

Overview of sector transformation programmes funded by DFID

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Question

(a) identify and briefly summarise key elements and delivery structures of programmes focused on the transformation of markets/sectors which primarily DFID, but also other donors, have done in DFID priority countries;

(b) to provide evidence on which private sector/market focussed interventions have been successful in promoting competitiveness, creating jobs and improving the economic growth to poverty transmission,

(c) while, drawing out findings from a) and b) related to South Asia, particularly Pakistan.

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1. Summary

This rapid literature review summarizes the existing evidence (mainly programme business cases, annual reviews, logical frameworks, etc.) on selected sector programs run by DFID in priority countries.

This report will discuss five key DFID sector programmes that can offer lessons for future potential sector development programmes (e.g. in Pakistan). The programmes discussed here are/were run mainly by DFID in its priority partner countries in the sub-Saharan Africa region.¹

A brief summary of the five selected sector programmes will be provided in this section. These programmes will be discussed further in detail in section 3).

- **Kenya Market Assistance Programme (MAP)**
 - The program is run by DFID over the 2012-2020 period in Kenya with a budget of £48.2M.
 - Programme's partners include Kenya Gatsby Charitable Trust (KGT).
 - The programme's objective is to 'build effective markets' and 'access to markets' in sectors such as agriculture, livestock and water.
 - The programme will work with 'market actors' including the private sector, government, civil society organizations.
 - The programme has three core components. Namely; the Kenya Markets Trust (KMT), Youth Employment, and Extractives. KMT is by far the biggest of these three components.
 - Programme Interventions will be carried out via the Making Markets Work for the Poor (M4P) method – which is the central Private Sector Development strategy of DFID. The programme prioritises arid and semi-arid lands because poverty rates are bigger in communities living in these geographical locations of Kenya.
 - Latest available project reviews suggest that the programme has met expectations.
 - However, reviews advised the programme to re-assess the appropriateness and level of 'ambition' of the results framework.
 - The programme also faced staffing challenges linked to the uncertainty of future funding.

- **Growth and Employment in States Programme (GEMS)**
 - The program was run by DFID over the 2009-2017 period in Nigeria with a budget of £91.1m.
 - The programme aimed to boost growth and employment across six sectors of the Nigerian economy. It additionally targeted business environment reform.
 - Under a set of four interventions, the programme targeted the following sectors:

¹ These sample projects reviewed by the case studies here were selected not necessarily on their success rate but based on suggestions from a DFID private sector development expert (i.e. prior expert knowledge of the relevance of these projects to upcoming/potential DFID private sector programmes in Pakistan).

- GEMS 1 - Meat and Leather;
 - GEMS 2 - Construction and Real Estate;
 - GEMS 3 - the Business Environment; and
 - GEMS 4 - Wholesale and Retail sectors.
 - Additionally, the World Bank Growth and Employment component of the programme targeted the Tourism, Hospitality, Entertainment, ICT & Light Manufacturing sectors.
 - The overarching target of the programme (and its sub-components) was to assist the development of non-oil sectors in Nigeria.
 - Overall, the project has fulfilled expectations and received good annual reviews for much of its lifespan.
 - The exception is GEMS 2, which was closed early since it failed to fully achieve its present objectives in time.
 - One key challenge noted by project review was linked to the set-up of the project as a suite of interacting projects. It was noted that collaboration was less effective among different components.
- **The BEAM Exchange (Building Effective and Accessible Markets)**
 - The program was run by DFID over the 2014-2017 period with a budget of £4m.
 - Programme partners include the Swiss Agency for Development Cooperation (which contributed £1m to the programme).
 - The programme was designed as a facility for knowledge exchange and learning about the role of market systems approaches in the fight against poverty.
 - BEAM's tried to spread and strengthen the application of market systems approaches. It has done so by helping to disseminate good practices through lesson-learning and experience-sharing.
 - The internal annual reviews of the program as well as an independent external review confirm the success of the project in attaining desired targets.
 - There are recommendations for the continuity of the program (be it in a scaled-up or scaled-down version).
 - **Jobs Compact Ethiopia**
 - The program will be run by DFID over the 2017-2023 period in Ethiopia with a budget of £80m.
 - The programme will support the industrialisation plan/process in Ethiopia.
 - The target is to facilitate the creation of over 100,000 jobs for Ethiopians and refugees residing in Ethiopia.
 - An important component is the eventual relaxation of the Ethiopian labour market so that 30,000 refugees will be able to participate in the local labour market.
 - Given that the project has been recently launched, it was not possible to have a formal review.

- **Dar es Salaam Urban Jobs Programme**

- This sector program will be run by DFID over the 2018-2023 period in Tanzania (Dar es Salaam) with a budget of £10m.
- The project will be very useful for the city since it suffers from a considerable unemployment problem (where unemployment rates in the city is more than twice the national rate) - particularly among the young people in urban areas.
- The programme is essentially an 'urban market systems programme'.
- It plans to realize sustainable change in sectors that have a better chance of creating jobs and incomes for poor people – especially vulnerable groups such as women and young people.
- Initial sectors targeted by the program include manufacturing, waste and childcare sectors.
- Just like Ethiopian Jobs Compact, a full annual review is not yet available for the project – owing to the programme's recent launch in 2018.

2. Introduction: sector transformation programmes

Even if there is **no formal definition of 'sector transformation programmes'**, the literature notes that they refer to development **interventions (or set of interventions) that target specific sectors (or sets of specific sectors) – as opposed to interventions aiming at economy-wide transformation** (Balchin et al., 2019; McMillan et al., 2017; Lin and Monga, 2017). The literature also stresses the suitability of sector transformation programmes for developing countries since development **gains can be made in particular sectors - even in the face of political or institutional difficulties** (McMillan et al., 2017; Lin and Monga, 2017).

A recent case-study on multi-country sector development programmes (Balchin et al., 2019) that was conducted in partnership between Gatsby Africa and ODI noted that **economy-wide transformations appear to be driven by the growth of particular sectors through which a country develops 'capabilities' and boosts 'productivity' - before shifting/expanding further into related or yet more productive sectors of its economy.**

For their analysis, Balchin et al. (2019) rely on a list of six cases of 'successful' sector transformations and five 'failed' cases. The list of successful cases derives from Ethiopian Airlines, The automotive industry in South Africa, Cocobod in Ghana, Indonesia's staple food revolution, Garments in Bangladesh, and Sector-based strategies in Mauritius. The lessons they drive for failed efforts at sector transformations is based on their case studies on Cashew nuts sector in Mozambique, Pineapples in Ghana, Maize production/subsidy policy in Malawi, President Kikwete's rice initiative in Tanzania, and Malaysia's manufacturing sector.

Balchin et al. (2019) note that **fruitful sector transformations are backed by suitable public actions. Some of the key elements of public support seen in the literature (among other factors) include:**

- **Credible commitments** to investors that their assets and profits will be safe from unwarranted expropriation: for instance;

- the successful Ethiopian 'Air transport and logistics' project had “consistent state backing and credible long-term policy vision for expansion articulated in successive vision documents.” (Balchin et al., 2019; p. 46)
 - in the case of the successful 'Cocoa revival' project in Ghana, “the key sector institution has been continuously run on a professional basis and with tight rules on e.g. marketing margins, and this is underpinned by the above-mentioned cross-party political logic.” (Balchin et al., 2019; p. 47)
 - in the case of the unsuccessful 'Cashew nuts' project in Mozambique, “Government’s credibility undermined by perceptions that the policy reforms were World Bank-driven. Reform policies poorly communicated to cashew farmers.” (Balchin et al., 2019; p. 49)
 - in the case of the unsuccessful 'Rice Initiative' in Tanzania, “the informal politics of food importing weakened the initiative’s credibility” (Balchin et al., 2019; p. 50)
- Suitable **supply of relevant public goods**, together with social and physical infrastructure: for example;
 - the successful Ethiopian 'Air transport and logistics' project enjoyed “coordinated public infrastructure investments alongside the airline’s expansion (e.g. expansion and improvement of airport).” (Balchin et al., 2019; p. 46)
 - in the case of the successful 'Cocoa revival' project in Ghana, “key public goods functions such as quality control have been well performed by Cocobod. Needed productivity enhancing measures have had only limited success.” (Balchin et al., 2019; p. 47)
 - in the case of the unsuccessful 'Cashew nuts' project in Mozambique, “export liberalisation reforms were not backed by sufficient investment to support smallholders to boost yields and output.” (Balchin et al., 2019; p. 49)
 - in the case of the unsuccessful 'Rice Initiative' in Tanzania, “public goods provision was biased to new works, on which district politicians gained kick-backs. O&M was not politically interesting and got neglected.” (Balchin et al., 2019; p. 50)
- Anticipating and amending **investment coordination failures**: for instance;
 - the successful Ethiopian 'Air transport and logistics' project enjoyed “Coordination and sequencing of investment in public infrastructure alongside EAL’s own capital investment (e.g. in cargo and maintenance). The latter was facilitated by allowing EAL to reinvest all profits to build up capital for expansionary investments.” (Balchin et al., 2019; p. 46)
 - the case of the successful 'Cocoa revival' project in Ghana enjoyed “coordination with land and credit issues, both of these more politically challenging, has not been effectively provided, giving rise to some concerns about the long-term prospects of the industry.” (Balchin et al., 2019; p. 47)
 - the unsuccessful 'Cashew nuts' project in Mozambique suffered from “little effort to coordinate investments to boost raw cashew nut production after export liberalisation.” (Balchin et al., 2019; p. 49)

- the unsuccessful 'Rice Initiative' in Tanzania, suffered from “absent coordination of trade and investment policies was the main problem.” (Balchin et al., 2019; p. 50)

3. Case studies: DFID Sector transformation programmes

3.1. Kenya Market Assistance Programme (MAP)

Title: Kenya Markets Assistance Programme (MAP)		
Programme Value: £48.2M		
Programme Code: 202698	Start Date: August 2012	End Date: March 2020

Source: MAP Annual Review (2018, p. 1). Licensed under [the Open Government Licence v3.0](#)

The Market Access Programme, MAP, was tendered in 2010 with provision for design, delivery and scale up. **MAP was won by a consortium with an international advisory lead, Adam Smith International, working with local partners including Kenya Gatsby Charitable Trust (KGT)**, experienced in local markets, with linkages into a regional enterprise network, and access to the resources of the UK Gatsby Charitable Foundation (MAP Annual Review, 2018; MAP Business Case, 2012).

The Kenya Markets Assistance Programme (MAP) aims to build accessible and effective markets by harnessing the underlying sources of poor performance in markets that are most important to poor people, such as agriculture, livestock and water. Some examples of underlying causes of poor performance in markets include inadequate access to information, insufficient knowledge and poorly designed and/or applied standards of certification/accreditation. To enhance markets, MAP works with ‘market actors’ encompassing the private sector, government, civil society and membership organizations (MAP Annual Review, 2018).

The programme originally included three core components:

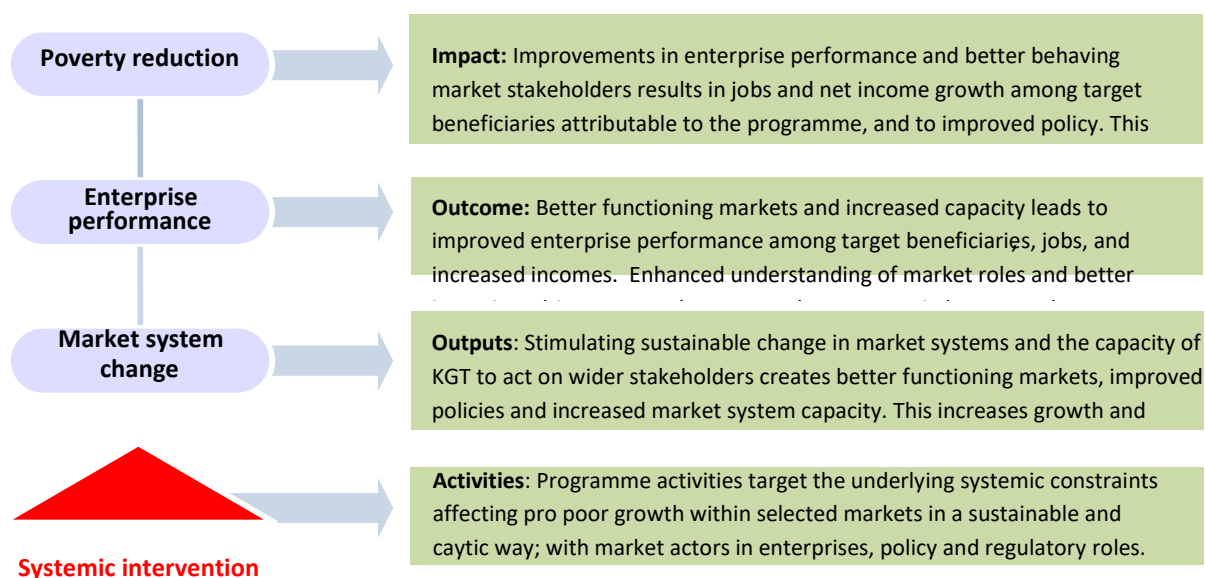
1. **Kenya Markets Trust (KMT) (£38.3M)**, which primarily backs the agriculture, livestock and water sectors in Kenya. This component is implemented by KMT and is co-funded by Gatsby Africa which donates a grant of £3M as well as £1M worth of technical assistance to fortify portfolio delivery and governance of the institution.
2. **Youth Employment (£5.5M)**, which endorsed job creation for youth in Mombasa County. This component was carried out by Adam Smith International (ASI).
3. **Extractives (£4.4M)**, which enhanced the governance of the extractives sector in Kenya. This component was executed by Adam Smith International (ASI) (MAP Annual Review, 2018, p. 1)

Based on the KGT Business Plan, an accepted outcome of the design phase, **MAP will widen over time to focus on 8 markets with the possibility to impact the situation of the poor.** Interventions try to improve incentives in the market, sustainably generating higher household incomes and more jobs. Interventions are designed using the Making Markets Work for the Poor (M4P) method which is situated at the heart of the DFID Private Sector Development strategy. Over time, the selected markets work will focus more on arid and semi-arid lands where poverty rates are high (MAP Logical Framework, 2016; MAP Business Case, 2012).

Theory of Change

The programme will attain results by applying interventions which target the systemic restraints deterring the participation of poor people in selected market systems. The interventions will be designed to readjust incentive structures, rules, relationships and support services which mould the way markets work and change the way poor people take part in, and access markets. The programme theory of change is summed up in Figure 1 below. Behind the programme theory of change, every markets system has a thorough results chain and individual theory of change linked to it. This theory of change is reinforced by work carried out on M4P programme design somewhere else, and evidence compiled from completed programmes (MAP Business Case, 2012).

Figure 1: Programme theory of change (MAP)



Source: MAP Business Case (2012, p. 14). Licensed under: [the Open Government Licence v3.0](#)

The main assumptions behind the theory of change are:

- **Interventions activate changes in the incentives of key market actors**, who will reply with improved services, better/equitable rules of the game and policies, and a upgraded quality debate about the role of markets, boosting growth and access opportunities for the poor and low income small scale farmers and entrepreneurs (i.e. the target groups);

- **Small-scale poor farmers and entrepreneurs will advance their business practices.** This successively leads to advanced productivity, lower costs of production, rising sales and economic diversification. Enhanced enterprise performance generates higher household income and growth;
- As momentum is generated and communicated into the market, a turning point will be achieved that will **draw in other market actors** – who will duplicate the changing behaviours - a process known as **‘crowding in’** (MAP Business Case, 2012).

Annual Reviews

	2013	2014	2015	2016	2017	2018
Year						
Programme Score	A+	A	A+	B	A	A
Risk Rating	Medium	Medium	Moderate	Major	Major	Major

Source: MAP Annual Review (2018, p. 1). Licensed under: [the Open Government Licence v3.0](#)

In general, the **programme’s performance (on output indicators) met anticipation**. As such, having considered both quantitative and qualitative results including through beneficiary interviews and field visits, the **most recent review (from 2018) has assigned a programme an ‘A’ score** (i.e. that it met expectation). By increasing market opportunities through innovation, supporting competition in sectors, and ultimately creating a market system that is profitable for investors, increasing income for suppliers and benefiting consumers, the program is on track to achieve the outcome objective of job creation and increased income among poor households. In addition, by improving the way poor people interact with markets, MAP has contributed to the big four agenda of the Kenyan government (specifically on food security), as well as the UK's priorities for inclusive growth in Kenya. Increased agricultural productivity is very important for food security and poverty alleviation (MAP Annual Review, 2018).

Recommendations from annual reviews and evaluations (Annual Review, 2018)

1. Programs need to strengthen portfolio oversight, including technical guidance and direction for sector teams. However, this was not prioritized adequately by the leadership and the KMT board, and was considered to have influenced the pace of implementation. KMT has hired a technical expert to work with the team, and is in the process of recruiting for the head of the program. KMT leadership must ensure that **these two roles are put to good use to strengthen portfolio quality. For example, it is necessary to have an action plan on how the technical advisor will interact with, and train the portfolio team** (MAP Annual Review, 2018).
2. After the update of the KMT sector strategy is completed (expected to be completed by December 2018), **DFID, Gatsby Africa and KMT must reassess the suitability and ambition of the current results framework. However, the revised results framework must consider the fact that MAP is nearing completion** (MAP Annual Review, 2018).
3. KMT’s sustainability remains the most significant risk to the programme and KMT is likely to lose key staff in the remaining period of DFID funding if no clarity on future sustainability/funding is achieved quickly. DFID, Gatsby Africa and the KMT board should **prioritise this risk and a contingency plan should be developed to prepare for a scenario where no further funding is secured** (MAP Annual Review, 2018).

4. MAP signifies DFID’s main intervention in the agriculture, livestock and water sectors in Kenya. The recent DFID Kenya Country Development Diagnostic confirmed the role of agriculture for poverty reduction in Kenya. With MAP closing in March 2020 **DFID Kenya should look for future options for interventions in the agriculture, livestock and water sectors in Kenya, via a portfolio board discussion** (MAP Annual Review, 2018).
5. KMT needs to **review the teaming structure of the programmes and the skillsets of the senior leadership to make sure that contingency plans are ready to alleviate risk of loss of key personnel** (MAP Annual Review, 2018).

Whilst evaluations of the MAP programme are not plenty, evidence collected by ITAD highlights the importance of iteration in programme design. One of the MAP projects has promoted the uptake of artificial insemination services for livestock. Initial analysis indicated high prices were the barrier to increased uptake of these services. Nevertheless, over time it became clear that lack of transparency and honesty among sellers of services was a great challenge. This demonstrates the need to be prepared to revise the theory of change, and not to stick firmly to output indicators (in this case, prices) once the knowledge of a market system improves (O’Sullivan, 2016: 17).

3.2. Growth and Employment in States Programme (GEMS)

Title: Growth and Employment in States		
Programme Value: £91.1m		
Programme Code:	Start Date: 18/5/09	End Date: 31/7/2017

Source: GEMS Project Completion Review (2018: 1). Licensed under: [the Open Government Licence v3.0](#)

The Growth and Employment in States (GEMS) programme is a seven-year programme, jointly funded by DFID Nigeria (£91 million) and the World Bank (£105 million). The **programme intends to increase growth and employment across six sectors of the Nigerian economy, as well as through business environment reform**. The DFID-funded sector portfolio encompasses:

- GEMS 1 - Meat and Leather, which began in 2010 and ended in September 2015;
- GEMS 2 - Construction and Real Estate, which began activities in April 2010 (but was closed at the end of December 2013);
- GEMS 3 - the Business Environment, which began in August 2010; and
- GEMS 4 - Wholesale and Retail, which began in August 2012.

The World Bank Growth and Employment component became operational in 2014 and is supporting sectors including Tourism, Hospitality, Entertainment, ICT & Light Manufacturing. The overall objective of the programmes was to nurture non-oil sector economic growth in selected states in Nigeria (GEMS Annual Review 2017; GEMS Project Completion Review, 2018).

GEMS 1 started in-country operations in March 2010, and concluded September 2015. It concentrated on improving the livelihoods of poor women and men in the meat and leather sector by putting on a “Making Markets Work for the Poor” (M4P) approach. The states where GEMS 1 functioned included Abuja, Aba, Lagos, Kaduna, Kano, Jigawa, Zamfara and Katsina (GEMS Project Completion Review, 2018).

- GEMS 1 followed 3 indicators at the Impact level related to income and employment. The income target was to help 120,000 people (50,000 poor/2,090 women) with actual achievements of 237,200 people (124,650 poor/19,490 women). Total income target was £24.7 million, with a total of £42 million attained. The employment target was 4,400 full time equivalents, with 4,076 achieved by the end of June 2015, i.e. approximately 92% of the target (GEMS Project Completion Review, 2018).
- GEMS 1 delivered many opportunities for other projects as well as private sector actors (i.e. also for service providers involved throughout the project), to continue the work of the project. Several of the interventions developed by GEMS 1 were passed on to other projects (both within and outside the GEMS suite) to guarantee that positive market system initiatives lead to sustainable change (GEMS Project Completion Review, 2018).

The overall **objective of GEMS 2 was to reinforce the performance of market systems** in the construction and real estate sector in order for these sectors to perform more effectively and provide enlarged opportunities (i.e. jobs and income) for the poor, and for women in particular in the sector. The GEMS 2 project was expected to run from early 2010 until 2015. Nevertheless, DFID Nigeria decided to close the project early – in 2013 - based on their valuation that it was improbable to achieve its objectives within the remaining project lifetime. A detailed lesson learning exercise was carried out to assess the difficulties encountered by GEMS2, with a report detailing the findings (GEMS Project Completion Review, 2018).

GEMS3 more than exceeded its logframe targets through its interventions. By the time of the programme’s end, GEMS3 had attained the following: an annual income upsurge of at least 15% for more than 1.3m people (of these; an aggregated, cumulative rise in income of £564m; and an growth in employment of 15,600 full time equivalent jobs (GEMS Project Completion Review, 2018).

As well as these specific results in Nigeria, **GEMS 3 has also developed wide-ranging approaches to reform** during its life. The models have become highly developed in the areas of tax and land, including focus on relevant regulation, training, public-private dialogue and sensitisation. On the other hand, the investment work stream was not quite so well advanced, reflecting the fact that it was a newer area of activity for GEMS 3. Nevertheless, considerable advances have been made here too. The team also concentrated more on ensuring the sustainability of its activities and gave much needed thought to understanding what realizes ‘systemic change’. This led to clear choices to focus on achieving ‘proof of concept’ in their intervention areas. In the case of tax and land, for instance, these are now well-embedded in the relevant state ministries. Work with national-level organisations such as the Joint Tax Board (JTB) and Nigerian Governors Forum (NGF) provided a good basis for the reforms to be sustained and rolled-out further into other Nigerian states (GEMS Project Completion Review, 2018).

GEMS 4 also reached the end of implementation with a strong performance, achieving 15 of the 16 log frame targets. At the output level, all targets were met or exceeded, occasionally by considerable margins. Likewise, at the Outcome level, all 5 targets were met or exceeded. Of

the 3 Impact targets, the project did not attain the income levels, but met those for jobs and outreach. The programme had faced momentous challenges, as identified for example by the 2014 MTR. By the time of the 2016 Annual Review, it became clear that whilst results were being achieved in the field, these were not being translated to the Impact level indicators (GEMS Project Completion Review, 2018).

Nevertheless, the **initial lag in broadening the scope of activity, followed by the delay in converging back in on the successful intervention areas, put the project behind the curve in attaining Impact results**. Whereas the jobs and outreach targets have been met, the achievement of only 55% of the income target is unsatisfactory (GEMS Project Completion Review, 2018).

Theory of Change

The GEMS projects are complex and ambitious (which is the case with many M4P programmes). As described above, it takes a considerable amount of resources to continually develop, revisit, test and refine intervention logics across the range of interventions a typical M4P project will be handling at any given phase in its project lifetime (GEMS ECORYS, 2015).

The rationale for the intervention logic is to outline the background information and data collection that is needed to be confident that change is happening and to deliver robust evidence that systemic change is starting to happen and is developing along the trajectory imagined in the intervention logic. Without a well-functioning intervention logic system, which is integrated into project management structures, it is uncertain whether a project can really benefit from the advantages of the approach (GEMS ECORYS, 2015).

GEMS 1 experiences highlight the levels of expertise needed not only in developing robust intervention logics, but also managing them as project implementation accelerates. Expertise is also needed at field level to translate back and forth between intervention logics and the realities of results in the market. GEMS 1 had to invest heavily in extensive coaching to develop intervention managers ability to 'argue' the progress of their projects (and the constraints faced) based on their documented intervention logics (GEMS ECORYS, 2015).

See: Figure 2: Theory of Change GEMS1, GEMS (2015: 5). <https://www.enterprise-development.org/wp-content/uploads/GEMS1Annex1Achievements.pdf>

The GEMS projects provide valuable learning on the use of the log frame, Theory of Change and intervention logics as tools for project management. So as to serve as valuable management decision-making tools, projects need to guarantee that individually and collectively these tools are kept 'live'; they need to be well matched to each other and frequently revisited and reviewed based on emerging and credible information from the market place (GEMS ECORYS, 2015).

Annual Reviews and evaluations

Year	10/11	11/12	12/13	13/14	14/15	15/16	16/17
Programme Score	X	B	A	A+	A+	A	A+
Risk Rating	M	M	M	M	M	M	M

Source: GEMS Project Completion Review (2018; p.1). Licensed under: [the Open Government Licence v3.0](#)

Recommendations from reviews (Project Completion Review, 2018)

The Independent Monitoring and Evaluation Project (IMEP) was commissioned to undertake an interlinked Mid-Term Review (MTR) and Lesson Learning Review of the DFID-funded GEMS components in Nigeria in May-June 2014. A report from the Independent Monitoring and Evaluation Project for the State Level Programmes (IMEP) (2015) collected lessons learned from GEMS 1, 3 and 4, and those collected from the GEMS 2 lesson learning review conducted in December 2013. Learning themes span project relevance, effectiveness, efficiency, impact and sustainability and the suitability of the Making Markets Work for the Poor (M4P) approach in the different GEMS settings. The realities of applying M4P principles and methodology in complex and dynamic markets and how particular GEMS components are inducing systemic change in markets are also guiding themes to this Review.

1. Donors and service providers have to agree on a clearly articulated vision for the target sector(s), or Theory of Change, at the outset of the programme.
2. Programme design must be informed (and developed) on the basis of sound market analysis. Donors must allow projects to conduct adequate market analysis early, so that interventions can be properly designed.
3. Project management log frames should not only include quantitative indicators, but also qualitative indicators that show systemic changes and impacts.
4. DFID should also consider how the Annual Review process (including content of the ARIES template) could be more valuable to projects.
5. The GEMS programme was set up as a suite of interacting projects. Though, a lack of coordination in the log frames meant collaboration was less effective.
6. The use of the DCED standards for results measurement is a sound basis for assessing impact - irrespective of the approach being taken.
7. The GEMS projects were planned to use a standardized approach to results measurement, 'the Handbook'. More attention should be given to ways to reflect on the usefulness of the handbook and to review and upgrade the approaches - if this approach across a suite of programmes is to be used.
8. Unintended outcomes or results (i.e. whether positive or negative) are likely to occur over the course of a programme. Allowing the flexibility in the initial project design to respond to these is useful.
9. The public private engagement mechanism (PPEM) and public private dialogue (PPD) methods applied by GEMS 3 are both fruitful components of the project's strategic framework and would be useful in the context of other market system development programmes.
10. Both GEMS 1 and 3 effectively used the model/approach of embedding technical expertise from the project with partners. The aspects of this approach that has helped the projects to succeed will provide useful lessons for a broader market system development programme audience.
11. Donors, including DFID, should back research and development for introducing more innovative tools and approaches. Successful projects will use a range of delivery mechanisms and will not be limited to working within one approach.
12. The use of ratings and weightings could be further inspected and considered by DFID Nigeria and other donors (with respect to VFM and impact), so as to address the challenge of demonstrating results and VFM while value takes time to generate.

3.3. BEAM Exchange (Building Effective and Accessible Markets)

Title: The BEAM Exchange (Building Effective and Accessible Markets)		
Programme Value: £4m (DFID contribution is £3m, Swiss Agency for Development Cooperation £1m)		
Programme Code: 203732	Start Date: April 2014	End Date: March 2017

Source: BEAM Annual Review (2016). Licensed under [the Open Government Licence v3.0](#)

The BEAM Exchange (or 'BEAM') is a platform for knowledge exchange and learning about the role of market systems approaches in fighting poverty.

DFID has a strong interest in improving the efficiency and impact of these approaches, given its large portfolio of programmes that include aspects of market system development. BEAM's outcome objective is to reinforce and extend the application of market systems approaches, by supporting the spread of good practice and facilitating lesson-learning and experience-sharing (BEAM Annual Review, 2016).

To do so, BEAM is building a community among policy-advisors, consultants, practitioners and businesses, supporting those who design, manage, implement, evaluate and participate in development programmes. It is enhancing access to field-orientated guidance and evidence of good practice and results; facilitating events and spaces for learning, knowledge sharing and experience-informed debate, and building a valued library of key resources (BEAM Annual Review, 2016).

There are eight broad separate work streams constituting the programme's current activities:

1. **Knowledge infrastructure:** launching and maintaining the BEAM website, knowledge assets and communications capability.
2. **Communicating the approach:** delivering accessible information, guidance and signposting to resources on market systems development.
3. **Evidence:** enhance the evidence base to strengthen the credibility of the approach.
4. **Practical tools and solutions:** deliver better tools and methods to address common challenges faced by practitioners.
5. **Learning networks:** enabling a more extensive and effective community of practice for MSD.
6. **Skills and capabilities:** enhancing quality and access to training, mentoring and coaching.
7. **Adaptive programming:** endorsing policies to encourage more adaptive management practices.

8. **Systemic change:** generating better understanding and guidance about how to achieve systemic change, and to credibly measure it (BEAM Annual Review, 2016).

The outputs of the Platform will provide improved coherence in the development of market systems approaches. The Platform will:

- facilitate an efficient commission of research (coordinated amongst key users),
- enable better evidence collection (via improved monitoring and evaluation guidance) and
- provide practical guidance to those implementing projects on the ground.

Thus, market systems approaches will become an increasingly relevant delivery method for a wider range of practitioners (BEAM Business Case, 2013).

These outputs will contribute to the outcome level objective of the reinforced and extended development and application of market systems development policy and practice. The likely impact of the market systems development Platform is the improved impact and effectiveness of development programmes that highlight ‘making markets work for the poor’ as their objective.

The eventual beneficiaries of the Platform will be poor people in market systems. By tackling the system-wide issues that prevent markets meeting the needs of poor people, an increase in the number of programmes adopting the approach will realize better market access and poor people being better able to gain the full rewards of their market interactions (BEAM Business Case, 2013).

Theory of Change

The project delivers guidance on developing Theories of Change for M4P programmes. The theory of change represents the programme’s vision of how market systems will be functioning in the future, the pro-poor outcomes it will result in, and the effects it will have on poverty (BEAM, 2019).

See: Figure 3: Programme theory of change (BEAM), BEAM (2019) Theory of change. <https://beamexchange.org/guidance/vision/theory-change/>

Annual Reviews and Evaluations

Year	2014	2015	2016	
Programme Score	A	A	A	
Risk Rating	Medium	Medium	Moderate	

Source: BEAM Annual Review (2016, p. 1). Licensed under [the Open Government Licence v3.0](#)

Recommendations from Annual Reviews and Evaluations (BEAM Annual Review, 2016)

An External Review of the programme was conducted by WYG (2016). The core data source for this was key informant interviews with 39 practitioners, donors, designers of MSD projects and ‘thought leaders’ from the field. Key learning includes:

1. **Amongst key informants** there is a **clear mandate for the continuing existence** of BEAM. The programme’s audience values the activities it provides. Support is also showed in the high attendance of the BEAM conference and the robust engagement within various sessions.
2. The **uniqueness of BEAM** includes: its solid focus on MSD, its geographical focus (on European-based donors and suppliers), its strong brand, and its scale.
3. The field that BEAM works in and the ambition of its objectives means that there are numerous **difficult dichotomies it must traverse**, with interviewees often giving different views.
 - a. These include: complexity versus simplicity (parts of the audience are new to MSD and need clear English, other parts are experts requiring technical debate) and facilitative versus directive approaches (there is a trade-off between inviting key thinkers together in a neutral space and guiding what the field should focus on).
4. The **Theory of Change must to deliberate the variance in community needs**. Different sub-groups have different needs, e.g. the desires of a team leader vary from new members of an MSD team. Similarly, donors may require a bespoke website section and/or further advocacy support.
5. Website users are **occasional rather than regular**, naturally visiting the exchange in order to find specific answers rather than checking it regularly out of habit. Similarly, community contributions tend to be at the suggestion of BEAM staff rather than purely voluntary.
6. The **breadth of knowledge products** on the BEAM site can make it **hard for users to identify how much quality assurance** the programme has delivered in each instance.
7. There is still **strong interest in supporting the use of MSD in ‘non-traditional’ sectors**, notwithstanding the shift away from this area of activity at the last annual review.
8. **The debate around the MSD evidence base continues**. Some informants think that the focus should now be on synthesising what exists, whilst others think more generation is needed. BEAM’s upcoming evidence paper and the online evidence map are aimed at better understanding these issues.
9. **There are numerous feasible scenarios for scale up or down of the programme**, even if it is doubtful that any of its core activities will be commercially viable in the short to medium term.

3.4. Jobs Compact Ethiopia

Title: Ethiopia Jobs Compact		
Programme Value: £80M		
Programme Code: 300393	Start Date: Feb 2017	End Date: Feb 2023

The Ethiopian Jobs Compact will back the industrialisation efforts of Government of Ethiopia. It plans to **create over 100,000 jobs for Ethiopians and refugees** residing in the nation. DFID's contribution will fulfil the promise made by the Prime Minister of the UK to support the Compact (BBC, 2016) through an £80 million contribution to the \$560 million overall estimated cost (Jobs Compact Business Case, 2018; Jobs Compact Annual Review, 2018).

The programme would match international support for job creation in Ethiopia and to the eventual easing of labour market restrictions – so that **30,000 refugees can participate in the labour market**. The programme funding will support enhancements in the investment climate, promotion of investment, labour productivity, and advancing environmental and social standards in the local manufacturing sector. This will **help create over 100,000 jobs, especially for women working in export-oriented sectors like garments**. To guarantee that refugees are capable of benefit from job generation in the wider economy, assistance would be delivered to realize essential legislative changes, training, relocation, and re-housing. Furthermore, protective procedures will be provided for vulnerable groups (Jobs Compact Business Case, 2018).

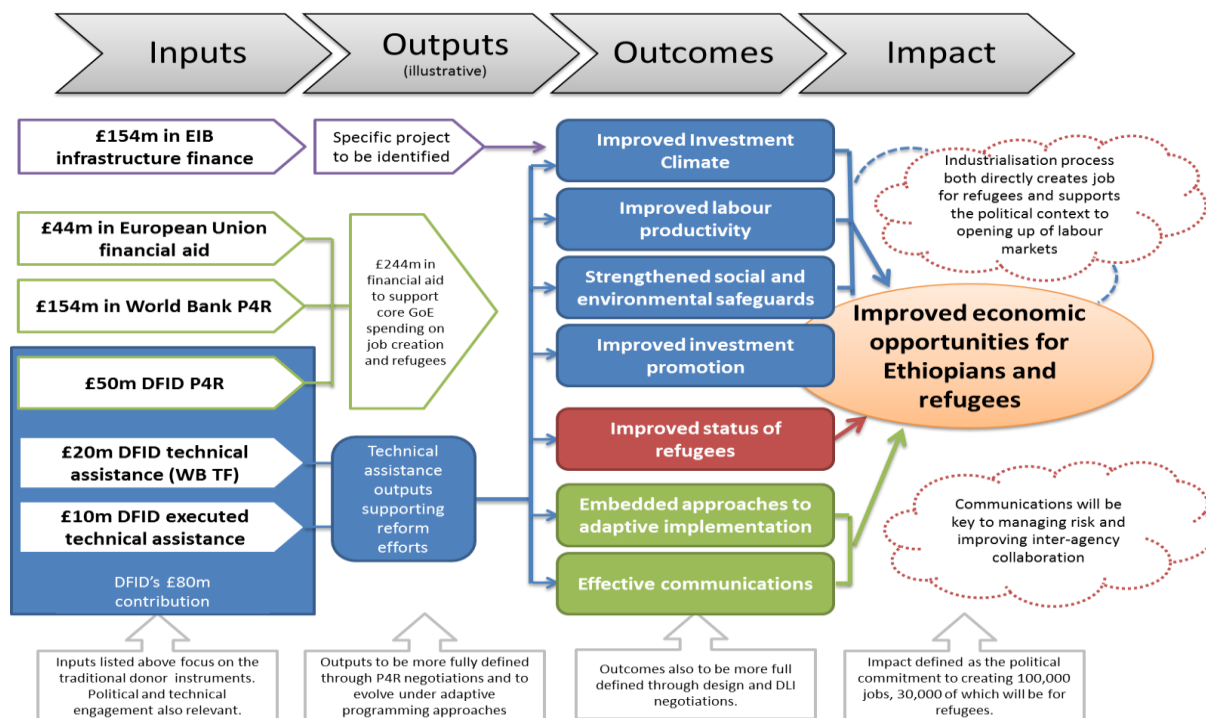
The delivery structure (i.e. of the £80 million of DFID support) constituted three separate components. The delivery process was also organised over a six years period:

- (i) **A contribution of £50 million channelled via the World Bank.** This would constitute of £40 million set aside for a 'Programme for Results' operation (payments to realize delivery of Compact commitments) and £10 million to fund specific government spending operations – which, for instance, includes the training and relocation of refugees that participate in the programme.
- (ii) **A technical assistance package of £20 million provided to the World Bank.** This will be used to support the Ethiopian government in carrying out the necessary reforms to attract investors and ascertain that the domestic manufacturing sector fulfils key international benchmarks of sustainability.
- (iii) **An additional £10m of the budget will be managed by DFID.** This amount will be used to finance the unblocking of unanticipated hindrances; enable refugee agencies to support the programme; and carrying out monitoring and evaluation (also on the impact on onward migration) (Jobs Compact Business Case, 2018).

Theory of Change

The overarching objective of the Jobs Compact programme in Ethiopia is to generate economic opportunities for both Ethiopians and refugees hosted by the country. To attain this, the Compact will back the industrialisation strategy of the Ethiopian Government with the target of job creation. In addition to this, **a set of reforms and interventions will enable refugees to profit from job opportunities that are created within the Ethiopian economy.** The emphasis on industrialisation is because of the need to both generate jobs directly and to support the political and economic circumstance in which labour market access is made open - without putting too much pressure on host communities in Ethiopia.

Figure 4: Programme theory of change (Ethiopian Jobs Compact)



Source: Jobs Compact Business Case (2018, p. 23). Licensed under the Open Government Licence v3.0

The **delivery of outputs** (leading to achievement of outcomes) is **based on three main headline assumptions** (Jobs Compact Business Case, 2018).

- I. **The quality of the outputs will be important** – both in terms of their technical trustworthiness as well as the way in which they are shaped and provided to the special circumstances in Ethiopian. The soft-skills training to both Ethiopian citizens and refugee workers is a useful example in this regard.
- II. **The capacity and commitment of the government to deliver on the very large number of concurrent reforms** and investment projects through its industrialisation agenda and the added commitment on refugee rights. The provision of effective cross cutting external support to strengthening institutions (i.e. under Workstream 6 “Embedded approaches to adaptive implementation” of Figure 2) will be important to this result.
- III. **The coordination of all stakeholders will be fundamental** to make sure that financial resources flow in a predictable manner and appropriate disbursements are realized on the financial aid from the World Bank, DFID and EU. The selection will be based on the following criteria, as this process begins. Namely:
 - The relevance to Jobs Compact’s ‘economic opportunities’ objective;
 - Motivation to drive impact (which will focus on results of the ground);
 - Simplicity;
 - Scalability, i.e. if interventions can be spread over several years to reinforce the momentum of reforms;
 - Timeliness, i.e. – in order to achieve a suitable disbursement pattern; and
 - Ease of Verification.

Annual Reviews

Year	2018	2019	2020	2021	2022	2023
Programme Score	A					
Risk Rating	Major					

Source: Jobs Compact Annual Review (2018, p. 1). Licensed under [the Open Government Licence v3.0](#)

So far, it was **not possible to ‘formally’ assess the contribution of the programme** to the expected outcomes (as noted in DFID’s latest annual review from year 2018). This is because the programme has not yet gone into full implementation. However, a simple look at the expected results and the ‘innovative’ nature of the project (i.e. in the way it tries to combine employment opportunities for local communities as well as refugees) makes it interesting enough. Overall, the program also received an ‘A’ score in 2018 (Jobs Compact Annual Review, 2018).

Recommendations from annual reviews and evaluations (Annual Review, 2018)

1. The SROs of the Jobs Compact and the Refugees and Migration programme should decide on an internal coordination mechanism and work together - e.g. conducting joint reviews, field trips and partnership management. The SROs should exploit the findings of the DFID funded national and regional refugee-host community context analysis to agree on a DFID Ethiopia (DFID-E) wide engagement approach on the refugee integration agenda.
2. DFID and World Bank must engage at multiple levels to safeguard the momentum gained so far in the policy area of refugee employment continues.
3. The Jobs Compact SRO and the Private Sector Lead of DFIDE should work with partners such as ILO, EIC, World Bank and MoLSA to guarantee that work around DLI3 (i.e. establishment of functioning labour units in industrial parks) involves sustainable approaches that will strengthen the integration of in-park labour issues with the government institutions that have the directive and expertise to work on this area.
4. DFIDE’s Economic Development Team must develop strategic engagement with MoLSA on the decent work agenda particularly concentrating on labour issues in the manufacturing sector.
5. There should be better coordination between IFC’s investment climate programme and other DFID programmes operating in the same space particularly the Tax Systems Transformation Programme (TSTP) that support tax administration and Ethiopian Investment Advisory Facility (EIAF II) that engages in the area of trade logistics. DFID should introduce the IFC Investment Climate team to the TSTP team and ask that they coordinate and report back on coordination efforts.
6. There are complementarities between DFIDE’s Strengthening Host and Refugee Population Economy programme (SHARPE) and the Employment Promotion and Protection (EPP) pilot project. Teams should facilitate co-learning and partnership on systems/enabling environment that are vital for refugees to engage in economic opportunities.
7. The minimum standards required for the Employment Promotion and Protection (EPP) Pilot waged jobs need to adhere to decent work principles and comply with local labour legislation. They also need to consider realities of labour markets in developing countries. After consultations with key stakeholders, the programme should arrive at an optimal set of ‘decent work’ criteria that is both aspirational but realistic given the circumstances.

8. As the programme goes into full implementation, the governance structure of the Jobs Compact, especially the Technical Working Group, should be reinforced. The TWG should play an improved role in clarifying, mandating and guiding the roles of different players but also navigating the growing interest of other development partners in the programme.
9. The programme's implementation started in 2018/19 financial year; hence DFID Programme Team should closely work with partners to review and fine-tune future years' financial forecasts. Once there is a clear understanding between DFID, GoE and World Bank on the adjustments, adjustments to the relevant agreements should be processed.

3.5. Dar es Salaam Urban Jobs Programme

Title: Dar es Salaam Urban Jobs Programme		
Programme Value: £10M		
Programme Code: 205092	Start Date: Feb 2018	End Date: Aug 2023

Source: Dar Urban Jobs Annual Review (2019). Licensed under [the Open Government Licence v3.0](#)

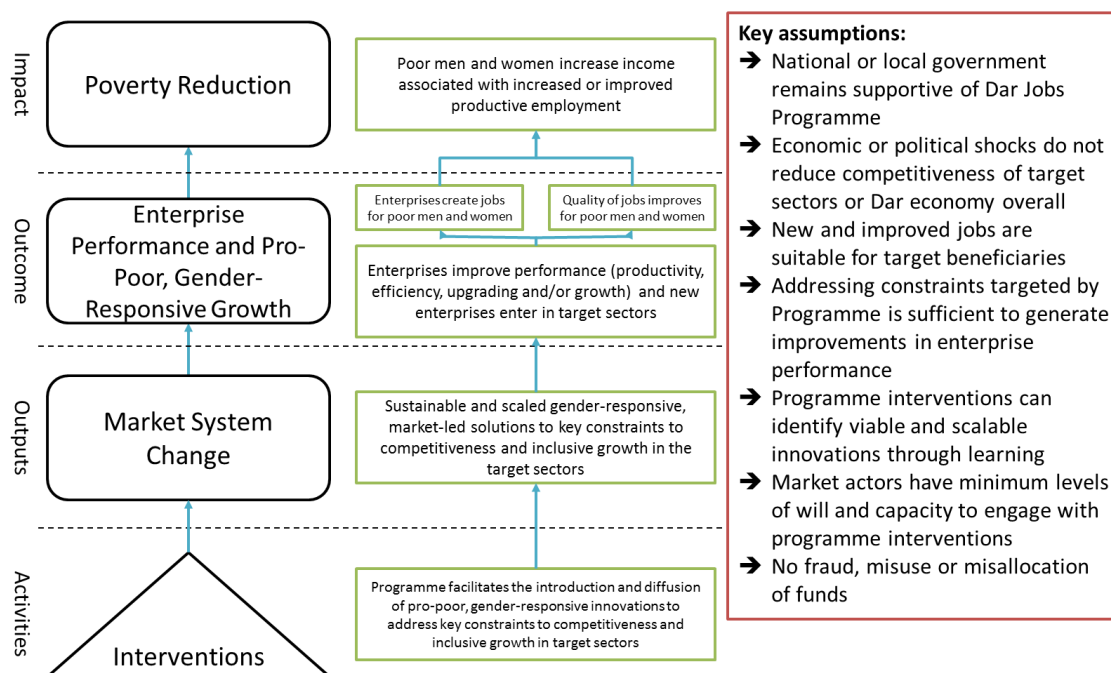
Dar es Salaam (Dar) is on track to become a megacity of 10 million people by 2027 and, at the moment, the third fastest-growing city in Africa. Nevertheless, much of the city's fast growth has been a 'jobless growth'. Dar's unemployment rate is 21.5%, compared to 10.3% nationally, and underemployment rates are much higher. With up to a million young people joining Tanzania's job market annually, harnessing labour-intensive sectors that can generate jobs for the urban poor is a critical, and growing, challenge. UK support can improve Dar's ability to generate productive jobs and catalyse economic transformation, while (at the same time) reducing poverty and vulnerability for its inhabitants (Dar Urban Jobs Annual Review, 2019).

Dar Jobs is a proposed 5-year £10 million urban market systems programme, the aim of which is to catalyse sustainable change in sectors that have the capacity to create jobs and incomes for thousands of poor people, principally women and youth. The programme will start with activities in the manufacturing, waste and childcare sectors. Funds will be disbursed to designated businesses to risk share and test business models that can generate economic opportunities for the poor. Funds will also be used to directly fund activities enabling business, local government or civil society organisations to deal with constraints to development in the target sectors. Dar Jobs will provide £20 million in additional income for 55,000 beneficiaries through creation of approximately 9,600 additional FTE jobs and augmented earnings within existing jobs (Dar Urban Jobs Annual Review, 2019).

Theory of Change

The theory of change shows that market-led solutions can deal with key limitations to competitiveness in the light manufacturing, childcare and waste sectors. This can help to realize improved enterprise performance and facilitate market entry of new enterprises, which in turn can lead to more incomes associated with the formation of new jobs and higher earnings in existing jobs (Dar Urban Jobs Business Case, 2018).

Figure 5: Programme theory of change (Dar es Salaam Urban Jobs)



Source: Dar Urban Jobs Business Case (2018, p. 19). Licensed under the Open Government Licence v3.0

The connection between labour productivity, employment and incomes is multifaceted. Yet, there is evidence of a positive relationship between productivity and job creation, particularly in the case of product innovation. There is also some evidence that productive businesses tend to display not only higher job growth compared with other businesses, but also more inclusive growth. Finally, investments in innovation might result in gains in employment at the industry level even when there are losses at the company level. There is also evidence that it is job growth together with augmented productivity that leads to poverty reduction. Key assumptions will be tested by the programme results framework (Dar Urban Jobs Business Case, 2018).

Recent evidences show that Tanzania’s employment generation was driven by smaller firms: the bulk of the recent employment growth in Tanzania came from the non-agricultural and largely informal private sector. Furthermore, the utmost contribution to labour productivity growth came from a relatively small sub-set of firms. Hastening employment in those firms has the potential to boost labour productivity by 1.3 percentage points (Dar Urban Jobs Business Case, 2018; Diao et al., 2016).

The theory of change reveals how enterprise performance enhancements lead to new jobs from existing and new entrants (i.e. enterprises create jobs) and also to increased incomes in existing enterprises (i.e. quality of jobs improves). A representation of the theory of change, together with the key assumptions, is provided in the Figure 5. These lower level theories of change are an important part of flexible programming where interventions are not pre-defined (Dar Urban Jobs Business Case, 2018).

Annual Reviews (Dar Urban Jobs Annual Review, 2019)

Year	2019	2020	2021	2022	2023
Programme Score	A				
Risk Rating	Moderate				

Source: Dar Urban Jobs Annual Review (2019). Licensed under [the Open Government Licence v3.0](#)

So far, the available annual review is a 'light-touch' – given that the program only started in 2018. The contract for the Dar Urban Jobs programme was ratified 18 October, with IPE Global, working with the unincorporated joint venture members, Springfield Centre for Business in Development Limited and Diligent Consulting Limited. The inception phase (spanning five and half-month) started around end October, thus the (latest) annual review in 2019 is mainly a forward-looking review that seeks to capture any issues identified early-on and establishes the core actions for the 2019 reporting period.

Recommendations and Key Points (Annual Review, 2019)

10. DFID SRO and consortium will jointly decide on how to inform Government and other stakeholders and seek their input. This will commence as soon as possible. The consortium plans to finalize a communications strategy, together with informative materials, by February 2019, but it may be essential to introduce the programme to some stakeholders ahead of that.
11. The consortium should re-evaluate the significance of the selected sectors, given the time elapsed since the business case was concluded, taking into consideration Government priorities and shifts in the business environment. It should also update the early mapping of other relevant initiatives in the city and make sure that they are complementary.
12. Together with the consortium leadership team, DFID SRO and programme manager should keep team capabilities under review over the inception period and ensure suitable levels of mentoring and other support is provided from the international offices of IPE and Springfield.
13. DFID SRO should make sure that a multi-disciplinary team of advisers takes part from the inception phase, and to ensure that design decisions are informed by robust social, gender and political economy analysis. The consortium should set up clear responsibilities for women and youth results.
14. The Consortium should plan early on about the programme's safeguards approach, e.g. initial thoughts in the standard operating procedures, and guarantee that a comprehensive strategy is in place by May 2019.
15. The Consortium will make sure that the proposed governance structure and processes incentivises pilots and depicts a clear procedure for moving from pilot to scale. Market systems programmes are more effective when timely decisions are taken to scale or drop interventions, i.e. on the basis of performance.

16. The consortium should design a dashboard approach, which will allow complete oversight of the various interventions, comprehend how these contribute to impacts and outcomes, and back a fast decision-making process regarding scaling activities up or down.

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