

The MARKUP Monitoring and Evaluation Framework and System (MMEF and MMES) is structured along with the four result areas with activities under the EAC and Partner States (PS) Windows grouped into 4 clusters. Such a consolidated system enhances the participation of and ownership by the Partner State as observed with regard to the update in the MMES of several indicators from the country windows as a result of the national M&E workshops organised by the PCU with Partners States.

The MEF mandates the Regional Technical Committee to approve amendments to the MMES up to the level of Specific Objectives. The PCU works in close collaboration with the NTCs, taking care of coordination between the national and regional levels, including the alignment of the national MMES and MARKUP MEF. For example, the MMES was amended as a result of workshops held by the PCU with National Steering Committees, Implementing Partners and other key stakeholders in Kenya, Rwanda, Tanzania and Uganda. As concerns the overall monitoring and evaluation system, this is based on the instructions included in the Financing Agreements (FA), the regional and the national logical frameworks, and the workplans. At the country level, these are produced by the lead implementing agency: ITC for Burundi and Rwanda; UNIDO in Kenya; ITC and Solidaridad in Tanzania; and UCDA in Uganda.

The EU is present in all governance structures: NTC, NSC, RSC and RTC, in order to ensure the necessary guidance and participation in decision making; the positive implications of this presence would benefit of a stronger coordination among EUDs⁵⁸ as an effective support to minimise the challenge of having a high number of implementing agencies delegated to execute a high number of activities, in particular considering the regional dimension and the fact that the PCU coordinating role is can only partly also coordinate EUDs and ITC focal points.

Annual Work Plans (WPs) are structured along with the 4 result areas in line with the intervention logic and tailor-made per country window. The WPs are well articulated with fields on results/ activity, sub-activity, partner institution(s), sector coverage, a time frame of 12 months, status and comments. The relating period annual report is in a consolidated format, covering progress both at the regional and the individual country's level.

The reporting process is as follows: each implementing partner sends an annual report to the PCU, which sets out activities undertaken according to the WP for that period. The PCU summarises these into a consolidated report and submits it to the RSC and EU, with the reports from the implementing partners as annexes. In the reporting template, there is a section where Partners report changes to plans where activities postponed, cancelled or modified are captured. On the basis of the evidence gathered and the documentation reviewed, the evaluation notes that the ITC follows specific reporting modalities compared to the other implementing partners with regard to the role of the relating HQs' involvement. This is visible in the reporting circuit followed: the PCU receives reports from the HQ for EAC Window R1,2,3 and R1 Tanzania and the Burundi window. The regional coordinator and the Burundi country director send quarterly activity reports to the PCU for discussion by the Regional Technical Committee. More specifically on ITC, the observed procedure is that the ITC country director collects information from the national implementing partners and sends it to HQ. ITC Geneva then consolidates the information and sends it to the EUD Tanzania. National stakeholders do not receive the final and financial reports. Also, ITC country's partners are not involved in the cost estimates of the WP. Regarding ToR-preparation and how inputs from stakeholders are incorporated, interviewees' feedback points to varying degrees and types of stakeholders' involvement.

It is noted that while the PCU has provided harmonised formats for all implementing partners to use for reporting, progress reports follow different formats which hinder a more efficient monitoring of the programme performance at the national and regional levels. Interviews with

⁵⁸ See Section 4.3, Recommendations: point 4, short-term, in section 4.3.1

beneficiaries and implementing partners revealed that the overall monitoring system could be improved by including a section in the national window report dedicated to activities by MARKUP regional; likewise, the latter, which contains an overview of progress at the country level, could also specify where activities are implemented in cooperation with the different implementing partners in each country under the relating section rather than at the bottom of the document under *MOUS and Synergies*. Likewise, a section of the progress reports could be added looking at the planned activities for the next reporting period, in line with the respective work plans. The project could capitalise also by regularly consolidating information building on the consolidated Monitoring Report from July 2018 to June 2021 produced by the PCU. This comprehensive document highlights challenges in accessing comparable data for some indicators, in particular because national statistics measure the contribution of agriculture to the GDP (not agricultural exports specifically). Additional challenges indicated by interviewees concern the lack of a mechanism to track business development services (BDS) activity and the impact of the services delivered to businesses through MARKUP, which would also allow to give feedback to the constituencies, business associations for example, and to mobilise resources. These gaps could be addressed through progress reports.

The evaluation assessment is that,

- ◆ generally, the MARKUP governing mechanisms have proved to be workable and are highly accepted by the EAC Secretariat and the Partner States. Even though the decision-making body of the intervention, the RSC, is a complex entity, the Monitoring Report is an effective tool that has facilitated the joint tracking of progress at the RSC level. Partner States have participated in all RSC meetings so far, which in most cases have been preceded by preparatory meetings of the NSCs. This demonstrates the ownership and commitment of most (if not all) EAC Partner States.
- ◆ While the inclusion of the GIZ standards expert into the PCU is not straightforward from the point of view of the PCU's core tasks, it has been beneficial to the programme as the standards expert has also taken on a supportive function for all standards-related issues raised by other Partners in the programme. Being seen as an EAC resource has also enhanced the acceptance and ownership of MARKUP.
- ◆ With regards to other EAC-GIZ interventions, the MARKUP governing mechanisms are conducive. In "SEED potatoes",⁵⁹ a similar steering structure with an RSC and NFPs has been "borrowed / inspired" from MARKUP because the EAC Secretariat found it to be effective.
- ◆ The Cluster approach has been an effective tool to bring the separate results and objectives of the EAC and PS Windows into a common monitoring and evaluation framework. For the regional window, quarterly Implementation reports have guided strategic and managerial decisions.

2.7 EU added value and coherence

2.7.1 Coordination with interventions of other donors and EU member states

The evaluation found it important to quote three examples of other donors' and EU member states' intervention within the MARKUP target geographic and thematic fields. These are:

⁵⁹ "Promotion of Nutrition-Sensitive Potato Value Chains in East Africa"
<https://www.giz.de/en/worldwide/40726.html>

TradeMark East Africa (TMEA)⁶⁰

TMEA is an aid-for-trade organisation that was established in 2010, with the aim of growing prosperity in East Africa through increased trade. TMEA operates on a not-for-profit basis and is funded by the development agencies, other than the EU, of the following countries: Belgium, Canada, Denmark, Finland, Ireland, Netherlands, Norway, United Kingdom and the United States of America. TMEA works closely with regional intergovernmental organisations, including the African Union (AU), East Africa Community (EAC), Intergovernmental Authority on Development (IGAD), Common Market for East and Southern Africa (COMESA), Southern Africa Development Community (SADC), national governments, the private sector and civil society organisations. Consequently, the scope and outreach of TMEA are beyond the EAC, as in the case of MARKUP.

TMEA, with an annual expenditure of approximately US\$80 million, is among the leading aid-for-trade facilities in the world. The first phase of TMEA (2010-2018) contributed to substantial gains in East Africa's trade and regional integration in terms of reduced cargo transit times, improved border efficiency, and reduced trade barriers. Consequently, different from MARKUP, which is a "value-chain development" programme, TMEA's focus is on trade facilitation and reduction of TBTs. TMEA's second phase (2018-2024) focuses on reducing trade barriers; but also, on improving business competitiveness. The latter is also an objective of MARKUP.

TMEA has its headquarters in Nairobi, Kenya, with operations and offices in EAC-Arusha, Burundi (Bujumbura), Democratic Republic of Congo (Bukavu), Ethiopia (Addis-Ababa), Horn of Africa (Hargeisa), Malawi (Lilongwe), Rwanda (Kigali), South Sudan (Juba), Tanzania (Dar es Salaam) and Uganda (Kampala).

USAID/Kenya and East Africa⁶¹

In this Regional Development and Cooperation Strategy (RDCS) 2016-2021, USAID/Kenya and East Africa (USAID/KEA) employed lessons from the past while setting a new standard of cooperation. It supported African leadership and aspirations by aligning with key African and global development agendas such as the African Union's Agenda 2063; the global "Agenda 2030" (outlining the Sustainable Development Goals); and the strategies of each of the partner regional institutions.⁶² Similarly, the RDCS was consistent with US global and regional foreign policy priorities as conveyed in the 2016 U.S. Strategy Toward Sub-Saharan Africa.

The East Africa RDCS had three priorities:

- ◆ Promoting regional partner institutions as a local solution. Supporting the regional institutions such as the EAC in achieving long-term sustainable development within East Africa by increasing their institutional strength and leadership expertise as they work with stakeholders to advance mutually-beneficial policies and address threats.
- ◆ Intra-regional economic integration and trade as the means to growth. Improving market access across borders, reducing barriers to trade and facilitating smart policy are proven and requirements for East African firms and labourers to take full advantage of the global economy to foster equitable and sustainable growth.
- ◆ Regional resilience to internal and external shocks. Partnering with regional institutions to identify and address the urgent and immediate threats to economic and political stability, including food insecurity and transnational threats such as the rise of violent extremism, to secure sustainable development gains.

⁶⁰ <https://www.trademarka.com/>

⁶¹ https://www.usaid.gov/sites/default/files/documents/1860/East_Africa_RDCS_July_2021.pdf

⁶² For USAID, facts and figures identified as "intra-regional" or attributed to "East Africa" are representative of the five countries of EAC (Kenya, Tanzania, Uganda, Burundi and Rwanda) only and not the broader region as defined by USAID/KEA.

Being conceived as an important component of US foreign policy towards Africa by the Obama administration, RDCS had a scope broader than MARKUP. However, its second objective, by targeting intra-regional economic integration and trade as a means to growth, was aligned with MARKUP's agricultural value-chain approach.

Support to East African Market-Driven and People-Centred Integration (SEAMPEC)⁶³

SEAMPEC is a programme commissioned by the German Federal Ministry for Economic Cooperation and Development (BMZ) and is co-funded by the EU. The lead executing agency is the EAC Secretariat and the overall term covers 2019 to 2022.

SEAMPEC aims at fostering economic growth in the EAC, among other things, by improving the legal framework to remove trade barriers, for example, in tourism, ICT, and professional services. The programme also assists the business sector in developing policy recommendations. Additionally, SEAMPEC helps the EAC to jointly formulate harmonised positions in the negotiations for the African Continental Free Trade Area (AfCFTA). Furthermore, it facilitates the implementation of regional agreements in selected economic sectors to bring more added value to the economic activities in those sectors. The GFA Consulting Group is subcontracted to implement parts of the support measures.

EU co-funding is directed to implement MARKUP, which, within the SEAMPEC umbrella, is considered by GIZ as a tool to promote the development, implementation and harmonisation of standards and customs procedures. Consequently, SEAMPEC targets one of the key MARKUP objectives.

To foster social integration, SEAMPEC also supports the EAC under the initiative "Incubator for Integration and Development in East Africa" (IIDEA). IIDEA promotes small-scale projects run by non-state actors that consolidate regional integration and showcase its tangible benefits for the people of East Africa. A special focus lies on youth and women.

At the level of organisational development, SEAMPEC develops the capacities of the EAC Secretariat to implement the 5th EAC Development Strategy. The goals are increased value-addition, industrial development, innovation and investment. Special attention is thus given to EAC departments relevant to achieving the programme goals. Another focus is regional initiatives and trainings related to digital change and, as part of this, an online course was provided on good manufacturing practices (GMP) for medicines and healthcare products.

Lastly, the programme works at the level of individual capacity development to provide the staff of the EAC and the relevant regional organisations with the knowledge and skills they need to push regional integration towards the goals outlined in the EAC Vision 2050. This includes training for EAC staff on how to better communicate the impacts of integration.

In terms of coordination between SEAMPEC and MARKUP management structures, there are 2-monthly meetings of a Value Addition team in which GIZ-PCU participates for coordination purposes with affiliated EAC interventions (with the Departments of Trade and Productive Sectors) supported under SEAMPEC. SEAMPEC management is involved in the MARKUP TCs as well as the RSCs (two per year). The GIZ-PCU-team is involved in a monthly GIZ-EAC cluster meeting.

The Republic of South Sudan (RSS) is not a beneficiary of MARKUP. However, through BMZ resources, GIZ was able to support the participation of RSS in selected standards harmonisation activities to ensure that the benefits were shared by all EAC Partner States, and to avoid a potential veto of key recommendations at the level of the EA Council of Ministers. In 2020, EUD approved the use of GIZ-MARKUP resources to support RSS particularly in training and capacity building. As an enlargement of MARKUP to RSS is envisaged by the

⁶³ <https://www.giz.de/en/worldwide/15766.html>

EAC, GIZ's activities in RSS could become relevant too. Two GIZ priority areas in RSS are food and nutrition security and rural development, and rural development and good governance. Ongoing projects in RSS are "Promoting rural governance and participation"; "Improvement of the nutrition situation in Sub-Saharan Africa"; and "Food security and agricultural development".

Besides, there are direct links with the GIZ team working with the EAC Secretariat on regional industrial value addition (RIVA). Through SEAMPEC, MARKUP and RIVA collaborate on specific activities to support standards and value addition in the fruit and vegetable sector (e.g., joint training, awareness creation). Since 2019, RIVA added an additional focus on plant-based/ herbal medicines in the EAC under its support to the pharmaceuticals value chain. There are potential linkages with MARKUP if pharmaceuticals/nutraceuticals as a sector continue to be supported under a SEAMPEC II. BMZ is interested in synergies among ongoing programmes. In June 2021 BMZ has expressed interest in continued co-funding with the EU on MARKUP and this SEAMPEC follow-on project. There is interest in further collaboration on value addition and enhanced private sector engagement for intra-regional trade.

Other programmes by the EU Member States at the EAC partner-state levels

The MARKUP mid-term evaluation, during its field mission work during August/September 2021 in the five EAC partner states, learned about the following actions led by GIZ, which runs the following projects at the country-level in East Africa (some of which have a high degree of complementarity with MARKUP):

Uganda

One of the two main GIZ priority areas is agriculture and rural development. Uganda is part of the "One World – No Hunger" initiative which gives support to projects promoting nutrition-sensitive potato value chains ("Promotion of Nutrition-Sensitive Potato Value Chains in East Africa" (2016–2022)). Besides: Climate Smart Agriculture (ProCSA, 2018–2022).

Kenya

One of the three main GIZ priority areas is rural development. A selection of ongoing projects is: Promoting youth employment in the agri-food sector in western Kenya; Promoting sustainable agricultural supply chains and standards; Fund for Agricultural Policy Advice and Innovation (FABI); Organic agriculture: promoting knowledge exchange and networks; Anchoring sustainable land management internationally; Soil protection and rehabilitation for food security; International Agricultural Research for Rural Development; and Promoting nutrition-sensitive potato value chains in East Africa.

Burundi

Agriculture and Rural Development are not priority areas. GIZ runs projects on economy and employment, sustainable infrastructure, social development, peace & security, environment and climate change (e.g., Reducing the impact of climate change on the availability of water and land resources).

Rwanda

Agriculture/Rural Development are not priority areas also in Rwanda. GIZ runs projects on economic development and employment, governance and democracy, and digitalisation.

Tanzania

German-Tanzanian cooperation focuses on the priority areas health, water, biodiversity. In Rural Development there was the project "High-quality rice for Africa / Competitive African Rice Initiative (CARI II)". BMZ was co-funded by the Bill & Melinda Gates Foundation in Nigeria, Burkina Faso, Ghana, Tanzania. Lead executing agencies were ECOWAS and the Ministry of Agriculture Tanzania, 2013 to 2021.

2.7.2 Complementarity with other EU sector policies and programmes at the regional and country level

The EU Green Deal

On July 14, 2021, the European Commission adopted a set of intermediate proposals to cut greenhouse gas emissions by 55 per cent from 1990 levels by 2030 as part of a broader European Green Deal (EGD). The EGD is a set of long-term policy initiatives that define the European Union's (EU) climate strategy to reach net zero emissions by 2050 and aim to make Europe the first mover in international climate policy. Toward this goal, the EGD provides a road map for a socioecological transition to a low-carbon future and the building blocks for a green economic growth strategy.

EGD's implications for Africa are multifaceted. Most prominently, a decline in European demand for fossil fuels alongside rising demand for cobalt, nickel, and other critical minerals for the energy transition will greatly affect global markets and, by implication, the economies of oil-dependent and mineral-rich African countries. The economy-wide effects of the EGD, however, extend beyond the energy transition. Implications of the EGD for African countries have been identified by scholarly studies in seven main areas: agriculture, biodiversity, energy, critical raw materials (CRMs), circular economy, new technologies, and finance. It also recommends steps to orient the policy initiatives to Africa's development priorities.⁶⁴

As it relates to MARKUP's present and future focus, EGD will affect new agricultural standards. As part of its "Farm to Fork" policy package⁶⁵, the EU aims to become a leader in setting sustainable global food standards. Compliance with these standards as a condition for accessing the European market could constitute additional nontariff barriers for African agriculture exports to the EU. Still, an EU-Africa partnership can help combat agroecological challenges.

The Farm to Fork Strategy aims to accelerate our transition to a sustainable food system that should have a neutral or positive environmental impact; help to mitigate climate change and adapt to its impacts; reverse the loss of biodiversity; ensure food security, nutrition and public health, making sure that everyone has access to sufficient, safe, nutritious, sustainable food; and preserve the affordability of food while generating fairer economic returns, fostering the competitiveness of the EU supply sector and promoting fair trade.



⁶⁴ <https://carnegieendowment.org/2021/10/18/what-does-european-green-deal-mean-for-africa-pub-85570>

⁶⁵ https://ec.europa.eu/food/horizontal-topics/farm-fork-strategy_en

The strategy sets out both regulatory and non-regulatory initiatives, with the common agricultural and fisheries policies as key tools to support a just transition. A proposal for a legislative framework for sustainable food will be put forward to support the implementation of the strategy and development of sustainable food policy. Taking stock of learning from the COVID-19 pandemic, the Commission will also develop a contingency plan for ensuring food supply and food. The EU will support the global sustainable agri-food systems through its trade policies and international cooperation instruments. To enable and accelerate the transition to a fair, healthy and environmentally-friendly food system, advisory services, finances, but also and innovation are instrumental as they can help resolve tensions, develop and test solutions, overcome barriers and uncover new market opportunities.

EGD's Farm to Fork Strategy is with no doubt the EU sector policy that shall be on top of the priorities of the follow-up action to MARKUP, which this evaluation contributed to design through the Concept Note output, thoroughly discussed during this evaluation with EUD TZ and the EAC Secretariat. By the time of writing this final report, the Concept Note for a MARKUP follow up intervention has been already approved and endorsed by EUD TZ.

3 Overall Assessment

The reconstructed intervention logic of MARKUP (developed during the Inception Phase of this evaluation and summarized in Annex 5 of this final report) assumed that outcomes achieved through the dynamic change process triggered by the implementation of its actions were deemed to contribute to attaining the programme's objective.

The analysis of findings summarized by each of the relevant evaluation criteria (Chapter 2) has confirmed that taken as a "package", the programmatic approach of MARKUP has been, by far, a relevant instrument to help strengthen some key enablers to agricultural trade and value addition, such as process improvement intervention in quality infrastructure, food safety and phytosanitary standards, and to some extent, support to SMEs to integrate export-oriented value chains. Consequently, MARKUP is visibly contributing to enhancing the quality of the targeted commodities and increasing the opportunities for growth in exports. However, less evidence could be collected in terms of the programme's contribution to expanding intra-African trade. It should be expected that this will be achieved once change has occurred at the necessary level of value-addition in the selected value chains. This varies in each country and is also different for the target products, with a possibility to determine a level of achievement closer to the end of the programme also based on the points of strength emphasized in this review.

The governance and coordinating structures of the various windows of MARKUP (PCU, NSCs and the EAC RSC) have been found, in general, adequate and effective in terms of planning and guiding the delivery of expected results. Most projects are performing adequately based on their initial design, having maintained a high level of activity during implementation, even with the significant challenges posed by the COVID-19 pandemic since March 2020. Based on the log-frames' indicators/targets, progress is evident, with a significant number of the planned outputs already delivered. In addition to the SCs, there is a regional and national technical committee (TCs). The evaluation assessed the importance of the TC in providing the necessary guidance to its work.

Beyond agricultural commodities, the 6th East Africa Development Strategy aims at significantly increasing value addition in agricultural value chains, including light manufacturing and branding and selling of East African-made value-added products and services. Indicators including the proportion of non-commodities products (manufactured) in exports to the EU and inter-regional trade will become relevant over the next programming period. The remaining time for MARKUP is definitely very important to bridge the existing gaps and propose adequate solutions given the dynamics triggered by the post-COVID-19 recovery measures in the EU and Africa; and, last but not least, in the presence of unexpected disruption of global value chains induced by the unfortunate conflict currently affecting Europe and the world.

4 Conclusions and Recommendations

4.1 Conclusions

This section contains the conclusions of the evaluation, organised as much as possible by the five DAC evaluation criteria to facilitate their connection with the analysis made in Chapter 2.

With regard to **Relevance**, the evaluation concludes that MARKUP has been and remains highly appropriate for the implementation of the broader Eastern Africa Regional Integration Strategy Paper (RISP 2018-2022); for the 11th EDF support to the EA-SA-IO region (2014-2020), the Regional Indicative Programme (RIP) for Eastern Africa, Southern Africa and the Indian Ocean. This is because it reinforces the strategic plans adopted by the EAC and the other RECs to achieve greater competitiveness and inclusive sustainable growth in particular through the promotion of agricultural exports, strengthening of agricultural value chains, reduction of trade barriers, harmonized standards. As such the programme is greatly coherent with the EU support for the African Continental Free Trade Area (AfCFTA). Throughout implementation, with the advent of new priorities, policies and strategies of the European Union, MARKUP became also aligned with the EU-SSA Multiannual Financial Framework and other thrusts including the Global Europe programming process, which started in November 2020 and was concluded in December 2021. Team Europe globally supports its partners in achieving the objectives of the EU Green Deal, the EU Circular Economy Action Plan, and the Farm to Fork - and Biodiversity Strategy. All these interventions are geared towards unlocking the potential of agricultural value chains and positively transforming the livelihoods of rural communities. The evaluation of MARKUP also found coherence with specific EAC Partner States' policies and strategies.

Concerning **Effectiveness**, on its whole, the programme has so far seen the advancement in targeted reforms and implemented activities. These have been designed to support, inter alia, institutional capacity building, advocacy, training, harmonisation of standards and improvement of Quality Infrastructure, market linkages through improved market intelligence, participation in trade fairs and investment promotion events, and regional/international auctions and competitions. Moreover, MARKUP has facilitated inter-institutional dialogue as well as public-private dialogue, also through the involvement of EABC, for example in the WTO Trade Facilitation Agreement workshops held in each country in January 2021. The development of trade portals in all EAC countries also shows good progress as well, bringing an important contribution to the provision of consistent harmonized trade-related information to the regional business community, including support for awareness-raising through marketing campaigns across the Partner States.

In terms of **Efficiency**, the answers to the specific evaluation questions point to weaknesses in the current synergy and coordination of the activities across the different components and country windows. In this regard, due consideration is given to the challenges intrinsic to the nature of the intervention, with a multiplicity of stakeholders from five countries and international organizations, with different contractual frameworks resulting in different numerous reporting lines. Notwithstanding these challenges, the remaining time of the programme can build on the strengths observed to date in order to ensure improved efficiency. For example, all the work in certification and standards shows a fair level of efficiency to capitalize on. Such programmes like "Quality Champions" have strong traction with certified quality trainers and are likely to be sustainable.

About **Impact**, the first, and obvious answer is that, as in all mid-term evaluations, it seems too early to measure the impacts of MARKUP interventions. However, interviews during field work revealed that, in 2020 and 2021, GIZ measured perceptions of companies supported under MARKUP with an "Ease of Market Access Perception Survey" in relation to national, regional and international markets for MARKUP commodities. While (supposedly due to pandemic

related policies) access to markets is perceived to have slightly worsened at the regional and national level, access to international markets has improved according to the feedback received. Nevertheless, access to international markets is still estimated to be harder than access in the EAC and nationally. Second, the GIZ team also informed the evaluation that the objective to increase intra-EAC trade was not well articulated as a priority in MARKUP (and thus in terms of impact pathway and means). Indeed, to date, there is no systematic mechanism to measure quality compliance within EAC, and other markets as rejection data is not consistently captured and reported. The evaluation has presented in this report a selection of cases of benefits (grouped by examples in the five partner states) so far delivered by the programme across the different country windows as well as regionally. The outputs include the adoption of policy documents, guidelines and/or standards. Preliminary answers are inferred from several success stories recorded in the successive MARKUP reports which, in some cases, could be visited and interviewed by the evaluation during the field mission of August / September 2021.

Finally, on **Sustainability**, the evaluation found that it is stronger in Result 2, in the light of positive MARKUP's approach to building sustainability in effective standards development and harmonisation (through the development of training manuals; training of trainers; supporting effective participation of the private sector-good practice; and supporting evidence-based orientation to standards development by data analysis). As concerns the other three Results, sustainability is highly dependent on developments at a broader level which are also dependent on the degree of complementarity actualised with other interventions funded in the same domains as illustrated in sections 2.7.1 and 2.7.2. These developments are: improving the investment climate; strengthening manufacturing capacity and value chains in the region; consolidating and strengthening regional integration initiatives; capacity rebuilding of trade and investment facilitation institutions; enhancing trade facilitation; promotion of EAC exports to external markets; prioritising key services sectors for trade development and investment; supporting agriculture and food security and sustainability. In general, the evaluation believes that sustainability is linked to the improvements targeted by the programme, given the centrality of the envisaged increase in exports to the regional GDP. This increase is beyond the programme's activities as it is the result of a variety of factors, external to the intervention and that normally impact on the overall performance, for example governments' policy measures in each member states, EAC initiatives related to the result areas of the programme and other external factors, such as the costs of production inputs such as fuel linked to international events.

4.2 Lessons learnt

MARKUP has been a relevant programme to help strengthen some key enablers to agricultural trade and value addition, such as process improvement intervention in quality infrastructure, food safety and phytosanitary standards and to some extent support SMEs to integrate export-oriented value chains. Such programmes like "Quality Champions" have strong traction with certified quality trainers and are likely to be sustainable.

As per EAC Vision 2050, it is stated that more emphasis will be put on expanding intra-African trade (including with SADC and COMESA trading blocks and DRC and South Soudan) with value-addition in selected value chains. EAC also aspires to further increase intra-Africa and inter-regional trade by removing bottlenecks, strengthening backward and forward linkages and widening Industrialisation. The evaluation sees a high level of alignment of MARKUP (I and II) with these EAC aspirational objectives.

Below is a summary of lessons learnt from the first MARKUP programme to date:

1. The Programme Coordination Unit (PCU) is useful to ensure an overview and follow-up of the whole programme, as well as the buy-in of regional institutions and EU

- Delegations in the Partner States. There is a need to ensure stronger representation and drive from the private sector, as well as to ensure stronger technical supervision and coordination of activities.
2. Tanzania's focal point indicated the need for physical exchanges between the Partner States on specific themes/topics, but this would need to be financed by a separate budget (all countries receive funding from the EU through "Support Unit to NAOs", etc.).
 3. There is a need to build sustainability into the critical interventions. There is more likelihood for success if the materials and resources are anchored into local organisations, rather than relying on other Implementing Partners.
 4. There is room for improvement in terms of the involvement of business associations (BSO), both deepening the interface with sector-specific BSO and also EU based Business Support Organisations such as the Chamber of Commerce and trade associations.
 5. The PCU is all the more useful given the complex structure of the MARKUP programme. This is partly due to the nature of the intervention, with a multiplicity of stakeholders from five countries and international organizations, with different contractual frameworks resulting in different numerous reporting lines. This could be streamlined in a future programme, e.g., revising the programme management structure and reporting lines, ensuring synchronization of the activities between MARKUP I and II, and aligning regional and national implementation time-frames.
 6. One of MARK UP specific strengths is its work at macro/meso level with both governments/ regional organisations and BSOs as well as directly at micro-level with SMEs. A number of factors can contribute to increase the potential to transform this strength into an actual effective delivery mechanism: strong targeted coordination across countries and regional bodies are needed, involving the national regional and international agencies in implementation, within the individual EAC MS.
 7. Linked to the above and specific to the management bodies, a systematic consultation process between the EU regional office and EUDs in the EAC Partner States can be regarded as a useful instrument to strengthen the overall EU endeavours in policy dialogue with national governments and the EAC Secretariat along the region.
 8. Evaluators found that EAC / national windows need some level of convergence at the operational level. National reports should have a section on the regional component and national stakeholders would need to be updated also on the regional window. The existence of these two components is relevant for the implementers, the management of the activities by headquarters, the regional and the national coordinators, and the PCU.
 9. Consideration should be given to streamlining issues around National Focal Points, for example, in cases where it is the Ministry of Finance while the Ministry involved in operations is a different one (Ministry of Commerce or Agriculture).
 10. Training delivery concerning the utilisation of the labs equipment should be continuous rather than a once-off event or through the short-term presence of the trainer. This aspect is to be followed up for the one-year extension period requested by ITC.
 11. Portfolio of agricultural commodities and products being limited to tea, coffee, cocoa, horticulture, and spices despite strong EAC strategy insistence on light manufacturing, and other value-added products: The initial focus on a few commodities made sense. There should be further investigation into the possibility to extend the portfolio to include light manufacturing, leather, tropical fruits and their transformation.
 12. Concerning access to finance – which was not delivered upon - it was observed that African companies, in general, are not able to raise 50% of the needed investment in matching grant mechanisms. This fact should lead to revising some aspects such as reduction of the threshold, improved clarity on requirements of due diligence, process

steps, and access criteria. Some essential “access to finance” intermediaries such as IMF (Microfinance), Venture Capital funds and subsidised bank credit/development banks should be delved into.

13. In general, the evaluators assess a good potential for impact and sustainability, given the complementary programmes by the EU and other donors. There is a need for targeted coordination among institutional stakeholders, including international partners also to continue directing support to areas of weak financial sustainability.

4.3 Recommendations⁶⁶

4.3.1 Short-term

1. MARKUP needs a one-year no-cost extension for making up for delays (due to several reasons, not only the pandemic).
2. ITC should sensitize public and private stakeholders to interventions undertaken with local partners and engage in dialogue for sustainability mechanisms. Other MARKUP implementing agencies responsible for the National Windows in the 5 countries are recommended to participate in such dialogue.
3. Concerning communications and visibility: Information on the overall programme and progress on activities are to be shared with stakeholders and beneficiaries at the national level. This is only necessary where not yet being done and under the PCU coordination by a closer engagement; through the PCU, engage closer with the EAC Secretariat and EABC for dissemination of MARKUP news and success stories within the EACS (including flagship events) and through the EACS and EABC channels.
4. Communication and coordination need to be improved:
 - ◆ Among institutional stakeholders at the national level
 - ◆ Among EUDs
 - ◆ EUD and implementing partnersThis will enhance a systematic consultation process and facilitate dialogue in consideration of the multiplicity of stakeholders involved
5. In Burundi, training modalities relating to building the capacity of the laboratories should be re-assessed, in order to consider a different deployment of the TAs as expressed by the beneficiaries with regard to building capacity to operate the labs equipment; this needs to be followed up by verifying which specific training needs to be delivered differently for the requested extension period (EU/ ITC);
6. In Uganda – The Technical assistance consultant assisting the UCDA will need its contract extended in line with the MGS that is delayed.
7. In Tanzania, consider the proposal presented to the evaluators by the Tanzania Smallholders Tea Development Agency (TSHTDA), which includes supporting women and youth to engage in the tea value chain for tea business inclusiveness. Currently, tea farming is dominated by old people, especially men. This is attributable to the inability of women and youth to access capital and resources for the establishment of their tea farms. Additionally, the Tea Board of Tanzania requested funding for the establishment of the Dar es Salaam Tea Auction, which is considered to have great potential in terms of logistical support, employment creation and tea marketing cost reduction. This auction is well-positioned for use by tea producers in neighbouring countries. This recommendation

⁶⁶ Short-term implies a period between immediate-action to 6 months; medium-term, from the sixth month until the end of the programme.

acknowledges that AGRICONNECT developed and successfully tested in 2021 an online tea-auction system.

4.3.2 Medium-term

8. Start a participatory process for the identification of lessons learnt through focus groups and consultations with beneficiaries in all EAC partner states; this could be done under the PCU coordination with each implementing agency at country level and by selecting the stakeholders to be involved according to parameters of priority, including a possible role of the selected stakeholders in a continuation of the programme.
9. Besides conducting research studies and the provision of lab equipment (as in the case of Burundi), training should adopt a more holistic approach to tackle building capacity for certification: this has to include aspects such as BDS to companies; up-stream / down-stream coordination for improved institutional delivery (targeted support to and better communication with farmers, associations and cooperatives); etc.
10. ITC has trained more than 150 local experts across the EAC region on specific topics, including advocacy and trade facilitation, quality management, resource efficiency and circular production, etc. ITC should leverage the remaining project events to raise public awareness of local trainers trained under MARKUP, e.g., Quality Champions and Quality Associations. They can be recruited by other projects, continue supporting companies in specific areas and replicate the training programs and methodologies in other sectors or any other neighbour country. A database of public and private BDS providers and relating referral systems should be set up.
11. Before the end of the programme, ITC could facilitate sharing of good practices from MARKUP in specific sectors/institutions across countries.
12. Knowledge management also needs to be strengthened. During the possible no-cost extension period (about one year) meetings with other EAC countries to share experience in project implementation could be organized. These actions should be done between EUDs in the region, and also between NAOs and key government officers (likely the members of the national steering committees). The PCU should promote these exchanges, but the funding of the costs of participation should come from other sources (for example, projects (NAO Support Units) funded by the EU in all countries of the region).
13. In the specific case of Tanzania, allow synergies between the two sources of finance that the implementing partner of the national window (Solidaridad) has received from the EU (MARKUP and AGRICONNECT) to maximize benefits received by farmers in the coffee, tea and horticulture sectors to certify their products. In concrete terms, synergies can be improved through more frequent periodic meetings between EUD TZ and Solidaridad, as it was suggested to the evaluation TL by the implementing partner during the field mission interview in late 2021.

4.3.3 Recommendations for a follow-up intervention

The Terms of Reference of this mid-term evaluation of MARKUP instructed the evaluators to follow up the field mission, after the delivery of the intermediary note and presentation of the preliminary findings before the Regional Technical Committee (virtual meeting on 20 October 2021), to dedicate primarily to the preparation of a Concept Note aimed at assisting EUD TZ with the preparation of a follow-up intervention.

The Concept Note work implied further consultations and research by the evaluation team, while EUD TZ advanced with the definition of an Action Document through exchanges with Brussels. The Concept Note draft was approved by the EAC TC during another virtual meeting that took place on 17 December 2021. However, after a thorough review, EUD TZ requested further work to better align the consulting work with EU priorities. The final version of the

Concept Note was delivered by the contractor to EUD in February 2022 and approved by mid-March 2022.

The recommendations for a MARKUP follow up intervention, as included in the Concept Note, are summarized in the following table, which was constructed by the consulting team vis-à-vis the lessons learned during the evaluation. These are:

Results	Main expected results/ outputs	Planned activities
Impact Overall Objective	Overall Objective (OO): "Increase sustainable intra-African and EU-Africa trade" NB: This OO objective echoes the initial MARKUP I OO which was to contribute to economic development in the EAC region, by increasing the value of both extra and intra-regional agricultural and light manufacturing exports, with a main focus on exports towards the European Union as well as onto other African FTA regions such as SADC, COMESA.	
Outcome 1	1 Specific Objective 1: Market access is enhanced for selected value chains SO1 aims to enhance market access for selected value chains by reducing trade barriers, ensuring transparency and efficiency of trade-related procedures, strengthening quality infrastructure services and SME compliance, and facilitating a shared value-chain strategic vision	
Outcome 2	2 Specific Objective 2: Export competitiveness enhanced for SMEs in selected value chains SO2 aims to strengthen SME export competitiveness for selected value chains, by enhancing value addition and diversification and by promoting business	
Output 1 related to Outcome 1	1.1 Market access barriers are reduced Removal of obstacles to trade on selected intra-regional and extra-regional trade flows	The proposed activities under result R1: 1. Completion of ITC work to establish Trade Facilitation Portals to improve trader information and compliance with trade laws, regulations and administrative procedures; 2. Removal of obstacles to trade on selected intra-regional and extra-regional trade flows: a. identification of NTMs and business advocacy in coordination with the Trade Facilitation Committees (TFC). b. establishing and promoting a value-chain Trade Obstacles Alert and Resolution Mechanism (TOARM). 3. Improvement and harmonization of practices of non-custom agencies at the

		borders (e.g. standard operating procedures, risk management, clearance of perishable products).
Output 2 related to Outcome 1	1.2 Quality Compliance and Standards are strengthened	<p>The proposed activities under result R2</p> <ol style="list-style-type: none"> 1. Improve Technical Barriers to Trade (TBT) and Sanitary and phytosanitary measures (SPS) laws and regulations (e.g. good regulatory practices, assess and support harmonization, ensure adequate pesticides controls and product labelling etc.). This area will, inter alia, ensure alignment of regional and national frameworks with AfCFTA frameworks including the recently adopted Africa Quality Policy; 2. Improve coordination of and access to conformity testing and certification services in a regional logic (e.g. mutual recognition agreements, regional centres of excellence); 3. National Quality Infrastructure (as an exception, possibly in direct benefit mainly of target value-chains); 4. Promotion of quality and safety culture, including through EAC Quality Portal and EAC Quality Awards; including a food safety information portal⁶⁷, to enable SMEs to navigate and access the complex web of information on compliance with food safety requirements as well as provide a regional platform with which the various national laboratories could interface; 5. Support services to SMEs, including through the Quality Champions Programme and Quality Hubs
Output 3 related to Outcome 1	1.3 Facilitate a value chain revision mechanism	<ol style="list-style-type: none"> 1. Provision of technical supervision and coordination of activities across all components and implementing partners. This will be a function coordinated by the proposed PMU, jointly with ITC/ EABC (focusing on specific value chains at the private sector/ national level) and carried out based on a regional work plan with its country components to ensure the necessary coordination and communication. 2. Build-up of a shared strategic vision (among key institutions e.g. EAC Secretariat, National Governments and Agencies, and key private sector associations) on key value-chain bottlenecks, opportunities and possible policy interventions. This will be based on a value-chain methodology⁶⁸, with a

⁶⁷ [MARKUP Assesses Compliance to EAC and EU Food Safety and Quality Standards \(eacmarkup.org\)](http://eacmarkup.org)

⁶⁸ Value chain methodology looks at innovation, vertical and horizontal linkages, entrepreneur ecosystem development, enabling environment for value addition at all stages/per node of the chain.

		<p>strong focus on market trends and entry strategies.</p> <p>For both activity areas, targeted involvement of the EABC and similar bodies will be instrumental for the effective set-up and implementation of the review mechanism.</p>
<p>Output 1 related to Outcome 2</p>	<p>2.1 Enhance value addition and diversification</p> <p>This result aims at improving value addition, efficiency and productivity, to improve revenue in selected sectors in the EAC. It will help companies to diversify their production as well as their market targets for more returns to the companies and farmers/ or agribusiness entrepreneurs. This will involve improving processing, developing new products and creating remunerative markets for higher-value products from the EAC including by focusing on new technologies and digitalisation</p>	<p>SUPPORT POLICY/REGULATIONS</p> <p>At the institutional level, two actions to promote policy development and regulatory systems for higher value-added crop diversification:</p> <ol style="list-style-type: none"> 1. Support to Ministries of Trade and Industry to formulate policies, regulations, and related implementation and monitoring mechanisms to help diversify, improve productivity, and realize the export potential for high-value crops. 2. Facilitate suitable financing mechanisms for the development of high-value crop diversification. Identify and promote value-chain financing modalities, e.g. repurchase agreements, trade receivables finance, trader finance, warehouse returns, and including commodity finance (Government support to facilitate, at the regulatory and policy level, the mobilisation of credit and intermediary financing institutions) <p>MARKETING AND CERTIFICATIONS</p> <ol style="list-style-type: none"> 1. Certifications for sustainable standards. Using smallholder sector associations and membership groups as entry points, provide capacity building to its SMEs members on voluntary sustainability standards and certification (i.e.: bio or fair-trade certification). 2. Branding, Geographical Indications (GIs), marketing and packaging. 3. Supply chain transparency and traceability. <p>TECHNOLOGY TRANSFER AND PROCESSING</p> <ol style="list-style-type: none"> 1. Improved post-harvesting⁶⁹ and processing (including mechanisation services) <p>As regards post-harvesting this might cover:</p> <ol style="list-style-type: none"> a. improving management and handling of horticultural crops by farmers, in partnership with agribusiness firms and business

⁶⁹ It is estimated that 9% to 16% of value chain products are lost due to post-harvest problems during shipment and handling. Improved post-harvest practices will result in reduced food losses, improved overall quality and food safety, and higher profits for growers and marketers.

		<p>development service providers through a market-driven approach;</p> <ul style="list-style-type: none"> b. developing and Capex financing of small and mid-size processing and transformation units (such as tomatoes canning, coffee drying and roasting, cocoa chocolate factories, tea drying and packaging, etc); c. developing more robust linkages between farmers and the market by connecting producers to premium markets through intensive training (e.g. Sell More for More); d. assisting farmer associations/cooperatives to expand their warehouse infrastructure and availability of working capital through business plan development and finance training courses. <p>2. Resource efficiency and sustainability, including the development of and matching with providers of green solutions.</p> <p>3. Technology transfer and digitalisation (for farm management, processing and supply chain management).</p>
<p>Output 2 related to Outcome 2</p>	<p>2.2 SME capacities and opportunities for business and export are enhanced</p> <p>This result aims at providing SMEs with business and export skills as well as access to alternative channels to market. It will also- support trade and investment promotion, and related capacities of Business Support Organisations.</p> <p>This result will also focus on strengthening the ecosystem of innovation and flow of entrepreneurs in the region. Exporters are first entrepreneurs. Their business skills, access to finance, and awareness of proper channels to markets will be enhanced</p>	<p>BUSINESS AND EXPORT SKILLS</p> <ul style="list-style-type: none"> 1. Enhanced Business and export skills of sector MSMEs and cooperatives (value-chain specific). This includes working with beneficiary country business incubators to identify and select promising candidate entrepreneurs for export, including linkage to trade finance sources. 2. Financial advisory services for MSMEs (including to access EIP-related EU investment facilities) are facilitated, and online information on financing opportunities (including through the Financing Gateway) delivered. <p>ALTERNATIVE DISTRIBUTION CHANNELS</p> <ul style="list-style-type: none"> 3. MSMEs connected to retail and wholesale markets, including intra-regional e-commerce and online auctions, backward linkages, export consortia, etc. <p>TRADE AND INVESTMENT PROMOTION</p> <ul style="list-style-type: none"> 4. Scaled-up B2B activities and events in partnership with BSOs and sector associations, promotion of local consumption and regional business collaboration deals. 5. Promoted trade and investment with the EU (including through linking EAC and European BSOs, investor missions, etc.) <p>BSOs CAPACITIES</p> <ul style="list-style-type: none"> 6. Regional networks and collaborative partnerships, including with EU BSOs built.

Annex 1 – Terms of Reference of the Evaluation

SPECIFIC TERMS OF REFERENCE – PART A
Mid-Term Review of EU-EAC MARKUP Programme
FWC SIEA 2018 - LOT 2 – Infrastructure, sustainable growth and jobs
EuropeAid/138778/DH/SER/multi

RFS-SIEA-2018-4216

CONTRACTING AUTHORITY: THE EUROPEAN UNION DELEGATION TO TANZANIA AND THE EAC

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1 BACKGROUND

1.1 Relevant country / region / sector background

The agricultural sector accounts for about 30 % of the EAC's gross domestic product (GDP), and represents the most important sector in terms of EAC exports to the EU. Considering its absorption of the workforce (60 % to 90 % in most of the regions' countries), it is the sector with the greatest potential for poverty reduction.

The EAC is a major exporter of cash crops, including tea, cotton, coffee, horticultural crops, oil-crops and pulses. The horticulture sector has the potential for the EAC countries to diversify their export baskets and increase revenue; it is seen as a labour intensive and investment attracting industry which will generate employment and foreign currency, and decrease imports.

An export potential assessment conducted in 2016 by the International Trade Centre (ITC) revealed that the region's cash crop commodities (mainly coffee and tea) and some horticultural products (including avocados and spices) have proven to be internationally competitive and offer good prospects of export success in the EAC and EU markets. Both sectors benefit from strong market fundamentals and buyer interest in supply from the EAC region.

One of the main challenges of EAC countries is how to enhance and sustain the connection to regional and global value chains by increasingly meeting requirements in a competitive manner to capture market access, and to enhance their productivity for sustained export expansion. EAC countries' export potential in agriculture is held back both by supply side constraints, including skills shortages, weak sector organisation and inadequate production and processing capacities, as well as market access constraints.

The latter include non-tariff barriers, both in the form of Technical Barriers to Trade (TBT) and sanitary and phyto-sanitary (SPS) measures. Differences in standards and SPS measures among EAC countries and weak quality infrastructure required for proving compliance increase the costs of trading within the region. In addition, exporters face the more stringent private standards of developed country retailers.

There is also need to pay more attention to market-facing elements of the value chains. This includes increasing production that conforms to export and inter-regional trade requirements and securing market segments with higher value added and reduced price volatility, allowing for higher farm gate prices.

Another important factor in securing and taking a good share of consumer-price revenues is value addition. Processing in the EAC region, apart from Kenya, is often limited to primary processing; great value could be created by covering also secondary processing. Value addition can be added also by improving labelling, packaging and marketing of the produce.

Moreover, throughout the production and marketing chains, a lack of access to affordable credit further limits the feasibility of investments improving productivity, quality and market access, particularly for SMEs. Among the biggest challenges EAC agribusiness enterprises face are also the lack of adequate knowledge of destination markets and limited capacity to participate in B2B international events. On the other hand, enterprises suffer from weak trade and investment support services offered by national institutions and private sector associations.

According to the EAC Trade and Investment Report (2018) the region's economy expanded at 5.7 percent in 2018, up from 5.6 percent in 2017, due to increased investment in infrastructure; increased private consumption as well as recovery of commodity exports. Total EAC exports decreased by 4.7 percent as a result of low international prices of mainly agricultural commodities. Outside Africa, the EU was EAC's biggest trading partner accounting for about 17.5% of the region's total exports, and representing an increase of 6.5% from 2017. Annual 'Doing Business' reports for the EAC region show consistent improvement since 2016. The score for 'Trading Across Borders' improved by 1.8% between 2018 and 2019. Nevertheless, the region continues to grapple with addressing Non Tariff Barriers which remains a persistent challenge to intra-regional trade.

The outbreak of the COVID-19 pandemic has caused supply chain disruption globally and this has impacted negatively on trade facilitation in the region. The movement of cargo and services has been affected more by measures instituted by the Partner States to contain the pandemic, including the stoppage of cross-border movement of passengers with the exception of cargo, curfews, screening, quarantining and isolation for suspected COVID 19 infected persons. However, the enforcement of these measures has had a negative impact particularly at borders where truck drivers have to be tested. Borders are witnessing unprecedented long queues of trucks, long periods of waiting for COVID 19 results by truck drivers and some being denied entry into neighbouring Partner State if found to be positive. The pandemic has also had a negative impact on airlift from and into the region, resulting in disruption and losses in high growth sectors as well as nascent regional value chains notably horticulture and tourism.

1.2 The Interventions to be evaluated¹

<p>Titles of the Interventions to be evaluated</p>	<p>1. Financing Agreement EU-EAC MARKUP</p> <ul style="list-style-type: none"> • 1.A Contract: MARKUP PAGODA with ITC (EAC R1-3-4; PS Tanzania R1) • 1.B Contract: MARKUP PAGODA with GIZ (R2) • 1.C Contract: EU-EAC MARKUP programme, Kenya National Window • 1.D Contract: EU-EAC MARKUP: Burundi intervention under the PARTNER STATES WINDOW <p>2. MARKUP Tanzania Component</p> <ul style="list-style-type: none"> • 2.A Contract: To certification and beyond: “Market access for sustainable coffee, horticulture and tea from Tanzania” <p>3. MARKUP Uganda Component</p> <ul style="list-style-type: none"> • 3.A Contract: Multi Annual Programme Estimate (MAPE) • 3.B Matching Grant contracts to 6 SMEs in coffee and cocoa (a total of Euro 3,146,798 is provisionally committed to six SMEs -4 in coffee and 2 in the cocoa subsectors); 3 out of the 6 contracts have now been signed: <ul style="list-style-type: none"> • 3.B.1 Contract: The development of a vibrant and sustainable cocoa value chain in Bundibugyo District. • 3.B.2 Increasing Market-orientated Production of Arabica Coffee Together (IMPACT). • 3.B.3 Enhancing smart agricultural practices, traceability, for value addition and sustainable market access for small holder specialty Arabica coffee farmers in Kabarole, Bunyangabu and Ntoroko districts in Rwenzori mountain range. • 3.B.4-6 (to be finalised)
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¹ The term ‘Action’ is used throughout the report as a synonym of ‘project and programme’.

	<p>4. Sector Reform Contract to enhance the agriculture sector's sustainable use of land and water resources, value creation and contribution to nutrition security (Rwanda)</p> <ul style="list-style-type: none"> • 4.A Contract: Sustainable livelihoods in horticulture value chains • 4.B Contract: A market driven approach for value chain improvements and the expansion of the Rwandan coffee market
<p>Budgets of the Interventions to be evaluated (EUR)</p>	<p>1.</p> <ul style="list-style-type: none"> • 1.A 13,500,000 (12,500,000+1,000,000) • 1.B 3,720,000 • 1.C 3,680,000 • 1.D 3,680,000 <p>2.</p> <ul style="list-style-type: none"> • 2.A 2,680,000 <p>3.</p> <ul style="list-style-type: none"> • 3.A 206,000 • 3.B 3,146,798 <p>4.</p> <ul style="list-style-type: none"> • 4.A 2,002,924.48 • 4.B 2,000,000
<p>CRIS and / or OPSYS numbers of the Interventions to be evaluated</p>	<p>CRIS Numbers:</p> <p>1. 2017/038545</p> <ul style="list-style-type: none"> • 1.A 2018/397-627 • 1.B 2018/398-674 • 1.C 2018/397-867 • 1.D 2018/397-932 <p>2. 2017/40655</p> <ul style="list-style-type: none"> • 2.A 2019/413-895 <p>3. 2017/40657</p> <ul style="list-style-type: none"> • 3.A 2019/408-880 • 3.B: <ul style="list-style-type: none"> • 3.B.1: FED/2020/419-935 • 3.B.2: FED/040-657 • 3.B.3: FED/2020/420563 • 3.B.4-6 (to be finalised) <p>4. 2016/37486</p> <ul style="list-style-type: none"> • 4.A 2019/414-048

	<ul style="list-style-type: none"> • 4.B 2019/413-820
Dates of the Interventions to be evaluated	<ul style="list-style-type: none"> • 1. • 1.A Start: 01/07/2018 End: 27/06/2022 • 1.B Start: 01/08/2018 End: 31/07/2022 • 1.C Start: 01/02/2019 End: 02/01/2023 • 1.D Start: 25/07/2018 End: 24/07/2022 • 2. • 2.A Start: 28/04/2020 End: 28/10/2023 • 3. • 3.A Start: 13/01/2020 End: 12/07/2022 • 3.B Start: March 2020 (provisional) for 24-42 months • 4. • 4.A Start: 23/01/2020 End: 23/01/2024 • 4.B Start: 29/01/2020 End: 02/02/2024

The evaluation will cover the whole of the EU-EAC Market Access Upgrade Programme (MARKUP), financed under the 11thEDF Regional Indicative Programme (RIP) for Eastern and Southern Africa and the Indian Ocean region (EAC Secretariat sub-component).

The MARKUP programme involves three Financing Agreements: two managed by the EU Delegation in Tanzania (EU-EAC MARKUP, 2017/038545; and MARKUP TANZANIA COMPONENT, 2017/40655); one by the EU Delegation in Rwanda (Sector Reform Contract to enhance the agriculture sector's sustainable use of land and water resources, value creation and contribution to nutrition security, 2016/37486) and one by the EU Delegation in Uganda (MARKUP UGANDA COMPONENT, 2017/40657).

For a full view of Financing Agreements, contracts, and Programme's components covered by this evaluation, please refer to **ANNEX II (Interventions to be evaluated – basic data)**.

The *EU-EAC Market Access Upgrade Programme* (MARKUP) aims at addressing both supply side and market access constraints of some key export-oriented sectors, namely agro-industrial crops (coffee, tea and cacao) and horticulture, supporting participation in regional and global value chains - with a particular focus on exports to the European Union, so as to enhance EAC capacity to exploit in full its trade-driven growth potential. This is intended to be achieved through interventions in selected value chains focusing mainly from post-harvest to export, and covering quality assurance and certification, value addition, trade facilitation and business promotion.

The programme is structured around two intervention levels, the EAC-WINDOW and the PARTNER STATES WINDOW.

The **EAC-WINDOW** supports EAC efforts to improve the regional trade and business enabling environment for the selected commodities, through enhanced capacity to advocate for the removal of sector trade barriers and improved sector standards and sanitary and phyto-sanitary (SPS) measures harmonisation. It also supports the private sector in enhancing its export competitiveness, through increased awareness and compliance with destination market requirements as well as with improved access to finance and business development opportunities (including by reinforcing business support organisations' capacities).

The **PARTNER STATES WINDOW** includes national interventions tailored to the countries' specific needs and complementing the EAC-WINDOW where any single country needs it the most. Interventions do focus on one or more areas among reduction of trade barriers and quality assurance, enhancement of SME export competitiveness and business promotion.

Interventions do prioritise the promotion of SMEs as drivers of the target value chains, but also strive to ensure long term sustainability through capacity building at business support organisations and institutions' level. In addition, the interventions try to improve the enabling environment, including through trade facilitation, reduction of non-tariff barriers and by enhancing the national quality infrastructure systems.

The EAC WINDOW covers all five EAC Partner States (excluding South Sudan) and is being implemented through two contracts:

1.A Contract: MARKUP PAGoDA with ITC (EAC R1-3-4)

This contribution agreement with ITC covers the following result areas under the EAC WINDOW:

R1. Enhanced capacity to advocate for the removal of sector trade barriers

This result aims at reducing trade barriers for selected sub-sectors, so as to reduce trading cost/time and, by this, increase trade and investment attractiveness in the EAC. It does so by increasing transparency on trade procedures - i.e. through Trade Facilitation Portals - and enhancing private sector (namely Trade and Investment Support Institutions - TISIs) capacity to identify and advocate for the removal of trade barriers. Activities are organised around two sub-results:

R 1.1 Improving policy advocacy on barriers for intra-regional and EAC-EU trade

Businesses as well as trade and investment support institutions (TISIs) in the EAC often lack the tools and methodology to advocate for the removal of non-tariff barriers. By influencing the policy design and implementation process through fact-based position papers and public-private dialogues, business can assist policy makers to create the necessary conditions to attract investment and increase their trade flows within regional and international value chains. This component focuses on building the capacity of national and regional trade support institutions, including the East Africa Business Council (EABC) and the East Africa Community Secretariat, in the EAC countries to engage in such effective advocacy practices so they can influence, in a professional and sustainable manner, the trade policy environment in the EAC region. Moreover, through regional workshops organized in collaboration with the EAC Secretariat, the project is building the capacities of the private sector to join forces across the 5 countries in articulating regional policy positions that affect their sectors and that require action of national and regional policy makers. In the first two years of implementation, the project focused on policy advocacy on the coffee sector. It is expected that the intervention will lead to improvements in the regional trade-related policies and/ or strategies and/or regulations with business sector input.

R 1.2 Strengthening Trade Facilitation Portals (TFP)

MARKUP is enhancing the Regional Trade Facilitation Portal (<https://tradehelpdesk.eac.int/>) and developing the EAC Quality Portal (<https://un-consulting.ch/eac>). This will help SMEs reduce the time and cost of conducting international trade transactions, which increases when laws, regulations and procedures about import, export and transit of goods are not readily available or easily accessible. The lack of transparency on trade clearance information often translates into unfair, inconsistent and discriminatory practices leading to an unpredictable environment that is detrimental to business competitiveness. It is expected that as a result of the project, the Trade Facilitation Portal for Burundi will be established and included in the Regional Portal and that number of additional product-specific procedures guides will be mapped and covered by the Regional Portal. It is expected that as a result of this, SMEs will readily have information on steps to be followed in order to export specific products to given markets along with the required documentation, thus reducing the costs and increasing their export competitiveness.

R3. Export Competitiveness enhanced for sector SMEs

This result aims at supporting the EAC efforts to enhance SME export competitiveness in target value chains, through increased awareness and compliance with destination market requirements. Activities are organised around four sub-results:

R 3.1 Improving awareness of market requirements

Facilitating SME understanding of quality related regulations and market requirements is a key element for trade facilitation and SME competitiveness. The project addresses this through developing export guides for SMEs covering key steps to benefit from the EU or EAC customs union; sensitization materials on quality as well as conducting value chain / supply/demand analyses to determine sector priorities, demand trends and supply capabilities or challenges to meet the regional / international demand.

R 3.2 Improving compliance with quality and standards requirements

We don't mention TBT?

The project develops SME's knowledge and skills related to how to comply with such requirements in their operations. Example activities include training and advisory services on GlobalGAP, Good Manufacturing Practices, food safety systems (HACCP / ISO 22000), including traceability issues, Quality Management Systems (ISO 9001) and other specific certifications relevant to the MARKUP sectors. The project also supports the development of certification processes for value added products (organic, bio and fair trade requirements) in collaboration with relevant local institutions and using the trainer-cum-counsellor approach (Quality Champions), in order to ensure sustainability. This pool of local experts (QCs) that the project is helping create will thus ultimately assist SMEs in quality compliance and standards in their countries but also across the EAC region. The associated infrastructure that the project is providing in the form of the EAC Quality Portal mentioned above will also help to facilitate local and regional networking of the QCs while the formation of Quality Associations will formalise their collaboration and pool resources to sustainably provide their services to SMEs in the long-run. The quality interventions are complemented with the development of a yearly EAC quality award serving to showcase and share successful quality-related initiatives /best practices and achievements at the regional level.

R 3.3 Increasing value addition

Supporting companies to move into higher-value added activities and entering new markets goes beyond the assistance on compliance with rules of origin, TBT and SPS. It also requires improving post-harvest management, supporting processing upgrade through small-scale processing units, introducing new low-cost technologies, new packaging materials that will help developing opportunities and access lucrative markets. For Coffee, this entails improving skills in roasting and preparation of coffee to improve the consistency of quality and therefore potential increased uptake amongst local consumers plus improved packaging and optimized distribution, which is also important for capturing regional markets and developing the regional coffee value chain/ value capture. In the spices sector, processing training and technologies are required to improve value addition in Tanzania. The approach strengthens spices producers in cultivation and post-harvest handling and processors in enhancing productivity and value addition. For avocado, the project targets support for the production of avocado oil in the long term.

Climate change directly affects the industry by altering temperatures and precipitation in tea growing regions, thus reducing yields and altering harvests. Moreover, there is an increasing demand from international buyers to reduce the environmental footprint, especially the carbon footprint, of their products. Hence, suppliers are faced with a two-fold challenge to mitigate and adapt to a changing climate. In order to create a climate resilient and competitive tea sector, this component provides targeted support to smallholder farmers and SMEs in the tea sector (Kenya, Tanzania and Burundi) and coffee in Uganda to implement climate change mitigation and adaptation strategies focusing on improving tea production and processing through the introduction of new technologies and sustainable business practices. Climate-smart production and processing practices increase the sector's yields, resource efficiency, improves its

environmental footprint and reduces production costs thereby boosting competitiveness and sustainability.

R 3.4 Improving access to Finance to SMEs

On the supply side, financing for SMEs business requirements needs to come from development or commercial financial institutions, project or government agencies or other forms of investors operating in the countries concerned. ITCs experience across the region shows that these partners often do not well understand the business opportunities or risk dynamics of SME applicants for financing, may only advise on their own products, and administratively struggle to address the challenges of working with applicants who are inexperienced or lacking financial/business management skills and adequate records. Whilst sufficient liquidity exists, there is a gap in the resources available to engage with SMEs to manage financing of viable applications that could drive value chain development at scale. At the same time intermediary independent advisers may not be of adequate quality, affordable or accessible to the intended beneficiary SMEs. On the demand side, SMEs engaged with the project in upgrading and expansion of their business, however, small, need good quality impartial advice to improve business records, financial literacy and management, planning and proposal writing, assessing their real capacity to take on finance, communicate with and report to finance providers. Even after successfully obtaining finance SMEs require periodic advice to coordinate implementation of their projects or deal with external shocks to their business that can temporarily impact their ability to service loans or investors. The project thus engages the financial institutions through capacity building and collaboration to avail information and better services to SMEs starting with those that the project is financing under the other project component. Regional training is organized for Business Development Providers assisting SMEs in obtaining finance and a regional Finance Gateway is being developed to help SMEs have a better overview of financing offerings in the market.

R4. Business Development capacities improved for sector SMEs

This result aims at supporting the EAC efforts to improve enterprise and business support organisations' capacities as well as concrete opportunities for business development in the target value chains.

R 4.1 Strengthening Trade and Investment Support Institutions

SMES around the world that are successful in the export business are supported or have been supported during their infancy by some TISI or Business Support Organization. Thus the project focuses on building the capacity of selected TISIs and Business Support Organisations in the region to deliver their mandate. The project seeks to address key constraints such as weak operational and managerial capacities, lack of information, inadequate skills and tools in order to provide more effective services to SMEs, including advocacy, networking, direct business advisory and market development activities (identification of buyers, participation in trade fairs, etc.). Supporting existing and new regional networks of TISIs and exchange of good practices for the benefit of SMEs is crucial for internationalization / regionalization of SMEs in the targeted sectors. Training of TISIs has taken place mostly by bringing together target TISIs from the specific target sectors for joint capacity building followed by focused coaching and advisory.

R 4.2 Developing export and investment linkages with EU and EAC

The project lays a lot of emphasis on developing investment and business between European business partners and EAC companies long with sector specific B2B activities, inward investment/ trade missions including partnership-networking meeting between EU investors/ EU-based institutions and EAC companies/EAC based institutions. In doing so, ITC collaborates with similar projects to tap synergies and optimize costs, eg. SheTrades Commonwealth funded by DFID.

R 4.3 Improving SME export and business capacities

Coffee, tea and cocoa trading on the international market is becoming increasingly complex and high risk. The ability of an SME processing and exporting company to understand risk, make trading decisions is

critical to ensure the competitiveness and financial stability of the business and to secure export market share. This is as well important for the multitude of farmers within the supply chains upstream of the processing and exporting companies ensuring they remain economically sustainable receiving a fair value of the export price. Thus, the project trains SMEs on export strategies and transactions: order and contract management; negotiation, marketing and sales approaches; customer relationships; warehousing, export documentation and forwarding as well as improving marketing, labelling and branding. Thus, this component helps ensure that for SMEs, at the end of the value chain, transactions take place and take place profitably and sustainably.

1.B Contract: MARKUP PAGODA with GIZ

This contribution agreement with GIZ covers the following result area under the EAC WINDOW:

R2. Sector Standards and SPS measures harmonisation improved

This result aims at supporting EAC efforts to enhance harmonisation of technical standards and SPS measures and facilitating national domestication and implementation.

Competitiveness of food and agricultural products in the regional and international markets is largely influenced by non-tariff barriers (NTBs) to trade. Some of the main NTBs which hinder exports of food and agricultural products from the EAC to international markets relate to Technical Barriers to Trade (TBT), and Sanitary and Phyto-Sanitary (SPS) standards. Harmonized EAC Standards, including both TBT and SPS, are therefore an essential factor for attainment of international market requirements, as well as facilitating intra-regional trade. The impact pathway for this Result is that through better compliance to EU and other international standards and SPS measures, SMEs in the target value chains will increase market penetration, thereby improve competitiveness. Further, harmonised standards and food regulatory systems and processes at EAC level will increase predictability, reduce transaction costs and make it easier for food products to move across the region. The multiplier effects of this are expected to result in overall growth in export earnings as well as GDP.

This Result is implemented largely through the EAC structures including the Codex committee, Standards Committee and its subcommittees, notably Standards Working Groups and Technical Committees, which comprise membership from Partner States' national standards bodies, relevant Government agencies, private sector representatives as well as other non-state actors as may be required. These committees are responsible for initiating and drafting standards, as well as obtaining stakeholder feedback in the Partner States. In addition to harmonisation of standards and SPS measures, other activities include training and capacity building, data generation, assessment of the costs and benefits of compliance, and targeted interventions to close implementation gaps.

Moreover, the agreement with GIZ covers the following activity areas aiming to support the EAC Secretariat in ensuring optimal management and coordination to the benefit of the whole MARKUP programme implementation: Coordination, Monitoring and Evaluation, Communication and Visibility.

This includes financing the MARKUP Programme Coordination Unit based at the EAC Secretariat. The PCU is responsible for the day to day operations of MARKUP on behalf of the EAC Secretariat, as well as ensuring effective governance and reporting on the Programme to the key structures of the Programme, which include:

Regional Technical Committee (RTC)- comprising technical officers of the EAC, the East African Business Council (EABC), implementers of the EAC Window (ITC and GIZ) and the EU, and chaired by the Director of Trade with the Director Productive Sectors as Alternate. The RTC meets every 1-2 months.

Regional Steering Committee (SC)- responsible for reviewing the overall policy and strategic directions of the programme, monitoring the overall performance and coherence between the different components, approving workplans for the EAC Window and providing guidance as appropriate. The RSC comprises representatives from Partner States, Implementing Partners, the private sector and EU and meets every 6 months.

National Steering Committees (NSC)- to provide oversight and guidance for the Partner States Window and ensure coherence with the EAC Window.

Sectoral Council on Trade, Industry, Finance and Investment (SCTIFI)- to receive implementation updates and endorse any key policy decisions of a regional nature.

Monitoring and Evaluation (M&E):

The PCU is responsible for overall Monitoring and Evaluation of the Programme. To this end, an M&E Framework (MEF) and System (MMES) have been developed in consultation with Implementing Partners and National Focal Points. The MEF describes critical elements, approaches and systems that are necessary to assess and measure progress, results and impact of different activities of the Programme. It also lays a sound and practical basis for the joint MARKUP Monitoring and Evaluation System (MMES). The MMES organizes various indicators and targets into Results Clusters as a means of tracking progress, achievement, and identifying areas that require corrective action. The PCU generates and produces Monitoring reports every 6 months for discussion by the Regional Steering Committee.

Communication and Visibility:

The overall framework of MARKUP Communication and Visibility (C&V) is based on the EU C&V guidelines. Accordingly, each Implementing Partner is obliged to undertake C&V of MARKUP activities, achievements, results and impact. In addition, the GIZ – through the Programme Coordination Unit - has the following specific responsibilities:

- a) Develop and elaborate a Communication and Visibility Plan (CVP)
- b) Coordinate implementation of communication and visibility activities by MARKUP implementing Partners at regional and Partner States levels, and
- c) Communicate best practices through appropriate channels and tools.

The **PARTNER STATES** window is being implemented through the following contracts:

(Kenya)

1.C Contract: EU-EAC MARKUP programme, Kenya National Window

A contribution agreement has been signed with UNIDO (and is managed by the EUD to Kenya). It covers the following results:

R1: Strengthened national Quality Infrastructure's regulatory framework and capacities

R2: Support sector smallholders, cooperatives and enterprises better integrate into export-oriented value chains

R3- Visibility and outreach on key quality and safety issues in priority horticultural sectors

The project is in line with National priorities and policies in relation to food safety and agri-business: Vision 2030; National Horticulture Policy; Agricultural Sector Transformation and Growth Strategy; National Agri-business Strategy. The objective is to bring about a highly productive and efficient agribusiness sector, competitive both locally and internationally. The strategy emphasizes the need to encouraged private sector organizations in the development of diversified agricultural and food products, which are essential for improving the competitiveness of the sector. The purpose of the

project is to contribute to the economic development of the Kenya by increasing the value of both extra and intra-regional agricultural exports in horticulture sectors. To achieve an impact and sustainable results, the project focuses on some subsectors giving priority to target value chains such as snow peas and peas, mangoes, passion fruit, chilies, herbs and spices and nuts. The project has a bottom up approach, taking account of the priority products in the 12 beneficiary countries.

(Burundi)

1.D Contract: EU-EAC MARKUP: Burundi intervention under the PARTNER STATES WINDOW

A contribution agreement has been signed with ITC (managed by EUD Burundi). The agreement covers the following results:

R1: National Quality Infrastructure framework, inspection and certification services strengthened

R2: Laboratory testing capacities for coffee/tea improved

R3: Quality related extension services strengthened

MARKUP-Burundi focuses mainly on improving the national quality infrastructure of the country. It aims to support project partners to comply with sanitary and phytosanitary (SPS) measures, technical regulations and standards relevant for the coffee, tea and horticulture sectors.

The direct beneficiaries of MARKUP Burundi are: Burundi Bureau of Standards and Quality Control (BBN), Coffee Development Office (ODECA) former Regulatory Authority of the Burundi Coffee Sector (ARFIC), Burundi Tea Office (OTB), Centre National de Technologie Alimentaire (CNTA/NACC), InterCafe Burundi, Direction de la Protection des Végétaux (DPV), SMEs in coffee, tea and horticulture sectors.

Under Result 1, support is provided to develop a national Quality Policy (NQP) in line with EAC SQMT Protocol and Act and adoption of an implementation action plan. Institutions of the National Quality infrastructure will be strengthened in terms of their standardization, certification and inspection services to the coffee, tea and horticulture sectors. A campaign for promotion of the Quality Culture is also provided.

Activities related to Result 2 aim at strengthening the laboratories' testing capacity for the products of the selected sectors both in terms of equipment and training of laboratory technicians.

Under result 3, the quality related extension services will be strengthened. Activities include the support to tea and coffee producers to improve the quality of their production and comply with private standards like SAN / Rainforest Alliance standard. Support is also being provided to industry for research and prevention and control of potato defect for coffee.

(Tanzania)

1.A Contract: MARKUP PAGoDA with ITC (PS Tanzania R1)

This is one component under the contribution agreement with ITC. It covers the following result under the PARTNER STATES Window - Tanzania Component: *R1: Enhanced awareness on sector enablers through market analysis and research.*

This component aims on the one hand on awareness raising on key enabling environment weaknesses currently constraining growth in coffee, tea and horticulture sectors in Tanzania with the objective of facilitating reform. On the other hand, the component aims at building local capacities in market analysis and research in order to reveal export opportunities, while also assisting SMEs with export strategies on how to tap these opportunities. This result will strategically complement activities of the 11th EDF Agri-Connect programme.

Activities are organised around two sub-results:

1.1 Providing market analysis and research

Building on the pre-existing work done by ITC on Non-Tariff Measures (NTMs) and the business environment in Tanzania, this activity aims to update the NTM survey results conducted in Tanzania in 2012, to document progress against the benchmark of 2012, particularly for the priority sectors, and to highlight possible new challenges that have emerged. The analysis will inform policy-makers and development partners in Tanzania, including the Agri-Connect implementing partners, on the main constraints faced by the private sector in the selected sectors. It will also serve as basis for training and awareness raising activities around NTMs and NTBs. At the same time, the project is building the capacity of trade advisors and analysts (e.g. in Ministries and TISIs) on market analysis and research focused on how to identify and analyse attractive markets (market profiles) and conducting export potential analyses.

1.2 Improving information on EU destination markets

The main type of activities towards improving information on EU destination markets include providing stakeholders in Tanzania with information on the opportunities existing in the EU for sustainable products (which leveraged data collected before outside of MARKUP under ITC's T4SD initiative) and supporting SMEs to develop business export strategies (through training and coaching).

2.A Contract: To certification and beyond: "Market access for sustainable coffee, horticulture and tea from Tanzania"

This grant contract with SOLIDARIDAD covers the following result under the PARTNER STATES Window - Tanzania Component: *R2: Improved access and compliance with voluntary sustainability standards (VSS).*

The horticulture industry in Tanzania is the fastest growing sub-sector within the agricultural sector with an annual average growth of about 9 to 12% per annum. The sub-sector employs about 2.5 million people, which makes the industry a major player in the country's economic growth and employment sector. Tea contributes more than US\$30 million to Tanzania export earnings, making it the fifth largest export crop after cashews, coffee, cotton, and tobacco. The tea industry provides employment to 50,000 families and directly or indirectly benefits more than 2 million Tanzanians. Tanzania is a growing economy. However, there are significant risks associated with the current growth pathway due to the unsustainable use of natural resources and the increasing reliance on and inefficient use of fossil fuels.

To address the above issues, this action is designed to become the backbone for the development of a coherent programme of public policy and private initiatives - at both standard-setting and implementation stages. This will be achieved through the promotion of proactive and strategic dialogue about national policies and experiences, as well as exchanging information on Voluntary Sustainability Standards (VSS). The intervention complements the efforts made by the government by increasing productivity and market access of agricultural products.

The action seeks to apply modern scientific advances, build synergies and market connections to help the sector's actors towards achieving the Sustainable Development Goals (SDGs), such as sustainable production and consumption, biodiversity conservation, poverty reduction and gender equity among others. By doing so, the project will assist producers and value chain actors in complying with Voluntary Sustainability Standards, reduce the cost of transitioning to compliance for actors along the value chain, particularly for smallholder farmers, reduce the annual costs for external inspection by a certification body and increase knowledge and access of market niche opportunities for Tanzanian "branded" sustainable tea, coffee and horticulture products. The action will furthermore foster farmers' aggregation mechanisms to enhance their bargaining power and marketing efficiency.

(Uganda)

The implementation of the PARTNER STATES Window - Uganda Component is through matching grants (call for proposals) and a Programme Estimate. The following are *Financing Agreement 3. MARKUP Uganda Component's Results/modalities*:

Result Area 2: Reduced production, harvest and post-harvest losses and increased marketing opportunities for smallholders; Area 3: Increased smallholders price incentive through diversification into higher value export markets especially, to the EU and ACP countries. Such results are covered by the call for proposals.

Result Area 1: Resistant varieties are developed and brought to market; Result Area 4: Strengthened institutional capacities for trade analysis, market surveillance and project management. Such results are covered by a Programme Estimate.

3.A Contract: Multi Annual Programme Estimate (MAPE)

The above mentioned Programme Estimate was signed with UCDA (Uganda Coffee Development Authority). The expected results are: 1) Cocoa standards adopted, national cocoa policy and strategy and implementing regulations ready for submission to Cabinet; guidelines for cocoa production and marketing adapted to Uganda context finalised; 2) The quality and regulatory services directorate of UCDA ready to submit accreditation request for ISO 17065 Conformity assessment for bodies that provide certification to other companies and accreditation request for laboratory according to ISO 17025 for the physical and sensory tests: moisture content, screen retention and cup test; 3) UCDA/MAAIF staff competent in terms of trading and optimal decision making on the cocoa and coffee commodities market, including data collection and processing and project cycle management; 4) Disease resistant and high yielding Arabica coffee varieties released for commercialization and high yielding cocoa clones available for on-farm and on-station demonstration; 5) MARKUP coordination properly managed.

The rationale behind the intervention is to technically target the two value chains of coffee and cocoa, whose expansion in the international market is on the rise, while potentialities are yet to be fully underpinned. This is done by supporting the competent authorities in updating the legal framework on cocoa value chain, by increasing the efficiency of the quality and certification services of UCDA and meeting the international requirements, by consolidating the competence of the staff in performing their task within the mandate of UCDA for the two commodities, in particular on market monitoring and advice, and to reinforce research programmes on cocoa. The programme foresees active involvement of the Uganda National Bureau of Standards (UNBS) and the National Coffee Research Institute (NaCORI). The implementation includes a section on managing the MARKUP national window and is facilitated by Technical Assistance.

3.B Contract: Matching Grant contracts to 6 SMEs in coffee and cocoa

Under the MARKUP national component, the European Union has provided for a matching grant scheme, aiming at improving the capacity of private operators in the two value chains to export, particularly to the EU market, adding value/volume and tapping into higher quality opportunities. The matching grant shall assist private economic operators' ability to increase coffee and cocoa exports.

The scheme targets private operators from the coffee and cocoa value chains, providing matching grants with the broad aim to boost production, reduce harvest and post-harvest losses, while allowing for increased market access and visibility for the products on the EU and EAC markets.

The operations to be funded will have a positive side impact on farmers' producers, actively involve women and youth and will not negatively affect the environment.

Four proposals have been provisionally accepted from coffee and two proposals for cocoa, 3 out of 6 contracts have already been signed. The actions proposed for funding range from reducing production, harvest and post-harvest losses in the coffee and cocoa value chains, support smallholders in their bid to galvanize and retain a share in the export market to the EU and other ACP countries and support certification and access to market information.

All processes involved in the identification and selection of the beneficiaries have been finalized. Due to incapacitation caused by the Covid-19 outbreak, the evaluation report is yet to be endorsed by the EUD. Once signed, the duration for implementation of the activities under the matching grant scheme will range between 24 and 42 months.

(Rwanda)

The Rwanda component of the MARKUP Partner States Window is meant to cover the following results: *R1 - Strengthening of national food safety systems; R2 - Support to horticultural/agricultural high-value chains, SME and agribusiness development; R3 - Coffee value chain development.*

MARKUP funding has been added to a pre-existing programme (4. Sector Reform Contract to enhance the agriculture sector's sustainable use of land and water resources, value creation and contribution to nutrition security) and four grant contracts have been signed. The following two are considered part of MARKUP, and good part of their outputs have been ring-fenced as pertaining to MARKUP (the remaining outputs are considered out of scope but will be reported 'below the line').

4.A Contract: Sustainable livelihoods in horticulture value chains

This contract was signed with OXFAM IRELAND 20/01/2020 The following are the four outcomes: 1) Increased investments to raise productivity, responsive to climate change & market demand; 2) Increased returns for small-holder horticultural farmers; 3) Increased access & capacity to respond to demand/supply of local/regional/international markets; 4) Strengthened horticulture policy & regulatory frameworks to support small holder farmers' productivity, income & marketing improvements.

Horticulture value chains are not only a potential driver for export promotion but most importantly a source of much needed off-farms jobs and a key element in access to finance by farmers and agriculture SMEs. The intervention aims to unlock the potential of Rwanda's horticultural value chains to ensure the supply of safe and high quality products to local, regional and international markets. Activities include building farmers resilience to climatic changes, strengthening farmers' groups/cooperatives, facilitating easier access to affordable and quality seedlings/seeds; Empowering horticulture farmers, processors, aggregators and other value chains actors to respond to the increasing demand for horticulture produce on local, regional and international markets; increasing production while creating more off-farm employment and reducing poverty; strengthening capacity of the supply chain, contribute to easing access to finance, support job creation and strengthen the capacity of the supply chain to maintain required quality assurance standards; and supporting the development and implementation of horticulture value chain policy and regulatory frameworks to ensure that these favour the most vulnerable and are pro-poor, while supporting the sustainable development.

MARKUP ring-fenced outputs: output 2.1, 2.2, 2.3; 3.1,3.2; 4.2.

4.B Contract: A market driven approach for value chain improvements and the expansion of the Rwandan

This contract was signed with ICU-ISTITUTO PER LA COOPERAZIONE UNIVERSITARIA-ONLUS on 29/01/2020 Outcomes: coffee growers and coffee washing stations have a collaborative and market-driven approach

to increase quality and margins, and public and private stakeholders are strengthened; the international market has a greater knowledge, appreciation and willingness to buy Rwandan coffee.

Rwandan coffee is not growing in value and actually decreasing in quantity (-27% from period 1992-1996 to 2012-2016). This due to a combination of external and internal factors such as increased competition from other suppliers, old trees, high input prices, poor management capacities and low access to finance in Coffee Washing Stations (CWS), lack of traceability, amongst others. Considering these challenges and that the export market represents 98% of the coffee sales, with prices fixed at international level and with a global competition, ICU and its partners will use a “pull” approach (market-driven) focusing on export and international market demand and on how Rwandan actors can better meet market requirements and differentiate their offer from other countries. The objective is to increase demand, and to strengthen the interaction between the actors along the value chain in order to produce better quality of coffee at a lower cost. The interventions, which will be undertaken in selected provinces, include international demand analysis, capacity building for selected coffee washing stations, training farmer groups in business and management skills; development of an effective mechanism to transmit international selling prices, improving traceability and branding.

MARKUP ring-fenced results: 1, 2, 3; 8, 9, 10; 12, 13.

See **Annex VI**:

- **MMES Table** (detailed Logical Framework as per MARKUP Monitoring and Evaluation System);
- **Logical Frameworks** at contract level

The Intervention Logic described in this chapter of the ToR is based on existing documents, and shall be subject to the evaluators’ scrutiny and reconstruction during the Inception phase (and reported in the inception report) in order to reflect an updated and shared vision of the intended casual chain underpinning the Intervention(s). This reconstruction shall be based on the existing Logframe / Intervention Logic, consultation with key stakeholders and on other key documents of the Intervention(s) bearing in mind the intervention logic may have evolved.

1.3 Stakeholders of the Intervention

The final beneficiaries of this programme are the five EAC Partner States (Burundi, Kenya, Rwanda, Tanzania and Uganda) and their citizens. The direct beneficiaries are: private sector operators in the agro-industrial and horticulture value chains in the EAC countries, in particular export oriented SMEs, and Trade and Investment Support Institutions (TISIs). The programme involves also Business Membership Organisations (BMOs), in particular the East African Business Council (EABC) and value chain specific organisations.

Stakeholders include also regional and national public sector actors. These include: the EAC Secretariat, EAC Partner States and their Ministries, Departments and Agencies (MDAs), first and foremost those housing the MARKUP National Focal Points as well as those covering trade, agriculture, and technical and sanitary standards; as well as EU Delegations to Tanzania, Burundi, Kenya, Rwanda and Uganda.

1.4 Other available information

See Annex II

2 DESCRIPTION OF THE EVALUATION ASSIGNMENT

Type of evaluation	mid-term
Coverage	All interventions covered by the contracts listed in section 1.2 Note. As explained below, the following contracts will be covered by the desk review only: 2.A (2019/413-895); 3.A (2019/408-880); 3.B.1 (2020/419-935), 3.B.2 (2020/040-657), 3.B.3 (2020/420563), 3.B.4-6 (being finalised) ; 4.A (2019/414-048); 4.B (2019/413-820)
Geographic scope	Burundi, Kenya, Rwanda, Tanzania, Uganda
Period to be evaluated	Entire period of the interventions to date (for start and end dates, please refer to Section 1.2)

2.1 Objectives of the evaluation

Systematic and timely evaluation of its programmes and activities is an established priority² of the European Commission³. The focus of evaluations is on the **assessment of achievements**, the **quality** and the **results**⁴ of Interventions in the context of an evolving cooperation policy with an increasing emphasis on **result-oriented approaches and the contribution towards the implementation of the SDGs**.⁵

From this perspective, evaluations should **look for evidence of why, whether or how these results are linked to the EU intervention** and seek to **identify the factors driving or hindering progress**.

Evaluations should provide an understanding of the **cause and effect links** among: inputs and activities, and outputs, outcomes and impacts. Evaluations should serve accountability, decision making, learning and management purposes.

The **main objectives** of this evaluation are to provide the relevant services of the European Union and the interested stakeholders with:

- 1) an overall independent assessment of the **past performance** of the MARKUP Programme, paying particular attention to its intermediate results measured against its expected objectives; and the reasons underpinning such results;

Note: for the following interventions, having few months of implementation, the evaluation of the past performance will pay particular attention to the 'efficiency' of work undertaken during the inception phase (involving preparations for activities' implementation) measured against its expected objectives: 2.A

²COM(2013) 686 final "Strengthening the foundations of Smart Regulation – improving evaluation" - http://ec.europa.eu/smart-regulation/docs/com_2013_686_en.pdf; EU Financial regulation (art 27); Regulation (EC) No 1905/2006; Regulation (EC) No 1889/2006; Regulation (EC) No 1638/2006; Regulation (EC) No 1717/2006; Council Regulation (EC) No 215/2008

³ SEC (2007)213 "Responding to Strategic Needs: Reinforcing the use of evaluation", https://ec.europa.eu/smart-regulation/docs/com_2013_686_en.pdf; SWD (2015)111 "Better Regulation Guidelines", http://ec.europa.eu/smart-regulation/guidelines/docs/swd_br_guidelines_en.pdf; COM(2017) 651 final 'Completing the Better Regulation Agenda: Better solutions for better results', https://ec.europa.eu/info/sites/info/files/completing-the-better-regulation-agenda-better-solutions-for-better-results_en.pdf

⁴ Reference is made to the entire results chain, covering outputs, outcomes and impacts. Cfr. Regulation (EU) No 236/2014 "Laying down common rules and procedures for the implementation of the Union's instruments for financing external action" - https://ec.europa.eu/neighbourhood-enlargement/sites/near/files/pdf/financial_assistance/ipa/2014/236-2014_cir.pdf

⁵ The New European Consensus on Development 'Our World, Our Dignity, Our Future', Official Journal 30th of June 2017. <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:C:2017:210:TOC>

(2019/413-895); 3.A (2019/408-880); 3.B.1 (2020/419-935), 3.B.2 (2020/040-657), 3.B.3 (2020/420563), 3.B.4-6 (being finalised); 4.A (2019/414-048); 4.B (2019/413-820)

- 2) key lessons learned, conclusions and **related recommendations in order to improve** current and future **Interventions**;
- 3) provide a forward looking assessment on the **opportunity, options and modalities for a new follow-up Programme**, to be possibly financed in the framework of the next EU programming cycle.

In particular, this evaluation will serve to understand the performance of the Intervention, its enabling factors and those hampering a proper delivery of results in order to adjust its design if need be, as well as to inform the planning of future EU interventions of this nature in the same or other sectors.

The main users of this evaluation will be the relevant EU services and other stakeholders (national partner Institutions, private sector etc.) that are involved in the implementation of the Intervention to be evaluated and / or its steering. These include the EU Delegations to Tanzania, Burundi, Kenya, Rwanda and Uganda, the EAC Secretariat, the relevant EAC Partner States' Institutions (MARKUP National Focal Points etc.).

Note: all EU funded actions must promote the cross-cutting objectives of the EC: environment and climate change, rights-based approach, persons with disability, indigenous peoples and gender equality.

2.2 Requested services

2.2.1 Scope of the evaluation

The evaluation will assess the Intervention using the six standard DAC evaluation criteria, namely: **relevance, coherence, effectiveness, efficiency, sustainability and early signs of impact perspectives**.

In addition, the evaluation will assess:

- one EU specific evaluation criterion, which is the **EU added value** (the extent to which the Intervention brings additional benefits to what would have resulted from Member States' interventions only), and;
- the **governing mechanisms** of the Intervention.

The definition of the 6 DAC + 1 EU evaluation criteria is contained for reference in the Annex VII.

The evaluation team shall furthermore consider whether gender, environment and climate change were mainstreamed; the relevant SDGs and their interlinkages were identified; the principle of Leave No-One Behind and the rights-based approach methodology was followed in the identification/formulation documents and the extent to which they have been reflected in the implementation of the Intervention, its governance and monitoring.

2.2.2 Indicative Evaluation Questions

The specific Evaluation Questions as formulated below are indicative.

The framework contractors are requested to further refine the Evaluation Questions in their Specific Contract Organisation and Methodology.

Based on the indicative EQs and further refinement, and following initial consultations and document analysis, the evaluation team will discuss them with the Evaluation Manager⁶ and propose in their Inception Report a complete and finalised set of Evaluation Questions with indication of specific Judgement Criteria and Indicators, as well as the relevant data collection sources and tools.

Once agreed through the approval of the Inception Report, the Evaluation Questions will become contractually binding.

Indicative Evaluation questions:

Effectiveness

EQ 1. To what extent are interventions financed under MARKUP effective - or expected to be effective - in achieving the expected effects all along the results chain? What main factors (financial, social, political, institutional, human factor) are facilitating the achievement of results, and which ones – if any – are preventing the beneficiary countries and final beneficiaries accessing the results?

Perspectives of impact

EQ 2. Are the early signs indicating the outcomes delivered by MARKUP are translated - or are expected to be translated - into the desired/expected impacts, namely in terms of achieving the strategic objectives/priorities to “Contribute to economic development in the EAC region, by increasing the value of both extra and intra-regional agricultural exports, with main focus on exports towards the European Union”?

EU added value

EQ 3. To what extent does the Intervention bring additional benefits to what would have resulted from:

- EU Member States interventions only?
- EAC Secretariat’s and Partner States interventions only?

Sustainability

EQ 4. To what extent are the benefits of the intervention going to continue or likely to continue, and what concrete actions are being put in place as to ensure sustainability of results?

Efficiency

EQ 5. How well are the different components coordinated between each other, and how synergic are they i.e. how well have they worked together to reach the intended results and objectives?

Governing mechanisms

EQ 6. To what extent are the MARKUP governing mechanisms effective and efficient in terms of ensuring quality and timely oversight and strategic direction to the Intervention as well as in ensuring main stakeholder’s buy-in?

Note: due consideration is to be given to the challenges to the governance because of the co-presence of both the regional and the national dimension, and because of the different implementation modalities.

EQ 7. Are the monitoring mechanisms and tools adequate to track achievement of results and used

⁶ The Evaluation Manager is the staff of the Contracting Authority managing the evaluation contract. In most cases this person will be the Operational manager of the Action(s) under evaluation.

effectively to support managerial and strategic decisions?

Relevance

EQ 8. To what extent does the Intervention objectives respond to beneficiaries’, country and partner/institution needs, policies and priorities, and are likely to continue to do so if circumstances change?

Coherence

EQ 9. To what extent is the Intervention compatible with other interventions in the countries, sectors or institutions covered?

2.3 Phases of the evaluation and required outputs

The evaluation process will be carried out in six phases:

- Inception
- Desk
- Field
- Synthesis
- Follow-up programme consultation
- Dissemination

The outputs of each phase are to be submitted at the end of the corresponding phases as specified in the synoptic table in section 2.3.1.

2.3.1 Synoptic table

The following table presents an overview of the key activities to be conducted within each phase and lists the outputs to be produced by the team as well as the key meetings with the Contracting Authority and the Reference Group. The main content of each output is described in Chapter 5.

A Field Phase will not be undertaken for the following Interventions: 2.A (2019/413-895); 3.A (2019/408-880); 3.B.1 (2020/419-935), 3.B.2 (2020/040-657), 3.B.3 (2020/420563), 3.B.4-6 (being finalised); 4.A (2019/414-048); 4.B (2019/413-820). Therefore, in relation to such interventions the assignment will require analysis of secondary evidence, as well as interviews and other techniques as relevant.

Phases of the evaluation	Key activities	Outputs and meetings
<u>Inception Phase</u>	<ul style="list-style-type: none"> • Initial document/data collection • Background analysis • Inception interviews • Stakeholder analysis • Reconstruction of the Intervention Logic • Revise the methodological design of the evaluation (Evaluation Questions with judgement criteria, indicators and methods of data collection and analysis) and evaluation matrix 	<ul style="list-style-type: none"> • Kick-off meeting with the MARKUP Evaluation Working Group via remote conference • Inception Note

Phases of the evaluation	Key activities	Outputs and meetings
<u>Desk Phase</u>	<ul style="list-style-type: none"> • In-depth document analysis (focused on the Evaluation Questions) • Interviews • Identification of information gaps and of hypotheses to be tested in the field phase • Methodological design of the Field Phase 	<ul style="list-style-type: none"> • Desk Report (inclusive of draft project/contract evaluation fiches, one for each Intervention not covered by the Field Phase) • Debriefing with the MARKUP Evaluation Working Group via remote
<u>Field Phase</u>	<ul style="list-style-type: none"> • Initial meetings at country level with all relevant stakeholders • Gathering of primary evidence with the use of interviews and the most appropriate techniques • Data collection and analysis 	<ul style="list-style-type: none"> • Intermediary Note • Slide Presentation of key findings of the field phase • Debriefing with the MARKUP Regional Technical Committee via remote (unless more convenient face-to-face)
<u>Synthesis phase</u>	<ul style="list-style-type: none"> • Final analysis of findings (with focus on the Evaluation Questions) • Formulation of the overall assessment, conclusions and recommendations • Reporting 	<ul style="list-style-type: none"> • Draft Final Report • Executive Summary according to the standard template published in the EVAL module • Slide presentation • Meeting with the MARKUP Regional Steering Committee via remote • Final Report
<u>Follow-up programme consultation phase</u>	<ul style="list-style-type: none"> • Interviews with key stakeholders • Elaborate a consultation paper • Facilitate consultations • Elaborate a Concept Note 	<ul style="list-style-type: none"> • Draft Concept Note • Debriefing with the MARKUP Regional Technical Committee via remote • Final Concept Note
<u>Dissemination phase</u>	<ul style="list-style-type: none"> • Final presentation of Final Report and Final Concept Note 	<ul style="list-style-type: none"> • Final presentation with the MARKUP Regional Steering Committee

2.3.2 Inception Phase

This phase aims at structuring the evaluation and clarifying the key issues to be addressed.

The phase will start with initial background study, to be conducted by the evaluators from home. It will then continue with a kick-off session via remote between the MARKUP Evaluation Working Group and the evaluators. Presence of all the evaluators is required. The meeting aims at arriving at a clear and shared understanding of the scope of the evaluation, its limitations and feasibility. It also serves to clarify expectations regarding evaluation outputs, the methodology to be used and, where necessary, to pass on additional or latest relevant information.

In the Inception phase, an initial document analysis of the most relevant documents will be undertaken (see annex II).

Further to a first desk review of the political, institutional and/or technical/cooperation framework of EU support to the East African Community, the evaluation team, in consultation with the Evaluation Manager, will reconstruct or as necessary construct, the Intervention Logic of the Intervention to be evaluated.

Furthermore, based on the Intervention Logic, the evaluators will develop a narrative explanation of the logic of the Intervention that describes how change is expected to happen within the Intervention, all along its results chain, i.e. Theory of Change. This explanation includes an assessment of the evidence underpinning this logic (especially between outputs and outcomes, and between outcomes and impact), and articulates the assumptions that must hold for the Intervention to work, as well as identification of the factors most likely to inhibit the change from happening.

Based on the Intervention Logic and the Theory of Change the evaluators will finalise i) the Evaluation Questions with the definition of judgement criteria and indicators, the selection of data collection tools and sources, ii) the evaluation methodology, and iii) the planning of the following phases.

The methodological approach will be represented in an Evaluation Design Matrix⁷, which will be included in the Inception Report. **The methodology of the evaluation should be gender sensitive, contemplate the use of sex- and age-disaggregated data and demonstrate how actions have contributed to progress on gender equality.**

The limitations faced or to be faced during the evaluation exercise will be discussed and mitigation measures described in the Inception Note. Finally, the work plan for the overall evaluation process will be presented and agreed in this phase; this work plan shall be in line with that proposed in the present ToR. Any modifications shall be justified and agreed with the Evaluation Manager.

On the basis of the information collected, the evaluation team should prepare an **Inception Note**; its content is described in Chapter 5.

The evaluation team will then discuss the Inception Note with the MARKUP Evaluation Working Group.

2.3.3 Desk Phase

This phase is when the in-depth document analysis takes place. The analysis should include a brief synthesis of the existing literature relevant to the Intervention.

The analysis of the relevant documents shall be systematic and reflect the methodology developed and approved during the Inception Phase.

Selected interviews via remote with the programme management, the EU Delegations to Tanzania and to the other EAC Partner States (excluding South Sudan) and key partners in the EAC will be conducted during this phase to support the analysis of secondary sources.

The activities to be conducted during this phase should allow for the provision of preliminary responses to each evaluation question, stating the information already gathered and its limitations. They will also identify the issues still to be covered and the preliminary hypotheses to be tested.

During this phase the evaluation team shall fine-tune the evaluation tools to be used during the Field Phase and describe the preparatory steps already taken and those to be taken for its organisation, including the list of people to be interviewed, dates and itinerary of visits, and attribution of tasks within the team.

⁷ *The Evaluation Matrix is a tool to structure the evaluation analysis (by defining judgement criteria and indicators for each evaluation question). It helps also to consider the most appropriate and feasible data collection method for each of the questions,*

At the end of the desk phase a **Desk Report** will be prepared.

A presentation by the evaluation team to the MARKUP Evaluation Working Group will take place via remote. Presence of all the evaluators is required.

2.3.4 Field Phase

Note: see Section 2.3.1 for a list of Interventions not covered in the Field Phase

The Field Phase starts after approval of the Desk Note by the Evaluation Manager.

The Field Phase aims at validating / changing the preliminary answers formulated during the Desk phase and further completing information through primary research.

If any significant deviation from the agreed work plan or schedule is perceived as creating a risk for the quality of the evaluation or not respecting the end of the validity of the specific contract, these elements are to be immediately discussed with the Evaluation Manager and, regarding the validity of the contract, corrective measures undertaken.

Whenever relevant, in the first days of the field phase visits in the different countries, the evaluation team shall hold a briefing meeting with the project / programme management, EU Delegation, national authorities and /or other relevant stakeholders.

During the field phase, the evaluation team shall ensure adequate contact and consultation with, and involvement of the different stakeholders; with the relevant government authorities and agencies. Throughout the mission the evaluation team will use the most reliable and appropriate sources of information, respect the rights of individuals to provide information in confidence, and be sensitive to the beliefs and customs of local social and cultural environments.

At the end of the field phase, the evaluation team will summarise its work, analyse the reliability and coverage of data collection, and present preliminary findings in a meeting with the MARKUP Regional Technical Committee via remote (unless more convenient face-to-face). Face-to-face (or remote) debriefings might also be organised at country level.

At the end of the Field Phase an **Intermediary Note** and a Slide Presentation will be prepared.

2.3.5 Synthesis Phase

This phase is devoted to the preparation by the contractor of **two distinct documents**: the **Executive Summary** and the **Final Report**, whose structures are described in the Annex III; it entails the analysis of the data collected during the desk and field phases to answer the Evaluation Questions and preparation of the overall assessment, conclusions and recommendations of the evaluation.

The evaluation team will present, in a single Report with Annexes, their findings, conclusions and recommendations in accordance with the structure in Annex III; a separate Executive Summary will be produced as well, following the compulsory format given in the EVAL module (see Annex III).

The evaluation team will make sure that:

- Their assessments are objective and balanced, statements are accurate and evidence-based, and recommendations realistic and clearly targeted.
- When drafting the report, they will acknowledge clearly where changes in the desired direction are known to be already taking place.

- The wording, inclusive of the abbreviations used, takes into account the audience as identified in art. 2.1 above.

The evaluation team will deliver and then present via remote the **Draft Final Report** to the MARKUP Regional Steering Committee to discuss the draft findings, conclusions and recommendations. Presence is required of all the team members.

The Evaluation Manager consolidates the comments expressed by the Reference Group members and sends them to the evaluation team for the report revision, together with a first version of the Quality Assessment Grid (QAG) assessing the quality of the Draft Final Report. The content of the QAG will be discussed with the evaluation team to verify if further improvements are required, and the evaluation team will be invited to comment on the conclusions formulated in the QAG(through the EVAL Module).

The evaluation team will then finalise the **Final Report** and the **Executive Summary** by addressing the relevant comments. While potential quality issues, factual errors or methodological problems should be corrected, comments linked to diverging judgements may be either accepted or rejected. In the latter instance, the evaluation team must explain the reasons in writing. After approval of the final report, the QAG will be updated and sent to the evaluators via EVAL Module.

2.3.6 Follow-up programme consultation phase

This phase will be devoted to provide a forward looking assessment on the **opportunity, options and modalities for a new follow-up Programme**, to be possibly financed in the framework of the next EU programming cycle.

It will include: interviews with key stakeholders, mainly to understand political priorities; elaboration of a consultation paper, to allow for structured consultations; facilitation of stakeholder consultation; and elaboration of a Concept Note for a new Programme.

Note: the Contracting Authority and the members of the Evaluation Working Group will strive to provide the Framework contractor with further guidance during the previous phases. This might include: guidance notes for EU regional programming, preliminary political priorities at EU and EAC regional and country level etc.

2.3.7 Dissemination phase

This phase is devoted to the **final presentation of the Final Report and Final Concept Note**, which will take place in Arusha (Tanzania). This will entail: preparation of presentation material; presentation and animation of discussions during an extraordinary meeting of the MARKUP Regional Steering Committee; elaboration of minutes and conclusions.

Live presence will be required of at least – as a minimum – the Team Leader, while participation of the other team members will be via remote.

Note: Regional Steering Committee members will participate either physically, if already based in Arusha, or remotely. No organisational related costs are foreseen for the framework contractor.

2.4 Specific Contract Organisation and Methodology (Technical offer)

The invited Framework Contractors will submit their specific Contract Organisation and Methodology by using the standard SIEA template B-VII-d-i and its annexes 1 and 2 (B-VII-d-ii).

The evaluation methodology proposed to undertake the assignment will be described in the Chapter 3 (Strategy and timetable of work) of the template B-VII-d-i.

Contractors will describe how their proposed methodology will address the cross-cutting issues mentioned in these Terms of Reference and notably gender equality and the empowerment of women. This will include (if applicable) the communication action messages, materials and management structures.

An alternative (plan B) Organisation and Methodology must be proposed to take into consideration the possibility for a prolonged or renewed COVID-19 pandemic.

2.5 Management and Steering of the evaluation

2.5.1 At the EU level

The evaluation is managed by the Evaluation Manager of the EUD to Tanzania and to EAC; the progress of the evaluation will be followed closely with the assistance of the main Reference Group, being the MARKUP Evaluation Working Group consisting of representatives from the EU Delegation to Tanzania, the EAC Secretariat, EABC, the MARKUP PCU, with GIZ and the International Trade Centre as observers.

Depending on the specific phase, as per synoptic table, it is proposed to work with larger Reference Groups i.e. the whole of the MARKUP Technical Committee (including as well EAC Partner States' MARKUP National Focal Points), or the whole of the MARKUP Steering Committee (including also other national authorities and agencies, EU Delegations in the EAC Partner States, private sector associations, other beneficiaries and other programme implementers).

The main functions of the Reference Group are:

- To define and validate the Evaluation Questions.
- To facilitate contacts between the evaluation team and the EU services and external stakeholders.
- To ensure that the evaluation team has access to and has consulted all relevant information sources and documents related to the Intervention.
- To discuss and comment on notes and reports delivered by the evaluation team. Comments by individual group members are compiled into a single document by the Evaluation Manager and subsequently transmitted to the evaluation team.
- To assist in feedback on the findings, conclusions, lessons and recommendations from the evaluation.
- To support the development of a proper follow-up action plan after completion of the evaluation.

2.5.2 At the Contractor level

Further to the Requirements set in the art. 6 of the Global Terms of Reference and in the Global Organisation and Methodology, respectively annexes II and III of the Framework contract SIEA 2018, the contractor is responsible for the quality of: the process; the evaluation design; the inputs and the outputs of the evaluation. In particular, it will:

- Support the Team Leader in its role, mainly from a team management perspective. In this regard, the contractor should make sure that, for each evaluation phase, specific tasks and outputs for each team member are clearly defined and understood.
- Provide backstopping and quality control of the evaluation team's work throughout the assignment.
- Ensure that the evaluators are adequately resourced to perform all required tasks within the time framework of the contract.

3 LOGISTICS AND TIMING

Please refer to Part B of the Terms of Reference.

3.1 Planning, including the period for notification for placement of the staff⁸

As part of the technical offer, the framework contractor must fill in the timetable in the Annex IV (to be finalised in the Inception Report). The 'Indicative dates' are not to be formulated as fixed dates but rather as days (or weeks, or months) from the beginning of the assignment (to be referenced as '0').

Sufficient forward planning is to be taken into account in order to ensure the active participation and consultation with government representatives, national / local or other stakeholders.

4 REQUIREMENTS

Please refer to Part B of the Terms of Reference.

The indicative Budget Breakdown to be submitted by the Framework Contractors will need to include daily expert fees, daily management fees, as well as (under "others") the following items: costs related to field missions, costs for dissemination.

5 REPORTS

For the list of reports, please refer to Part B of the Terms of Reference.

5.1 Use of the EVAL module by the evaluators

It is strongly recommended that the **submission of deliverables** by the selected contractor **be performed through their uploading in the EVAL Module**, an evaluation process management tool and repository of the European Commission. The selected contractor will receive access to online and offline guidance in order to operate with the module during the related Specific contract validity.

5.2 Number of report copies

Apart from their submission -preferably via the EVAL Module, the approved version of the Final Report will be also provided in 4 paper copies and in electronic version at no extra cost.

5.3 Formatting of reports

All reports will be produced using Font Arial or Times New Roman minimum letter size 11 and 12 respectively, single spacing, double sided. They will be sent in Word and PDF formats.

6 MONITORING AND EVALUATION

6.1 Content of reporting

The outputs must match quality standards. The text of the reports should be illustrated, as appropriate, with maps, graphs and tables; a map of the area(s) of Intervention is required (to be attached as Annex).

6.2 Comments on the outputs

For each report / output, the Evaluation Manager will send to the Contractor consolidated comments received from the Reference Group or the approval of the report within 15 calendar days, excluding for the draft Final Report for which the 30 calendar day limit applies.

⁸ As per art 16.4 a) of the General Conditions of the Framework Contract SIEA

The revised reports addressing the comments shall be submitted within 10 calendar days from the date of receipt of the comments. The evaluation team should provide a separate document explaining how and where comments have been integrated or the reason for not integrating certain comments, if this is the case.

6.3 Assessment of the quality of the Final Report and of the Executive Summary

The quality of the draft versions of the Final Report and of the Executive Summary will be assessed by the Evaluation Manager using the online Quality Assessment Grid (QAG) in the EVAL Module (text provided in Annex V). The Contractor is given – through the EVAL module - the possibility to comment on the assessments formulated by the Evaluation Manager. The QAG will then be reviewed following the submission of the final version of the Final Report and of the Executive Summary.

The compilation of the QAG will support/inform the compilation by the Evaluation Manager of the FWC SIEA's Specific Contract Performance Evaluation.

7 PRACTICAL INFORMATION

Please address any request for clarification and other communication to the following address: [REDACTED]

[REDACTED]

ANNEXES TO TOR - PART A

ANNEX I: SPECIFIC TECHNICAL EVALUATION CRITERIA

SPECIFIC TECHNICAL EVALUATION CRITERIA

RFS-SIEA-2018-4216

FWC SIEA 2018 - LOT 2 – Infrastructure, sustainable growth and jobs
EuropeAid/138778/DH/SER/multi

1. TECHNICAL EVALUATION CRITERIA

The Contracting Authority selects the offer with the best value for money using an 80/20 weighting between technical quality and price⁹.

Technical quality is evaluated on the basis of the following grid:

Criteria	Maximum
Total score for Organisation and Methodology	35
<ul style="list-style-type: none">Understanding of ToR and the aim of the services to be provided	10
<ul style="list-style-type: none">Overall methodological approach, quality control approach, appropriate mix of tools and estimate of difficulties and challenges	10
<ul style="list-style-type: none">Technical added value, backstopping and role of the involved members of the consortium	5
<ul style="list-style-type: none">Organisation of tasks including timetable	10
Score for the expertise of the proposed team	65
OVERALL TOTAL SCORE	100

2. TECHNICAL THRESHOLD

Any offer falling short of the technical threshold of 75 out of 100 points, is automatically rejected.

3. INTERVIEWS DURING THE EVALUATION OF THE OFFERS

N.A.

⁹ For more details about the 80/20 rule, please see the PRAG, chapter 3.3.10.5 - https://ec.europa.eu/europeaid/funding/about-funding-and-procedures/procedures-and-practical-guide-prag_en

ANNEX II: INFORMATION THAT WILL BE PROVIDED TO THE EVALUATION TEAM

This list includes both documents that will be gathered during tendering and documents that will be given to the evaluators after the signature of the contract.

- 1. EDF EA-SA-IO Regional Indicative Paper, EAC sub-envelope
- 2. Interventions to be evaluated – basic data (Excel Table)
- 3. Financing Agreements, Contracts (as listed in Section 1.2) and its Addenda
- 4. M&E Documents (including M&E Framework, MMES table – updated Logical Framework, M&E Reports, Alignment of Partner States Window Results and EAC Window)
- 5. Annual work-plans and Progress Reports
- 6. Regional Steering Committees (Minutes and Rules and procedures)
- 7. National Steering Committees (ToR of NSCs and NFPs; and Minutes of NSCs)
- 8. Regional Technical Committees (Minutes)
- 9. Communication and Visibility Plan, and report of C&V Workshops and C&W Working Group meetings
- 10. Final Reports of technical studies undertaken during implementation:
<https://www.eacmarkup.org/resources/publications>

Note: The evaluation team has to identify and obtain any other document worth analysing, through independent research and during interviews with relevant informed parties and stakeholders of the Intervention.

ANNEX III: STRUCTURE OF THE FINAL REPORT AND OF THE EXECUTIVE SUMMARY

The contractor will deliver – preferably through their uploading in the EVAL Module- two distinct documents: the **Final Report** and the **Executive Summary**. They must be consistent, concise and clear and free of linguistic errors both in the original version and in their translation – if foreseen.

The report layout and sequence shall allow to easily capture the specificities of each intervention and, at the same, time the sum of these parts.

The Final Report should not be longer than the number of pages indicated in Chapter 6. Additional information on the overall context of the Intervention, description of methodology and analysis of findings should be reported in an Annex to the main text.

The presentation must be properly spaced and the use of clear graphs, tables and short paragraphs is strongly recommended.

The cover page of the Final Report shall carry the following text:

“This evaluation is supported and guided by the European Commission and presented by [name of consulting firm]. The report does not necessarily reflect the views and opinions of the European Commission”.

Executive Summary

A short, tightly-drafted, to-the-point and free-standing Executive Summary. It should focus on the key purpose or issues of the evaluation, outline the main analytical points, and clearly indicate the main conclusions, lessons to be learned and specific recommendations. It is to be prepared by using the specific format foreseen in the EVAL Module.

The main sections of the evaluation report shall be as follows:

1. Introduction

A description of the Intervention, of the relevant country/region/sector background and of the evaluation, providing the reader with sufficient methodological explanations to gauge the credibility of the conclusions and to acknowledge limitations or weaknesses, where relevant.

2. Answered questions/ Findings

A chapter presenting the answers to the Evaluation Questions, supported by evidence and reasoning.

3. Overall assessment

A chapter synthesising all answers to Evaluation Questions into an overall assessment of the Intervention. The detailed structure of the overall assessment should be refined during the evaluation process. The relevant chapter has to articulate all the findings, conclusions and lessons in a way that reflects their importance and facilitates the reading. The structure should not follow the Evaluation Questions, the logical framework or the evaluation criteria.

4. Conclusions and Recommendations

4.3 Lessons learnt

Lessons learnt generalise findings and translate past experience into relevant knowledge that should support decision making, improve performance and promote the achievement of better results. Ideally, they should support the work of both the relevant European and partner institutions.

4.1 Conclusions

This chapter contains the conclusions of the evaluation, organised per evaluation criterion.

In order to allow better communication of the evaluation messages that are addressed to the Commission, a table organising the conclusions by order of importance can be presented, or a paragraph or sub-chapter emphasizing the 3 or 4 major conclusions organised by order of importance, while avoiding being repetitive.

4.2 Recommendations

They are intended to improve or reform the Intervention in the framework of the cycle under way, or to prepare the design of a new Intervention for the next cycle.

Recommendations must be clustered and prioritised, and carefully targeted to the appropriate audiences at all levels, especially within the Commission structure.

5. Annexes to the report

The report should include the following annexes:

- The Terms of Reference of the evaluation
- The names of the evaluators (CVs can be shown, but summarised and limited to one page per person)
- Detailed evaluation methodology including: options taken, difficulties encountered and limitations; detail of tools and analyses.
- Evaluation Matrix
- Intervention logic / Logical Framework matrices (planned/real and improved/updated)
- Relevant geographic map(s) where the Intervention took place
- List of persons/organisations consulted
- Literature and documentation consulted
- Other technical annexes (e.g. statistical analyses, tables of contents and figures, matrix of evidence, databases) as relevant
- Detailed answer to the Evaluation Questions, judgement criteria and indicators, inclusive of project/contract evaluation fiches

- Usage of funds summary sheet (showing usage of funds per intervention - in absolute terms and as a percentage of total allocated funds). Cut-off date would best be an agreed date preceding the evaluation. It will be based on data submitted by each single implementer. Note: the report format can be based (or improved) and update the annexed 'Consolidated financial implementation summary' developed by the MARKUP PCU.

ANNEX IV: PLANNING SCHEDULE

This annex must be included by Framework Contractors in their Specific Contract Organisation and Methodology and forms an integral part of it. Framework Contractors can add as many rows and columns as needed.

The phases of the evaluation shall reflect those indicated in the present Terms of Reference.

		Indicative Duration in working days ¹⁰		
Activity	Location	Team Leader	Evaluator ...	Indicative Dates
Inception phase: total days				
•				
•				
Desk phase: total days				
•				
•				
Field phase: total days				
•				
•				
Synthesis phase: total days				
•				
•				
Follow-up programme consultation phase: total days				
•				

¹⁰Add one column per each evaluator

		Indicative Duration in working days ¹⁰		
Activity	Location	Team Leader	Evaluator ...	Indicative Dates
Dissemination phase: total days				
•				
•				
TOTAL working days (maximum)				

ANNEX V: QUALITY ASSESSMENT GRID

The quality of the Final Report will be assessed by the Evaluation Manager (since the submission of the draft Report and Executive Summary) using the following quality assessment grid, which is included in the **EVALModule**; the grid will be shared with the evaluation team, which will have the possibility to include their comments.

Intervention (Project/Programme) evaluation –Quality Assessment Grid Final Report

Evaluation data			
Evaluation title			
Evaluation managed by		Type of evaluation	
Ref. of the evaluation contract		EVAL ref.	
Evaluation budget			
EUD/Unit in charge		Evaluation Manager	
Evaluation dates	Start:	End:	
Date of draft final report		Date of Response of the Services	
Comments			
Project data			
Main project evaluated			
CRIS/OPSYS # of evaluated project(s)			
DAC Sector			
Contractor's details			
Evaluation Team Leader		Evaluation Contractor	
Evaluation expert(s)			

Legend: scores and their meaning

Very satisfactory: criterion entirely fulfilled in a clear and appropriate way

Satisfactory: criterion fulfilled

Unsatisfactory: criterion partly fulfilled

Very unsatisfactory: criterion mostly not fulfilled or absent

The evaluation report is assessed as follows

1. Clarity of the report

This criterion analyses the extent to which both the Executive Summary and the Final Report:

- Are easily readable, understandable and accessible to the relevant target readers
- Highlight the key messages
- The length of the various chapters and annexes of the Report are well balanced
- Contain relevant graphs, tables and charts facilitating understanding
- Contain a list of acronyms (only the Report)
- Avoid unnecessary duplications
- Have been language checked for unclear formulations, misspelling and grammar errors
- The Executive Summary is an appropriate summary of the full report and is a free-standing document



Strengths	Weaknesses	Score
Contractor's comments	Contractor's comments	

2. Reliability of data and robustness of evidence

This criterion analyses the extent to which:

- Data/evidence was gathered as defined in the methodology
- The report considers, when relevant, evidence from EU and/or other partners' relevant studies, monitoring reports and/or evaluations
- The report contains a clear description of the limitations of the evidence, the risks of bias and the mitigating measures





Strengths	Weaknesses	Score
Contractor's comments	Contractor's comments	

3. Validity of Findings

This criterion analyses the extent to which:

- Findings derive from the evidence gathered
- Findings address all selected evaluation criteria
- Findings result from an appropriate triangulation of different, clearly identified sources



<ul style="list-style-type: none"> When assessing the effect of the EU intervention, the findings describe and explain the most relevant cause/effect links between outputs, outcomes and impacts The analysis of evidence is comprehensive and takes into consideration contextual and external factors 		
Strengths	Weaknesses	Score
Contractor's comments	Contractor's comments	
4. Validity of conclusions		
<p>This criterion analyses the extent to which:</p> <ul style="list-style-type: none"> Conclusions are logically linked to the findings, and go beyond them to provide a comprehensive analysis Conclusions appropriately address the selected evaluation criteria and all the evaluation questions, including the relevant cross-cutting dimensions Conclusions take into consideration the various stakeholder groups of the evaluation Conclusions are coherent and balanced (i.e. they present a credible picture of both strengths and weaknesses), and are free of personal or partisan considerations (If relevant) whether the report indicates when there are not sufficient findings to conclude on specific issues 		
		
Strengths	Weaknesses	Score
Contractor's comments	Contractor's comments	
5. Usefulness of recommendations		
<p>This criterion analyses the extent to which the recommendations:</p> <ul style="list-style-type: none"> Are clearly linked to and derive from the conclusions Are concrete, achievable and realistic Are targeted to specific addressees Are clustered (if relevant), prioritised, and possibly time-bound (If relevant) provide advice for the Intervention's exit strategy, post-Intervention sustainability or for adjusting Intervention's design or plans 		
		
Strengths	Weaknesses	Score
Contractor's comments	Contractor's comments	

6. Appropriateness of lessons learnt analysis (if requested by the ToR or included by the evaluators)	
<p>This criterion is to be assessed only when requested by the ToR or included by evaluators and is not to be scored. It analyses the extent to which:</p> <ul style="list-style-type: none"> • Lessons are identified • When relevant, they are generalised in terms of wider relevance for the institution(s) 	
Strengths	Weaknesses
Contractor's comments	Contractor's comments
Final comments on the overall quality of the report	Overall score



ANNEX VI: LOGICAL FRAMEWORK MATRIX (LOGFRAME) OF THE EVALUATED ACTIONS

- 1) **MMES Table** (updated detailed MARKUP Logframe) (– attached)

- 2) **Logframes** included in each single **implementation contract**

ANNEX VII: THE EVALUATION CRITERIA

The definition and the number of the DAC evaluation criteria has changed following the release (10 December 2019) of the document “Evaluation Criteria: Adapted Definitions and Principles for Use” (DCD/DAC(2019)58/FINAL).

The evaluators will ensure that their analysis will respect the new definitions of these criteria and their explanatory notes. Reference and guidance documents are being developed and can be found here: <https://www.oecd.org/dac/evaluation/daccriteriaforevaluatingdevelopmentassistance.htm>

Unless otherwise specified in the chapter 2.2.1, the evaluation will assess the intervention using the six standard DAC evaluation criteria and the EU added value, which is a specific EU evaluation criterion. Their definitions are reported below:

DAC CRITERIA

- **Relevance:** the “extent to which the intervention objectives and design respond to beneficiaries’, global, country, and partner/institution needs, policies, and priorities, and continue to do so if circumstances change.”
- **Coherence:** the “compatibility of the intervention with other interventions in a country, sector or institution.”
- **Effectiveness:** the “extent to which the intervention achieved, or is expected to achieve, its objectives, and its results, including any differential results across groups.”
- **Efficiency:** the “extent to which the intervention delivers, or is likely to deliver, results in an economic and timely way.”
- **Impact:** the “extent to which the intervention has generated or is expected to generate significant positive or negative, intended or unintended, higher-level effects.”
- **Sustainability:** the “extent to which the net benefits of the intervention continue or are likely to continue.”

EU-SPECIFIC CRITERION

- **EU added value:** the extent to which the Intervention brings additional benefits to what would have resulted from Member States' interventions only in the partner country. It directly stems from the principle of subsidiarity defined in the Article 5 of the Treaty on European Union (<https://www.europarl.europa.eu/factsheets/en/sheet/7/the-principle-of-subsidiarity>).

TERMS OF REFERENCE – PART B

BACKGROUND INFORMATION

1. Benefitting Zone

Angola Belgium Burundi Botswana Democratic Republic of the Congo Djibouti Eritrea Ethiopia Kenya Comoros Madagascar Mauritius Malawi Namibia Rwanda Seychelles Sudan Somalia Eswatini Tanzania Uganda Zambia Zimbabwe South Sudan

2. Contracting authority

The European Union, represented by the European Commission, B-1049 Brussels, Belgium.

3. Contract language

English

LOCATION AND DURATION

4. Location

- Normal place of posting of the specific assignment: Normal place of posting of the specific assignment: home-based
- Mission(s) outside the normal place of posting and duration(s): Field visits will take place during the Field Phase covering Burundi, Kenya, Rwanda, Tanzania and Uganda; additionally the final presentation seminar will take place in Arusha (Tanzania) at the EAC Headquarters.

5. Start date and period of implementation

The indicative start date is 14/06/2021 and the period of implementation of the contract will be 365 days from this date (indicative end date: 14/06/2022).

REQUIREMENTS

6. Expertise

The minimum requirements covered by the team of experts as a whole are detailed below:

- Qualifications and skills required for the team: Category I experts: - at least Master level degree in a relevant thematic subject as well as at least one additional certificate (obtained after graduation) in a relevant thematic subject; - strong technical leadership in SME business development and exports, including investment and access to finance, as well as market access and trade facilitation; - at least one of Category I experts has a certificate (obtained after graduation) in the evaluation of development cooperation projects. Category II experts: at least University level degree in a relevant subject; strong technical leadership in agribusiness development and exports
- General professional experience of the team: Category I experts: - a cumulated experience of at least 12 years in designing and/or managing complex development cooperation programmes in

relevant sectors; - good experience in leadership and strategic management of a project team; - proven experience in project management, coordination, cooperation and negotiation with private sector stakeholders, business associations, financial institutions, high level government officials, donor partners and a multitude of local stakeholders. Category II experts: a cumulated experience of at least 6 years in designing and/or managing business development related programmes in relevant sectors

- Specific professional experience of the team: Category I experts: - deep experience with: SME business development and exports, including investment and access to finance, as well as market access and trade facilitation; - at least one Category I expert has good experience with export-oriented agribusiness development, distribution channels, and value chain upgrading; - at least 2 successful assignments in the last 5 years evaluating development cooperation programmes in related sectors. Category II experts: - deep knowledge of export-oriented agribusiness development; - preferably, previous experience in evaluating development cooperation programmes in the agribusiness sector. **ADDITIONAL REQUIREMENTS OF THE TEAM:** The team as a whole is requested to have: direct experience and good understanding of the horticultural sector (i.e. avocado, spices etc.) and the industrial crops sector (i.e. coffee, tea, cocoa etc.); experience in managing or designing development cooperation programmes in at least one of the two sectors. As a preference, the team as a whole will also have experience in working directly for a private company whose main business is export of some of the above mentioned products. Preferably, familiarity with agribusiness in Sub-Saharan Africa and with Eastern and Southern African regional integration. Fully conversant with the principles and working methods of project cycle management and European Commission aid delivery methods. Preferably, experience with EU development cooperation financial instruments.
- Language skills of the team: English: no expert shall possess below a level C1 expertise. Swahili: at least one expert shall possess at least a B2 level expertise. French: at least one expert shall possess at least a B2 level expertise. Languages levels are defined for understanding, speaking and writing skills by the Common European Framework of Reference for Languages available at <https://europass.cedefop.europa.eu/en/resources/european-language-levels-cefrand> shall be demonstrated by certificates or by past relevant experience.

Additional expertise requirements for the team composition:

Position	Expert category	Minimum requirements	Minimum number of working days	Additional information
Expert	Cat. II (>6 years of experience)	See above section	34	A minimum of 1 evaluator is required. Minimum total number of days in the field: 10
Expert	Cat. I (>12 years of experience)	See section above	96	A minimum of 2 evaluators is required. Minimum total number of days in the field: 37. In particular,

Position	Expert category	Minimum requirements	Minimum number of working days	Additional information
				<p>the Team Leader (to be identified in the Organisation and Methodology and in the Financial Offer) is expected to be a Cat I expert, possess a demonstrable senior evaluation expertise coherent with the requirements of this assignment and not provide less than 50 working days, out of which at least 19 in the field (namely for Field and Dissemination phases).</p>

7. Incidental expenditure

No incidental expenditure provided for in this contract.

8. Lump sums

No lump sums provided for in this contract.

9. Expenditure verification

No expenditure verification report is required.

10. Other details

No other details provided for in this contract.

REPORTS AND DELIVERABLES

11. Reports and deliverables requirements

Title	Content	Language	Submission timing or deadline
Desk report	As per ToR	English	Within 6 Week(s) After the project start
CN - Follow-up Programme	As per ToR	English	Within 17 Week(s) After the project start
Progress report	As per ToR - Intermediary report, at end of Field Phase	English	Within 11 Week(s) After the project start
Draft final report	As per ToR	English	Within 14 Week(s) After the project start
Draft Executive Summary	As per ToR	English	Within 14 Week(s) After the project start
Final report	As per ToR	English	Within 16 Week(s) After the project start
Inception report	As per ToR	English	Within 2 Week(s) After the project start
Executive Summary	As per ToR	English	Within 16 Week(s) After the project start
Dissemination - final presentation	As per ToR	English	Within 23 Week(s) After the project start
Draft CN - Follow-up Programme	As per ToR	English	Within 16 Week(s) After the project start

Annex 4 – Evaluation Matrix

While respecting the numbering of the EQs of the ToR, the evaluators re-organized the sequence of the EQs by ordering them according to the OECD/DAC criteria plus the specific criterion that applies to the EU. This proposal was agreed with the approval of the Inception Report of the MTE:

Evaluation Questions	Judgement criteria	Indicators	Sources of information
<p>EQ 8. Relevance: <i>To what extent do the Intervention objectives respond to beneficiaries', country and partner/institution needs, policies and priorities, and are likely to continue to do so if circumstances change?</i></p>	<p>The collaboration of EAC Partner States in areas of common interest promote the regional economic integration agenda in the agricultural sector</p> <p>Participation and capacity building in enhancing the regional and national value-chains</p>	<ul style="list-style-type: none"> ▪ # of trade policies and regulations improved through advocacy ▪ # of standards for produce and products approved. ▪ # and extent that the capacities of SMEs are enhanced in trade and competitiveness, ▪ a comprehensive national trade policy effectively developed, adopted and in course of implementation. ▪ Harmonized criteria for registration and certification of pre-packaged foods and a roadmap for implementation were developed and approved 	<ul style="list-style-type: none"> ▪ Literature review ▪ Interviews with key stakeholders ▪ National strategies and policies ▪ National packaging and certification standards and regimes
<p>EQ1: Effectiveness <i>(i) To what extent are interventions financed under MARKUP effective - or expected to be effective – in achieving the expected effects all along the results chain?</i></p>	<p>The degree to which the Action is achieving the expected results both in the EAC and in the Partner States Window</p> <p>The results of the Action in terms of adoption of policy documents, guidelines and/or standards</p>	<ul style="list-style-type: none"> ▪ Planned reforms achieved ▪ institutions reporting improved operational and managerial performance as a result of training, capacity building and Negotiations conducted on informed basis ▪ # of SMEs receiving financing through access to finance boot camps and linkages with financial services providers ▪ reduced SPS and TBT challenges due to improvement ▪ Quality of expertise developed ▪ Satisfaction of beneficiaries ▪ Strengthened capacities apply new working methods 	<ul style="list-style-type: none"> ▪ Project progress reports ▪ Project deliverables ▪ Key Interlocutors Interviews ▪ Trainees' interviews ▪ Press articles
<p><i>(ii) What main factors (financial, social, political, institutional, human factor) are facilitating the achievement of results?</i></p>	<p>The quality of outputs is helping address Beneficiaries' identified needs and constraints</p>	<ul style="list-style-type: none"> ▪ Training and capacity building activities are directed to the main institutions' beneficiaries and the private sector ▪ Increased number of trading partners accepting non-traditionally traded products from ▪ Market information frequency ▪ Export and aggregation associations ▪ Access to finance mechanisms ▪ Critical remarks that beneficiaries can make about the programme: what actions were most beneficial to the stakeholders? ▪ Mapped a total # of exporters and processors of particular value 	<ul style="list-style-type: none"> ▪ Project progress reports ▪ Project deliverables ▪ Key Interlocutors Interviews ▪ Beneficiaries' interviews ▪ Lists of participants for trainings ▪ Participating Financial institutions, Grants and Venture capitals

<p>(iii) Which ones – if any – are preventing the beneficiary countries and final beneficiaries accessing the results?</p>	<p>Capacity-building activities need to be tailor-made for Beneficiaries' needs</p>	<p>chains</p> <ul style="list-style-type: none"> ▪ Local Rules and regulations ▪ National Policies ▪ Political decisions ▪ Farmer Associations ▪ Funding models ▪ Governance and Poor coordination ▪ delays in implementing the Matching Grants ▪ Delays in recruitment of activity delivery Agents 	<ul style="list-style-type: none"> ▪ Risks and assumptions matrices in reports and agenda of Programme Steering Committee (PSC)
<p>EQ 5. Efficiency How well are the different components coordinated between each other, and how synergic are they i.e. how well have they worked together to reach the intended results and objectives?</p>	<p>Inputs/resources provided by the various stakeholders are adequate for achieving the planned results</p>	<ul style="list-style-type: none"> ▪ Improved quality compliance and acceptability of EAC products ▪ Completed activities compared against planned ones ▪ Impact of possible non-fulfilment of diagnostics and trainings' contracts ▪ linkages between exporters and buyers self-sustaining to ensure continued performance after the end of MARKUP ▪ Frequency of share residues monitoring and food safety reports with coordination units and other Partner States ▪ SMEs accessing finances, markets, Market information, 	<ul style="list-style-type: none"> ▪ Project Progress Reports ▪ Key Interlocutors Interviews ▪ PSC Minutes ▪ Lists of exporters, Aggregators ▪ Information platform Exploitations
<p>EQ2 Perspectives of impact: Are the early signs indicating the outcomes delivered by MARKUP are translated - or are expected to be translated - into the desired/expected impacts, namely in terms of achieving the strategic objectives/priorities to "Contribute to economic development in the EAC region, by increasing the value of both extra and intra-regional agricultural exports, with main focus on exports towards the European Union"?</p>	<p>The food and nutrition security situation in EAC is improving Exports are increasing at the regional level and to the EU markets</p>	<ul style="list-style-type: none"> ▪ Quality-compliant exports flow across the EAC and EU ▪ Frequency, Cost and increased # of products exporters and input importers' operations in EAC. ▪ Quality and safety of products for the domestic market. ▪ Quality of surplus products for export outside the EAC and African region ▪ Examples of increased access to export markets. ▪ # of non-compliant food products withdrawn from the domestic market ▪ Level of adaptation of staff (by number and/or training/ skill development) in relation to the increased capacities of trade-related institutions. 	<ul style="list-style-type: none"> ▪ Literature review ▪ Trade and industry statistics ▪ Project Progress Reports ▪ Key Interlocutors Interviews
<p>EQ 3. EU added value: To what extent does the Intervention bring additional benefits to what would have resulted from: (a). EU Member States interventions only? (b). EAC Secretariat's and Partner States interventions only?</p>	<p>The programme is introducing successful tools to strengthen and expand capacity development and ownership</p> <p>The planning and consultation process avoid overlapping with other ongoing interventions and</p>	<ul style="list-style-type: none"> ▪ Attribution or rate of participation to the same impact ▪ # of complementarities with other projects in terms of improved governance of domestic and international trade ▪ List of other programmes aimed at the same broad overall issues: how far has EAC MARKUP addressed these issues? ▪ Collaborations with other GIZ/EU/KfW/SIDA actions in 	<ul style="list-style-type: none"> ▪ Literature review ▪ Project Progress Reports ▪ Key Interlocutors Interviews

	creates synergies.	private sector development in the regions and partner states. <ul style="list-style-type: none"> ▪ EU Perception in relation to MARKUP ▪ Level of perception that the benefits brought by this programme to EAC are the result of EU interventions 	
<p>EQ 4 Sustainability: (i). To what extent are the benefits of the intervention going to continue or likely to continue, and</p> <p>(ii). what concrete actions are being put in place to ensure sustainability of results?</p>	<p>The continuity of Action is ensured by the Beneficiary.</p> <p>The policy orientations are reflected in the current and foreseen policies to remove trade barriers and adopt other relevant measures to strengthen the value-chains</p> <p>MS commitment in terms of financial sustainability is not ensured in all relevant domains</p>	<ul style="list-style-type: none"> ▪ Relevant decision-making based on Learnings from actions across partner states and strengthened capacities. ▪ Financial and technical sustainability of new institutions ▪ Strengthened capacities remain within each supported institution ▪ Process or developed plans to make institutions sustainable ▪ State partners Government funding is adequately budgeted and allocated in their window ▪ Examples of improved procedures to support certification of technical services according to international certifications such as ISO and/or GLP ▪ # Ministries of departments of stage supported enhancing food safety regulation by providing options on establishing autonomous regulatory authority for food safety within partners states ▪ # of new procedures and guidelines adopted by relevant regulatory authorities ▪ ISO accreditation of institutions / Outcomes of periodic Accreditation audits (on both SPS and TBT-reduction related institutions) ▪ # of actions toward Regional harmonisation of standards and regulations 	<ul style="list-style-type: none"> ▪ Literature review ▪ Project Progress Reports ▪ Key Interlocutors Interviews ▪ Press articles ▪ Government budget ▪ EAC regional integration plans in the Agricultural value chain and trading sectors of concern ▪ Project Progress Reports ▪ Key Interlocutors Interviews ▪ National strategies / plans
<p>EQ 6. Governing mechanisms To what extent are the MARKUP governing mechanisms effective and efficient in terms of ensuring quality and timely oversight and strategic direction to the Intervention as well as in ensuring main stakeholder's buy-in? Note: due consideration is to be given to the challenges to the governance because of the co-presence of both the regional and the national</p>	<p>The chosen implementation mechanism and governing structures in place are conducive to achieving the expected results.</p> <p>Governing mechanisms ensure adequate coordination and communication among implementing partners</p>	<ul style="list-style-type: none"> ▪ Coordination meetings ▪ # of updated and introduced new indicators to the MARKUP Monitoring and Evaluation System (MMES) following engagement with Regional and National Steering Committees 	<ul style="list-style-type: none"> ▪ Project Progress Reports ▪ Key Interlocutors Interviews

<p>dimensions, and because of the different implementation modalities.</p>			
<p>EQ 7. Are the <i>monitoring</i> mechanisms and tools adequate to track achievement of results and used effectively to support managerial and strategic decisions?</p>	<p>The programme M&E (reporting and framework/s) contributes to a better understanding and utilization of project outputs and outcomes among stakeholders and partners</p>	<ul style="list-style-type: none"> ▪ Monitoring system in place ▪ # frequency of residue measurement reports ▪ # committee feedback on progress ▪ Monitoring of SPS and TBT measures 	
<p>EQ 9. Coherence: <i>To what extent is the Intervention compatible with other interventions in the countries, sectors, or institutions covered?</i></p>	<p>Degree of complementarity between sector policies and programmes at the regional and country level</p>	<ul style="list-style-type: none"> ▪ Working with Climate smart Agriculture projects ▪ Increasing Intra and Inter Regional Trade and Commerce and trade institutional Infrastructure ▪ Collaboration with Actions of TMEA 	<ul style="list-style-type: none"> ▪ Project documents ▪ Visibility action plan ▪ Project deliverables ▪ Press articles ▪ Interviews

Annex 5 – Reconstructed Intervention Logic

The project's initial intervention logic⁷¹

Overall, MARKUP was conceived to support EAC (both the Community and its Member States) efforts to improve the regional trade enabling environment as well as enterprise export competitiveness. It was deemed to do so with a commodity-based approach focusing only on specific commodities of significant importance for regional exports.

Interventions at the enterprise/farm level were expected to support export competitiveness through enhancing capacities to meet international standards and market requirements.

The priority was placed on promoting SMEs as drivers of the target value chains, with SMEs providing, in turn, enhanced services/benefits to the farmers within their supply chains.

MARKUP was designed to combine broad-based enterprise capacity development (quality, exporter training, etc.) with targeted enterprise upgrading (company level supply-chain management and mentorship, value addition related interventions etc.). This was linked with follow-on market development and targeted matchmaking "from the product to the market".

MARKUP was also conceptualized as an attempt to ensure maximum support from buyers to farmers and SMEs, especially through investments for industry certifications, traceability and processing/technology upgrades.

To ensure the long-term sustainability of the EAC's drive for regional integration and overall export competitiveness enhancement, MARKUP logic also considered associating itself closely with capacity and institution building at meso and macro levels. At meso level, it would enhance capacities of business membership organisations and trade and investment support institutions to provide selected sectors with export/investment-oriented support services; at macro level, it would contribute to improving the enabling environment for business through trade facilitation actions, reduction of non-tariff barriers and enhancement of the national quality infrastructure systems.

Last but not least, in supporting access to affordable credit, MARKUP would make possible investments to boost productivity, quality and market access. By crowding in private sector investments together with donor and government interventions, MARKUP was aimed at providing a virtuous stimulus to unleash target sectors potential for growth, job creation and poverty reduction.

Reconstructed intervention logic

Based on the above summary of the Intervention Logic developed at the time of the programme design, the evaluators are presenting hereby an interpretation of the logic of the Intervention that has effectively emerged during the implementation of the ongoing contracts. This reconstruction of the intervention logic is based on the review of the profuse documentation already developed by the various units responsible for implementing MARKUP.

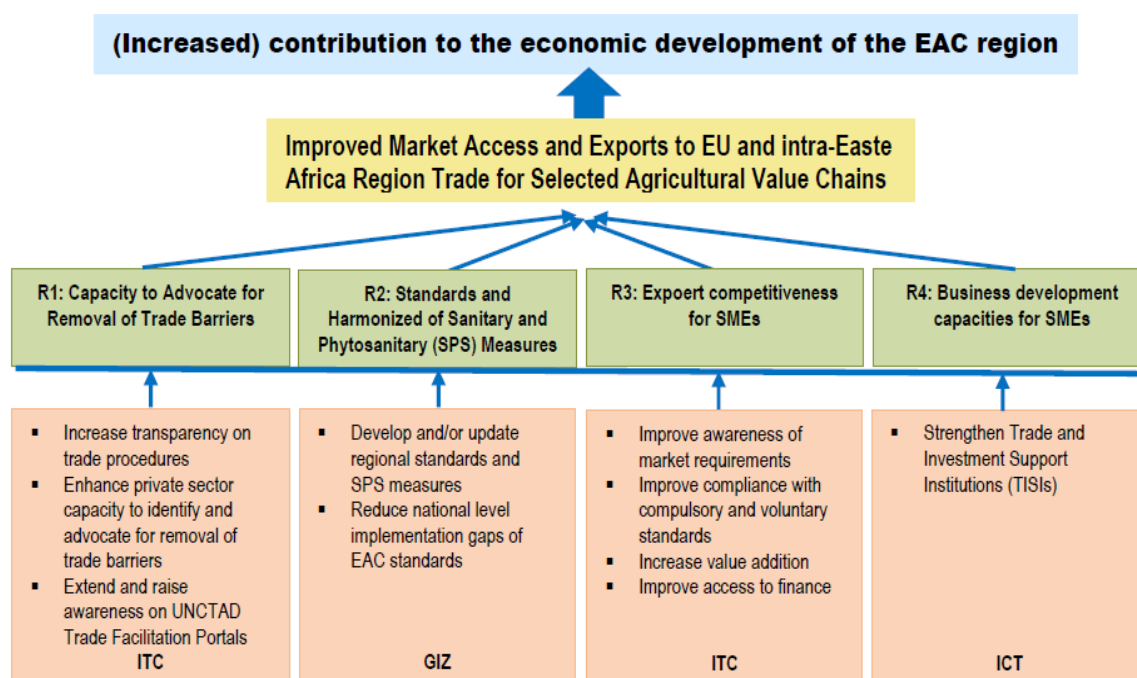
In first place, it must be said that, as shown in Figure 3 in section 1.3, the implementation of the EU MARKUP programme has, in effect, resulted in the construction of an "umbrella" (or a "container") that encompasses a number of separate projects currently in course of implementation through different modalities and by diverse executing agencies.

The ultimate combined objective of all these interventions is to create a certain degree of convergence towards the realisation of the overall goal to enhance the EAC region's capacity to exploit its trade-driven growth potential. This is expected to happen through the strengthening of both the supply side and market access for some key export-oriented sectors,

⁷¹ FA RSO/FED 2017/038545, section 1.3. Intervention Logic

such as agro-industrial crops (*coffee, tea and cacao*) and horticulture, with the ultimate goal of supporting participation in regional and global value chains.

Overall MARKUP Reconstructed Intervention Logic



In addition to the structure illustrated in the above graph, MARKUP includes interventions at the country level, known as the “Partner-State Window”. Each Window has its own Intervention Logic.

The respective result areas and activities are not interdependent but amalgamated through four Clusters that represent the four expected results of the programme:

- ◆ Cluster 1 – Analysis, Debate and Advocacy for Reducing Trade Barriers
- ◆ Cluster 2 – Improving Standards, SPS Measures and National Quality Systems
- ◆ Cluster 3 – Enhancing Business Capacities for Export Competitiveness
- ◆ Cluster 4 – Improving the business development capacities for SMEs

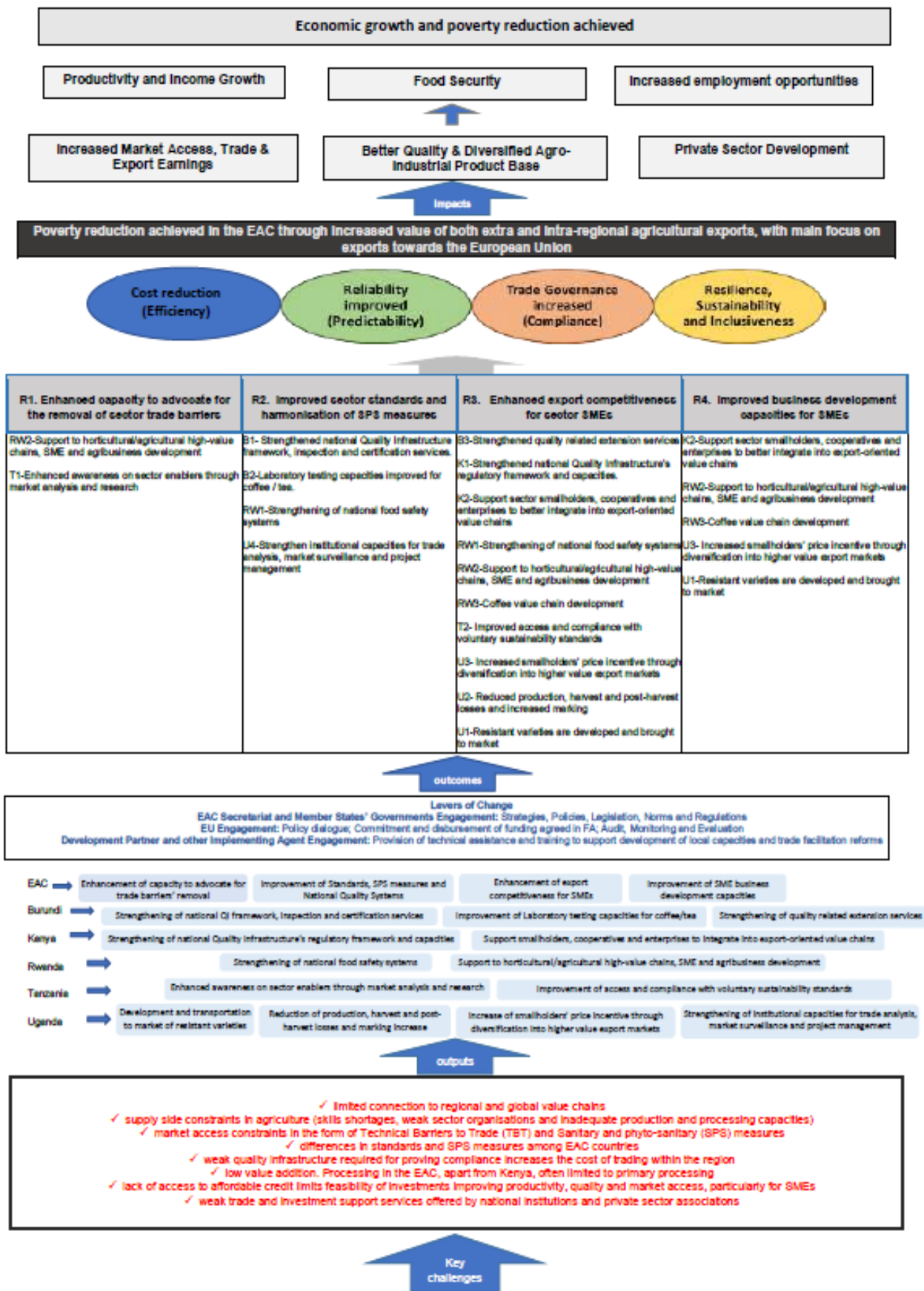
The reconstructed intervention logic of MARKUP is presented in Figure 5 with a Theory of Change model, which has been prepared by the evaluators with the assistance of a matrix produced by the project itself:

MARKUP – Alignment of EAC and Partner States Window Activities into Results Clusters

	Cluster 1 Analysis, Debate and Advocacy for Reducing Trade Barriers	Cluster 2 Improving Standards, SPS Measures and National Quality Systems	Cluster 3 Enhancing Business Capacities for Export Competitiveness	Cluster 4 Improving the business development capacities for SMEs
EAC Window				
R1-Enhanced capacity to advocate for the removal of sector trade barriers				
R2-Improved sector standards and harmonisation of SPS measures				

R3-Enhanced export competitiveness for sector SMEs				
R4-Improved business development capacities for sector SMEs				
Partner States Window				
BURUNDI				
B1- Strengthened national Quality Infrastructure framework, inspection and certification services.				
B2-Laboratory testing capacities improved for coffee/tea.				
B3-Strengthened quality-related extension services				
KENYA				
K1-Strengthened national Quality Infrastructure's regulatory framework and capacities.				
K2-Support sector smallholders, cooperatives and enterprises to better integrate into export-oriented value chains				
RWANDA				
RW1-Strengthening of national food safety systems				
RW2-Support to horticultural/agricultural high-value chains, SME and agribusiness development				
RW3-Coffee value chain development				
TANZANIA				
T1-Enhanced awareness of sector enablers through market analysis and research				
T2- Improved access and compliance with voluntary sustainability standards				
UGANDA				
U1-Resistant varieties are developed and brought to market				
U2- Reduced production, harvest and post-harvest losses and increased marketing				
U3- Increased smallholders' price incentive through diversification into higher value export markets				
U4-Strengthen institutional capacities for trade analysis, market surveillance and project management				

Reconstructed Theory of Change



The ToC is the result of the evaluators' interpretation and understanding of the changes aimed at supporting the reforms pursued by the EAC and its Partner States through the implementation of this project. This ToC has not resulted from a participatory process, given the fact that is just a theoretical effort made at a very early stage of the mid-term evaluation, and when the programme has been under implementation for over three years.

MARKUP's ToC builds on the hypothesis that an increase in international trade can contribute to achieving improved levels of economic and social development, through sustainable increased growth, (implying more jobs, better educational levels, better sanitary conditions along the food chain and improved quality infrastructure in the EAC Partner States, etc.) and, consequently, less poverty.

Increased trade can also contribute to nurturing the Region's capacities (in line with EAC Priorities 2017 – 2021)⁷² to take advantage of new opportunities in global markets, derived from reforms aimed at strengthening institutions to efficiently perform their mandate in relation to trade facilitation. Likewise, EAC and Partner States' capacities will expand after the implementation of trade policies and an international trade agenda (including advancement of EPA with the EU). Implementation of trade policies and reforms will benefit from an enhanced capacity to advocate for the removal of sector trade barriers; improved sector standards and harmonisation of SPS measures; enhanced export competitiveness for sector SMEs, and improved business development capacities for sector SMEs. In other words, implementation of the EAC agenda will significantly benefit from the attainment of MARKUP's expected results.

Furthermore, in addition to the adoption of good governance practices directly targeted by MARKUP, other cross-cutting issues will be progressively addressed. Climate change and environmental sustainability will be appropriately dealt with by EAC and Partner States' decision-making institutions by applying best practices to trade policy-related activities in accordance with international trade requirements and commitments.

Moreover, gender equality, encouraged in all the activities of the project, whenever possible, and gender-disaggregated indicators, used as much as possible for monitoring purposes, will also ensure change with a more equal society. As agriculture is the most important source of employment for women in Eastern Africa, the achievement of the project objectives will improve the living conditions of women, who make a significant contribution, especially in cross-border trade. The programme also targets the youth, who represent a dominant group in the informal sector (90% of informal workers being women and youth). Supporting young African entrepreneurs, notably empowering them to join value chains and benefit from international trade, would help them to take advantage of economies of scale through the structuring of value chains and business / sectoral organisations.

Furthermore, the ToC acknowledges that the Sustainable Development Goals (SDGs) require integrated action on social, environmental and economic challenges, with a focus on inclusive, participatory development that leaves no one behind. This requires a significant increase in the data and information that is available to individuals, government, civil society, companies and international organizations to plan, monitor and be held accountable for their actions.⁷³

MARKUP's theory of change is based on the fundamental logic that change is dynamic and non-linear. Given the facilitative nature of the programme, the change pathways from outputs to outcomes are dependent on a combination of mutually reinforcing and sometimes

⁷² These are consolidation of the Single Customs Territory (SCT); Infrastructure development in the region; enhancing free movement of all factors of production across the Partner States; enhancement of regional industrial development; improvement of agricultural productivity and value addition; promotion of regional peace, security and good governance; and institutional transformation at the regional and Partner-State levels. See: <https://www.eac.int/component/documentmanager/category/regional-national-strategies-and-plans?Itemid=297#:~:text=EAC%20Priorities%202017%20%2D%202021&text=Enhancing%20free%20movement%20of%20all,peace%2C%20security%20and%20good%20governance>.

⁷³ <https://www.undatarevolution.org/wp-content/uploads/2014/11/A-World-That-Counts.pdf>

overlapping activities categorized as levers of change (making funding available, supporting changemakers, creating incentives, and developing learnings) and contributions from implementing partners (skills, data, knowledge, resources). The initiatives or interventions which MARKUP is supporting are intended to contribute to change at the outcome (intermediate result) level by supporting activities within one or more outputs that leverage one or more of the levers of change and crowd in (or activate) contributions or inputs from the implementing partners. MARKUP's ToC assumes that the two key challenges that condition change are the inconsistent, unreliable and costly trade transactions; and lack of inclusion, transparency and trust among the stakeholders deemed to drive change.

To overcome resistance to change, MARKUP has identified as levers of change the intended outputs expected from the intervention grouped under three main categories:

- ◆ EAC Secretariat and Member States' Governments Engagement: Strategies, Policies, Legislation, Norms and Regulations;
- ◆ EU Engagement: Policy dialogue; Commitment and disbursement of funding agreed in FA; Audit, Monitoring and Evaluation; and
- ◆ Development Partner and other Implementing Agent Engagement: Provision of technical assistance and training to support the development of local capacities and trade facilitation reforms

MARKUP's ToC assumes that the outputs will contribute to each of the outcomes through a dynamic process that involves one or more of the levers of change and some combination of identified contributions from partners. This assumption is to be tested during the remaining time for the implementation of the programme since interactions among the 7 contracts that compose the programme are still to be verified during this Mid-Term Evaluation.

The outcomes achieved through the dynamic change process described above shall contribute to attaining the programme's objective because there will be efficient and reliable digital databases that contribute to the reduction of cost for the private sector, increased transparency, predictability for both public and private sector trade operators, more products that meet quality standards, and the further development of sustainable agriculture which contemplates inclusion of vulnerable groups and respect of environmental regulations.

Annex 8 – Literature and documentation consulted

- ◆ 190721_Final_LF_SDL99_EU-EAC_MARKUP_Burundi_intervention_under_the_PARTNER_STATES_WINDOW
- ◆ Financial Report 31 July 2021
- ◆ Inception report MARKUP Burundi Final clean
- ◆ MARKUP -Burundi Report up to 31 December 2019 Final
- ◆ Narrative Report_1 Jan 2020 -31 July 2021
- ◆ ITC National Coordinator Burundi
- ◆ Narrative Report_1 Jan 2020 -31 July 2021
- ◆ Markup 2021 - Répertoire des services d'appui - Version définitive 05 2021 Format PDF (1)
- ◆ MINUTES OF THE MEETING BETWEEN PROTHEM AND ITC, 25.11.2019
- ◆ Mission Report ITC Markup _ Burundi January 2019
- ◆ Narrative Report_1 Jan 2020 -31 July 2021 (2)
- ◆ REV_COORDONNEES DES MEMBRES DU COMITE TECHNIQUE DE SUIVI
- ◆ scan TORs MARKUP 28.11.2018 (National Coordinator)
- ◆ Rapport 2ème CTS du 17_18 Nov. 2020
- ◆ Rapport de la 1ère Réunion du comité Technique
- ◆ Rapport de la 3ème Réunion du COPI Gitega le 24 Juin 2021
- ◆ Rapport de la Deuxième Réunion du COPI du Programme MARKUP Burundi Ngozi le 19-11-2020
- ◆ Rapport de la première réunion du comité de pilotage
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Links to videos

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- ◆ [Cutting-edge trainings for coffee stakeholders are organised across the region](#)
- ◆ Kikobero Uganda (video done independently by the enterprise) participation in the online coffee auction organised by ITC under MARKUP:
https://www.youtube.com/watch?v=BFvTBjT_DWw