

Mid Term Review of Edible Oilseeds Value Chain Development Program Tanzania



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Acronyms

AMCOs	Agricultural Marketing Co-operative Societies
AMDT	Agricultural Markets Development Trust
ANSAF	Agriculture Non-State Actors Forum
ARI	Agriculture Research Institutes
ASA	Agriculture Seed Agents
BDS	Business Development Services
CEZOSOPA	Central Zone Sunflower Processers Association
CSO	Civil Society Organization
DADPs	District Agriculture Development Plans
DCED	Donor Committee for Enterprise Development
EOS	Edible Oil Seeds
ESRF	Economic and Social Research Foundation
FAO	Food and Agriculture Organization
FGD(s)	Focus Group Discussions
GAP	Good Agricultural Practices
IFAD	International Fund for Agricultural Development
ILULU	Lindi Regional Cooperative Union
KAEA	Kalangali Agricultural and Environmental Advocacy
KII	Key Informant Interviews (KIIs)
LCB(s)	Local capacity Builder(s)
LG	Local Government
LGA(s)	Local Government Authorities
LIMAS	Lindi and Mtwara Agri-Business Support
M&E	Monitoring and Evaluation
M4P	Making markets work for the poor
MAFC	Ministry of Agriculture, Food Security and Cooperatives
MBEOSA	Mbeya Edible Oilseed Association
MBESOPA	Mbeya Sunflower processors Association
MEOSA	Morogoro Edible Oilseed Association
MIT	Ministry of Industry and Trade
MMA	Match Maker Associates Limited
MRA	Management Resource Associate
MT	Metric Tons
MTR	Mid Term Review
MUVI	<i>Munganisho Ujasiriamali Vijijini</i>
NBMCL	Nico Business Management Consultancy Limited
NGO(s)	Non Governmental Organizations
NSGPR	National Strategy for Growth and Reduction of Poverty
PA	Project Advisor
PCAL	Poverty Combat Alliance
PM	Project Manager
PMG(s)	Producer Marketing Group(s)
PMORALG	Prime Minister's Office Regional Administrative Authorities and Local Government
QDS	Quality Declared Seeds
ROSDO	Rural Oriented Sustainable Development Organisation
RUCODIA	Rural Commercialization and Diversification of Agriculture
RUEOSA	Rukwa Edible Oilseed Association
RUNALI	Runali Cooperative Union
SAGCOT	Southern Agricultural Growth Corridor of Tanzania
SEIDA	Small Enterprises Institution Development Associates
SFSP	Smallholder Farmer Support Program
SITA	Supporting India's Trade Preferences for Africa
TBS	Tanzania Bureau of Standards
TCCIA	Tanzania Chamber of Commerce and Industries and Agriculture
TEMNAR	Temnar Company Limited

TEOSA	Tanzania Edible Oilseeds Association
TFDA	Tanzania Foods and Drugs Authority
TGEN	Tanzania Grassroots Empowerment Network
TIW	<i>Twende na wakati</i>
TNBC	Tanzania National Business Council
TOR	Terms of Reference
TUBOCHA	<i>Tuboreshe Chakula</i>
TUCED	Tumaini University Center for Entrepreneurship Development
TZS	Tanzanian Shillings
UNIDO	United Nations Industrial Development Organization
USAID	United States Agency for International Development
VBCF	Village Based Contract Farming
VCD	Value Chain Development
VECO	Vredeseilanden

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Lastly, the consultants would like to stress that the opinions expressed in this report are purely those of the authors based on observations and findings of this MTR and that MMA take sole responsibility for any errors of omissions or commissions.

Executive summary

This report presents the findings of a mid-term review of the Edible Oilseeds Value Chain Development Program, which is funded by Irish Aid and implemented by SNV Netherlands Development Organization. The program under review commenced in December 2012 and is coming to an end in December 2016, and is being implemented through sunflower and sesame projects. The mid-term review's scope focused on assessing progress, performance achievements and lessons learnt between December 2012 and June 2015 and to provide recommendations to ensure that the program is adjusted as and where necessary in order for it to achieve impact and sustainable outcomes. The consultants recognize that value chain development moves through different stages towards maturity. The first stage is selection and analysis. The second stage is planning and setting strategy. The third is implementation and managing and the fourth is maturity stage. Key features of these stages are annexed (see annex 5.4). At the outset the consultants are of the opinion that the two value chains being appraised are still to a large extent at stage 3 and hence findings are within this context and there is still plenty of room to upgrade the value chains to maturity.

By comparing targeted and achieved indicators of outcomes and contribution to impact as presented in the revised result framework (2014), the consultants assessed through project documentation, focused group discussions and key informant interviews, the extent to which outcomes and contribution to impact has been achieved. For more details of the methodology, refer to section 1.3. Key findings of the review are summarized as follows:

Effectiveness:

Cumulative contribution to impact achievements with respect to increased incomes and employment from the records kept by SNV are well above targets set over the review period as shown in Table 1 .

Table 1: Summary - Effectiveness

Impact Contribution	Target and actuals (cumulative)							% Achieved
	Baseline	2013		2014		By June 2015		
Sesame		P	A	P	A	P	A	
Increased income	8,742	5,000	1,920	10,000	14,520	15,000	24,454	+36%
Increased employment	20	118	238	318	505	418	1,253	+142%
	W 6	W 35	W 71	W 101	W 111	W 125	W 360	+138%
	M 14	M 83	M 167	M 217	M 394	M 293	M 893	+128%
Sunflower		P	A	P	A	P	A	
Increased income	16,500	10,000	6,350	20,000	34,850	30,000	82,458	+106%
Increased employment	1000	1000	1,234	2,000	4,940	3,000	7,416	+127%
	W 334	W 388	W 432	W 888	W 1,334	W 1,388	W 2,226	+50%
	M 667	M 612	M 802	M 1,112	M 3,606	M 1,616	M 5,190	+187%

W= women; M=men

It has been established with the project team that the methodology for tracking the progress on increased smallholder farmer income was based mainly on including those farmers that were reached through the package of services rendered, rather than the indicator of \$1/day/acre income. Likewise employment was based on direct casual and permanent employment opportunities provided through the work of AMCOs (the SNV entry point) and not for the whole sub sector. During FGD with farmers, the review team assessed the yearly income generated in an acre using the gross margin analysis as proxy indicator for generated income, the results of it does not meet the threshold set of 1 \$/day/acre income, as the current (2014/15 season) gross income from an acre of sesame in the project area is only about TZS 160,000, although under good agronomic practices, the gross income could rise to about TZS 625,000 in the project area. In the case of sunflower oil seeds the proxy gross income per acre is around TZS 180,000. The disparity between the indicator set and the current data collection methodology needs to be critically re-examined by the project team and together with the development partner agree on a coherent indicator and methodology for tracking its achievement.

The program has generally been effective in the most outcome areas for the two value chains.

Sesame value chain: Strengthening of oil processors were below target throughout the review period as the earmarked buyer abandoned the project. Initiation of TEOSA regional chapters and councilors oversight capacity are within targets. An exceptional achievement well above target was in strengthening AMCOS in Sesame Value Chain.

Sunflower value chain: Achievements in strengthening capacity of edible oil processors and strengthening councilors' oversight have surpassed target. Achievement in strengthening capacity of producer groups is slightly below target but is likely to be surpassed by the end of the year 2015. Achievement in strengthening capacity of TEOSA is within target. Training and facilitation of TEOSA was effective to enable it successfully secure government recognition, raised issues of protection of the infant edible oil sector, raised the issue of seeds, technology etc. to the relevant ministries. The outcome indicator of increase in import tariff percentage was not explicit enough, and was not yet achieved.

Overall project implementation: SNV effectively brought on board relevant actors (public & private) and institutions. Efforts to prevent duplication of efforts were noted, especially in some districts in the sesame value chain. Where Local Capacity Builders (LCBs) are from the locality where program works, using such LCBs has been cost effective. The change in staffing and delays of the EOS program has been most challenging part of SNV's implementation.

Efficiency

Overall total burning rate for EOS is 76% of the approved budget, with a 50% over expenditure in the LCB budget. Program support budget, (which covers workshops, meeting costs, DSA, accommodation, transport - e.g. by bus or by SNV vehicle costs are covered in indirect costs), workshops, communication, and stationery, is 19% of which 96% is to be used for soft skills and 4% for small investments. Such a low budget for investments obviously would limit interventions that could leverage VC actors to engage in innovative initiatives. Less than 5% of the total project budget has been utilized for travelling. One wonders how such low budget was adequate, taking into account the expansive coverage of the program - 10 regions and the decision to operate from the main offices in Iringa. However, it has to be taken into account that the project was at standstill for over 6 months and hence no travelling took place. Overall only 28% of the approved budget for 2015 was utilized by end of June 2015; hence there is sufficient budget space for 2015.

Investment versus the achievements: In total through SNV intervention during the review period, a total of 164,552 people (123,658 sunflower, and 40,894 sesame) were reached (with a package of services) and increased their incomes, and direct employment of 15,606 (13,590 Sunflower and 2,016 sesame) was created during the same period. Taking into account the budget utilization of USD 1,097,747 during the review period, expenditure the per person reached is around USD 6 which signals that the project is achieving impact at quite modest investment.

Sustainability

Sustainability of activities: A number of activities implemented have not yet fully reached the sustainability threshold and hence can only be partially sustainable. For instance, a number of producer groups are showing signals of becoming sustainable (e.g. negotiation and management capacities in contract farming) but still need further coaching and support. Also, TEOSA and regional chapters needs more tailored support especially on issues of articulation of their strategy and in improving their operational capacity in order for it to become sustainable. Similarly, AMCOs still need capacity strengthening especially in collective marketing.

Sustainability of approaches: Where an LCB is engaged for a particular assignment that takes a short period of time, and where such LCB is not from the same locality, the sustainability of engaging such a LCB is questionable because required follow up during internalization process may not be there. However, the institutional development approach, by ensuring relevant public, private and Civil Society Organizations (CSO) having a common agenda, which SNV - EOS has been pursuing, creates a good base for follow up and sustainability.

Sustainability of structures: SNV aimed to create industry structures for advocacy. Such structures did not exist before. For instance, SNV facilitated the establishment of farmer and processor organizations and alliances for engagement with government (local /central) on policy implementation and development issues. Most of the farmers and processors' organizations (e.g. sunflower processors association) are still weak in their capacities and it is debatable if these associations can continue to exist after the project if project support would stop now, which is not the case. SNV in the remaining period is hence required to ensure the capacity gaps are addressed in a systemic manner.

Lessons learnt – what has worked

Involving the LGA from district to village level in most of the project activities especially in the sunflower areas was instrumental to ensure effective implementation of activities and sustainability of services. Trainings, especially on GAP was effective in increasing productivity. In addition, training has been effective to mobilize more farmers to engage in growing sunflower. Village based contract farming was effective in enhancing clear and sure markets for sunflower farmer's produce especially in Chunya district, hence increasing incentives for farmers to increase production of sunflower. Equally successful was the introduction of contract farming in sesame seed production and adoption of improved sesame varieties as a result of collaborative effort with NARI (Naliendele). Training of AMCOS in governance has increased transparency and accountability of farmer organizations in Southern Tanzania.

Lessons learnt – what has not worked

In spite of a number of supportive activities, TEOSA still does not have adequate capacity to undertake effective lobbying and advocacy, and TEOSA governance structure is not yet functional. Besides TEOSA regional chapters in Morogoro and Mbeya, which have been formalized and registered, most regional chapters are still at formative stage and have a long way to go to become functional. What might be crucial at this point is to intensify the interface between private and public sector at the LGA level through district value chain development platforms, which has proved to be effective in other value chain development projects such as MUVI in Tanga region. No structured follow up of several studies (e.g. Benchmarking study, ripple effect in sesame etc.), which were conducted by the program, are undertaken so far.

The overall conclusion is that the two value chains are still at the implementation stage and have not yet reached maturity as stated earlier. The evaluation team's opinion is that the EOS program has the potential to significantly impact income and employment if recurrent constraints holding back the value chains are addressed. Factors contributing to this situation include: a seed roadmap for the two edible seeds products in question is not yet operational, the marketing system for sesame (i.e. open marketing system), whereby, an increasing number of farmers sell produce to the middlemen gives very little room for the farmers and their organizations to negotiate favorable terms and there is a growing concern over environmental impact of shifting cultivation practices currently being used in sesame production, especially for Southern Tanzania.

We make recommendations on short-term interventions (for the remaining period of the program) and what needs to be done in the long term. What need to be done in the short term (2016) builds on the implementation of activities that were previously planned to be undertaken within the current budget, while linking implementation of such activities to broadening the scope and timeframe of the project and including new partnerships. The main thrust in the short term should be to consolidate what is on the ground towards a sustainable base. Long-term interventions are looking at a broader planning framework, while taking into account current opportunities for collaboration.

Short-term interventions are summarized in table 12. Specific interventions are presented for each strategic issue. Strategic issues include; strengthening sector alliances, strengthening councilor oversight capacity, strengthening capacities of agribusinesses to access working capital, consolidating capacities of producer groups and marketing cooperatives as well as knowledge development and research. Recommendations for longer-term interventions incorporated inputs from the learning workshop that was part of this MTR.

For the long term, it is recommended that SNV rework the strategy and planning of the program to take into account the stage, which the value chain has reached, and current opportunities for collaboration. We foresee this necessitates broadening the horizon of the program beyond 2016 and even including other actors. Longer-term interventions include; Scaling up smallholder commercialization towards medium scale farming; legislating of contract farming in Tanzania, strategizing and positioning for rewarding value addition, developing the entire marketing system, and synchronizing the marketing systems with a more structured commodity exchange type of marketing system. SNV, AMDT and SAGCOT should collaborate to develop a strategy towards the maturity stage of the edible oilseeds value chain. Lastly, this MTR recommends having sesame partnerships in the SAGCOT area, as it is also grown in most regions that SAGCOT covers. Likewise it is recommended that AMDT could consider adding sesame into its portfolio products due to its potential for growth in Tanzania.

1.0 Introduction

This report presents a mid term review of the Edible Oilseeds Value Chain Development Program, which is funded by Irish Aid and implemented by SNV Netherlands Development Organization. Although SNV has promoted edible oilseeds sub sector in Tanzania since 2008/09, the review focuses on the above-mentioned program that commenced in December 2012 and is coming to an end in December 2016. The program is being implemented through sunflower and sesame VCD projects. Whereas the sesame project is implemented in 2 regions (Mtwara and Lindi), the sunflower project is implemented in 8 regions (Morogoro, Iringa, Ruvuma, Dodoma, Singida, Njombe, Rukwa and Mbeya). SNV has contracted Match Maker Associates Limited (MMA) to conduct a mid term review of Edible oilseed Value Chain Development Program in question.

1.1 Aim and objective of the Mid Term Review (MTR)

The Terms of Reference (TOR) in annex 5.1 spells out the aim of the consultancy which is to assess the edible oilseeds program progress, performance achievements and lessons learnt between December 2012 and June 2015, and to provide recommendations to ensure that the program is adjusted as and where necessary in order for it to achieve impact and sustainable outcomes by the end of the program.

The overall purpose of this review is:

- a) Learning and improvement as a building block for future work: It is intended that the outcomes of this mid-term review will provide useful and relevant information to the on-going work; explore why the implemented strategies and actions have been successful, or not and to provide guidance on how to improve program implementation in future
- b) Accountability: The mid-term review is also an accountability instrument for the program. Consequently, it will be used to assess whether or not project plans have been, or will be fulfilled, and to determine the extent to which the project's resources have been used in a responsible and effective manner.
- c) Sustainability: The outcomes of the mid-term review should assist Irish Aid and SNV in assessing the sustainability (or otherwise) of the activities, approaches and structures initiated or supported by the program, and provide recommendations for the future including possible suggested for further intervention of the Agricultural Markets Development Trust (AMDT).

The objective of this assignment is to review strategies and approaches that were used to implement the edible oilseeds program to attain current outcomes. The review work will also suggest ways in which the program implementation and communication of results and lessons will be more effective.

The specific objectives are:

- i. Review the Edible Oilseeds Program strategies, approaches and outcomes. Specific attention should be given to the assessment of the exit strategy help to determine if there should be a final program evaluation and to the efficiency in communication between SNV and Irish Aid.
- ii. Assess the effectiveness and efficiency of project implementation, including assessing the institutional arrangement, partnerships, risk management, M&E and project implementation. Specific attention will be given to:
 - a) Assess the increase of smallholder farmers' agricultural productivity (measured by income) as result of EoS program intervention.
 - b) Assess the perception of EoS smallholder farmers (male/female) on market access provided by the EoS program.
- iii. Identify key program lessons (what worked, what didn't and why), particularly with regard to strategic processes and the mechanisms chosen to achieve the project's objectives to date
- iv. Make clear, specific and implementable recommendations on the strategic and operational changes required to ensure impact, and sustainability of project outcomes.
- v. Assess the way ahead towards AMDT interventions for sunflower using Making markets work for the poor (M4P) approach including constellation of actors around sunflower value chains for selected program locations.

1.2 Scope

Consultants and SNV Edible Oilseeds (EOS) Program team jointly developed the scope for the review during the inception phases of this MTR. Content wise, the sesame and sunflower value chain projects were assessed separately since they are in essence different value chains with different dynamics, and a synthesis of lessons learnt from each are brought together. Geographically, the field review with various actors was conducted in 5 regions out of the 10 regions where the program operates. Respondents for the study included; primary value chain actors starting with main market players followed by producers, aggregators, Agricultural Marketing Co-operative Societies (AMCOs), Producer Marketing Groups (PMGs), and traders, processors and exporters. Likewise interviews were carried out with relevant secondary actors including the Non Governmental Organizations (NGOS) active in Edible Oilseeds sub sector, SNV Program Team, LCBs, Platforms (TEOSA and regional chapters), Government Officials (LGAs and Ministry level), relevant R&D institutions and potential strategic collaborators for the future including AMDT and SACGOT.

1.3 Methodology

Being a value chain program, the assignment has applied value chain development framework as the overriding methodology to undertake this Mid Term Review (MTR). The entry point was to understand the market dynamics as drivers for the sunflower products and sesame value chains. But also, it was necessary to recognize the stage towards maturity that these value chains have reached.

The consultants adapted and applied the Donor Committee for Enterprise Development (DCED) definitions and criteria of effectiveness, efficiency and sustainability. Program efficiency relates to an analysis of the costs – money, people, time, materials, etc. – that are expended as part of a program in comparison to either their benefits or their effectiveness. The consultants reviewed budgets and expenditures for the project and evaluated expenditures against budgets for specific components of the project finance. Program effectiveness relates to the level by which the activities of a program produce the desired effect. By comparing targeted and achieved indicators of outcomes and contribution to impact as presented in the result framework, the consultants evaluated the extent to which outcomes and contribution to impact has been achieved. In addition, the consultants assessed the extent to which program activities led to achievements of outcomes and progress towards desired impact. To assess sustainability, the consultant evaluated the continuity of activities, approaches and structures initiated by the program to ascertain if these activities, approaches and structures will continue where necessary after the lifespan of sesame and sunflower oil project interventions.

The consultants used the inception phase to interact with the SNV Edible Oilseed program team and especially in understanding the program's logic (result chain and causal model) and the underlying assumptions. The consultant agreed with the SNV program team that the review would build on the findings of the extensive review and revised program strategy that was agreed upon with the donor in October 2014. The program staff of SNV provided the baseline and measurable indicators of progress for the key outcome areas. Measures of indicators were verified through the interviews to determine whether outputs and outcomes have been achieved and whether the program is on course to achieve its impacts. The consultant evaluated performance targets and benchmarks as well as annual reports provided by the Project Manager (PM) to assess project performance and achievements up to June 2015.

The consultants incorporated comments and inputs from the debriefing meeting held with the representatives of the client (SNV) and the donor (Irish Aid) as well as inputs from the learning workshop to the draft report in order to obtain this final version of the report.

1.3.1 Sampling

Purposive stratified sampling, which followed a snowball sampling procedures along the value chain, was adopted. The PM, Project Advisor (PA) in consultation with consultants sampled 5 regions (Lindi and Mtwara for sesame project and Morogoro, Mbeya and Ruvuma) and conducted field visits to these regions.

Two teams conducted the review assignment. The first and the second teams reviewed the sesame and sunflower value chains respectively. Whereas team 1 conducted fieldwork in Mtwara and Lindi regions, team 2 conducted fieldwork in Morogoro, Mbeya and Ruvuma regions. Team one also carried out interviews in Dar es Salaam with potential strategic collaborators.

1.3.2 Data collection

Generic research methodologies such as literature review, Key Informant Interviews (KIIs) and Focus Group Discussions (FGDs) were employed to collect data. In addition, the consultants reviewed the project annual report (2013, 2014 and 2015 Mid-year report) and other relevant activity reports, and revised program proposal. Review questions and tools are annexed (See annex 5.2).

1.3.4 Limitations

The main limitation of this review is rather limited time to review and verify all project activities carried out in the 10 regions of Tanzania. Hence the aggregated data on effectiveness towards achieving the outcome targets relies on SNV Monitoring and Evaluation (M&E) reports. It should be noted also that SNV has been promoting these value chains for 4.5 years prior to the commencement of this program; hence the review team ensured that they focused the respondents to the respective MTR period. It has been noted however, that the program has had a number of challenges especially in terms of continuity of staff and political unrest in sesame operating regions that literally made the activities stall for the entire year of 2014. In terms of value chain development, lack of continuum in process facilitation is a setback. There are other NGOs like AgaKhan Foundation (AKF) and Care International and LIMAS in the sesame subsectors and MUVI and VECO in sunflower, who have been operating in the same geographical areas and also focusing on the Edible Oil Sub sector during the same period of review, which makes it rather difficult to isolate the effectiveness of SNV-EOS program alone.

Despite these limitations, consultants have used their experience in the two sub sectors to be able to come up with an informed position of SNV's achievements and lessons for the future.

2.0 Context of the edible oilseeds program

2.1 Highlight of key contextual issues

Analyses of the accountability dynamics and power relationships in Tanzania indicate that centralistic tendencies are widespread and systematic and negatively influence bottom-up planning and budgeting. There appears to be limited political will or effective leadership to enforce and assure compliance on agreed upon regulations.. Most if not all organs that are formally in place to assure public accountability (e.g. councilors, MPs, PCCB) appear to be part of the problem rather than part of the solution; and many of the CSO are co-opted, either by government or Development Partners, and do not present a significant and effective power to assure effective public accountability. Despite the major reforms since the 1990's, democratization dynamics and decentralization logics are dysfunctional, as they do not guarantee proper accountability relations between citizens and leadership. Weak citizen-state relations, lack of transparency, answerability and enforceability, inefficient and ineffective utilization of resources for development, are major contributing factors to the existing poor access to and quality of public goods and services and the weak business environment (EOS Program document, 2014)¹.

Section 2.1.1 and 2.1.2 presents most recent contextual issues, in the sesame and sunflower value chains respectively, which the consultants were able to unfold during the literature review preceding the fieldwork and through interviews and FGDs held with various actors during the fieldwork.

2.1.1 Sesame

In the revised program document (October 2014) the context influencing the edible oilseeds in Tanzania was presented and is still valid. What are added in this section are more highlights on new developments and actors that may shape the future of the sesame subsector.

¹ The context analysis presented in the October 2014 Project is still valid and what is presented in this section is an abstract of it and any additional issues that aroused in the last 1 year.

Tanzania is in the top 5 producers

According to Food and Agriculture Organization (FAO), Tanzania was among the top 5 Sesame Seed Producing Countries in the world in 2013. Sesame is a second cash crop in southern Tanzania (Mtwara and Lindi regions) after cashew, and is an emerging major cash crop in Tanzania. Table 2 presents the position of Tanzania in Global sesame production.

Table 2: The position of Tanzania in global sesame production

Name	Sesame Production 2013 (MT)	% of World Total
1) Myanmar	890,000	18.3%
2) India	630,000	13.1%
3) China	623,492	12.8%
4) Sudan (former)	562,000	11.5%
5) Tanzania	420,000	8.6%

Source: FAOSTAT

Export market for seeds as major market drivers

The major drivers for the sesame seeds sub sector remains to be export markets mainly to India and China. There has been no breakthrough into local value addition of sesame products yet, despite initiatives of many including UNIDO and the SNV EOS program. Records indicate that production and productivity have not managed to match the growing market demand, of over 4.2 million tons per annum and which is estimated to be growing at 5% per annum. However, Tanzania seems to have made great progress in the last 5 years in terms of annual production that was only 144,420 MT (Naliendele ARI – 2010) to 420,000 MT in 2013 (FAO). If these figures are authentic, this is an increase of 190% which is remarkable and may be attributed to increased adoption of high yielding varieties, more areas in Tanzania getting into sesame production (Rukwa, Dodoma, Ruvuma etc.), and indeed a clear signal of market driven growth.

Role of SHFs still docile

What has not changed much in the last couple of years are the marketing arrangements and power dynamics in the sesame value chain. Although more farmers seems to organize themselves into producer groups (PGs) and Agricultural Marketing Cooperatives (AMCOs), these organizations have more or less remained agents of large scale exporters who are determining market prices and payment mechanisms. The fact that some district authorities try to come up with indicative prices at the beginning of the buying season, but buyers have used the forces of demand and supply to come up with a price at which they are willing to buy, and its prediction is not easy. However, there have been

changes in the power of the voice of SHFs. AMCOs were dissatisfied with the services and transparency of the ILULU union and so withdrew and set up one mainland and later one coastal union (i.e. RUNALI and MWAMBAAO). These are very new farmer organizations but offer a real chance for more proactive engagement with exporters, thereby upgrading the voice of farmers in negotiations on prices, quality control and reduction of transaction costs.

Sesame market fragmentation



Figure 1: Products of sesame

Tanzania adds minimum value in sesame.

Although the feasibility of producing sesame oil of high quality in Tanzania is minimal, there are opportunities for adding value and producing products, which have demand in the local market. The

key issue is insufficient innovation and modeling of market development for local consumption of sesame products. The agricultural commodity exchange is at an advanced stage of getting introduced in Tanzania and, assuming sesame could be one of the commodities qualifying in the exchange as is the case in Ethiopia, it may create a new opportunity for market deepening of the Tanzania sesame market.

SHFs share of end market price less than 50%

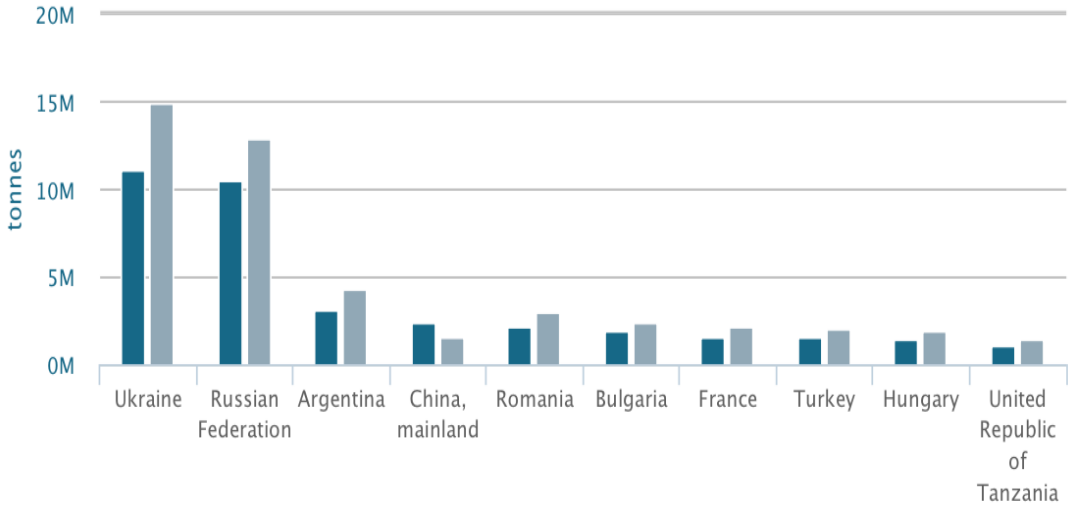
Average farm gate prices fluctuate and have currently gone down from over Tanzanian Shillings (TZS) 2500 per kg in 2013 to TZS 1,700 in 2015 season and this is affecting incomes to smallholder farmers. International (FOB - Dsm port) market prices for hulled white sesame could range around USD 1,700 per MT i.e. TZS 3,500 per kg (2015). This market growth is not sufficiently inclusive and thus programs and projects promoting sesame value chain development, including SNV in Southern Tanzania, are very actively trying to influence the situation.

2.1.2 Sunflower

Tanzania’s global position in Sunflower production 2012

Production of sunflower in Tanzania has been increasing steadily over the years and had reached over 1 million tonnes by 2012. In spite of its 10th position in global sunflower seed production, Tanzania is the only country from Africa among the top 10 producers of sunflower in the world. Countries from Eastern Europe, namely: Ukraine, Russian Federation, Romania and Bulgaria, dominate global sunflower production. Figure 2 presents global sunflower production and the position of Tanzania.

Figure 2: Production of Sunflower



Source: Faostat

Increasing importance of sunflower and gains to smallholder farmers

Sunflower is emerging from being a minor cash crop to becoming a key cash crop, providing income to rural households. In Mbeya (Chunya District) and Ruvuma Region (Namtumbo district), sunflower is beginning to provide more income to farmers, replacing tobacco, which has for a long time been a key cash crop. An increasing number of farmers, particularly in Mbeya and Ruvuma regions, are adopting production of sunflower and farmers who have earned incomes from sunflower production in recent years are showing interest in increasing acreages under cultivation of sunflower. Patterns of increases in farm gate prices of sunflower seeds have remained fairly stable. There is anecdotal evidence of production increase and although farmers are exuding interest to increase production, production has not significantly increased to match the increasing demand for sunflower seeds. New entrants (i.e. large scale investors in double refinery as well as additional increases in the number of small mills) are continuously intensifying competition for sunflower seeds.

Marketing and market access

Availability of buyers, the place to sell sunflower seeds, price and the time to sell sunflower seeds constitute key aspects of marketing and market access. The number of buyers has been on the

increase. In most cases, traders, who sometimes act as agents or intermediaries of processors and occasionally processors, buy seeds directly from the farmers. The concept of Village Based Contract Farming has been implemented by SNV, albeit with varying levels of success. Group marketing initiatives are constrained by, among other factors, inadequate or lack of storage facilities and limited linkage to finance (for both farmers and buyers). In the last two years and especially in the districts visited during this assessment, prices increase from TZS 500 per kilo at the beginning of harvest to TZS 700 per kilo two to three months after harvest.

Institutional strengthening and capacity for lobbying and advocacy

SNV facilitated the formation of sector alliances as well as the formation and strengthening of Tanzania Edible Oilseeds Association (TEOSA), for the purpose of conducting lobbying and advocacy for the edible oilseeds sector, market and research information, strengthen service providers among others. SNV has been supporting the formation of the regional arms of TEOSA and so far regional chapters arms of TEOSA exist in Morogoro, Iringa, Njombe, Mbeya, Ruvuma, Rukwa, Katavi, Lindi and Mtwara.

Support for the edible oilseeds and sunflower subsector

The local edible oil industry and particularly sunflower sub sector is receiving renewed attention and attracting additional investments from local government (e.g. in Mvomero, Chunya and Namtumbo district councils) and projects such as AMDT, Southern Agricultural Growth Corridor of Tanzania (SAGCOT) and Supporting India's Trade Preferences for Africa (SITA). There is a general government support for adding value to agricultural produce. As a result, LGAs (Mvomero, Chunya and Namtumbo) are promoting initiatives for farmer groups to add value at the local levels and eventually sell sunflower oil as opposed to selling sunflower seeds. LGAs are providing processing machines for farmers to use to process oil.

Due to the activities of Tanzania Edible Oilseeds Association (TEOSA), there has been an increased awareness by central government, particularly Ministry of Agriculture, Food Security and Cooperatives (MAFC) and Ministry of Industry and Trade (MIT), on the importance of sunflower and edible oilseeds sub sectors, especially to substitute imports and the need to promote the local and infant oilseeds industry. Although the two ministries have been supportive of the edible oilseeds sector, concrete policies to protect the infant industry (e.g. removal of the zero tariff on imported palm oil) have not been instituted.

There has been a growing awareness and a push for improving the quality and nutrient content of sunflower oil. Tuboreshe Chakula (TUBOCHA), an agency funded by Unites States Agency for International Development (USAID) undertook initiatives to fortify sunflower oil. The Tanzania Bureau of Standards (TBS) and Tanzania Foods and Drugs Authority (TFDA) has been pushing for small processors to double refine sunflower oil. However, oil processed from local technology and single refineries does not comply to TBS and TFDA standards, hence a need for double refining that is costly in terms of technology and investment.

Underdeveloped market for critical services

Access to finance, inadequate availability of quality seeds, limited storage facilities as well as poor and inefficient technology are key factors among a plethora of factors constraining the development of the edible oils and sunflower subsectors. SITA, a program currently under inception phase is promising to support linkage to technology, finance, and storage facility for processors and hence boost trade in exports of sunflower oil to India.

2.2 Implementation framework and strategies employed

The program is implemented through a structure that involves the sector leader, project manager, Agriculture? advisor and Local Capacity Builders. The Project Manager (PM) has the overall responsibility for project implementation. The Agriculture Advisor is functionally responsible for the sunflower value chain and the PM is functionally responsible for sesame value chain, in addition to his overall project management roles. The two operate from the project office based in Iringa. The Project Administrator (PA) provides support services to the project team.

During 2015, the project worked with 7 LCBs in total, 5 for sunflower (i.e. PCAL, CARITAS, TUCED, NBMCL and TGEN) and 2 for sesame (i.e. ROSDO and SEIDA) to undertake capacity building and trainings for farmer groups and associations. In the sunflower value chain 4 other LCBs (MRA, RUCODIA, CARITAS and PCAL) were engaged to undertake capacity building for the regional chapters and TEOSA. The PM is the budget holder and overseer and takes the lead in recruiting the LCBs. SNV has a LCB engagement manual for advisory staff that guides the process of recruiting LCBs. Planning for the activities is done annually through an annual plan framework. While consulting with the M&E Officer, the PM and program staff develop tools for monitoring activities. The project team undertakes mid year and end of year review of the implementation of the planned activities. The Governance Advisor also occasionally supports the project team on documentation and quality assurance, and supports the PME Adviser who advises the team on M&E. Ideally, LCBs are supposed to be locally based in the areas where the project is working. However, this is not always the case as RUCODIA from Songea, Ruvuma Region previously implemented activities in Morogoro region.

Intervention strategies

SNV positioning in the edible oilseeds subsector, sector is informed by and aligned with the Government of Tanzania's Development Vision 2025, the *Kilimo Kwanza* initiative, the Agriculture Sector Development Strategy Phase I and the National Strategy for Growth and Reduction of Poverty (NSGPR) II. SNV's contribution to edible oilseeds value chain development is based on tailoring capacity development services to value chain actors, directing capacity development needs to stimulate opportunities and incentives amongst oilseed actors, as well as maximizing and sustaining commercially viable and pro-poor oilseeds value chain development initiatives or models.

The reviewed SNV interventions focused on the following areas:

- **Promoting Inclusive Business:** Promotion of inclusive business arrangements between small-scale producers, processing industry and agribusiness dealers to ensure: reliable and timely access to quality inputs, sufficient quality, quantity and reliability of supply of seeds for processors. Prompting inclusive businesses involved inclusive contract farming arrangements to increase access to extension services, input supply, and financial services, organized along inclusive business arrangements.
- **Strengthening capacities of producer groups and farmer marketing cooperatives** for collective bargaining. Strengthening capacities of farmer groups was meant to enable the groups to: a) negotiate better prices for their products and economy of scale for input supplies, and b) demand and improve access to market information and relevant extension and business development services and for organizational governance and c) to influence policy and legal frameworks.
- **Strengthen councilor oversight capacity** for more equitable and effective planning, service delivery (including extension) and resource allocation (including use of local government crop revenue - Cess), based on value chain actor priorities and demands. It should be noted that with respect to challenges faced in 2013 and 2014 in implementing councilor oversight training, and in view of the forthcoming general elections scheduled for October 2015, implementation of activities related to strengthening councilor oversight will be phased. Councilor oversight training will be conducted in 2016.
- **Strengthen capacities of agri-businesses to access working capital** to expand input purchasing power and processing capacity.
- **Strengthening sector alliances** (e.g. producers, processing enterprises) to engage in policy dialogue (district and national level) for sustainable and inclusive access to resources and practice based research and knowledge development for national policies.
- **Knowledge development and research:** support research and joint knowledge development to provide information and analysis which: increases awareness about the (formal, informal) realities on the ground, facilitates informed debate at local and national level, build to accountability relations and enable actors to work towards solutions which are acceptable.

2.3 The result framework

Table 3: Revised result framework - sesame

Key Outcomes	Outcome indicator	Impact: Contribute to;	Impact Indicator to be monitored
Strengthened capacity of edible oil buyers to engage in contract farming	# of edible oil processor enterprises in inclusive contract arrangement with smallholders groups	Increased income	# of people (m/w) that derive > 1\$US/day
Strengthened capacity of producer groups to engage in contract farming	# of smallholders groups in contract with enterprises		
Strengthened capacity of AMCOs	# of AMCO's participating in price setting	Increased employment	# of new employment in the edible oil seeds value chain (casual and full time)
Strengthened organizational capacity of TEOSA	# of active TEOSA regional chapters		
Strengthened councilor oversight capacity	# of district councils including edible oil sector in annual budgeting		

Table 4: Revised result framework - sunflower

Key Outcomes	Outcome indicator	Impact Contribute	Impact Indicator to be monitored
Strengthened capacity of edible oil processors to engage in contract farming	# of edible oil processor enterprises in inclusive contract arrangement with smallholders groups	Increased income	# of people (m/w) that derive >1\$US/day/acre
Strengthened capacity of producer groups to engage in contract farming	# of smallholders groups in contract with enterprises		
Strengthened organizational capacity of TEOSA	# of active TEOSA regional chapters	Increased employment (Casual labor & full time)	# of new employment in the edible oilseeds value chain
	Increase in import tariff %		
Strengthened councilor oversight capacity	# of district councils including edible oil sector in annual budgeting		

The consultants interpreted that for both result frameworks, contribution to impact in terms of income and employment is through achievement of the key outcome areas, and not necessarily in the manner in which they are presented in the tables above. Likewise, some indicators are difficult to operationalize e.g. the >1\$US/day/acre; Increase in import tariff % and hence consultants have used

the practice that they found SNV practicing on the ground and at the end it is recommended to simplify such indicators in future.

2.4 Key assumptions and risk management

The risks and mitigation were revised in June 2014 in view of the changing context in Tanzania. Table 3 below presents a summary of those risks and mitigation strategies and in the next section consultants have reviewed their status.

Table 5: Risks and mitigation

Risks	Mitigation
Given the current political context in Tanzania:	
1. Alliance may turn into political entities either as a result of internal dynamics – local client’s networks – or by being co-opted by local politicians	SNV in collaboration with LGAs to closely facilitate the respective Associations to ensure that their registration is properly in line with the Ministry of Trade Industries and Marketing regulations.
2. Chronic rent seeking practices, government may be reluctant to give the AMCOS the space for autonomy	SNV to promote yearly inclusive multi-stakeholder dialogue and relationship building to create common understanding, commitment and joint action among producers, government, and private sector actors for oilseed value chain development. Limited councilor oversight training activities to be carried out in 2015 before the general elections, and activities moved to 2016.
3. Councilors may use the program as a platform for political campaigning	
4. The potential for politically initiated disturbances during 2015 may be relatively high due to: local government elections, constitutional referendum and the general elections	SNV to monitor the situation (from a security point of view) and consult Irish Aid on possible actions to be taken as regards the program implementation.
Change in local and global consumer preferences and market demand	SNV to promote further product development, including value addition.
Negative trends in climate change	Sunflower and sesame are dry area crops; SNV in collaboration with Agricultural Research Institutions to promote drought adapted seed varieties

3.0 Review of Results up to June 2015 and Analysis of Findings

3.1 Effectiveness

3.1.1 Sesame

The overall objective of the sesame value chain project is to increase incomes of 28,742 smallholder farmers in Mtwara and Lindi regions and to create 538 new employment. The main project activities are as follows;

- **Promoting inclusive Business:** giving greater attention to producer group capacity to negotiate contractual terms and conditions and expand inclusive contract farming arrangements.
- **Strengthening capacities of producer groups and farmer marketing cooperatives** for collective bargaining and organizational governance
- **Strengthening councilor oversight:** for more equitable and effective planning, service delivery (including extension) and resource allocation (including use of Cess), based on value chain actor priorities and demands.
- **Strengthening sector alliances:** strengthening membership base and organizational governance; strategic planning, quality assurance and evidenced based advocacy skills.

- **Knowledge development and research:** support research and joint knowledge development to provide information and analysis to inform debate at local and national level.

The envisaged program partners include:

- Government: Ministry of Industry and Trade; Ministry of Agriculture Food and Cooperatives, Prime Minister's Office Regional Administrative Authorities and Local Government (PMORALG); Local Government Authorities, Tanzania Food and Drugs Authority, Tanzania Bureau of Standards; Agriculture Research Institutes
- Private Sector: Tanzania Chamber of Commerce and Industries and Agriculture (TCCIA)
- Civil Society: Agriculture Non-State Actors Forum (ANSAF); Agri-ProFocus;
- Donor funded programmes: Lindi and Mtwara Agri-Business Support (LIMAS) Programme (Finland); Smallholder Farmer Support Programme (SFSP)- Aga Khan Foundation.

This project was initially designed to be funded by the MasterCard Foundation, AcT and SNV core fund. At the end the only main funding partner is Irish Aid and SNV's has made an own contribution. Table 4 below summarizes the achievements made based on the result framework up to June 2015.

Table 6: Results Framework: Sesame Value Chain Development Project

Key Outcomes	Outcome Indicator	Target and actuals (cumulative)								Impact Contribute to	Impact Indicator to be monitored	Target and actuals (cumulative)							
		Baseline (2012)	2013		2014		June 2015		Baseline			2013		2014		By June 2015			
			P	A	P	A	P	A				P	A	P	A	P	A		
Strengthened capacity of fixed. Oil buyers to engage in contract farming	# of fixed. Oil process Enterprises in inclusive contract arrangement with smallholders groups	0	1	0	1	2	2	2	Increased income	# of people (m/w) that derive \$1US/acre/day	8,742	5,000	1,920	10,000	14,520	15,000	24,454		
Strengthened capacity of producer groups to engage in contract farming	# of smallholders groups in contract with enterprises	0	25	0	50	30	60	16											
Strengthened capacity of AMCOS	# of AMCOS participating in price setting	4	6	22	21	41	31	29	Increased employment	# of new employment in the edible oil seeds value chain (casual and fulltime)	20	98	258	318	505	418	1,253		
Strengthened organizational capacity of EOSA	# of active EOSA regional chapters	0	1	1	2	2	2	2			W16	W35	W116	W101	W111	W111	W160		
Strengthened councilor oversight capacity	# of district councils including edible oil sector in annual budgeting	2	0	4	2	4	4	4			M14	M33	M142	M237	M194	M107	M193		

P= Planned; A= Actuals

In terms of planned outcomes, the achievements in strengthening capacity of oil buyers, TEOSA and councilors are within targets. An exceptional achievement of 50% above target was in strengthening AMCOS. Achievement in strengthening capacity of producer groups was less than target by over 50%. In terms of contribution to the impact indicators, the achievements so far have been far above the planned, whereby, in terms of income, the number of people reached has been surpassed by 36% and increased employment, casual and full time has been surpassed by 142%. The achievements against the result framework are quite impressive, given the context in which the project has been operating (i.e. political unrest, staff changes within SNV and elections). It has been established with the project team though that the methodology for tracking the outreach was based mainly on the package of services rendered rather than the indicator of 1 \$/day/acre².

The gross margin analysis done during MTR, does not support the threshold set of 1 \$/day/acre income as it turned out that the current gross income from an acre is only about TZS 160,000, although under good agronomic practices, the gross income could rise to about TZS 625,000 (See SGM analysis in annex 5.5). The disparity between the indicator set and the current data collection methodology needs to be critically re-examined by the project team. In the sesame sub sector, where there are no processors, the source of additional employment comes from the work of aggregation and marketing through AMCOS. The 2 AMCOS that were visited during MTR generated an average of 30 additional jobs in a year.

Effectiveness of Sesame Value Chain implementation; 2013 to June 2015

The Annual reports of 2013 & 2014; the revised program document (October 2014), and the Mid Year Report of 2015, have been used to compile of the section on effectiveness of sesame value chain. MTR comments are based on the field assessment and inputs from project team and other key stakeholders that were interviewed during the MTR. Table 7 presents comments on the effectiveness of expected outcomes.

² Exchange rate fluctuations affect the results of gross margin calculations. Family labor was not included in the gross margin analysis. Including family labor would make the margins even much smaller.

Table 7: Comments on effectiveness of expected outcomes - sesame value chain

Expected Outcome Results	Realized Outcomes	Comments on effectiveness
Outcome1: Strengthened capacity of edible oil processors to engage in contract farming / Promoting Inclusive Business		
<ul style="list-style-type: none"> ➤ One processor (Frasal Company) engaged in contract farming with PGs (2013) ➤ Increased commitment to contract farming by other key actors to contract farming (2014) ➤ 2 additional buyers engaged in contract farming (2015) 	<ul style="list-style-type: none"> ➤ 11 AMCOS indicated willingness to engage with Frasal Company through VBCF (2013) ➤ Two buyers showed interest in and began to engage in VBCF with 30 PGs (2014) ➤ Farmers expanded area of sesame production by an estimated 30% (2014) ➤ AMCOS identified medium level buyers and engaged with them in contract farming (2014) ➤ Joint selling of sesame through contract farming arrangement helped 5 AMCOS to sell their sesame consignment at TZS 2,100 per kilogram. Breakeven price was established at TZS 1,000 per kg (2015) 	<ul style="list-style-type: none"> ➤ Engagement with Frasal Company, assumed that local market development for processed sesame products (oil, confectionaries etc.) are feasible and is a competitiveness strategy for Tanzania in this sector. This issue remains unresolved from 2013 until the time of MTR. Without serious private sector drive that has broad global competitiveness strength, the processing of sesame products is still an ambition for medium to long-term period. Ruangwa District, through support from UNIDO, has installed machinery for sesame processing that may remain unutilized for some time because sesame processing is not a feasible investment option in the current business environment in Tanzania. ➤ SNV is now planning to engage consultants to develop a business model for the project, but our main comment is that the market development component should not be overlooked. ➤ The overall benefits of the concept of contract farming in the current sesame marketing context is hard to realize. Many competing buyers have no incentive to engage in contracting except for the quality seeds production. AMCOs now engaging in collective marketing are more like buyers' agents and have little or no say in setting the terms. It was not evident during the MTR if AMCOS had managed to negotiate for better prices, since they have no financial muscle to challenge the buyers.
Outcome 2 & 3: Strengthened capacity of producer groups & AMCOs to engage in contract farming		
<ul style="list-style-type: none"> ➤ 50 PGs engaged in VBCF ➤ Increased capacity of PG leaders to influence members to improve the quality of their produce by applying GAP and good post-harvest handling (2013/14) 	<ul style="list-style-type: none"> ➤ 30 PGs engaged in VBCF (By June 2014) ➤ PG leaders are influencing members to improve the quality of their produce by applying GAP and good post-harvest handling (By June 	<ul style="list-style-type: none"> ➤ Farmer groups' strengthening has posted very good results in terms of cost effectively imparting GAP and in providing marketing services to its members. ➤ The target of 50 PGs was not met yet as the project had several delays in implementation. ➤ The main thrust of the program lately to focus on AMCOs for

<ul style="list-style-type: none"> ➤ Farmers use improved agricultural practices (2013/14) ➤ Increased capacity of farmers to effectively use agronomic practices (2014) ➤ 18 AMCOS participating in price setting (2014) ➤ AMCOS provide improved services to members (2014) ➤ Farmers use improved agricultural practices (2014) ➤ 5 AMCOS engage with buyers in contract farming (2015) ➤ Strengthened union operations e.g. providing marketing services to members (2015) ➤ Farmers are adopting GAP ➤ Farmers practice records keeping and GM analysis. (2015) 	<p>2014)</p> <ul style="list-style-type: none"> ➤ 30% increase in the area of sesame grown during 2013/2014 season compared to the previous year Quality of sesame seed sold improved due to greater use of high oil content seeds. ➤ AMCOS in Ruangwa, Nachingwea and Liwale districts managed to sell 2,100 tonnes at price of up to TZS 2,500 per kilogram. The price for sesame in 2013 was TZS 1,800 per kilogram. (By Dec 2014) ➤ The regional union ILULU failed to respond to the increased AMCOS demands for transparency and accountability. As a result two new unions were formed in Lindi Region and ILULU was closed in September 2014. The newly formed RUNALI union allows for more participation of members in price setting and more transparency communication towards members. Lindi MWAMBO union still at formative stage (Dec 2014) ➤ 5 AMCOS engaged with buyers through VBCF arrangement (2015) ➤ Farmers produced at 530kg/acre of white sesame variety (Lindi 02) through using recommended GAPs. (2015) ➤ Practices adopted and practiced by most farmers were the use of 	<p>collective marketing purposes is a well in line with experiences in Southern Tanzania of using Cooperatives as marketing arms in WRS in cashew sector.</p> <ul style="list-style-type: none"> ➤ Main stumbling block of AMCOS in sesame value chain is their limited capacity to facilitate effective market access whereby farmers have voice and participate in price setting and other services. ➤ AMCOS voiced their concern on the functioning of ILULU regional cooperative union (i.e. lack of transparency and effective participation of AMCOS in price setting), which resulted in the AMCOS withdrawal from ILULU, ILULU's closure and the establishment of two new unions. This is a big step forward towards beginning to engage more effectively with buyers, albeit the new unions capacity is as yet limited. ➤ PGs and AMCOS that have managed to set SACCOs and storage facilities to avail financial services and storage services to its members respectively have more chances of becoming a partners rather than agent of main buyers. ➤ During MTR it was not feasible to access capacities of Unions.
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	improved varieties, timely planting and harvesting; effective means of managing weeds and post harvesting management activities. (2015)	
Outcome 4: Strengthened capacity of TEOSA (Regional Chapters):		
<ul style="list-style-type: none"> ➤ Two active TEOSA regional chapter established (2013/14) ➤ Increased cooperation between sesame sub-sector stakeholders in addressing policy issues facing sesame farming as a business (2013/14) ➤ Increased regional chapter membership (2015) ➤ TEOSA Regional Chapters Governance structure functional (2015) 	<ul style="list-style-type: none"> ➤ Lindi TEOSA regional chapter and Mtwara TEOSA regional chapter formally registered in April 2014 (2013/14) ➤ Regional chapter steering committees (2) established to support the development of the constitution (2013/14) ➤ Regional chapters constitutions developed (2013/14) ➤ Two regional chapters identified and agreed on issues for policy advocacy in sesame sub-sector, which indicates increased cooperation among sesame stakeholders in the two regions (2013/14) ➤ Understanding of roles and responsibilities by Lindi and Mtwara TEOSA RCs leaders (50%) increased. ➤ Able to differentiate TEOSA RCs roles from other kind of associations 	<ul style="list-style-type: none"> ➤ The TEOSA Regional chapters are at infant stages and still have a long way to go towards becoming fully functional. The chapters in Lindi and Mtwara, which have an NGO status, still need support to transform and build their capacity within TEOSA mandate.
Outcome 5: Strengthened councilor oversight capacity		
<ul style="list-style-type: none"> ➤ Strengthened councillor oversight capacity (2013/14) ➤ Four district councils include edible oil 	<ul style="list-style-type: none"> ➤ Councilors in two districts questioned the deductions e.g. for shrinkage, transport, bags, etc. to 	<ul style="list-style-type: none"> ➤ Councilor oversight training was carried out once in sesame project. Additional councilor oversight activities have not been taken up and have been postponed. More councilor oversight activities will be

<p>sector in annual plans and budgets (baseline 2) – 2013/14</p>	<p>the price made by the Unions (2013/14)</p> <ul style="list-style-type: none"> ➤ 6 districts councils include edible oil sector in annual plans and budgets (cumulative. 2013/2014 actual = 4) 	<p>undertaken after elections.</p> <p>Due to the fact that this MTR was undertaken during the period close to elections, Councilors were engaged in campaigns and the consultant did not manage to meet with them, so as to assess any changes in the oversight capacity of councilors due to their participation in sesame project activities.</p>
<p>Outcome 6. Knowledge development and research</p>		
<ul style="list-style-type: none"> ➤ Political economy analysis (2013/14) ➤ Case study and brief (2013/14) ➤ Report on Benchmarking Agriculture and Agriculture Trade Policies to improve sesame industry competitiveness in Tanzania (ESRF commissioned) – 2013/14 	<ul style="list-style-type: none"> ➤ Not done ➤ Report on Benchmarking Agriculture and Agriculture Trade Policies to improve sesame industry competitiveness in Tanzania (ESRF) ➤ Assessment of Practices of Agricultural Production Marketing and Domestic Trade Policies in Tanzania ➤ Ripple effect study report including conclusions and recommendations for the way forward 	<p>The knowledge development and research is not well structured. Various studies have been carried out such as benchmarking agriculture & trade and Ripple Effect (sesame), which were done quite professionally.</p>

3.1.2 Sunflower

The sunflower project focused on Dodoma, Singida, Manyara, Iringa, Mbeya, Rukwa Ruvuma and Morogoro. By the end of 2016, the project aims to achieve an increase of at least 56,500 people/smallholder farmers with increased income from sunflower and 5,000 new employment created. The main project activities are:

1. Promoting Inclusive Business / Strengthening capacity of sunflower processors to engage in contract farming
2. Strengthening producer groups - Strengthened capacity of producer groups to engage in contract farming
3. Strengthened councilor oversight
4. Strengthening sector alliances - TEOSA
5. Strengthening regional alliances – focusing on the regional chapters
6. Knowledge development and research

The envisaged program partners included;

- Government: Ministry of Industry and Trade; Ministry of Agriculture Food and Cooperatives, Prime Minister’s Office Regional Administrative Authorities and Local Government (PMORALG); Local Government Authorities, Tanzania Food and Drugs Authority, Tanzania Bureau of Standards; Agriculture Research Institutes
- Private Sector: Tanzania Chamber of Commerce and Industries and Agriculture (TCCIA)
- Civil Society: Agriculture Non-State Actors Forum (ANSAF); Agri-ProFocus;
- Donor funded programs: MUVI - Association of Village Entrepreneurs (IFAD); Vredeseilanden - VECO (Belgian International NGO)

Project was funded by Irish aid. Effectiveness of implementation is summarized in the table 5 below and further discussed in table 6

Table 8: Results Framework: Sunflower Value Chain Development Project

Key Outcomes	Outcome Indicator	Target								Impact Contribute	Impact Indicator to be monitored	Target							
		Baseline (2012)	2013		2014		Jun-15		Baseline (2012)			2013		2014		Jun-15			
			P	A	P	A	P	A				P	A	P	A	P	A		
Strengthened capacity of seed oil processors to engage in contract farming	# of seed oil process Enterprises in inclusive contract arrangement with smallholders groups	8	11	15	16	30	18	38	Increased income	# of people (m/w) that derive \$1US/day	16,500	10,000	6,350	20,000	34,850	30,000	82,458		
Strengthened capacity of producer groups to engage in contract farming	# of smallholders groups in contract with enterprises	97	10	30	60	60	90	83											
Strengthened organizational capacity of EOSA	# of active EOSA regional chapters	2	0	2	2	3	4	4	Increased employment	# of new employment in the edible oil seeds value chain	1,000	1,000	1,234	2,000	4,940	3,000	7,416		
	increase in import tariff %	0	0	0	3	0	3	0			W34	W388	W32	W388	W1,334	W1388	W2,226		
Strengthened councillor oversight capacity	# of district councils including edible oil sector in annual budgeting	4	2	3	3	5	4	5			M67	M12	M02	M112	M3,606	M1616	M5,190		

P= Planned; A= Actual

Both the planned and realized cumulative targets do not include baseline figures. In 2015 the full year's target is included, while the MTR covers only up to mid-2015. In terms of planned outcomes, the achievements in strengthening capacity of edible oil processors and strengthening councilors' oversight have surpassed target. Achievement in strengthening capacity of producer groups is slightly below target but is likely to be surpassed by the end of the year 2015. Achievement in strengthening capacity of TEOSA is within targets. In terms of contribution to the impact indicators, the achievements so far have been far above the planned. In terms of income, the targeted number of people reached has been surpassed by 106% and in terms of increased employment (both casual and full time) target of number of people reached has been surpassed by 127%.

The annual reports of 2013 & 2014, the revised program paper (October 2014) and the Mid Year Report of 2015 informed the compilation of this section. MTR comments are based on the field assessment and inputs from project team and other key stakeholders that were interviewed during the MTR.

Table 9: Comments on effectiveness of expected outcomes - sunflower value chain

Expected Outcome Results	Realized Outcomes	Comments on effectiveness
1. Promoting Inclusive Business / Strengthening capacity of sunflower processors to engage in contract farming		
<ul style="list-style-type: none"> ➤ Increased commitment to VBCF among key actors (2013, 2014) ➤ Twenty-four processors engaged in contract farming (baseline 8) (2013) ➤ Increased effectiveness and harmonization of VBCF (2013, 2014) ➤ 10 processors engaged in contract farming (2015) ➤ Processors registered for vitamin fortification (2015) ➤ Increased effectiveness and harmonization of CF practices (2015) 	<ul style="list-style-type: none"> ➤ 15 processors engaged in contract farming totaling to 23 (2014) ➤ Producers reported a 43% increase in sunflower prices and processors reported a 25% increase in the average quantity of sunflower seed purchased in 2013 compared to 2012 (2014) ➤ Processors engaged in contract farming increased plant utilization capacities from 64% in 2012 to 71% in 2013 as a result of increased quantity of sunflower seed purchased (2014) ➤ On average each processors increased seed purchase from 5-10 tons to 50 tons (2014). ➤ Average sunflower oilseed utilization capacity increased from 71% (2013) to 76% (2014). ➤ Processors source 40% of sunflower seed through the VBCF arrangement (2014). ➤ VBCF is increasing being adopted by buyers (mainly sunflower processors) and smallholder producers (2015) 	<p>Trainings (on contract farming) provided to farmers, as well as advice and periodic coaching to processors, was partially effectiveness in promoting contract farming, based on the following findings;</p> <ul style="list-style-type: none"> • Initiatives to enhance contract farming were more effective in particularly Mbeya, where Mbeya Sunflower processors Association (MBESOPA) bought 80 tons of sunflowers from farmers. • In Morogoro and Ruvuma, where similar support was provided, processors did not buy seeds from farmers through contract farming arrangements. Instead they continue to purchase seeds through their agents, or occasionally through traders/middlemen. • In Ruvuma, Mama Sunflower Company bought seeds from groups the company supported, through informal agreements. Majority of farmers who did not get support from the company have been adamant to sell seeds to the company. • Although farmers are showing interest in VBCF and farmers consider VBCF to be a lasting solution to

		<p>marketing sunflower and linkage to inputs, VBCF is being adopted mainly in Chunya District in Mbeya, particularly because members of MBESOPA are proactively following up farmers and farmers are responding positively.</p> <ul style="list-style-type: none"> • Elsewhere, more support to processors and follow up on the VBCF is needed if VBCF is to be promoted effectively. Support to processors should include linking them to finance to enable them purchase seeds when seeds are available, hence increasing processors capacity to effectively participate in VBCF. Processors need linkage to Business Development Services (BDS) to enable them to become investment ready and secure finance. On the other hand, farmers need linkage to a package of inputs.
<p>2. Strengthening producer groups - Strengthened capacity of producer groups to engage in contract farming</p>		
<ul style="list-style-type: none"> ➤ 137 producer groups engaging in VBCF (baseline 97) (2013) ➤ Strengthened Producer Group (PG) leadership (2013, 2014) ➤ PG members use Good Agricultural Practices (GAP) (2013, 2014, 2015) ➤ Producer group members start to engage in contract farming (2014) ➤ Producer groups provide marketing services to members (negotiate contracts) (2015) ➤ Farmers practice record keeping and GM analysis (2015). 	<ul style="list-style-type: none"> ➤ 137 PGs engaged in contact farming (= cumulative figure. 2013 + 2014 actual = 40). There is a positive trend, whereby producers are accepting contract farming as beneficial, in terms of improved prices and reliable markets (2014). ➤ Producer groups are now engaging with increased trust with agro-input suppliers and processors, although this remains a challenge during the initial engagement period (2014). ➤ Five PGs organized and held ward farmer days (share knowledge, seed vars., technologies) (2014) ➤ Producer groups set up 15 demonstration plots in collaboration with local government extension staff and processors (2014) ➤ At least 450 farmers applied GAP during 2013/2014 crop season (2014) and farmers are increasingly adopting GAP ➤ Farmers produce improved quality sunflower seeds for oil production: use of improved varieties and agro-inputs (2014) 	<p>Training of producer groups was effective in enhancing strength of farmer groups, but the effectiveness of the trainings in enhancing capacity of farmer groups to engage in contract farming varied:</p> <ul style="list-style-type: none"> • LCBs trained producer groups on a number of aspects. Topics covered and depth of training varied, depending on the in-house and outsourced capacity of the LCB. Most common topics covered include: Good Agricultural Practices (GAP); Record Keeping, Negotiation skills in the context of village based contract farming, leadership and management). • Training was mostly effective in enhancing skills for GAP, leadership and management of the groups. Farmers in Mvomero District (Hembeti), Chunya district (i.e. Tumaini, Fahari, Maendeleo, Iseche Twende na wakati (ITW), Mwambani and Ukombozi group in Mbala Village are adopting skills in Good Agronomic Practices (GAP). • Trainings and mobilisation of farmers, was effective to get more farmers to grow sunflower. In all the districts

	<ul style="list-style-type: none"> ➤ Increased PG access to extension services through contractual arrangement between PGs and input suppliers (2013) ➤ -47 PGs of which the membership were 778 male and 690 female (47%) provide marketing services (2015) ➤ 75% adopted Knowledge and skills GAPs for sunflower production (2015) ➤ Farmers use record keeping, negotiation skills during VBCF contracting (2015) 	<p>visited, farmers are showing interests to increase acreages under the cultivation of sunflower</p> <ul style="list-style-type: none"> • However, in Mvomero, producer groups in Hembeti did not effectively follow up on the initial market linkage and processor's interests to buy seeds from the farmers and instead farmers sold sunflower seeds to predominantly middlemen
3. Strengthened councilor oversight		
<ul style="list-style-type: none"> ➤ Increased councillor oversight capacity ➤ 20 districts include edible oilseed sub-sector in annual plans and budgets (baseline 4) 	<ul style="list-style-type: none"> ➤ Councillors' capacity in local government planning and budgeting has increased. Kilolo District councillors took the action to use council revenue to order fertilizer for sunflower for the first time ever (as a result of the Cess study presentation) ➤ Eight districts include edible oilseed sub-sector in annual plans and budgets (= cumulative, 2013/2014 actual = 4) ➤ Sunflower was selected as a priority cash crop in four districts as a result of councillor prioritization ➤ Chunya District Council purchased sunflower processing machines for farmers in three villages ➤ Councillors awareness and knowledge of VBCF increased as a result of their participation in awareness raising and training activities 	<ul style="list-style-type: none"> • Councilor oversight training was carried out once in the sunflower project. • Additional councilor oversight activities have not been taken up and have been postponed. More councilor oversight activities will be undertaken after elections.
4. Strengthening Sector Alliances – TEOSA		
<ul style="list-style-type: none"> ➤ TEOSA board and executive body in place (2013) ➤ TEOSA organisational procedures, policies and manuals in place (2013) ➤ One policy brief produced for advocacy purposes (2013) ➤ Support the operationalization of 	<ul style="list-style-type: none"> ➤ TEOSA has increased its capacity to address members' interests on issues that affect the edible oil seeds sub sector. ➤ TEOSA was invited to become a member of the Edible Oilseeds National Task Force in the Ministry of Industries and Trade ➤ TEOSA identified oil quality as a priority issues to be addressed and have generated information for 	<p>Training and facilitation of TEOSA was effective to enable it successfully secure government recognition, raised issues of protection of the infant edible oil sector, raised the issue of seeds, technology etc. to the relevant ministries. In addition, TEOSA successfully lobbied for the import tariff on imported edible oil to be increased. Although this proposal was passed by parliament in 2013, it has not yet been implemented.</p>

<p>necessary policies, procedure manuals and plans; provide skills training (2014)</p> <ul style="list-style-type: none"> ➤ Support TEOSA to strengthen regional chapters based on demand (2014) ➤ TEOSA organisational procedures, policies, and operations manuals operationalized ➤ Regional chapters begin to address members needs and demands 	<p>advocacy on this issue</p> <ul style="list-style-type: none"> ➤ TEOSA has widened its network by becoming a member of the recently formed Southern Africa Oilseed Association ➤ TEOSA conducted their first annual general meeting in 2014 to discuss the draft strategic plan and compliance to TFDA and TBS standards for oil quality ➤ TEOSA organized an held an Annual General Meeting to discuss issues constraining the sub-sector; improving oil quality was identified as a priority issue (2014) 	<ul style="list-style-type: none"> • However, TEOSA management is of the opinion that they do not have adequate capacity to undertake effective lobbying and advocacy and TEOSA governance structure is not yet functional. The MTR consultants agree with this opinion. • The linkage between TEOSA and the regional chapters is loose, characterized by a weak feedback mechanism. • TEOSA has a draft strategic plan but there are no structures for implementation of the strategic plan, TEOSA lacks a sustainable source of funding to implement its strategic plan.
<p>5. Strengthened sector alliances - TEOSA regional chapters and Sunflower Processors Association</p>		
<ul style="list-style-type: none"> ➤ Four TEOSA regional chapters established (baseline 2) ➤ Regional chapters begin to address members needs and demands 	<ul style="list-style-type: none"> ➤ Four regional chapters established and three registered (cumulative. 2012+2013 actual = 2): Mbeya, Morogoro, Ruvuma and Iringa-Njombe (to be registered) ➤ TEOSA chapters in Iringa-Njombe and Mbeya chapters tackled local issues that affect sunflower farmers in the regions. For example: Iringa-Njombe and Mbeya regional chapters raised farmers concerns on the quality of sunflower seeds available from the Agriculture Seed Agents (ASA). As a result ASA agreed to increase quality control measures to ensure the availability of quality seeds through their regional/district agents. Members were encouraged to use Quality Declared Seeds (QDS) in favour of using traditional seeds ➤ Three regional chapters registered. TEOSA organized and held a regional chapter launch for Morogoro, Iringa-Njombe, Ruvuma and Mbeya to raise TEOSA profile (2014) ➤ Morogoro Sunflower Oil Processors Association 	<p>The outcome focusing on regional chapters were revised in 2014 to focus on strengthening sector alliances as in outcome 4 above.</p> <ul style="list-style-type: none"> • A processor needs assessment for Morogoro processors association (MSOPA) was done in July, 2013 by RUCODIA. The needs assessment for Mbeya, Iringa, Njombe and Morogoro TEOSA regional chapter was done in June, 2014 by MRA. • MEOSA and MBEOSA met once in 2014. • Iringa-Njombe and RUEOSA regional chapters has been registered with BRELLA •

	<p>(MSOPA) formally registered. Iringa-Njombe Processors Association are working on formal registration process (2014)</p> <ul style="list-style-type: none"> ➤ The Regional Chapters in Morogoro, Mbeya and Ruvuma started to address access to quality seeds and compliance on production of double refined oil as key issues that affect production of quality sunflower kernels and penetration of sunflower oil into the markets (2015) 	
6. Knowledge development and research		
<ul style="list-style-type: none"> ➤ Case studies and policy briefs ➤ Development of tools 	<ul style="list-style-type: none"> ➤ Case studies and policy briefs not done ➤ Development of tools including: <ul style="list-style-type: none"> • Contract farming guidelines for sunflower, draft • Enterprise-led crop collection centres/storage facilities guidelines, draft • Revised business model for commodity associations • Good Agronomical Practices Handbook (to be printed) ➤ Benchmarking the Quality of the Central Zone Sunflower Processors Association (CEZOSOPA) processed Sunflower oil in the Central Zone of Tanzania. Report prepared for SNV by Kalunde Kissawike, PhD; Sokoine University of Agriculture, Department of Food Science and Technology; May 2013. A VBCF study on actors experience in the sunflower value chain by Poverty Combat Alliance (PCAL); September 2015, draft. 	<p>The program has recently conducted a gender assessment and a learning event. It is anticipated that the outcomes and recommendations of the gender study will be incorporated in the subsequent plans.</p> <p>A number of issues brought up in previous studies (e.g. ripple effect) have not been used to effectively inform implementation of several aspects of the program. The consultants do not see any evidence that recommendations from previous studies have been incorporated in project implementation.</p>

3.1.3 Effectiveness of overall project implementation

Bringing on board relevant actors and institutions

SNV has been quite effective as a facilitator of a value chain development program to bring on board relevant actors and institutions from Public, Private and Civil Society. On the public sector side SNV works with both the ministries and the local government authorities, and a number of standards and food safety agencies. SNV also worked with Agriculture Research Institutions (ARIs). On the private sector side, SNV engaged processors, aggregators as well as farmers and their respective organizations. In addition on the private sector side SNV also works with TCCIA. On the CSO side SNV is working with ANSAF and AgriProFocus for influencing policies.

Realizing that there are several projects that are promoting sesame and sunflower (e.g. Aga Khan Foundation, Care International and LIMAS, VECO, MUVI etc.), SNV tries not to duplicate interventions and has often chosen wards and villages where there are no similar projects. However, this has not always been the case as there are a few districts where more than one project is operational and often the approaches are not aligned. For instance in Masasi, SNV, Care International and Aga Khan Foundation are all working in Masasi District. Both SNV and Care International are working in Nachingwea. In Iringa & Songea both SNV and MUVI project have worked on the sunflower value chain. The crux of the matter is that different organizations have different approaches to value chain development. Aga Khan Foundation for instance, has a comprehensive approach with lead facilitators and field facilitators at district levels and community-based facilitator in each village, all equipped with transport facilities and working budget, whilst Care International has business and community advisors at district level and promotes para-professionals (selected lead farmers) at village level. In addition, Care International has a focal staff at LGA extension department whom they equip with transport facility and working budget. SNV on the other hand works via LCBs and promotes AMCOS and Farmer Organizations.

The consultants were informed that in the past, there were efforts to align and to seek opportunities for collaboration with other projects in Lindi and Mtwara. However, collaborative efforts have been limited. SNV collaborated with Aga Khan Foundation, who organized a stakeholder meeting when SNV presented the documentary “Kulikoni”. Therefore there is still a need to realign these approaches at the field level in order to be more effective and in setting a good base for sustainability once these projects are over. In places where sunflower project is implemented, SNV engages a focal person at the district level. In addition, SNV has been involving village leadership in the implementation of VBCF and in its trainings. SNV has been collaborated with MUVI Iringa and Ruvuma as well as VECO in Chunya. MOUs between SNV, MUVI and VECO signed for policy enhancement in EOS subsector in the country. This resulted of TEOSA working closely in influencing policy by supporting AGM and strategic plan.

Working via LCBs

Where LCBs are generally from the locality, the LCBs have good knowledge of the local context, existing relations with key stakeholders and their engagement is more cost effective. Some LCBs have appreciated the opportunity and trust provided by SNV to enable them operationalize SNV strategies. The consultants have also observed LCBs growing and becoming successful business operators in their localities. However, the concept of working with LCBs is still relatively new and it is only SNV, in the field of value chain development that is championing this concept. This concept started in SNV in 2007 when SNV (global) developed a localization policy. SNV Tanzania started by formalizing engagement with 15 organizations in 2007 i.e. these were included in a LCB roster which has been built up to more than 200 over the past 8 years. Availability of local organizations has been easier in Water and Sanitation (WASH) sector compared to agriculture and renewable energy as many NGOs (after NGO Act passed in 2001) worked in education, health, water and environmental project. It has taken SNV more time to build up a portfolio of LCBs for agriculture sector. A major boost came in February 2013 with a meeting in which many potential agriculture LCBs were invited in order for them to introduce themselves to SNV.

It is difficult to find credible LCBs especially those in the field of value chain development, and who reside in the districts where the project operates. For instance, during the MTR, the consultants met LCBs (RUCODIA), based in Songea offering services in Morogoro. Also, SEIDA who worked with SNV in 2007/8 in Dodoma (Kondoa) has been re-engaged again in October 2015 to provide services to AMCOS in Mtwara and Lindi. SEIDA is based in Dar es Salaam. The engagement of SEIDA is a one-off contract and according to the LCB, this is not effective as a lot of follow up is required in order to internalize the capacity development services offered. According to the EOS project staff, ideally selecting LCBs should take no more than 20% total days required for the engagement supporting LCBs (40%) and supervising LCB should take 40%. However, experience have shown that selecting takes 30% of the time, Support 40% and Supervision 30%. There are monitoring visits that are frequently done to assess and support LCBs during implementation of particular assignments.

Staffing and coverage

It has been observed that the staffing of EOS program has been the most challenging part of SNV implementation. SNV started with 6 advisors in 2013, 3 full time and 3 part-time, but currently have two on full time, while 3 staff are working with the EOS program on part-time. Although the coverage of the program has been constantly reviewed, it is still wide as it covers 10 geographical regions. Initially the project team worked from Morogoro and presently they operate from Iringa. It takes the 2 days for the Project Manager to travel from Iringa to get to Mtwara and 2 days to go back to Iringa. It takes a whole day for the advisor to travel from Iringa to Chunya. This fact underscores why regular visits to the field are not feasible and hence an inevitable learning gap when LCBs are engaged to undertake assignments. Leave alone the fact that some LCBs require quite a lot of capacity strengthening before they become seasoned value chain facilitators. The geographical coverage and the reduction in number of full time advisors does not support effectiveness in the implementation of the project.

Visibility of sunflower and sesame in the districts

Sunflower and sesame should ideally be the main crops chosen in the District Agriculture Development Plans (DADPs) for greater visibility, which has not always been the case. For decades the government has nominated these two crops as minor crops and this phenomenon is not going to change soon. Although sesame features prominently in many districts in Southern Tanzania, cashewnut is the main cash crop. Of the 3 districts visited during the MTR in the sunflower value chain, only Chunya has sunflower as its priority crop in DADPs. Where the crop does not feature in the district priority, then it is less visible. Visibility also comes from the way SNV plans and allocates project resources in the respective districts in consultation with the LGAs. SNV plans and resource allocation is often not known in the districts where MTR took place. The experience elsewhere in Value Chain Development (VCD) projects is that project plans are included in the district annual plans the district budget and on a half yearly basis reports are shared with the LGA for discussion. Also these plans are discussed at the district value chain development platforms. Other projects in Mtwara and Lindi have allocated a focal person and budget in the districts. These focal persons are provided with transport and other funds for operation and it seems to the LGAs that this is the way a project can be visible.

3.2 Efficiency

Table 10: Budget and efficiency of project implementation

Narrative	Cumulative Budget 2012-2013	Cumulative Expenditure 2012-2013	Variance as % of budget	Revised budget 2014	Actual Expenditure Dec 2014	Variance as % of Budget	Budget 2015	Budget Jan-June 2015	Actual Expenditure Jan-June 2015	Variance % of budget	Total Budget 2015	Total Expenditure up to June 2015	Total Variance
1) Technical assistance													
SNV Advisor International Staff	154200	118413	23	28,800	27,704	-31	6,096	3,048	4,064	-33	16,048	10,181	37
SNV Advisor International staff	36600	41472	-13	13,100	5,816	51	1,400	0,700	6,800	8	20,400	44,088	28
Consultants and associated advisors International	75273	23799	68				1,380	5,690		100	80,963	23,799	71
Consultants and associated advisors Internationals	72727	0	100		7,404						2,727	7,404	50
LCBs	72000	187112	-160	3,602	8,915	-58	5,484	2,742		100	68,344	56,027	52
Subtotal	410800	370796	10	35,502	69,838	8	284,360	42,180	80,864	36	38,482	31,498	4
2) Travel costs													
	85600	22170	74	9,113	2,376	35	2,254	6,127	16,753	36	30,840	51,299	61
Subtotal	85600	22170	74	9,113	2,376	35	2,254	6,127	16,753	36	30,840	51,299	61
3) Program support													
Workshops and training	62100	59038	5	10,709	9,284	55	4,352	1,617	4,415	98	34,426	9,737	63
Publication and dissemination	10000	186	98	9,500	790	99	9,000	2,000	237	-112	1,500	713	55
Small investments	10000	0	100								0,000		00
Subtotal	82100	59224	28	30,209	9,574	62	8,352	3,617	8,652	91	75,926	14,450	69
4) Direct support costs													
Support Staff	45188	35094	22	50,400	4,324	-8	50,400	25,200	5,222	0	20,788	14,640	55
Direct operational costs	36972	28486	23	28,800	4,448	-54	28,800	4,400	4,400	0	80,172	57,334	90
Subtotal	82160	63580	23	79,200	8,772	-25	79,200	29,600	9,622	0	200,960	101,974	11
5) Indirect costs													
a	61620	55619	10	7,825	9,277	-5	5,834	7,917	3,630	24	7,362	8,526	68
b													
e.t.c													
Subtotal	61620	55619	10	7,825	9,277	-5	5,834	7,917	3,630	24	7,362	8,526	68
Grand total	722280	571389	21	41,849	59,838	19	800,000	289,441	166,520	42	453,570	109,747	24

Remarks on Budget and Efficiency Levels in EOS

- Overall total expenditure for EOS (burning rate) is 76% of the approved budget. This is not alarming taking into account that EOS program implementation almost stalled for one year (2014).
- The LCB budget utilization offer mixed signals. Overall there has been over 50% over expenditure, however in 2015, up to June, no budget had been utilized. During MTR we were informed that in the sunflower area, trainings that were conducted by LCBs in the months of Jan-March, were already paid for in the year before (accrual). The LCBs were recruited in December 2014 and started their implementation in January 2015. In 2013 there was an increased engagement of LCBs. The activity was under budgeted. Led to budget review by increasing EUR 125,000. In 2014 more LCBs were also engaged to bridge implementation gap.
- Program support budget is only 19%, of which 96% is to be used for soft skills (e.g. workshops and publications) and 4% for small investments. The program strategy was not anchored on activities such as developing markets for new seed varieties that involves private sector seed producers and may require leverage to cushion initial costs; this is an area of program support that could require a substantial budget if adopted. LCBs are supported to deliver capacity building interventions.
- 50% - 58% of the budget is for technical assistance out of which 40% is for engaging LCBs.
- Less than 5% of the total project budget has been utilized for travelling. One wonders how such low budget was adequate, taking into account the expansive coverage of the program - 10 regions and the decision to operate from the main offices in Iringa. However, it has to be taken into account that the project was at standstill for over 6 months and hence no travelling took place.
- In terms of budget sufficiency for the remaining project period, first observation is that only 28% of the approved budget for 2015 was utilized by end of June 2015, hence there is sufficient budget space for 2015, also taking into account anticipated slow pace of implementing some activities e.g. councilors training due to general elections. As for 2016 and for the potential future extension, we

would suggest the budget is renegotiated with the donor and in consultations with AMDT based on proposed way forward arising from the findings of this MTR.

- 7) **Investment versus the achievements:** In total through SNV intervention during the review period, a total of 164,552 people (123,658 sunflower, and 40,894 sesame) were reached (with a package of services) and increased their incomes, and direct employment of 15,606 (13,590 Sunflower and 2,016 sesame) was created during the same period. Taking into account the budget utilization of USD 1,097,747 during the review period, expenditure the per person reached is around USD 6 which signals that the project is achieving impact at quite modest investment.

3.3 Risks management

Table 11: Assessment of risks and mitigation strategies

Risks	Mitigation	Assessment
Risks identified in 2014		
a) Given the current political context in Tanzania,		
1. Alliance may turn into political entities either as a result of internal dynamics – local client’s networks – or by being co-opted by local politicians	<ul style="list-style-type: none"> Registering of associations will be closely followed up ensuring that the process is properly in line with the Ministry of Trade Industries and Marketing regulations. 	<ul style="list-style-type: none"> So far alliances have not turned into political entities, and hence not affected the program. SNV has continued to closely facilitate the respective Associations to ensure that their registration is properly in line with the Ministry of Trade Industries and Marketing regulations.
2. Chronic rent seeking practices, government may be reluctant to give the AMCOS the space for autonomy	<ul style="list-style-type: none"> SNV will promote inclusive multi-stakeholder dialogue and relationship building to create common understanding, commitment and joint action among producers, government, and private sector actors for oilseed value chain development 	<ul style="list-style-type: none"> This risk still remains high. All regional chapters are still very weak in their capacities and are not autonomous to foster meaningful change.
3. Councilors may use the program as a platform for political campaigning	<ul style="list-style-type: none"> Limited councilor oversight training activities will be carried out in 2015 before the general elections, and activities expanded in 2016. 	<ul style="list-style-type: none"> The risks remained moderate during election phase. However, there is a challenge that the new councilors may need to be informed and capacitated on the ongoing initiatives
4. The potential for politically initiated disturbances during 2015 may be relatively high due to local government elections, constitutional referendum and the general elections	<ul style="list-style-type: none"> SNV will monitor the situation (from a security point of view) and consult with Irish Aid on possible actions to be taken as regards the program implementation. 	<ul style="list-style-type: none"> The risks remained moderate during election period, as there has been no further disturbances.
b) Change in local and global consumer preferences and market demand	<ul style="list-style-type: none"> Promote product development, including value addition. 	<ul style="list-style-type: none"> Oil seeds local & global consumer preferences and demand has kept increasing and hence focus should be on further market development for Tanzania positioning.

		<ul style="list-style-type: none"> • Over installed capacities, especially for sunflower processing, with limited entrepreneurial and innovations capacities • Value addition at farmer group level often faces the challenge of lacking entrepreneurial drive
c) Negative trends in climate change	<ul style="list-style-type: none"> • Sunflower and sesame are dry area crops; promotes drought adapted seed varieties 	<ul style="list-style-type: none"> • Risks remain relatively high and climate change has continued to affect productivity in the production areas. The trend for shifting cultivation especially for sesame has not been checked, consequently weather patters and climatic conditions are getting more and more unpredictable. • Weather index insurance is an opportunity to consider. Likewise environmentally friendly practices, should be further disseminated.
d) Additional risks identified during MTR 1. No taxes imposed on imported palm oil, a substitute for locally produced sunflower oil	<ul style="list-style-type: none"> • TEOSA capacity (National and Regional chapters) is further strengthened with respect to advocacy agenda for change. 	

3.4 M&E system

SNV has a web-based PM&E system that supports the project cycle. It should ideally be possible to extract information of the status of the project at any one time from this system. However, the consultants observed the following issues with the existing system;

- The 2014 revised program targets were not yet updated in the web based PME system at the time of the MTR.
- The indicator for income (\$1 /day/year) has been difficult to track and a subject of constant discussion without conclusive position.
- It is the view of the consultant that this indicator needs to be reviewed for a proper consensus on the methodology of arriving at the indicator. What is captured now is the increase in income based on a gross margin calculation based on number of farmers reached i.e. actual outreach to farmers (male/female) with a bundle of services that the project is offering.
- We suggest that the program should also track percentage increase in productivity.

The consultant is aware that SNV is in the process of developing an outcome mapping/outcome-harvesting tool and use it to assess program outcome results, which will give better insight into the governance aspects, including perception, behavior, action and relations between key stakeholders.

3.5 Sustainability

In value chain development, the facilitator is expected to be able to exit, leaving behind the service providers, interacting with primary value chain actors. The public sector puts in place an enabling environment and continues to provide the public goods that cannot be provided by the private sector. Indicators of sustainability of a value chain that has reached maturity stage are: commitment of primary actors, business growth potential, structured and coordinated support from the service sector and enabling environment. Examining the sunflower and sesame value chains against these indicators, the consultants are of the opinion that the two value chains in question have not reached maturity stage. Sustainability is viewed in terms of: sustainability of activities, approaches, structures and emerging business models and their commercial viability and scalability.

Sustainability of Activities:

SNV has been providing capacity building service through the four activities: promoting inclusive business arrangements, strengthening producer groups and farmer marketing cooperative, strengthening of sector alliances, as well as knowledge development and research.

A number of trainings were offered as a means of strengthening producer groups. A number of producer groups met during this MTR, especially in the sunflower value chains are showing signals of moving towards becoming sustainable in the future. However, more still needs to be done to enable the groups become sustainable. Stronger linkages to rewarding markets and structuring group management are likely to enable the groups become sustainable.

In terms of strengthening of sector alliances, TEOSA needs to be supported to put in place and strengthen communications with its regional chapters, as well as develop a mechanism of soliciting financing for it to be able to run its day-to day's business activities. Similarly, AMCOS still need more support to look for markets, enter contracts with buyers and where possible bulk, transport and deliver produce to the buyer. AMCOS transition towards becoming stronger partners with private sector in marketing still needs a number of services and support.

In terms of knowledge development a number of activities were suspended and a number of activities related to knowledge development are ongoing. There is no evidence that the recommendations from previous studies have been incorporated in today's program management. Activities related to enhancing access to finance were suspended following the very limited success with the provision of investment advisory services to selected businesses. Further, in connection to value addition, training and capacity building were provided to processors and processor's associations and this activity has some indication of sustainability. However, results of activities for supporting value addition in sesame

have not been successful. It can be concluded that sustainability of activities has only been partially achieved.

Sustainability of Approaches

The consultants are of the view that in the few cases where LCBs are providing one-off services and are not from the same locality, sustainability of LCB service provision and sustainability of development results are questionable. Institutional development approach – by ensuring relevant public, private and CSO having a common agenda is an approach that creates a good base for sustainability. Also, the sector alliances (e.g. TEOSA) are still not able to undertake brokerage and advocacy for its members effectively and the regional chapters are at formative stages. It can be concluded that not all approaches have reached the sustainability threshold and the approaches may need to be further developed or fine-tuned.

Sustainability of program structures

SNV by design envisaged not creating new structures but work with existing structures. Ideally this could have been sustainable. Given the diverse nature of the program and the required presence of service providers in the local areas, the current structure is not sustainable at LCB level, TEOSA, in terms of multi-stakeholder platforms

Emerging business models and their commercial viability and scalability

Emerging business models include that of farmer groups as processors (LGA driven), contract farming between farmers and processors and contract farming between private seed company and organized farmer groups. Assessments of commercial viability and scalability of these business models are presented below.

In Chunya District as well as in Namtumbo District, LGAs have provided processing machines to farmer groups. In Mvomero district (Hembeti village) a farmer group previously supported with a processing machine had not managed to get the machine working. In Chunya, Tumaini farmer group is running a processing machine but face challenges of fixing it when it breaks down. Also models where farmers are supported to own small processing machines lacks scale. In Chunya, Mwambani farmer group are being supported to undertake double refining of sunflower oil. Although farmers groups often asked to be supported to be able to add value at local levels, the consultants doubt the entrepreneurial capacities of the farmer groups and also often group initiatives lacked a sense of responsibility, if for instance costs are involved. In this respect, a farmer group as a processor is not a viable business model. Farmer groups should not be expected to be effective and efficient in processing especially where groups have been given machines as a grant. However, farmers groups can put in place separate management for the machines they are often provided. In this sense, a separation of function and roles may make such a business model viable.

So far, contract farming is another emerging business model, albeit with mixed results. Contract farming scheme in sunflower, particularly in Mbeya (Chunya) has demonstrated success primarily because it is not a new thing in the area since it has been used in tobacco production. Processors are mobilizing themselves and going out to purchase sunflower seeds through their processors association, hence there are less competition and limited cases of side selling of sunflower seeds. Processors are committed to providing inputs (improved seeds) to the farmers and so far, farmers are also proactively producing seeds for the processors. Overall, in contract farming schemes where buyers are not interested in getting into long-term relationships and farmers and their organizations have no sufficient capacity to bargain, then such contract farming schemes are not likely to work. Also in a legislative environment where mechanisms for enforcement of contracts is not clear to all the parties or to one party to the contract, contract farming does not work. Ingredients that make contract farming effective and lessons learnt so far, can be used to improve on the contract farming elsewhere.

Contract farming between private seed company contracting farmers organized in groups to do seed production is profitable for farmers and there is a growing market for seeds. The case of TEMNAR and AMCOS in Masasi and Nachingwea illustrates this aspect of contract farming.

3.6 Lessons learnt

3.6.1 What has worked

LGA involvement and participation

Involving the LGA from district to village levels in most of the project activities was instrumental to ensure effective implementation of activities. Involving LGAs gave farmers assurance and a strong belief in the project and also made the project credible to the farmer. Involving LGA made it easier for the group in Hembeti village, Mvomero district to follow up on a number of their resolutions. In the said group, it was easier for members to follow up change in management and also how to get the machine, which has been idle to work. This is mainly because the village and ward leadership was part of the group.

Training and capacity building of farmers and farmer groups

Trainings, especially the training on GAP, were effective in increasing productivity. Also training has been effective to mobilize farmers to engage in growing sunflower. In Chunya district, some farmers' doubled yields from 4 bags per acre to 8 bags. Participatory approaches to trainings enabled the participants to easily pick up issues they are being trained on.

On the other hand there still exists a great opportunity to improve the effectiveness of trainings and increase adoption of GAP. Making training more practical using demonstration plots would go a long way to demonstrate GAP and hence enable farmers to adopt more quickly. One-off training, conducted in class is less sufficient hence less effective to enhance GAP and increased productivity.

Facilitating market linkage through contract farming

Village based contract farming was effective in enhancing clear and sure markets for farmer's produce hence increasing incentives for farmers to increase production of sunflower. VBCF was particularly successful in Chunya district and partially successful in Songea, especially through the efforts made by Mama Sunflower Oil mill. Farmers in these two regions, who were able to access inputs and markets for sunflower are now more interested to grow sunflower because of access to inputs and sure markets.

However, there is still a great opportunity to improve VBCF, especially to make it work elsewhere. Both farmers and processors need linkages to finance. Processors have to have finance especially at the time farmers are harvesting sunflower so that they are able to effectively buy sunflower. Also, untimely availability of inputs (seeds) reduces farmer's incentive to produce. Processors have to provide seeds on time in order for farmers to be able to plan early and hence benefit from the advantages of using improved seeds.

LGA leveraging interventions to previous projects

In Chunya district, the LGA has followed up on sunflower producer groups left behind by a VECO project and is also working closely with two groups currently being supported by SNV. Leveraging LGAs interventions to activities of previous projects enhances sustainability of projects left behind by development agencies. The challenge is for the managers of the various projects of development agencies to identify and strengthen links with the LGA as well as leverage exit to the LGA interventions.

3.6.2 What has not worked & why?

In spite of an array of support interventions offered to TEOSA, aimed at making TEOSA and the regional chapters sustainable, TEOSA does not have adequate capacity to undertake effective lobbying and advocacy and TEOSA governance structure is not yet functional. The linkage between TEOSA and the regional chapters is loose, characterized by a weak feedback mechanism. The TEOSA regional chapters are still at formative stages and still have a long way towards becoming functional. The chapters, which have an NGO status, still need support to transform and build their capacity within TEOSA mandate.

4.0 Conclusions and Recommendations

4.1 Conclusions

Context

The seed roadmap for the two edible seeds value chains in question is not yet fully functional. In spite of signals and indications of a huge market for sunflower seeds, demand articulation and supply responses are not matched. The low response to demand is leading to low adoption of improved seeds, consequently low production and productivity. Production and productivity is lagging behind and inadequate increase in production is perhaps a major setback to the growth of the edible oils seeds subsector and value chains.

There is anecdotal evidence to the effect that markets for the edible oils in question are growing. There have been new investments in processing, leading to increased capacity for processing and increased competition for seeds. A huge boost in production is needed so as to generate a glut of seeds to feed the increasing processing capacities.

The marketing system for sesame (i.e. open marketing system), whereby, an increasing number of farmers sell produce to the middlemen gives very little room for the farmers and their organizations to negotiate favorable terms. This (selling on terms they do not dictate) affects the perception of farmers on market access. Agricultural marketing, including marketing of oilseeds crops would receive a big boost through introduction of structured marketing such as commodity exchange, now in the making in Tanzania. The experience from Ethiopia reveals a huge success with structured marketing in a number of crops, including oilseed crops.

There is a growing concern over environmental impact of shifting cultivation practices currently being used in sesame production, especially for Southern Tanzania. A number of people are migrating towards districts in Lindi, particularly Liwale to go and grow sesame there. However, acreages of virgin land is cleared for production and after a season or two, these plots are abandoned and the same farmers move on to clear other acreages of and elsewhere. If unchecked, this practice poses a serious environmental and sustainability problem.

There are several projects at different stages of implementation. In sesame project, Aga Khan Foundation, Care International and LIMAS are undertaking a number of projects to develop the edible oil sector. Similarly, the SAGCOT initiative is also going to work in the sunflower subsector. Unfortunately, despite efforts to enhance synergies, synergies among these projects have not yet been fully articulated.

Awareness on subsector related constraints and opportunities have been well analyzed and shared at different levels, including the relevant ministries. What is lacking is appropriate actions and scalable business models to address the subsector related constraints and reap from the opportunities (e.g. import substitution of edible oil) that are so far very widely known.

Effectiveness

The relationship between outcome attainment and contribution to impact for both sesame and sunflower are inconsistent. A few outcomes are below targets e.g. producer group strengthening, yet contribution to impact has surpassed the target by far. Perhaps the revised targets were too low. Given the extent to which the program activities were planned and revised overtime, the consultants are of the view that achievement up to this time is fairly good. SNV has gone through a lot of turbulence, especially with staffing and this has created inconsistencies and lack of continuation, which is not good form especially within the context of value chain development, which needs continuity following patterns in the cropping season.

Efficiency

Considering the budget utilization, it can be concluded that SNV has been fairly efficient. The project utilized its resources in an efficient manner. However, it is also noticeable that the entire program has

not managed to provide resources to leverage innovation (though not in the design). The program efficiently invested in enhancing soft skills.

Sustainability

LGA involvement, training and capacity building of farmers and farmer groups especially for GAP in sunflower agronomy, facilitating market linkage through village based contract farming and LGA leveraging interventions to previous projects have been successful interventions. Capacitating regional alliances have not worked well. In as far as the whole issue of sustainability is concerned, it can be concluded that sustainability of activities has only been partially achieved. Also, not all approaches have reached the sustainability threshold and the approaches may need to be further developed or fine-tuned.

The overall conclusion is that the two value chains are still at the implementation stage and have not yet reached the stage of maturity. The consultants are not able to find plausible sense of impact (refer to value chain transition framework annexed). There is room to still work further to move the value chain towards maturity.

4.2 Recommendations

Our recommendations include what the program can do in the remaining period (short term) and what can be done beyond 2016 (long term). Both short and long-term interventions addresses systemic issue that hinder growth and competitiveness of the two value chains and drive such value chains to reach maturity. Recommendations are drawn from the consultant’s view formed during the MTR, inputs from the debriefing meeting held with representatives of the client and the donor. Also, the inputs from and discussion with the participants in the learning workshop, was used to beef the recommendations for longer-term interventions.

Recommended short-term interventions

These are recommendations that will be implemented through the remaining budget resources provided for by the current program, with a room to prepare for the longer-term horizon. For instance the whole issues of exit strategy should be considered differently given that SNV and the partners have shown interest to coin interventions to further develop the sunflower program. In the validation meeting AMDT expressed interest for SNV to become one of the facilitators of the sunflower value chain program. It is also suggested in the short term that implementing partner and the donor should agree on clearer indicators and methodology as highlighted various sections of this report.

Table 12: Recommended short term interventions

Strategic issue 1: e.g. Strengthening sector alliances		
		Who
What needs to be done	• Develop lobbying agenda for TEOSA and identify one agenda on which to start work	SNV, TEOSA, regional chapters
	• Prepare capacity development plan for TEOSA and all its chapters	SNV, TEOSA, regional chapters
	• Provide initial mentoring and coaching for implementation	SNV
	• Facilitate PPP forums through which TEOSA and its chapters would be the secretariat	SNV, TEOSA, regional chapters
Strategic issue 2: Strengthen councilor oversight capacity		
		Who
What needs to be done	• Conduct Councilors Oversight training for selected councilors in the four districts on council planning and budgeting and on their oversight function	SNV and LCBs
	• Develop Councilors’ action plan in 4 districts	SNV and LCBs
	• Facilitate execution of the action plans in the selected wards	SNV and LCBs

Strategic issue 3: Strengthen capacities of agri-businesses to access working capital to expand input purchasing power and processing capacity.		
		Who
What needs to be done	<ul style="list-style-type: none"> Appraise sunflower processors in four regions and identify capacity gaps in business management and development 	SNV and Consultant
	<ul style="list-style-type: none"> Build the capacity of selected processors on business planning and management including access to finance resources 	SNV and LCB
	<ul style="list-style-type: none"> Facilitate MSP meeting and facilitate linkages among various services providers and actors in Sunflower and Sesame Value Chains 	SNV
	<ul style="list-style-type: none"> Raise awareness on VBCF to various agribusiness services providers and actors in Sunflower and Sesame Value Chains 	SNV
Strategic issue 4: Consolidate strengthening of capacities of producer groups and farmer marketing cooperatives		
		Who
What needs to be done	<ul style="list-style-type: none"> Conduct Market Intelligence training to AMCOS and producers groups 	SNV and LCBs
	<ul style="list-style-type: none"> Build the capacity of AMCOS and Producer Groups on Business Development and Management Skills 	SNV and LCBs
	<ul style="list-style-type: none"> Capacitate Certified seeds producers to increase production and hence supply to the market 	SNV, ASA and ARI
Strategic issue 5: Knowledge development and research:		
		Who
What needs to be done	<ul style="list-style-type: none"> Follow up on gender assessment recommendations 	SNV
	<ul style="list-style-type: none"> Follow up on the recommendations of the previous studies (ripple effects etc.) 	SNV
	<ul style="list-style-type: none"> Build the capacity of Lindi- Mwambao and RUNALI unions as per ripple effect recommendations 	SNV and LCBs

Recommended long term interventions

Strategic and operational changes required ensuring impact and sustainability of project outcomes

It is recommended that SNV rework the planning of the project to take into account the stage the value chain has reached towards the maturity stage. We foresee this might necessitate broadening the horizon of the program beyond 2016 and even including other actors and new partnerships.

The seed roadmap for oil seeds crops (sesame and sunflower)

Strategic areas for further support should include putting in place the seed road map for oilseeds crops (sesame and sunflower) and the putting in place a viable seed system that will produce and multiply quality seeds in a manner that makes seeds accessible and affordable to a wide spectrum of farmers.

Medium to large-scale farming

Scaling up smallholder commercialization towards medium scale farming is recommended. Although the developmental effect of focusing on smallholder farmer is great and justifies such a focus, scaling up smallholder commercialization towards medium scale farming is recommended. This is because commercialization of production and commercialization of the entire edible oilseeds sector is most possible with medium scale and (or) large-scale farms. Commercialization of the edibles oilseeds sector will require a comprehensive package of finance, business advice etc.

Legislating contract farming in Tanzania

Contract farming is great as it provides lasting relationships and a market for producers. We observed that contract farming is effective where the marketing system is closed, and that is partly the case in places like in Chunya District. However, Tanzania is opening up pretty quickly and soon there will be traders from other regions, looking for seeds in places like Chunya District. For this reason developing the entire marketing system and synchronizing the marketing systems with the more structured commodity exchange type of marketing system is recommended.

Value addition and food safety

Lastly, enhancing value addition is great, as it creates employment and more value is captured where the process of value addition is conducted. However, the whole value addition needs strategizing. Value addition should be thought of within the context of enhancing competitiveness and considering the competitive advantage of Tanzania in local regional and global markets for edible oils.

For sesame

- Assessment of market demand for sesame processed products
- Business modeling of existing

For sunflower

- Assessment of installed capacity and spatial distribution
- Business modeling, taking into accounts clustering small millers (single refinery) and large millers – double refinery).

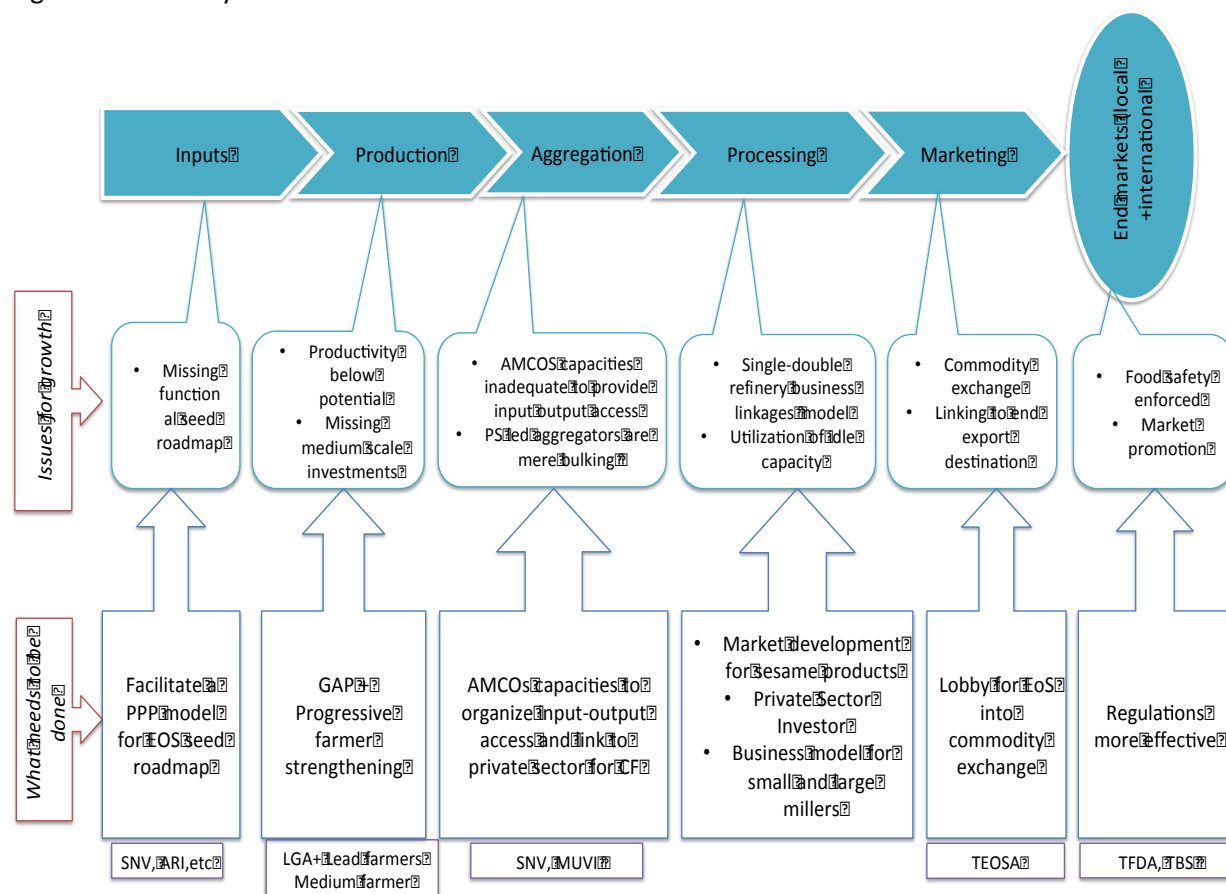
Lack of a functional commodity exchange

Initiatives for developing structured marketing are underway in Tanzania. We recommend developing the entire marketing system and synchronizing the marketing systems with a more structured commodity exchange type of marketing system.

Linking to end export destination - sesame

AMCOS can play function of supplying inputs and aggregating outputs. It is therefore recommended that AMCOS/union be capacitated to take up export orders from importing countries and follow up exports. In this connection, AMCOS should be facilitated to have strategic partnerships with a large exporter and a financial institution.

Figure 3: Summary of the recommendations



Way forward towards collaboration with AMDT

SNV, AMDT and SAGCOT should collaborate to develop the strategy towards the maturity stage of the edibles oilseeds program.

During the MTR, AMDT has been analyzing constraints in the sunflower sector in order to inform the strategic direction of their market facilitation and strategic advice pillars. This is a perfect opportunity for SNV to link up with AMDT to position itself in the potential role they could play towards the AMDT program.

Sesame is widely grown in Mbeya, Ruvuma, Rukwa and Katavi regions and these regions are in the SAGCOT corridor. In the programming of SAGCOT, interventions for the development of the oilseeds sector will be made through a Sunflower Strategic Partnership. This MTR recommends having a partnership in SAGCOT that includes sesame. The two commodities have a very good chance to succeed. The ideas should be to bring the two main oilseed commodities together. Likewise it is recommended that AMDT could consider adding sesame into its portfolio products due to its potential for growth in Tanzania.

Should there be another (end of project) evaluation?

There need to be a study focused on assessing the EOS contribution to impact. This study is still necessary to do because the MTR review scope could not sufficiently cover the impact as it was focused on outcomes. In addition, some outcome related activities (e.g. councilor training, alliance strengthening etc.) are still to be undertaken.

5.0 Annexes

5.1 Terms of reference (TOR)

Name of the assignment	Mid Term Review for Edible Oilseeds Programme
Terms of reference title	Mid Term Review
Sector and Program	Agriculture Sector
Project	Edible oilseed (Sesame and Sunflower) Value Chain Development Programme
Geographical focus	Lindi, Mtwara, Rukwa, Morogoro, Mbeya, Singida, Ruvuma, Dodoma, Njombe and Iringa
Proposed start date	7 th September 2015
Proposed end date	09 th October 2015

1.0. Introduction

SNV in partnership with Irish Aid are supporting the implementation of the Edible Oilseeds Value Chain Development Programme Tanzania from December 2012 to December 2016. The overall goal of this programme is to improve the livelihoods and wellbeing of smallholder farmers in rural areas by developing the edible oilseeds value chain, in line with the National Vision 2025 and the MKUKUTA II targets, to increase economic growth and reduce poverty in Tanzania.

The mid-term review of the Edible Oilseeds programme will be learning focused. The aim of the mid-term review is to assess the edible oilseeds programme progress, performance achievements and lessons between December 2012 and June 2015, and to provide recommendations to ensure that the programme is adjusted as and where necessary in order for it to achieve impact and sustainable outcomes by the end of the programme. These ToRs cover: background information, aim and objectives, scope of work, timeframe, deliverables and reporting.

2.0. Background

SNV, Netherlands Development Organization is an international not-for-profit development organization, working in 36 of the poorest countries worldwide, including 17 countries in Sub Saharan Africa. We focus on achieving impact in Agriculture, Renewable Energy, and Water, Sanitation & Hygiene. By sharing our specialist expertise in Agriculture, Renewable Energy, and Water, Sanitation & Hygiene, we contribute to solving some of the leading problems facing the world today – helping to find local solutions to challenges regarding food, energy and water and sowing the seeds of lasting change.

Within the agriculture sector, SNV Tanzania is currently implementing a number of programmes and projects aiming at: i) increased production (productivity), income & employment for small holders by widening market access and employment opportunities for smallholder farmers and processors, and ii) national and regional food security through increased smallholder farmer income and promotion of staple food value chains, alongside non staple chains. What we do to meet these impact aims includes: value chain development, impact investment, inclusive business, inclusive public policy development and climate responsive agriculture.

The purpose of the Edible Oilseeds programme is to contribute to the development of domestic edible oilseeds subsector to make it competitively supply the local, regional and global sunflower oil markets and sesame seed export market, benefiting local processors and producers. The overall objective of this programme is to increase incomes from oilseeds of 120,000 people/small holder farmers in rural areas, both men and women, and to increase employment opportunities of 14,000 people (6,300 women) in the edible oilseeds value chain, especially for rural women and youth. Increased smallholder farmer income levels and increased availability of locally produced edible oilseeds will improve household nutrition and food security.

The following are main activities that the programme is implementing to attain its objective:

- Promoting inclusive business arrangements

- Strengthening producer groups and farmer marketing cooperative
- Strengthening of Sector alliances
- Knowledge development and research

The programme is implemented through two projects that were designed to develop the sesame and sunflower sub-sectors. The programme covers ten regions. The Sesame project covers six districts in Lindi and Mtwara regions: Lindi rural, Masasi, Nachingwea, Ruangwa, Kilwa and Liwale and the sunflower project covers 14 districts in Morogoro (Mvomero and Ulanga), Iringa (Kilolo), Ruvuma (Namtumbo, Mbinga and Nyasa), Dodoma (Bahi), Singida (Iramba), Njombe (Makambako) Rukwa (Sumbawanga and Katavi (New Region) and Mbeya (Chunya, Mbozi and Mbeya Rural).

3.0. Aim and Objectives of the Assignment

The aim of the mid-term review is to assess the edible oilseeds programme progress, performance achievements and lessons between December 2012 and June 2015, and to provide recommendations to ensure that the programme is adjusted as and where necessary in order for it to achieve impact and sustainable outcomes by the end of the programme.

The overall purpose of this review is:

- d) Learning and improvement as a building block for future work: It is intended that the outcomes of this mid-term review will provide useful and relevant information to the on-going work; explore why the implemented strategies and actions have been successful, or not and to provide guidance on how to improve programme implementation in future
- e) Accountability: The mid-term review is also an accountability instrument for the programme. Consequently, it will be used to assess whether or not project plans have been, or will be fulfilled, and to determine the extent to which the project's resources have been used in a responsible and effective manner.
- f) Sustainability: The outcomes of the mid-term review should assist Irish Aid and SNV in assessing the sustainability (or otherwise) of the activities, approaches and structures initiated or supported by the programme, and provide recommendations for the future including possible suggested for further intervention of the Agricultural Markets Development Trust (AMDT).

The objective of this assignment is to review strategies and approaches that were used to implement the edible oilseeds programme to attain current outcomes. The review work will also suggest ways in which the programme implementation and communication of results and lessons will be more effective.

The specific objectives are:

- vi. Review the Edible Oilseeds Programme strategies, approaches and outcomes. Specific attention should be given to the assessment of the exit strategy help to determine if there should be a final programme evaluation and to the efficiency in communication between SNV and Irish Aid.
- vii. Assess the effectiveness and efficiency of project implementation, including assessing the institutional arrangement, partnerships, risk management, M&E and project implementation. Specific attention will be given to:
 - a) Assess the increase of smallholder farmers' agricultural productivity (measured by income) as result of EoS programme intervention.
 - b) Asses the perception of EoS smallholder farmers (M/F) on market access provided by the EoS programme.
- viii. Identify key programme lessons (what worked, what didn't and why), particularly with regard to strategic processes and the mechanisms chosen to achieve the project's objectives to date
- ix. Make clear, specific and implementable recommendations on the strategic and operational changes required to ensure impact, and sustainability of project outcomes.

- x. Assess the way ahead towards AMDT interventions for sunflower using M4P approach including constellation of actors around sunflower value chains for selected programme locations.

4.0. Scope of work

Within the above framework, specific issues (and questions) to be assessed will be developed by the consultant and there after reviewed by SNV for final agreement. The assessments questions will focus on the key evaluation criteria of effectiveness, efficiency and sustainability.

4.1. Methodology

It is important that the review provides an in depth view of the programme and its operating environment. The consultant should propose a methodology to be used to carry out the review is described. The methodology adopted should update the preliminary issues and questions outlined within the ToRs, specifying the specific review issues, questions, methods of data collection and analysis that will be undertaken. It should encompass a combination of both qualitative and quantitative methods. It should also allow for wide consultation with all interested partners and stakeholders. . It is suggested that the methodology should include, but is not limited to, the following, but consultants must propose their own methodology and justify and explain that proposal:

- i. A desktop review of all relevant documentation, including (but not limited to): the programme document, contracts and related agreements; work-plans and budgets; progress technical and financial reports;
- ii. Face-to-face interviews and discussions with all key stakeholders involved in the project to ensure that the review is carried out in a participatory manner. A list of key partners and stakeholders will be identified at an early stage and a consultation process developed. Key stakeholders will include but are not limited to: the programme team, value chain actors at different nodes of the sunflower and sesame value chains, local capacity builders, multi stakeholder platform leaders, government officials and programme beneficiaries. All stakeholders consulted should be in a position to present their views in confidence to the team and to identify issues, opportunities, constraints and options for the future
- iii. Electronic interviews through skype and telephone calls, or written comments, e.g. email; where partners cannot be reached for face to face interviews
- iv. A learning workshop with staff and stakeholders where initial findings, lessons and recommendations are presented, discussed and refined
- v. Feedback session with SNV advisors and Irish Aid representatives where findings and recommendations will be presented and discussed.

5.0. Time Frame, Deliverables and Reporting

5.1 Timeframe

The assignment will cover the period commencing on the 1st through 30th September 2015 and will require 21 working days.

5.2 Deliverables

- a) An inception report, detailing the proposed methodology, tools, schedule for the review work and detailed responsibilities of each team member to be submitted prior to the onset of the assessment process.
- b) A findings report, of not more than 30 pages, excluding annexes, which should include an assessment of the performance of the project based on the project document contracts and agreements and the main lessons learnt,
- c) Recommendations and guidance in the future scope of work

5.3 Reporting

The MTR report will be submitted in soft copy and hard copy to SNV Sector Lead Agriculture, Tom Ole Sikar. The consultant should propose a reporting format in the inception report and which will be discussed and approved by SNV

The Original financial supporting documents are to be submitted to SNV and a photocopy retained by the organisation.

6.0 Submission of the expression of interest

The expression of interest shall be submitted in two parts, i.e. Technical and Financial proposals. The technical proposal should include the organizational profile detailing the relevant experience, CVs of the proposed team members, and the methodology to be used. The financial proposal should provide a detailed budget. SNV will provide formats for both technical and financial proposals. EoI should address the selection criteria in section 7.0 in this ToR. In addition, a sample of MTR report from similar assignment conducted by the organization/applicant must be submitted along with other information as per section 7.0

7.0 Partner Selection criteria for engagement

Presentation of an expression of interest for carrying out the assignment, which clearly indicates the following aspects:

Selection criteria	
Mandatory Criteria	<i>Legal Status (Certificate of registration, TIN no., other)</i>
Understanding of the Assignment	<i>Clear conceptual understanding of the (assignment name) in line with the ToR for this assignment</i>
	<i>Proposed approach and methodologies for the assignment(overall or for specific tasks)</i>
Experience in (key aspects of the assignment)	<i>Demonstrated experience in similar work including..... (i.e. the key tasks in the assignment)</i>
	<i>Local presence in Tanzania</i>
	<i>Track record (quality and timeliness of delivery)</i>
Capacity to Deliver	<i>Quality of proposed staff to be involved in the assignment</i>
	<i>Resource availability and proposed use (vehicles, staff team, organization structure, geographic outreach, other)</i>

5.2 List of people interviewed

Name	Organization and designation	Contacts
Salimembe Killagane	Morogoro Sunflower Processor's Association (MSOPA)	Mobile: 0754/0784 – 769699; Email: bkillagane@yahoo.com
Hans Mheto	Secretary MSOPA and Director, Morogoro Edible Oilseed Actor's Limited (MEOSA)	Mobile: 0656576652; Email: hassanmheto6@gmail.com
Makauli Aloyce	Tanzania Grassroots Empowerment Network (TGEN)	Mobile: 0713 487986
Michael Kairumba	Technical Director – Agricultural Marketing Development Trust (AMDT)	Mobile: +255 788 779 722 Email: mkairumba@amdt.co.tz
Julie Adkins	Senior Adviser- Governance SNV Netherlands Development Organisation	Mobile: +255 784 220 282 Email: jadkins@snvworld.org
Tom Ole Sikar	Sector Leader – Agriculture SNV Netherlands Development Organisations	Mobile: +255 754 481 802 E mail: tolesikar@snvworld.org
Deogratus Chubwa	Project Manager – Edible Oilseeds Programme SNV Netherlands Development Organisations	Mobile:+255 689 154 557 E mail: dchubwa@snvworld.org
Anastazia Kondowe	Project advisor-EOS SNV Netherlands Development Organisation	Mobile : +255 788 709 162 Email : akondowe@snvworld.org
Filbert Sebastian	Sesame Trader - Mtwara	+ 255 713 058897
Juma Said	Unit Head- Olam(T) Ltd	+255 784 393 684
Nuru Lugumira	M&E Officer – Care International	+ 255 713 509552
Beda Hamphrey Hamisi	Acting Chairman – Mtwara Farmers Agricultural Development Organization (MFADO)	+ 255 782 076611
Sandip	Manager – Afrisan Depot – Masasi	+ 255 687 490 304
John Julius	LCB / Director TEMNAR Co ltd – Masasi	+ 255 719 992 378 Email: julius2003us1@yahoo.com
Raphael Ajeta	DAICO – Nachingwea District	
Julius Malibiche	Crops Officer - Nachingwea District	
Violet Byanjweli	Ag DAICO- Ruangwa District	
FGD (10 pp) – Kibutuka AMCOS	Liwale District	
FGD (12 pp)– Ngunichile AMCOS	Nanchingwea District	
Frederic Ogenga	LCB – SEIDA	+ 255 755 788 981 Email: seidatz@gmail.com
Tom Cadogan	Programme Manager – Irish Aid	+ 255 718 040 744 Email: thomas.cadogan@dfa.ie
Juma Mfaume	Naliendele Agricultural Research Institute	+ 255 782 838010
Eliud Katai	Business Development Coordinator – Agakhan Foundation	+ 255 655 753946
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Salma Malaja	Hembeti Farmer Group	+255 717 527 042
Lea Tobias	Hembeti Farmer Group	+255 652 062 810
Amina Ali	Hembeti Farmer Group	+255 719 931 541
Eufrasia Philipo	Hembeti Farmer Group	+255 718 597 712
Editha Jelemias	Hembeti Farmer Group	+255 659 758 363
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5.3 Questionnaires and checklist for the mid term review

Respondents	Questions /Checklist	Tools
Market players (Buyers)/ Exporters	<ul style="list-style-type: none"> • Key trends • Critical Success Factors • Framework for market access in EOS • Critical assessment of Contract farming arrangement, does it work? If not in which areas and what needs to be changed? 	<ul style="list-style-type: none"> • Key Informant Interviews (KIIs)
Producers	<p>The increase of small holder farmers’ agricultural productivity & Income</p> <ul style="list-style-type: none"> • What were the yield in 2012 (baseline yield), 2013, 2014, and 2015 production seasons? • What was the level of income per acre (Turnover – Direct Costs= Gross Profit) of sunflower/sesame in 2012 (baseline yield), 2013, 2014 and 2015 production seasons (Conduct SGM Analysis with a FG) • What are your two major constraints / hurdles that hinder increased production & productivity given unmet market demand in Tz? • What new production skills did you acquire (Changes in agronomic practices) in the last years from EOP interventions and what have you successfully addressed with the new skills? <p>The perception of smallholder farmers (M/F) on market access provided by the EOP program</p> <ul style="list-style-type: none"> • Where (place and buyer) were you selling sunflower/sesame in 2012 • Where (place and buyer) did you sell sesame/sunflower in 2013, 2014 and 2015? • What is your perception of the market (new; old market)? • What are your views about contract farming framework, does it work? If not what needs to change? <p>Policy & Regulations</p> <ul style="list-style-type: none"> • How do local & central policies & regulations affect you as a SHF? • How do you influence policy development and policy implementation (e.g. WRS)? • Enforcement of policies & regulations how? 	<ul style="list-style-type: none"> • FGD with farmer groups • SGM analysis
Aggregators	<p>Change in enterprise productivity</p> <ul style="list-style-type: none"> • What was the volume of sunflower/sesame traded in 2012 (baseline), 2013, 2014, and 2015 production seasons? <p>Increase in income</p> <ul style="list-style-type: none"> • What were your direct costs? • What was your gross and net revenue in 2012 (baseline), 2013, 2014 and 2015 production seasons • What was net additional income realized as a result of support of the edible oilseeds project? <p>Increase in employment</p>	<ul style="list-style-type: none"> • Key informant interviews (KIIS) with aggregators • SGM with aggregators

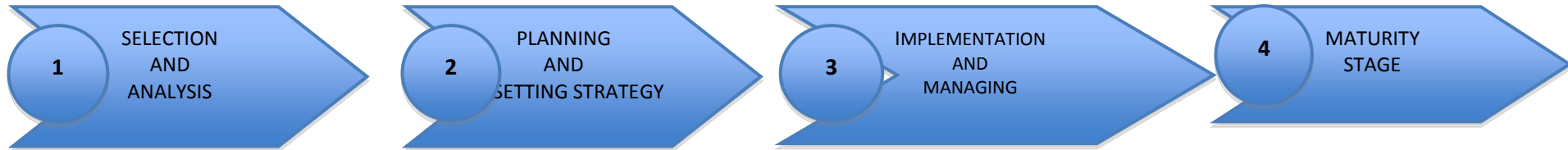
	<ul style="list-style-type: none"> • How many people were you employing in 2012? • How many more people were you able to employ in 2013, 2014, and 2015? 	
Processors	<p>Capacity Utilization</p> <ul style="list-style-type: none"> • What is your installed capacity (seeds crushing /8 hours /day? • What have been your capacity utilization percentage overs years? • If low why? And what remedy? <p>Change in enterprise profitability</p> <ul style="list-style-type: none"> • What were your Gross Margin for 2012/13/14 & 2015? • What was the volume of sunflower seeds processed in 2012 (baseline), 2013, 2014, and 2015 production seasons? <p>Increase in employment</p> <ul style="list-style-type: none"> • How many people (F/M) were you employing in 2012? • How many more people (M/F) were you able to employ in 2013, 2014, and 2015? What caused this additional employment? • How many processors (competitors) are there in your district? <p>Access to finance:</p> <ul style="list-style-type: none"> • What challenges are you facing in accessing relevant finance? • What other critical challenges do you face for growth & competitiveness? <p>Policy & Regulations</p> <ul style="list-style-type: none"> • How do local & central policies & regulations affect you as a processor? • How do you influence policy development and policy implementation (e.g. WRS)? <p>Enforcement of policies & regulations how?</p>	<ul style="list-style-type: none"> • Key informant interviews (KIIS) with processors • SGM with processors
Wholesalers / Exporters	<p>Change in enterprise profitability proxy</p> <ul style="list-style-type: none"> • What were your direct costs? • What was the volume of sunflower/sesame traded in 2012 (baseline), 2013, 2014, and 2015 production seasons? <p>Increase in income</p> <ul style="list-style-type: none"> • What was your gross and net revenue in 2012 (baseline), 2013, 2014 and 2015 production seasons • What was net additional income realized as a result of support of the edible oilseeds project? <p>Increase in employment</p> <ul style="list-style-type: none"> • How many people were you employing in 2012? • How many more people were you able to employ in 2013, 2014, and 2015? • How more processors are there in your region? 	<ul style="list-style-type: none"> • Key informant interviews (KIIS) with processors • SGM with wholesalers

<u>Strategic Collaborators & Partners</u> ³	<ul style="list-style-type: none"> • In which areas have you been collaborating with SNV in EOP? • What are your opinion on the EOP program strategies, approaches and outcomes • What are opportunities for future collaboration with EOP • What do you think should be sustained in the EOP and possibility for collaboration with you? • Lessons learnt (what worked, what did not and why) 	<ul style="list-style-type: none"> • Key informant interviews (KIIS) with LCBs
Program Team	<ul style="list-style-type: none"> • Institutional arrangements, partnerships risk management M&E and project implementation • Program strategies, approaches and outcomes • Exit strategy • What is needed to enhance efficiency in communication between SNV and Irish Aid • Lessons (what worked, what did not and why) 	<ul style="list-style-type: none"> • Meeting with project team
LCBs (at least 2) and other Service Providers	<p>Program approaches and implementation</p> <ul style="list-style-type: none"> • In which areas have you been contracted by SNV as LCB and for how long? • Effectiveness of Program strategies, approaches and outcomes that you have been involved? • Lessons (what worked, what did not and why?) • Sustainability of using the LCB in providing services to the VC? 	<ul style="list-style-type: none"> • Key informant interviews (KIIS) with LCBs
Platforms (Regional chapters)	<p>Program approaches and implementation</p> <ul style="list-style-type: none"> • What is the role of the regional chapter? • What role did SNV / EOP play in establishment of the platform? • What actions did you take as a follow up to the policy studies undertake e.g. on benchmarking (sesame) • Effectiveness of EOP Program strategies, approaches and outcomes in strengthening sector alliances • Lessons (what worked, what did not and why) • How to sustain the functioning of the platform beyond EOP? 	<ul style="list-style-type: none"> • Key informant interviews (KIIS) with LCBs
Government Officials – LGAs /Councilors / DAICO and Ministry level (Enabling business environment)	<p>Program approaches and implementation</p> <ul style="list-style-type: none"> • What have you been able to do (action plans) after the training of councilors? • Effectiveness of EOP Program strategies, approaches and outcomes in assisting in policy formulation, incorporating oil seeds in the Government Agricultural plans & Budget • If oil seeds was included in your DADP plans, did you manage to get funds released • Lessons (what worked, what did not and why) • Sustainability strategies of projects supported by EOP in your district/region? 	<ul style="list-style-type: none"> • Key informant interviews (KIIS) with LCBs

³ SESAME: LGAs; ANSAF, Care Int, NARI, Agakhan Foundation; SUNFLOWER: ARIs – Ilonga, ANSAF, SAGCOT, LGAs, MUVI, SIDO

Donor – Irish Aid/AMDT	<ul style="list-style-type: none"> • What were your expectations (outcomes) of supporting EOP? • What is your view on Program strategies, approaches and outcomes so far • What are your views on Exit strategy • What are your future plans and strategies of supporting EO in Tanzania? • In what ways can the efficiency be enhanced in communication between SNV /AMDT and Irish Aid • Lessons learnt (what worked, what did not and why) 	<ul style="list-style-type: none"> • Key informant interviews (KIIS) with LCBs
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5.4 Value chain assessment framework



STAGE ONE: KEY ISSUES <ul style="list-style-type: none"> Assessing the idea and market Selection criteria Selection process Key players in the process Analysis methodology and process Usefulness of the study findings 	STAGE TWO: KEY ISSUES <ul style="list-style-type: none"> Selection of strategic implementing partners Build relationships Agreement on goals and vision of future Existence of a strategy 	STAGE THREE: KEY ISSUES <ul style="list-style-type: none"> What activities? How undertaken? Why delivered in this way? With whom? How organized? 	STAGE FOUR: KEY ISSUES <ul style="list-style-type: none"> Overall impact logic Key indicators Current performance
KEY CRITERIA FOR ASSESSMENT			
<ol style="list-style-type: none"> Degree of detail, rigor and depth with respect to: <ul style="list-style-type: none"> Identification of growth potential Position of disadvantaged people Firm-level constraints Underlying systemic constraints Strategic challenges Value chain 'catalyst' Leadership vision Level of ownership achieved with key players Assessment of resources, risks and rewards 	<ol style="list-style-type: none"> Careful partner selection Commitment from all Cohesion and interdependence A dedicated 'champion' and chain manager Expert assistance in facilitation Degree to which an overall strategy expresses clearly: <ul style="list-style-type: none"> An objective/ambition of systemic change Collaborative planning sessions A future vision of the value chain operating in a sustainable manner <ul style="list-style-type: none"> Compelling value chain goals 	<ol style="list-style-type: none"> Launched pilot project Integrate systems, build and adapt The degree to which: <ul style="list-style-type: none"> Interventions are consistent with addressing constraints and opportunities Interventions are promoting sustainability and wider scale-up Interventions are supporting organizations in roles that reflect their incentives/capacities Relationships are productive & transactional (increased cohesion) Facilitators are sufficiently close & informed Levels of resource commitment are appropriate (commitment from all) Process for ongoing dialogue and opportunities to learn 	<ol style="list-style-type: none"> The degree to which the M & E approach: <ul style="list-style-type: none"> Sends the right signals and incentives Provides a plausible sense of impact Assessment of level of success in value chain development <ul style="list-style-type: none"> Tangible results at the level of primary chain actors (productivity, profitability, income) Qualitative changes at the level of secondary actors (behavior, mindset, attitude, skills, knowledge) Indicators of sustainability – commitment of primary actors, business growth potential, structured and coordinated support from service sector & enabling environment.

=====> Planning, Monitoring & Evaluation System =====>

5.5 Gross margin analysis

SGM sesame value chain

	Seed Production by Naliendele ARI	Sesame Grain - by DAICO – Ruangwa	Sesame Grain by Kitubuka AMCOS - Liwale	Sesame Grain by Ngunichile AMCOS- Nachingwea
Total Direct costs per acre	821,200	1,500,000	350,000	388,700
Expected yield per acre (Kgs)	500	1,250	300	240
Price per kilogram of sesame seed	3,500	1,700	1,700	1,700
Total revenue -yield x price	1,750,000	2,125,000	510,000	408,000
Gross Income per acre - GP	928,800	625,000	160,000	19,300
SGM percentage	53	29	31	5
Average acreage			5 to 10	5 to 10
Data from Aga Khan Foundation				
Gross Profit - TZS per acre as per Aga Khan Foundation			250,000 in 2009	450,000 by 2015
Yield per acre			150 kgs in 2009	525 kgs by 2015

Analysis of SGMs:

1. Data kept by farmers and method of profitability analysis differs across the board. Prices and pricing system is often the most dominating concern and much less is discussed about yields/ productivity factors.
2. Generally sesame business is profitable to farmers based on the analysis of gross margin that MTR team conducted with a few farmers. Level of profitability is highly sensitive to yields and direct cost drivers. It seems that current yields of less than 300 kgs is hardly 25% - 50% of potential yields.
3. Simulating impact on income based on impact indicator of 1\$/day /acre it shows under the current exchange rate of 1 US\$ = TZS 2100, the present achievements are below the threshold even in the case of applying GAP principles that DAICO of Ruangwa indicated to the MTR team.
4. If the yield benchmark of Kg 525/acre indicated by Aga Khan Foundation could true across the Southern Region, then the impact indicator would be close to realization.
5. Without some degree of mechanization (e.g. use of oxen ploughs) coupled with access to assured markets (where AMCOs have a say), it seems rather impractical to increase production & productivity and hence incomes.

SGM sunflower value chain

	Mvomero District Council - Hembeti Farmer Group - Selling seeds	Chunya DC - Mkwayuni - Tumaini Group - Selling sunflower oil
Total Direct costs per acre	245,000	218,000
Expected yield per acre (Kgs)	8.5	150
Price per bag of sunflower/liter of oil	50,000	1,500
Total revenue -yield x price	425,000	225,000
Profit per acre - GP	180,000	7,000
SGM	42	3
Average acreage		
Gross Profit - TZS per acre	Selling seeds	180,000
	Selling seeds	7,000
Project Indicator (1\$/day sesame income) - approximately		TZS 750,000 pa

- 1) Gross margins vary widely as per groups of farmers interviewed.
- 2) Generally, sunflower production is profitable. Selling seeds seems to be more profitable to a farmer, than selling sunflower oil. Level of profitability is highly sensitive to yields and direct cost drivers.