

TRADEMARK EAST AFRICA



Growing Prosperity Through Trade

FINAL DRAFT REPORT

FOR

THE FORMATIVE EVALUATION OF THE TRAILINKS PROGRAMME (RWANDA AND BURUNDI) LOT 1

CONTRACT REFERENCE: PO/20131314

COUNTRIES: BURUNDI AND RWANDA

BY



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ABBREVIATIONS AND ACRONYMS

API	Burundi Agency for Investment Promotion
BSO	Business Support Organization
DAC	Development Assistance Committee
EAC	East African Community
EAI	Export Adviser Initiative
ECP	Export Capacity Programme
EDP	Export Development Programme
MLP	MarketLinked Programme
NGO	Non-Government Organization
OECD	Organization for Economic Co-Operation and Development
PAR	Project Appraisal Reports
RBS	Rwanda Bureau of Standards
RDB	Rwanda Development Board
TMEA	TradeMark East Africa
VfM	Value for Money

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EXECUTIVE SUMMARY

1. This formative evaluation assesses the TMEA-supported Traidlinks Programme (Rwanda and Burundi) Lot 1 which aims at increasing export values of the programme supported companies in Rwanda and Burundi to contribute to the TMEA overall objective of increased trade in the EAC. The evaluation covered the period from January 2012 to June 2015 for the Rwanda Project though the project was extended to December 2015 at no cost. The Burundi Project was scheduled to run from January 2014 to June 2015 but additional funds were provided and the project extended to March 2016 however, this evaluation covers both the pilot phase and the extended phase up to June 2015. This formative evaluation set out to measure the relevance, effectiveness, efficiency, impact and sustainability of the TMEA-supported Traidlinks interventions in Rwanda and Burundi. The overall aim of this evaluation was to ascertain the results and assess the programme performance and provide the findings, conclusions and recommendations with respect to the programme in order to draw lessons for future design and implementation. This evaluation report further provides case studies as Annex 1.
2. In addition to contribution analysis, methods involving both qualitative and quantitative techniques were used in the evaluation which guaranteed and ensured high response rate of 78%. The evaluation team used the OECD-DAC standard evaluation criteria of relevance, effectiveness, efficiency, impact and sustainability to assess the programme progress. Each criterion was provided with an overall assessment using a sliding scale of 1 (poor), 2 (fair), 3 (good), 4 (very good) and 5 (excellent), for further details refer to Annex 2. Confidence levels of low (red), medium (yellow) or high (green) outlining the available level of evidence to support the evaluation team’s assessment is also provided, for further details refer to Annex 3. Table 1 summarizes the findings and the assessment of the country projects according to the evaluation criteria.

Table 1: Overall Programme Assessment against Evaluation Criteria

#	Criteria	Country Project	Assessment (1 To 5)	Confidence Levels	Comments
1.	Relevance	Rwanda	4	High	<ul style="list-style-type: none"> ❖ Programme is highly relevant because lack of export capacity is one of the major challenges in Rwanda¹ and Burundi² that the programme is addressing. ❖ Interventions are consistent with TMEA’s Theory of Change and objectives of increasing business competitiveness and trade; the EAC Partner States’ trade policies, export strategies and priorities of increasing exports.

¹ Rwanda Revised National Export Strategy (2012)

² Burundi Trade Integration Diagnostic Study (2012)

#	Criteria	Country Project	Assessment (1 To 5)	Confidence Levels	Comments
		Burundi	4		<ul style="list-style-type: none"> ❖ Initiatives are consistent with the EAC Development Strategy of increasing the competitiveness of locally manufactured products to access local and regional markets.
2.	Effectiveness	Rwanda	4	High	<ul style="list-style-type: none"> ❖ 80% of the targeted outputs in Rwanda were delivered in time. ❖ The programme supported a total of 16 Rwandan companies and out this, 7 companies that were not previously exporting started exporting to new markets in the EAC as a result of the programme intervention; and 4 companies that were exporting had their export capacities enhanced which contributed to increased export values in the region and the remaining 5 had good prospects for business. ❖ 9 Export advisers against a target of 15 were trained in Rwanda which enhanced their skills and capacity in advising exporters. ❖ 15 export action plans (EAPs) were developed against a target of 12 in Rwanda which helped the exporters to plan appropriately for the export markets. ❖ Building the capacity of Rwanda exporters and linking them to markets exposed them to new export opportunities.
		Burundi	2	High	<ul style="list-style-type: none"> ❖ 4 action plans were developed against a target of 5 in Burundi and 8 companies took part in sales missions against a target of 5 in the pilot phase however, no follow ups in form of technical assistance had been made on the companies. ❖ No progress had been made in realising the outputs in the extended phase in Burundi because all activities were halted due to political insecurity that was prevailing.
3.	Efficiency	Rwanda	4	High	<ul style="list-style-type: none"> ❖ Traidlinks services were procured through competitive bidding using technical and financial proposals for the Rwanda Project. ❖ Traidlinks team is composed of competent local and international experts that were engaged in the implementation of activities through sharing of experiences and skills. ❖ Traidlinks closely worked with RDB and API which improved the capacity of the national staff and private sector through skills transfer which made them more effective in the implementation of the programme interventions.

#	Criteria	Country Project	Assessment (1 To 5)	Confidence Levels	Comments
		Burundi	3		<ul style="list-style-type: none"> ❖ 86.4% of the total programme budget for the initial phase was used to realize 85.7% of the targeted outputs and the remaining 13.6% was being utilized for no cost extension for linking Rwandan companies to markets in DRC. ❖ Only 7.4% of the budget for the extended phase in Burundi had been used before the activities were halted due to insecurity. ❖ The net benefits of the programme is US\$4,512,548 and the return per US\$ invested is \$4.2. ❖ The internal rate of return is 52% and the payback period is 4 years.
4.	Sustainability	Rwanda	4	High	<ul style="list-style-type: none"> ❖ Rwanda has incorporated the programme interventions and goals into the Revised Rwanda National Export Strategy which will greatly ensure sustainability through national budgets and the trained RDB staff. ❖ RDB is a government agency that is allocated with resources from the national budget that can be used to sustain programme results. ❖ Skills transfer and mentoring promotes and builds capacity and confidence of exporters which keeps them sustainable in the export markets. ❖ Existence of institutional frameworks and collaboration by the RDB and implementation partners keeps the programme sustainable.
		Burundi	2	High	<ul style="list-style-type: none"> ❖ Burundi has not yet incorporated the programme activities into the national export strategy for sustainability. ❖ API is a government agency that can get some resources from the national budget that can be used to sustain programme results. ❖ Existence of institutional frameworks and collaboration between API and implementation partners can keep the programme sustainable.
5.	Impact	Rwanda	4	High	<ul style="list-style-type: none"> ❖ Out of the 16 companies that were programme supported, 44% of them in Rwanda started exporting to new markets in the EAC and 25% of them that were already exporting increased their export values. ❖ The programme supported companies in Rwanda contributed to export values of US\$ 15.7 million to the EAC by June 2015.
		Burundi	1	High	<ul style="list-style-type: none"> ❖ None of the programme supported companies in Burundi was exporting as a result of programme intervention.

3. The evaluation team made the following recommendations:

#	Recommendation	Action point
1.	<p>Recommendation 1: Increase awareness and product promotions to key target markets.</p> <p>TMEA should support proactive promotion and awareness of Rwandan</p>	<ul style="list-style-type: none"> ❖ RDB ❖ API ❖ Traidlinks ❖ TMEA Rwanda and

#	Recommendation	Action point
	and Burundi Products in key target export markets in the EAC and beyond to increase exports growth.	Burundi country project offices
2.	<p>Recommendation 2: Improve the capacities of new and existing exporters.</p> <p>TMEA should continue supporting the development of the capacity of new and existing Rwandan and Burundi exporters to identify opportunities and to promote their products in key markets.</p>	<ul style="list-style-type: none"> ❖ RDB ❖ API ❖ Traidlinks ❖ TMEA Rwanda and Burundi country project offices
3.	<p>Recommendation 3: Follow up and monitor the programme supported companies.</p> <p>TMEA should support Traidlinks and RDB/API to follow-up and monitor the programme results achieved such as implementation of the export action plans and market linkages created by visiting the supported companies on schedule. This will strengthen the coordination between Traidlinks, RDB/API and the supported companies which will enhance programme sustainability.</p>	<ul style="list-style-type: none"> ❖ RDB ❖ API ❖ Traidlinks ❖ TMEA Burundi and Rwanda country project offices
4.	<p>Recommendation 4: Identify and utilize the networks of well-established distributors in the EAC.</p> <p>TMEA should support Traidlinks to identify and work closely with the already well established distributors in the EAC to be able to tap into their distribution channels. The well-established distributors in the EAC have got key linkages and can also influence the level and volumes of goods exported in the region.</p>	<ul style="list-style-type: none"> ❖ Traidlinks ❖ RDB ❖ API
5.	<p>Recommendation 5: Utilize the existing market information platforms to market the products of the programme supported companies.</p> <p>TMEA should support Traidlinks, RDB and API to identify relevant existing market information platforms and recommend them to the programme supported companies for use to market their products.</p>	<ul style="list-style-type: none"> ❖ Traidlinks ❖ RDB ❖ API
6.	<p>Recommendation 6: Integrate the programme intervention activities in the Burundi national export strategy.</p> <p>TMEA should support Traidlinks Burundi Project to replicate the best practices from Rwanda such as integrating the programme in their National Export Strategy, having well trained local export advisors and having adequate staff in API who should work closely with Traidlinks to ensure skills transfer.</p>	<ul style="list-style-type: none"> ❖ API ❖ TMEA Burundi Country project offices
7.	<p>Recommendation 7: Train and designate the export advisors to build confidence in the stakeholders who need their services.</p> <p>TMEA should support RDB and API to train and put in place a mechanism of designating the trained export advisors for easy access and building confidence in the stakeholders who need their services. To</p>	<ul style="list-style-type: none"> ❖ RDB ❖ API

#	Recommendation	Action point
	ensure effectiveness and sustainability of export adviser initiative, the advisers should be designated and incorporated into the RDB structure through public-private- partnership.	
8.	<p>Recommendation 8: Scale up Traidlinks programme model to support the TMEA export capability programme.</p> <p>Given the good performance of the TMEA Traidlinks supported programme in building the export capacities of the SMEs in Rwanda, TMEA should support scaling up the model to strengthen the TMEA export capability programme to promote export growth.</p>	<ul style="list-style-type: none"> ❖ TMEA head office ❖ TMEA Burundi Country project offices
9.	<p>Recommendation 9: Link the programme supported companies to financial institutions.</p> <p>The programme supported companies should be linked to financial institutions to address the challenge of funding.</p>	<ul style="list-style-type: none"> ❖ TMEA head office ❖ RDB ❖ API
10	<p>Recommendation 10: Increase the number of female owned companies that benefit from the programme interventions.</p> <p>TMEA should support initiatives to deliberately increase the number of female-owned companies in Rwanda and Burundi and motivate them to join the programme.</p>	<ul style="list-style-type: none"> ❖ TMEA Head Office ❖ TMEA Country Office ❖ RDB ❖ API
11	<p>Recommendation 11: Operationalize the programme steering committee.</p> <p>The steering committee that was initially planned for in the programme design needs to be made fully operational and functional to provide a platform that Traidlinks should use for discussion and updating TMEA and other key programme stakeholders such as RDB and API on the programme implementation progress and way forward.</p>	<ul style="list-style-type: none"> ❖ RDB ❖ API ❖ Traidlinks ❖ TMEA Rwanda and Burundi country project offices
12	<p>Recommendation 12: Carry out baseline survey of target firms before programme implementation.</p> <p>TMEA should carry out baseline surveys and studies to generate baseline data on target firms to improve data quality and assist in setting realistic targets before programme implementation to be able to implement the programme from an informed point of view, addresses the right set of needs and also be able to get good value for money at the end of the programme implementation.</p>	<ul style="list-style-type: none"> ❖ TMEA Head Office ❖ TMEA Burundi Country Project Offices



1. INTRODUCTION

4. This formative evaluation assesses the TMEA-supported Traidlinks Programme (Rwanda and Burundi) Lot 1 which aims at increasing export values of the programme supported companies in Rwanda and Burundi to contribute to the TMEA overall objective of increased trade in the EAC.
5. The African Transformation Report (2014) indicated that exporting is critical for transforming small and medium-size economies and that the opportunity to export widens the market available to domestic producers and thus increases potential demand and the prospects for higher prices. Higher demand allows a larger scale of production, which can increase employment and the use of other domestic factors of production. The report further indicates that larger scale production leads to economies of scale which lower unit costs and increase competitiveness and thus boost profit margins for domestic producers.
6. Thus to develop and transform their economy and to meet their ambitious development goals, Rwanda and Burundi need to develop a competitive private sector with the capacity to compete and export value-added products to the EAC markets and beyond. However, the two countries are yet to exploit fully the opportunities offered by EAC membership because of weak and relatively small private sector.

1.1 BACKGROUND TO THE TRAILINKS PROGRAMME

The Export Development Programme

7. In order to address the challenges facing Rwanda and Burundi exports, in 2012 TMEA contracted Traidlinks, an Irish funded NGO based in Kampala to run a pilot project to help 10 selected Rwandan companies enter the Ugandan market. Based on the TMEA funded pilot, the Export Development Programme (EDP) aimed at building the Rwandan companies' capacity to grow exports outside the traditional sectors of Tea, Coffee and Minerals through diversification of its export base and development of a comprehensive export support environment. Some of the products that the supported companies were dealing in included: cement, fruit juice, pasta, mineral water, rice, wheat flour, maize flour, cassava flour, sorghum flour, chilli sauce, tiles and slabs, chalk, cooking oil, steel products, wines, biscuits, clay tiles and gins.
8. Following the success of the pilot project, three programmes in Rwanda and one in Burundi were developed namely:
 - i) **MarketLinked Programme (MLP)** aimed at linking Rwandan and Burundian potential exporters to buyers in the EAC market. It should be noted that the TMEA-supported Traidlinks Programme in Burundi was not as developed and as big as the Rwandan programme and therefore, this evaluation is meant to provide recommendations and lessons learned that will be applied in Burundi.
 - ii) **Export Adviser Initiative (EAI)** to build the capacity and competency of the qualified Rwandan local business consultants to support exporters in preparing and executing their export business plans.
 - iii) **Export Capacity Programme (ECP)** to provide direct technical support to new and existing exporters to identify and/or exploit export growth opportunities.

9. It is against this background that TMEA engaged the services of a consultancy firm, Ayaah Enterprises Ltd, to conduct the formative evaluation of the TMEA-supported Traidlinks Programme for Rwanda and Burundi (Lot 1).

1.2 EVALUATION PURPOSE

10. The aim of the formative evaluation was to measure the relevance, effectiveness, efficiency, impact and sustainability of the TMEA-supported Traidlinks interventions in Rwanda and Burundi.

Specifically, the evaluation objectives were to:

- a. Establish the extent to which the intended outcomes of increased exports were achieved which included:
 - i) Improved capacity of exporters in Rwanda and Burundi through various training programmes conducted;
 - ii) Improved export support networks in EAC;
 - iii) Enhanced capacity of local service providers and Business Support Organizations (BSOs) to provide support to Rwandan exporters;
 - iv) Creation of an EAC Trade network for exporters;
- b. Highlight the successes, the appropriateness of the model, the challenges faced during implementation of the programme including competency and capacity of the programme team, and the lessons learnt;
- c. Establish whether the support TMEA is offering is sufficient and/or if there are better alternatives to ensure sustainability;
- d. Make recommendations oriented towards improving programme design and management especially for the Burundi Traidlinks project which has just begun implementation.

2. EVALUATION APPROACH AND METHODOLOGY

11. The evaluation team's overall approach and methodology was based on the five OECD-DAC criteria for evaluating development assistance, specifically: relevance, effectiveness, efficiency, impact and sustainability in line with the ToRs. Both qualitative and quantitative methods of data collection were used. Primary data was collected through consultative field visits to Rwanda, Burundi, Kenya and Uganda where key informant interviews and focus group discussions were held with identified key stakeholders. Secondary data was collected through desk review of the project documents and other documents relevant to the programme and the evaluation and thereafter, the collected data was triangulated.
12. In addition to the focus group discussions held regarding the contribution of the TMEA Traidlinks programme, the evaluators used a questionnaire to collect data from the programme supported companies during field work. Out of the 23 targeted companies that were supported by the programme, questionnaires were directly administered to 18 of them in Rwanda and Burundi which is 78% of target and this guaranteed and ensured a high response rate. For further evidence on the statistical significance of the findings refer to annex 6.
13. Quality assurance of the evaluation was done according to the OECD/DAC criteria which involved internal and external reviews of the report and incorporation of the agreed review comments. The

evaluation was also compliant with International Standard, ISO 9001³ for Quality Management where the evaluation team ensured that the client's needs and requirements of the evaluation were met.

14. Contribution analysis⁴ was used to assess the progress made to achieve the programme results and focused specifically to what extent the observed results (whether positive or negative) were as a consequence of the TMEA-supported Traidlinks interventions and established whether the programme interventions made a noticeable contribution to the observed results. The contribution analysis approach followed by the evaluation team had six steps:

Step 1: Setting out the attribution problem to be addressed: The core evaluation questions in the ToRs set out the specific questions to be addressed which were reviewed by the evaluation team to determine the specific cause-effect questions to be addressed and other key influencing factors.

Step 2: Reviewing the results chain: The evaluation team reviewed the programme results chains based on the ToRs and literature review. The review of the results chains (refer to annexes 8, 9 & 10) provided a structured approach to the factors that contributed to programme results realized and other factors that may have influenced the results.

Step 3: Gathering the existing evidence on the results chain: The results chains were used to trace step-by-step how the programme interventions led to the desired results by collecting the necessary evidence through interviews, literature review and discussions with the programme staff and beneficiaries. Evidence to validate the programme results chains was collected on the results, assumptions and the other influencing factors. List of persons contacted is in Annex 11 and documents reviewed are in Annex 12. The programme results chains were further used to analyze the design, delivery, results and potential of the programme in a logical way.

Step 4: Assembling and assessing the contribution story: The contribution story was assembled and assessed critically to identify strong and weak links in the results chain and the credibility of the contribution story. The analysis of the programme activities and the results revealed to what extent the programme lived up to its expectations in terms of quality, quantity and timing which was synthesized into the evaluation report (refer to Annexes 4 & 5).

Step 5: Seeking out additional evidence: From the contribution story additional evidence was gathered by the evaluation team to augment the evidence in terms of the results which occurred, the key assumptions and the role of external influences and other contributing factors.

Step 6: Revising and strengthening the contribution story: The evaluation team used the additional evidence collected to build a more substantive and credible evidence that made the contribution story stronger and more plausible. This therefore, provided an argument with evidence from which the evaluation team reasonably concluded with confidence that the TMEA-supported Traidlinks intervention made a contribution to the results.

³ ISO 9001: 2000 Quality Management Systems Requirement

⁴ John Mayne (2008), Contribution Analysis, An Approach to Exploring Cause and Effect, ILAC Brief 16.

2.1 KEY ASPECTS EVALUATED

15. The two key aspects that were addressed during the evaluation were:

- i) **Programme activities and the targeted results:** Analysis of the activities and results produced revealed to what extent the programme lived up to its expectations in terms of quality, quantity and timing. Attribution issues were addressed by basing on the programme indicators and assessing: the extent to which the observed results were as a result of the programme other than other factors;
- ii) **Programme management and implementation:** The analysis of management and implementation of the programme was approached by taking insights from the Abilities Approach⁵, which addresses issues such as: the governance structure, administrative procedures, financial management and stakeholder involvement.

2.2 EVALUATION LIMITATIONS

16 In all aspects the evaluation team received full co-operation and openness from the programme staff, project staff and companies that the programme was supporting and programme beneficiaries in Rwanda and Burundi and we wish to record our appreciation for all the assistance provided. The methodology used proved appropriate for the purpose of the formative evaluation and no significant limitations undermining the reliability, validity or utility of findings was identified. However, during the project site visits to Burundi, the evaluation team was not able to physically meet all the programme supported companies as was planned because they had fled the country due to insecurity that was prevailing. This challenge was overcome by using telephone, skype and emails to collect the relevant information and data. In addition, collecting data on export values from the programme supported companies in Rwanda and Burundi was not easy because most of the companies were not keeping proper records of what had been exported and most of them were not exporting directly but through middle men. This was overcome by collecting and using data from customs authorities.

2.3 RESULTS CHAIN FOR THE TRAILINKS PROGRAMME

17 The programme had results chains for the Rwanda and Burundi projects which clearly articulated the linkages between the programme inputs and the results which were reviewed to include the assumptions needed for the programme to contribute to the high level outcome of increased trade. The key underlying hypotheses for the TMEA-supported Traidlinks Programme were that:

- i) Improving the capacity of exporters in Rwanda and Burundi through various training programmes increases their exports values.
- ii) Improving the export support networks and creation of a trade network for exporters in EAC increase exports.
- iii) Enhancing the capacity of local consultants to provide support to exporters increase exports.

⁵ Stein-Erik Kruse Oslo (1999), How To Assess NGO Capacity: A Resource Book on Organisational Assessment. Norwegian Missionary Council.

3. FINDINGS

18. Based on the evidence from the review of the available programme documents and other relevant literature and extensive interviews with programme staff, key stakeholders and the programme supported companies, the evaluation team came up with these findings that were organized according to the 5 OECD-DAC criteria in line with the evaluation requirements in ToRs.

3.1 RELEVANCE

Relevance is the extent to which a development intervention conforms to the needs and priorities of the target groups, the policies of the recipient countries and donors and TMEA's strategy.

- ❖ Is the intervention well in tune with the trade policies and administrative systems of the partner country government and EAC policies and systems?
- ❖ Are the programme interventions/strategies employed responsive to the needs and aspirations of the private sector players targeted?
- ❖ Are the interventions consistent with TMEA's policies and priorities? Is the intervention consistent and complementary with activities supported by other programmes in TMEA and/or by other donor organisations?

19. The overall objective of the TMEA-supported Traidlinks Programme in Rwanda and Burundi of increasing the export values through export development in these countries is in line with their respective national export strategies and goals of mobilizing and organizing stakeholders to accelerate export growth, increase revenues and ultimately improving the economic development of the country. The TMEA-supported Traidlinks programme is implemented by Traidlinks in Burundi in collaboration with Burundi Agency for Investment Promotion (API) and in Rwanda with the Rwanda Development Board (RDB) who are the national export promotion agencies to ensure the relevance and ownership in terms of political support for programme development and implementation. The main findings from the evaluation indicate that the export development programme content and approach were relevant to developing the export capacities of the supported companies that are majorly SMEs. These companies have been mentored in designing and implementing better action plans, product costing and pricing and understanding market export standards and expectations which has made them plan for their exports more professionally and contributed in accessing regional markets in the EAC and DRC. The programme initiatives should be promoted so as to help contribute to the competitiveness of EAC products. The programme considers the private sector to be an important stakeholder with particular focus on producers and manufacturers with potential to export. Improving export competitiveness by the private sector is explicit in the programme agenda as one of the priorities and the programme activities are divided into 3 components, which are all relevant in contributing towards the achievement of the overall programme goal of increased exports.

20. **Conformance to Countries' Priorities and Policies:** The TMEA-supported Traidlinks Programme is consistent with the Rwandan specific export facilitation system such as the Revised Rwanda National Export Strategy (NES) which aim at finding new markets for products currently exported and

diversifying products exported as the best avenue for export growth. In addition, the programme is consistent with the TMEA Strategy for Rwanda approved by the National Oversight Committee (NOC) to ensure the sustainability and ownership of the programme. The programme also rolls out of further pilots to Burundi in line with the Burundi National Poverty Reduction and Economic Growth Strategy that promotes the diversification and promotion of exports of non-traditional crops to the rest of the EAC with the aim to support export growth and competitiveness across the region. Whilst a major focus of the budget and activities were specific to Rwanda, together the planned programmes addresses the EAC wide gaps in market intelligence by creating the foundation for a regional network. The programme aims to build export development expertise in each EAC Partner State so that companies can access advice and support from both the private and public sector enabling them to exploit regional and eventually global opportunities thereby creating a market driven export facilitation infrastructure.

21. **Conformance to donors and TMEA Strategy:** The TMEA-supported Traidlinks Programme is in line with the TMEA's revised theory of change which is anchored on three key strategic objectives: Increased Physical Access to Markets (SO1); Enhanced Trade Environment (SO2) and Improved Business Competitiveness (SO3). The programme is also consistent with the TMEA export capability component under SO3 that facilitates increased exports for the region within the areas of standards, services and export development.
22. **Consistency with the Treaty Establishing EAC:** The Programme activities of improving the competitiveness of East African businesses are consistent with the Treaty for the Establishment of the EAC (Cap 13, Article 79) which recognizes the significance of improving the competitiveness of the industrial sector so as to enhance the expansion of trade in industrial goods within the Community and the export of industrial goods from the EAC Partner States in order to achieve the structural transformation of the economy that would foster the overall socio-economic development in the Partner States.
23. **Consistency with the EAC Development Strategy:** The Programme is consistent with the EAC Development Strategy that focuses on improving her global competitiveness for faster and sustainable economic growth and move closer to the status of a newly industrialized region. It focuses on increased efficiency in production and distribution; and increased trade with other RECs and globally through strong and continuous support to the on-going process of creating a COMESA-EAC-SADC Grand Free Trade Area and identification of new international markets.
24. **Consistency and complementarity with other TMEA programmes:** The TMEA-supported Traidlinks Programme focus on Rwanda and Burundi was linked to TMEA-supported Business across Borders (BizaB) Programme which was phased out. However, the Traidlinks Programme is now consistent with the Export Capability Strategy Programme where the need to focus on firm level competitiveness is critical for these countries to take advantage of regional integration and access to new markets. In order to increase trade, particular focus is given to influencing enterprise or firm level performance translating to aggregated competitiveness at the sector level. In Rwanda, the project proposals are also closely linked with other important TMEA work in trade facilitation particularly related to:

- ❖ **Agriculture and Trade Logistics Hub** – which aims at export facilitation and backward linkages particularly in the agriculture business sector that also complements TMEA’s work to establish a trade and logistics hub by increasing exports, filling up half empty containers and thereby improving the efficiency of logistics and reducing the cost of transport along the corridors.
 - ❖ **Product Certification and standards** – TMEA is working closely with the Rwanda Standards Board to support product certification to enhance export competitiveness and works closely with the RDB on this project to support participating companies with product certification.
 - ❖ **Private Sector Advocacy** – TMEA is also helping Rwandan exporters organize themselves into an export forum to understand common issues and constraints that exporters face and support evidence based research to advocate on these matters.
 - ❖ **Export Information Dissemination**-TMEA is also providing support to RDB and the Private Sector Federation to improve information dissemination about opportunities for export into the EAC. TMEA is also planning to establish a trade information portal to provide useful information to importers and exporters on trading across borders and other trade related instruments.
25. **Aid for Trade initiative:** The programme interventions are in line with the aid for trade objective of raising standards of living and reducing poverty through its effects on economic growth. Aid for Trade and more particularly Trade-Related Assistance helps partner countries take advantage of opportunities created by unilateral, bilateral or multilateral trade openings and hence it is an important tool to facilitate trade reforms, improve the business environment, support regional integration and provide opportunities to integrate into global value chains. It is an important part of a long-term strategy for global poverty reduction, alongside debt relief and development aid.
26. Overall, the relevance of the TMEA-supported Traidlinks Programme is high, and its design corresponds to the stakeholders needs’ involved in the export business and increasing exports.

3.2 EFFECTIVENESS

Effectiveness is the extent to which the development intervention has achieved its objectives taking their relative importance into account.

- ❖ To what extent were the objectives achieved / are likely to be achieved?
- ❖ If gender mainstreaming targets were set at project inception, did the program achieve the targets, if not what were the challenges?
- ❖ What strategies were used in implementation of the programme and how well did each strategy work?
- ❖ What were the factors influencing the achievement and non-achievement of the objectives?

27. Evidence from the evaluation shows that the aim of the TMEA-supported Traidlinks Programme was to improve the capacity of exporters in Rwanda and Burundi in accessing regional markets through the Export Development Programme (EDP) approach. The EDP aimed at building the Rwandan capacity to grow exports outside the traditional sectors through diversification of its export base and development of a comprehensive export support environment. To meet the programme objectives,

EDP was a package of support comprising 3 inter-linked components that include: Export Adviser Initiative (EAI); Mentoring and Export Capacity Programme (ECP) and Market Linked Programme (MLP) (Rwanda and Burundi).

Rwanda Project

28. **Component 1: Export Adviser Initiative (EAI):** The evaluation team found that this component aimed at building up a cadre of qualified local business consultants capable of helping SMEs and companies to develop and deliver export oriented growth strategies. This initiative involved working closely with the Kigali Independent University (ULK) with the intention of building skills capacity of local consultants with focus on export market studies and exports action planning, costing, pricing, logistics, among others. Therefore, Traidlinks with support from TMEA selected 19 applicants based on their level of education which was a bachelor's degree, experience in the business consultancy specifically dealing with SMEs and trained them on the export development. The target was 15 which was adequate given the level of export business in Rwanda. The 6-month training modules and content covered include: export planning; market entry strategies; basics of international trade fairs & exhibitions; exports costing and pricing; exports logistics; packaging and labeling; quality standards; selling in foreign markets; finance in export trade and basics of consulting which were delivered by the experts in these respective areas. After the theory component, trainees were guided through specific market research tasks which was relevant in including the real practical situation of what they were supposed to do when they graduate, though it covered a period of only 3 days which was quite short. The practical component determined the success of the trainees for award of certificates.
29. The evaluation findings indicate that out of the 19 trainees that enrolled for the course, 9 qualified for award of certificate of completion, 5 dropped off course along the way, while 5 did not succeed through the practical assignment. Having well trained consultants in export development was envisaged to ease the network of marketing products in the EAC because each consultant was expected to be conversant with the business environment of the country and the region. Despite the programme targeting the right beneficiaries for export market training who were already in business consultancy, the evaluation findings indicate that the intended 6-months long hands on coaching and mentoring to produce competent export advisors was not achievable and appropriate. This was largely because the training turned more theoretical than practical and the trainees were not available for the task due to varying reasons including: lack of motivation in terms of some training remuneration, not measuring to the task, having other business engagements and low consultancy business opportunities from the expected exporters. However, this could be improved by selecting the trainees from university graduates who are not constrained by other work engagements and taking them through a longer twelve-month full-time training consisting of a four-month training followed by eight-month full internship at specific business enterprises. Whereas the programme was designed to use the traditional university for export advisor training, the arrangement has proved to be academic and theoretical and therefore in future the training should be delivered by a company or college with specialty in short courses; usually designed as continuous professional education that imparts practical skills for the work place.

30. **Component 2: Mentoring and Export Capacity Programme (ECP):** The evaluation findings indicate that this component aimed at providing technical support to build capacity of potential exporters through mentorship in designing and implementing better export market plans, product costing and pricing, and understanding export market standards and expectations. The evaluation team found that Traidlinks in collaboration with Rwanda Development Board (RDB), visited and interviewed 60 enterprises with the purpose of assessing whether they had the capacity or potential to export such that they could be recruited into the programme. However, finding suitable companies for export capacity development was difficult due to varying reasons that included limiting the scope to non-traditional exports and yet most companies were start-ups. Nevertheless, 23 companies against a target of 20 were selected based on their export potential and willingness to join the programme. Export Capacity Audits (ECA) were performed for them and 15 Export Action Plans (EAP) developed and agreed against a target of 12. Memorandum of Understanding (MoU) were signed with 20 companies to join MarketLinked Programme (MLP). Each MoU was accompanied by US\$500 as a cost-sharing contribution for each participating company which enhanced ownership of the programme and commitment.
31. The evaluation team found that the capacity building (skills building) to selected enterprises were conducted by addressing internal skills gaps in market analysis and research, strategy development, product packaging, bar-coding, dealing with Rwanda Standards Board, understanding cross-border trade, export readiness and participation in international trade exhibitions and developing EAP which was relevant in building their export capacity. From the survey carried out on the programme supported companies, 89 % of the respondents interviewed agreed that the programme improved their export capacities. The 11% that differed were companies from Burundi where the programme was still in infancy and there were no benefits realized as yet due to political insecurity.
32. **Component 3: Market Linked Programme-Rwanda:** The evaluation team found that in 2012 TMEA contracted Traidlinks to run a pilot project to help 10 selected Rwandan companies enter the Ugandan market. The Market Linked pilot worked through the RDB, the national export promotion agency, by providing training and hands on tailored support including market research, sales missions which involved business-to-business (B2B) meetings and sales follow up to companies to penetrate the Ugandan market. It was a good strategy working with RDB since it is the government agency mandated to develop and promote exports in Rwanda.
33. The evaluation findings showed that following the success of the pilot, the TMEA-supported Traidlinks Programme further carried out market research in Uganda and Burundi for 16 Rwanda companies which culminated into sales missions. The Market Linked Programme was carried out by screening of companies through site visits and conducting interviews with companies interested in joining the programme and thereafter market research was conducted by organizing outward sales missions to Uganda and Burundi and linking up at least 15 Rwanda companies pre-selected from ECP component to potential importers/customers in those countries where Traidlinks facilitated B2B meetings. Market linked programme also involved establishing a regional framework in EAC member countries where national export agencies such as Rwanda Development Board (RDB), National Agricultural Export Board (NAEB) and private sector organizations such as Private Sector

Foundation (PSF), Rwanda Manufacturers Association (RAM) and equivalents in the EAC partner states would come together to cooperate on export promotion, joint sales missions and regional business networks. Later market research was also conducted in Goma (Eastern DRC) as part of filling the gap caused by the recent political instability in Burundi market.

34. Evaluation evidence indicate that 5 sales missions involving B2B meetings were carried out: 1 to Kampala (Uganda), 3 to Bujumbura (Burundi) and 1 to Mbarara (Uganda). As a result of this, 7 goods distributorship contracts were signed with a distributor in Burundi. Furthermore, Traidlinks arranged and most of the companies on the programme participated in the annual National Trade Exhibition in Kampala and Mbarara in Uganda in 2014. Rwandan companies on the programme were linked to various potential distributors and importers in Kampala and Bujumbura; including large stores such as Nakumatt, Capital shoppers, Shoprite, World Food Programme and agents for United Nations Peace missions that resulted into getting orders for their products however, the contract amounts were not disclosed as this was confidential information.
35. The evaluation findings further indicate that despite this component aiming at improving the export support networks in EAC, it largely contributed to creation of networks in Burundi, Rwanda and Uganda only, no networks were created in Kenya and Tanzania because of the poor programme reception by the export regulators and promoters in those countries whose export capacities are relatively much more developed. Since the export capacities in Kenya and Tanzania are more developed compared to Rwanda and Burundi, Traidlinks needs to package the intervention differently in Kenya and Tanzania to be more specific and relevant to their export sectors especially in the SMEs. Therefore the creation of an EAC Trade network for exporters is not yet full accomplished as was planned. Evaluation evidence also showed that improving the integration of key Rwandan supply chains with local SMEs was outside the scope of Traidlinks work and therefore was not part of this evaluation.
36. The evaluation team also found that Traidlinks initially targeted working with 24 companies in Rwanda. However, 6 companies dropped off because 4 of them already had well established export channels and 2 were not export ready. The evaluation evidence indicated that actual number of active companies that Traidlinks worked with were 18 in number and out of these, 2 were exporting traditional exports (coffee and tea) which was outside the programme scope; export capacities of the companies were enhanced and 4 companies (A, D, G & K) that were already exporting their exports increased and 7 companies (B, C, E, F, H, I & M) started exporting their products. Two companies (J & L) though their export capacities were enhanced they were affected by other factors such lack of raw materials and management issues and their exports reduced. The remaining 3 companies (N, P & Q) had their export capacities enhanced and were yet to start exporting at the time of the evaluation (refer to Annex 7 for further details). Further findings also indicated that Traidlinks used export readiness and potential of the companies in Rwanda as the major criteria for companies to be supported by the programme and only worked with companies that were committed, had export potential and were export ready. Despite the achievements and the results registered by the programme, more technical support is still needed to enhance the export capacities of the companies to meet quality and volume demanded in export markets.

Burundi Project

37. The evaluation evidence indicated that the Burundi Project of the TMEA-supported Traidlinks Programme had two phases: the pilot phase which was from January 2014 to June 2015; and the extended phase was from January 2015 to March 2016. Therefore, the evaluation scope for Burundi Project was to assess the pilot phase and the progress being made in realizing the results of the extended phase.
38. **Pilot Phase:** The evaluation findings indicate that the Burundi Project pilot phase was a light touch support to Burundi Export Development Programme and the purpose was to identify and work with at least 5 local companies deemed to have export potential to assist them to develop and implement individual export plans for the EAC market.
39. Evaluation evidence show that in 2014 an MOU was signed between Traidlinks and the Burundi Agency for Investment Promotion (API) to commence the implementation of the Burundi Project which comprised of delivering the MLP that undertakes research to highlight Burundian companies to potential clients in East Africa and facilitates Burundian companies to generate new export sales. In addition, the project aimed to transfer to API an understanding and capacity in this very pragmatic and effective mechanism to connect sellers with buyers to accomplish increased export sales and to establish a region-wide trade promotion system that API could access to support Burundian companies to promote their exports beyond the life of the MOU. The supported companies in Burundi were selected based on market research carried out to identify companies with marketable products that would be exported and also working with local partners like API which was a good strategy in keeping the programme relevant and identifying the right beneficiaries to support.
40. The evaluation findings indicate that despite there being few export ready companies in Burundi, Traidlinks identified 18 companies to benefit from the MLP, however after review based on the criteria of willingness to join the programme and having the potential to export, 8 companies met the criteria and 10 did not meet the criteria and were dropped off. With support from the programme, 45 Rwandan companies were visited by the 8 Burundian companies and had B2B meetings. During the visits by the Burundi companies, API was represented by 3 officers including the Chairman, CEO and the officer in charge of exports who travelled to Kigali to support the efforts of the business private sector and also had engagements with Rwandan authorities such as the Rwanda Standards Bureau and RDB which was very key in building the relationship both social and political to tackle any trade barriers that could arise. Whereas the evaluation evidence indicated that there were no immediate benefits from these visits in terms of sales however, the companies were able to learn lessons for the trips that improved their exporting skills such as market entry strategies, product packaging, quality standards, bar coding, distribution channels, competing products and competitor pricing which enhanced their confidence in the export markets. By Traidlinks working in close collaboration with API which is the public institution mandated to promote export in Burundi ensures, political support from government that guarantees sustainability of activities beyond the project. Despite the pilot phase involving light touch market

linkage export promotion activities, evaluation evidence indicate that the light touch follow ups by the consultants never took place as planned for due to political insecurity that was prevailing.

41. **Extended Phase:** Evaluation findings indicate that in 2015 the project was extended from January 2015 to March 2016 and additional US\$400,000 was provided to expand the scope to include training of export advisors, mentoring and export capacity building and increase the number and depth of companies supported to 20. The evaluation team found that whereas the activities geared towards realizing the expected outcomes was started, they were halted because of the political insecurity that was prevailing in Burundi and therefore little progress had been made in realizing the expected outcomes of the extended phase.
42. **Programme Activity Assessment:** The evaluation evidence showed that the activities that were carried out by the programme were relevant and appropriate in developing the export capacities of the programme supported companies in Burundi and Rwanda. The programme activity assessment in each country refer to Table 2.

Table 2: Programme Activities Assessment

#	Country Project	Number of planned activities	Number of Completed Activities	Number of incomplete Activities	Assessment (1-Poor and 5-Excellent)	Confidence level (low-red, medium -yellow and High-green)
1.	Rwanda	27	26	01	4 (Very Good)	High
	Percentage	100%	92%	8%		
2.	Burundi pilot phase	7	6	1	4 (Very Good)	High
	Percentage	100%	86%	14%		
3.	Burundi extended phase	8	1	7	1 (Poor)	High
	Percentage	100%	13%	87%		

Source: TMEA Project work plans, result chains and monitoring plans

43. **Rwanda Project Activity Assessment:** Evidence gathered by the evaluation team indicated that in Rwanda 27 activities were planned to be carried out, of which 26 (92%) activities had been completed in planned time and only 1 (8%) was incomplete. The incomplete activity was the creation of the market linked alumni which was going to be handled at the same time with the regional alumni but with the political insecurity in Burundi this was delayed. However, this incomplete activity was not very critical and does not have big influence on the programme results.
44. **Burundi Project Activity Assessment:** The evaluation findings indicate that the Pilot Phase in Burundi had 7 planned activities of which 6 (92%) were completed which was very good and 1 activity (8%) of light touch technical follow up was incomplete. This incomplete activity is very critical and had big influence on the programme results because the subsequent activities were not implemented. The extended phase had 8 activities of which 1 (13%) was completed which was poor performance. All the incomplete activities were very critical and had great influence on the programme results in Burundi and thus the poor progress towards the realization of the programme

outcomes. The incomplete activities were majorly because of the political impasse that was prevailing in Burundi at that time. However, chances are very high that once peace fully prevails in Burundi, these incomplete activities will be fully accomplished within the short to medium term if the resources are made available, for details of activities refer to annex 4.

45. **Assessment of Outputs and Immediate Outcomes:** The evaluation team found that the implementation of the programme activities was based on country project work plans for Burundi and Rwanda and results were monitored using the project monitoring plans to keep track record on programme progress however, there was need to promptly update the project monitoring plans to track progress more effectively. The evaluation team also noted that despite these challenges, the programme made good progress in achieving its intermediate outcomes in Rwanda. However, in Burundi the realization of the immediate outcomes was poor due to political insecurity that slowed the implementations of the activities. Table 3 shows the summary of the output and immediate outcome assessment, for details refer to annex 5.

Table 3: Programme Assessment of the Output and intermediate Outcomes

#	Country Project	Targeted outputs	Realized outputs	Outputs not realized	Progress towards immediate outcomes	Assessment (1-Poor and 5-Excellent)	Confidence level
1.	Rwanda	5	4	1	Of the 16 programme supported companies: ❖ 7 companies that were not previously exporting started exporting to new markets in the EAC as a result of the programme intervention; ❖ 4 companies that were exporting had their export values increased which contributed to increased trade. ❖ 5 companies had prospects for business.	4 (Very Good)	High
	%	100 %	80%	20%			
2.	Burundi pilot phase	2	2	0	Little progress being made towards increase in the export values of the Programme supported companies.	1 (Poor)	High
	%	100 %	100%	0%			
3.	Burundi Extended phase	5	0	5			High
	%	100 %	0%	100%			

Source: TMEA Project work plans, result chains and monitoring plans

46. The evaluation team found that 4 (80%) outputs in Rwanda out of the 5 targeted outputs had been realized within the planned time frame and were relevant to the programme objectives and 1 (20%) output was not yet realized. This unrealized output was not critical and did not have great influence on the programme results. For the Burundi Project pilot phase, 100% of the planned outputs were realized however, all the 5 outputs in the extended phase had not been realized because they were affected by the political insecurity which was beyond Traidlinks programme management control. The evaluation evidence indicated that all the unrealized outputs were very critical and had great influence on contributing to the poor programme results in Burundi. At the time of evaluation some of the programme beneficiaries and implementers had fled the Burundi and the component implementation had been suspended due to insecurity that was prevailing in the country. However, chances were high that the programme will achieve the remaining unrealized outputs in the short to mid-term if resources are made available.
47. **Gender Issues:** Most of the SMEs, particularly women-led ones, are disproportionately impacted by unfavorable and opaque policy environments, limited capital and lack of awareness on cross border taxation, which translates into few women-owned companies in Rwanda and Burundi exporting into the region to take the advantages offered by the EAC integration such as EAC Common Market and EAC Custom Union. Efforts to mainstream gender across TMEA-supported Programmes have been relatively recent and this programme did not have a policy to measure and monitor the different impact on men and women at project inception. However, evaluation evidence indicate that genders issues concerning women were considered in the programme design by only providing for a target of 10-40% women involvement and beneficiaries. Despite there being few female owned companies in Rwanda and Burundi, the evaluation findings indicate that 4 (25%) of the 16 programme supported companies in Rwanda and 2 (29%) out of the 7 programme supported companies in Burundi were owned by women which was within the target set. However, there should be deliberate efforts by the programme to increase the ratio of female owned companies in Rwanda and Burundi in order to increase the number of women-owned companies exporting.

3.3 EFFICIENCY

Efficiency is the extent to which the costs of a development intervention can be justified by its results taking alternatives into account.

- ❖ To what extent was the programme cost effective in use of resources in implementation of the interventions (achieved good Value for Money)

48. The assessment of VfM delivered by this programme was based on economy (assessing the reduction of the cost of resources used for an activity while maintaining quality); efficiency (assessing how output was increased for a given input while maintaining quality) and effectiveness (assessing how the programme resources were successfully utilized in achieving the intended outcomes from an activity) and benefits to cost as the ratio of expected monetized benefits to funds expended during programme implementation. Evaluation evidence indicate that the primary funding approach and form of implementation of the 3 programme components was through technical assistance to support a range of activities including business audits, market research,

training, mentoring and coaching, sales missions and selling and enhancing marketing and product quality.

49. **Assessment of the VfM Economy (VfM Economy Savings/Overspent):** The programme economy was assessed by examining the extent to which the programme was able to achieve the best cost of inputs and results realized while maintaining quality. In this instance economy was about whether TMEA was achieving appropriate quality at the right price for inputs and resources - including the technical assistance used to produce the programme outputs. The evaluation findings indicate that for the Rwanda Project, economy was achieved through competitive bidding for the technical assistance based on technical and financial proposals, using the less bureaucratic and fast TMEA internal procedures. Table 5 shows the country project budgets and the respective actual expenditures as at June 2015.

Table 4: Summary of the Programme Budget and Expenditure (US\$) 2013/14 – 2014/15

No.	Programme Component	Component Budget	Actual Expenditure as at June 2015	% Expenditure of total component budget as at June 2015	Person Days used	% Days	
1. 1	Rwanda Export Development	900,000	954,821	106%	1,393	74%	
	1.1 Market Linked		Fees	323,603	36%	737	39%
			Expenses	48,429	5%		
	1.2 Export Advisor Initiatives		Fees	145,064	16%	223	12%
			Expenses	42,274	5%		
	1.3 Mentoring and Export Capacity Development		Fees	285,409	32%	433	23%
Expenses		110,042	12%				
2. 2	Burundi Export Development Pilot	150,000	179,800	120%	230	12%	
	2.1 Market Linked		Fees	139,545	93%		
			Expenses	40,255	27%		
3. 3	EAC Export System Pilot	150,000	174,159	116%	250	13%	
	Market Linked Kenya		Fees	69,865	47%	112	6%
			Expenses	8,637	6%		
	Market Linked Tanzania		Fees	79,688	53%	138	7%
			Expenses	15,969	11%		
4.	Subtotal Total	1,200,000	1,308,780	109%			
	Fees		1,043,174	87%	1,873	100%	
	Expenses		265,606	22%			
5.	Burundi Export Development-Extended Phase (Up to March 2016)	400,000	29,788	7%			
6.	Grand Total	1,600,000	1,338,568	84%			

Source: Project Appraisal Reports and programme expenditure reports

50. The evaluation findings indicate that the project disbursements for the components that were supposed to end by June 2015 were overspent by 9% compared to the budget. However, the

expenditure was below the contracted sum of US\$1,479,905. The programme was being implemented based on the contract budget that was controlled from Headquarters of Traidlinks in Ireland rather than the components activity budget. Most of the component activity budget was spent on fees (87%) since the project implementation approach was through technical assistance that required hiring of experts. The other expenses were 22% of the component activity budget and covered items such as travel, subsistence allowance and per diem for the experts. Most of the resources were used on the Rwanda Export Development Programme (71% of the total expenditure and 74% of the human resource) as shown in Table 4. It was not possible to evaluate the extent to which VfM economy savings was realized or overspent per activity because no detailed budget information was provided showing project costs broken down beyond single aggregate project component budget and cost figures (project component totals broken into fees and expenses).

51. Assessment of VfM efficiency: The programme efficiency was assessed by the evaluation team examining how well the programme activities converted inputs into results cost effectively. National and international technical experts were engaged that ensured efficiency through sharing of experiences and producing expected results in time for the Rwanda Project. The overall programme actual expenditure as of June 2015 has a cost saving of US\$171,213 compared to the planned contract budget which indicates that Traidlinks applied highly cost conscious and value for money approach and frugality in expenditure while implementing the programme. This saving has led to the programme to be given a no cost extension to handle additional activities. The evaluation findings further indicate that for the extended phase in the Burundi Project, out of the US\$ 400,000 allocated, only 7.4% had been spent by the time the programme activities were halted to due insecurity, leaving a balance of US\$ 370,212 which can be utilized when the Burundi Project resumes.

52. Assessment of VfM effectiveness: The evaluation team examined effectiveness as an aspect of VfM by assessing how well the how the programme resources were successfully utilized in achieving the desired outcomes from activity outputs. The evaluation team found that the export capacities of the exporting firms were enhanced through mentoring that improved their confidence in the export markets that contributed to increased trade values of the programme supported exporting companies. US\$1.3 million was used to contribute to increased exports of programme supported companies by US\$ 14.3 million to the EAC by June 2015. Evaluation evidence show that 86.4% of the contract budget for initial phase was used to realize 85.7% of the initially targeted outputs by 30/6/2015 which indicates frugality in the management of funds by the programme. Overall publically available data on similar programmes was not readily available which made benchmark comparisons of the implementation cost of the programme very limited.

53. Cost benefit analysis: The CBA results are based on Traidlinks’ estimates of the average export sales growth of 20% by the programme supported companies. On

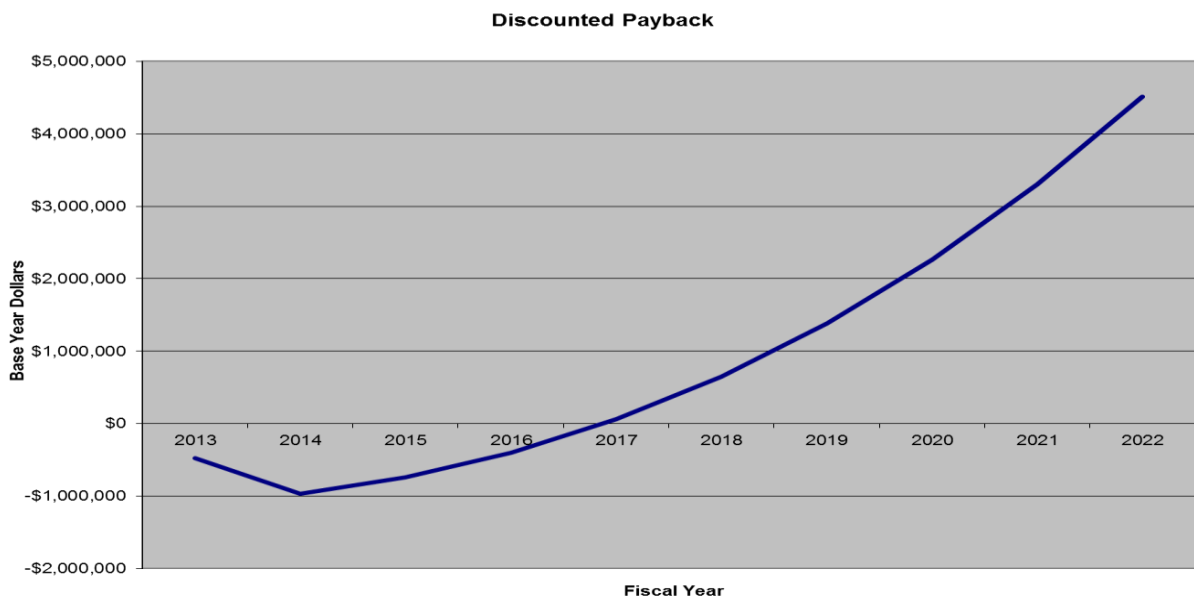
Table 5: Cost Benefit Summary

TMEA Investment (Cost) (Discounted)	1,069,674
Programme Induced Trade Benefits (Discounted)	5,582,223
Net Benefits (Discounted); (Net Present Value (NPV))	4,512,548
Net Benefit to Cost Ratio (Net Return per Dollar Invested)	\$4.2
Internal Rate of Return	52%
Payback Period (Years)	4

the average annual trade growth is assumed to be 5% throughout the forecast period – this is less than or equal to trade growth across the EAC for every year between 2008 and 2012 but one. The assessment of the available export data above the trend for the programme supported companies using a discount rate of 10% over a 10 year period of effectiveness and assuming benefits began in 2014 indicates that the programme is beneficial as shown in Table 5. The programme has a net benefit of about US\$4.5 million (after deducting cost) and Internal Rate of Return (IRR) of 52% and net return per US\$ invested of US\$4.2 and the payback period is 4 years which indicates that it is economically viable and profitable.

The analysis of the current results indicates that the project will break even by 2017 as indicated in the graph 1.

Graph 1: Break even and pay back



3.4 IMPACT

The impacts are the tangible long-term outcomes to which the project contributed, positive and negative, intended and unintended.

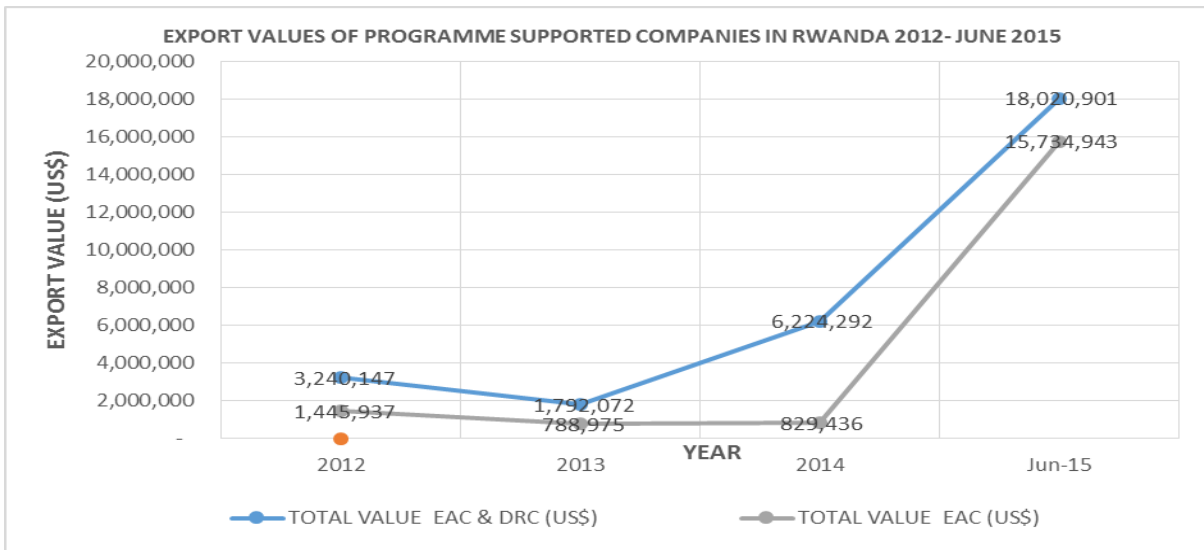
- ❖ What was the current and likely impact (intended and unintended, positive and negative) of the intervention? How has the intervention affected the well-being of different groups of stakeholders?
- ❖ What is the current and likely impact of the intervention on enhanced export competitiveness and increase in trade flows?
- ❖ To what extent can identified changes be attributed to the intervention? What would have occurred without the intervention?

54. The evaluation evidence indicates that Traidlinks was initially conceived to develop, support and promote exports in Rwanda, Burundi and the EAC as a whole and the overall programme design is

relevant with a focus on export development to increase trade. The evaluation does not attempt to prove that the programme intervention directly caused the increase in trade values and volumes, but rather explored the contribution the interventions made to the observed results.

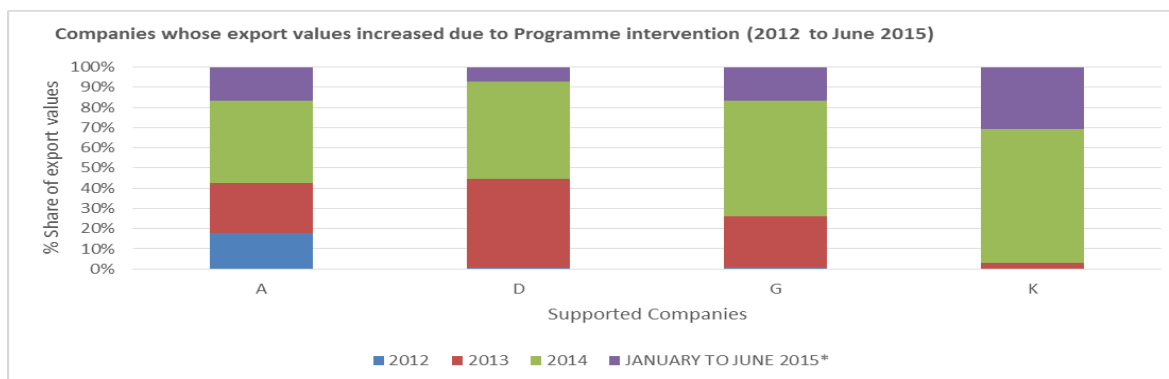
55. Evaluation evidence indicates that the programme intervention built export capacities of the of the supported companies and linked them to buyer in the EAC and DRC that contributed to the measurable impacts of increased export growth values of some companies supported by the programme in Rwanda. The trend of the export values of the programme supported companies in Rwanda is shown in graph 2.

Graph 2: Trend of the export values of the programme supported companies in Rwanda



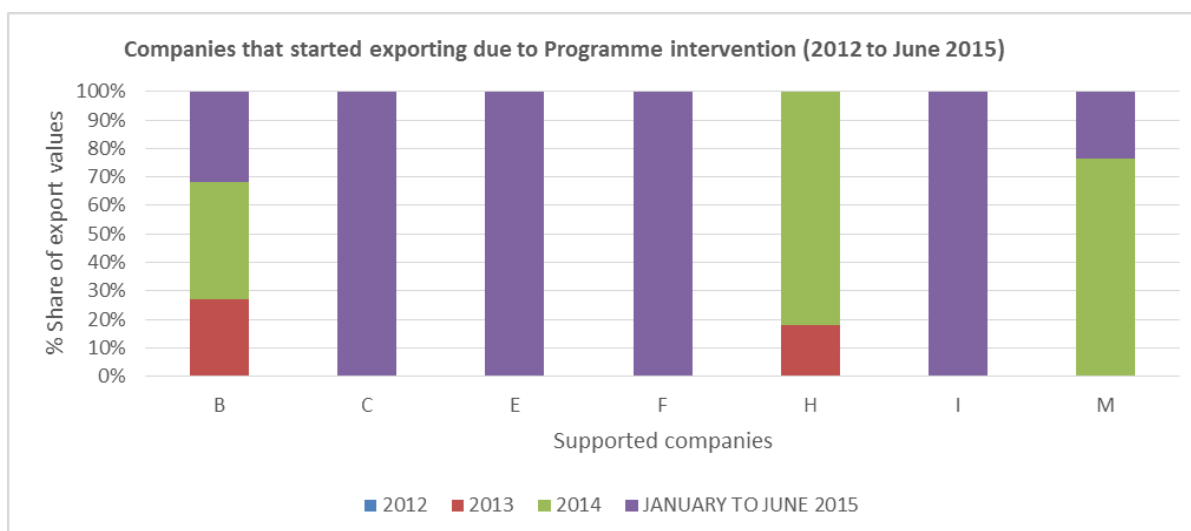
56. The evaluation evidence show export values started increasing in 2014 and the programme aimed at increasing the export values to the EAC of the supported companies in Rwanda by US\$ 500,000 by 31/12/2015, however, the evaluation team found that by June 2015, the supported export active companies in Rwanda had contributed US\$ 15.7million to the EAC export values. In addition, evaluation findings indicate that Rwanda exports were mainly destined to Uganda, Burundi and Democratic Republic of Congo (DRC). Chances are high that if Traidlinks works with more companies with export potential through established product distribution channels, these export value contribution will even increase further. Annex 7 shows the export values of the programme supported Rwandan companies to EAC and DRC (given code for confidentiality).
57. The evaluation findings indicate that out of the 16 programme supported companies, 4 companies (A, D, G & K) were already exporting and the programme intervention enhanced their export capacity which contributed to increasing their export values as shown in in Graph 3.

Graph 3: Companies whose export values increased due to programme intervention



58. Seven supported companies (B, C, E, F, H, I, M) that were not previously exporting by the year 2012 had their export capacity enhanced which contributed to their ability to start exporting thereafter as shown in graph 4.

Graph 4: Companies that started exporting due to programme intervention (2012-June 2015)



59. Whereas the 2 companies (J & L) were already exporting by 2012, the programme intervention did not contribute to increase in their export values due to factors which were beyond the programme control such as lack of funds and other internal management issues. 3 companies (P, Q & N) had their export capacity enhance but were yet to export due to issues such as having product certification marks by RSB, lack of suitable raw materials for manufacturing their products and acquiring the relevant regulatory import requiring form the importing countries.

60. Companies F and K contributed high export value increments in the period January 2015 to June 2015 as shown in Annex 7 because they were able to get bigger business deals than other companies. These deals included company K exporting goods worth US\$ 2.060 million to DRC and company F exporting to Kenya goods worth US\$ 15.165 million. Despite the high export value increment contributed by these companies which was quite out of range, the exports to EAC when the value contributed by F to Kenya is excluded, the remaining companies contributed to a value of

US\$0.57 million towards the EAC export values by June 2015 and chances are high that the export value contributions will increase further. The evaluation team further found that whereas the programme supported companies in Burundi had a target of exporting products to the tune of US\$ 74,000 by March 2016, none of the Burundi programme supported companies was exporting as a result of the programme intervention because of the political insecurity. Overall the programme interventions contributed to the TMEA theory of change of improved business competitiveness and increased trade in the region by addressing the export related firm level constraints. For further analysis of the programme supported companies in Rwanda refer to annex 7.

61. **Assessment of results attributed to the programme:** the evaluation findings indicate that the following results can be attributed to the TMEA Traidlinks supported programme:
62. **Improved Export Capacities:** 16 companies were supported to improve their export capacities through mentoring, preparation and implementation of export action plans, product costing and pricing and understanding export market requirements and from the survey conducted by the evaluation team, results indicated that 89% of the supported companies had their export capacities enhanced which has contributed to EAC export value of US\$15.7 million and US\$ 2.3 million to the DRC by June 2015.
63. **Use of Export Action Plans:** 15 companies were able to develop export action plans with support from the programme that helped them know how best to plan for their products in the export markets and also assess their levels of readiness to export their products and all the 15 action plans developed were being implemented.
64. **Local Export Advisors:** The programme built skills capacity of 9 local consultants through training on the export market studies and were able to get certificates on completion of the course. 3 of the 9 local export advisers that were interviewed during the evaluation indicated that their skills and capacity was enhanced and that they were able to provide export advisory services to the exporters and in turn some of the exporters were able to get updated market information which made them more aware of export market opportunities that they were not aware of which contributed to increased sales in the export markets as indicated in to annex 7.
65. **Market Linkage Channels:** The programme arranged 5 successful sales mission for the supported companies to Uganda and Burundi where they were able to meet with potential buyers and importers of their products that resulted into business deal negotiation to the tune of US\$2.3 million, lesson learning on the skills of how to export and also improved their confidence in the export markets which enhanced their export capacities and contributed to increased export values. However, there were no follow up with supported companies by Traidlinks to track progress of the companies and yet this step is crucial for export development which needs to be done in future to improve on the market links created.

Other initiatives contributing towards increased trade for the supported companies were:

66. **Standards Harmonization and Conformity Testing Programme:** This programme supported standards harmonization, improved the technical capacities and quality infrastructure in the EAC

Partner States which enabled the companies to test and certify their products to meet quality market requirements. This is contributing to improved market access and competitiveness of products exported because they can be tested locally at lower cost and the average clearance time of certified products significantly reduced to less than 0.5 days.

67. **Single Customs Territory (SCT):** The creation of a Single Customs for the Northern Corridor member states helped in making it easier for people to do business in the region and also reduced restrictive regulations and internal border controls on goods moving between partner states hence promoting the free circulation of goods which contributes to increased trade.
68. **The Electronic Single Window (ESW):** The ESW system facilitates trade by expediting and simplifying information flows between traders and government institutions in such a way that information and administrative requirements for imports and exports only needs to be submitted once at a single entry point on the internet. The implementation of ESW simplifies cross border trade and enhances the trade competitiveness through improvements to trade logistics systems and processes and thus contributes to increased regional trade.
69. **Agriculture and Trade Logistics Hub** – This project which facilitated exports through backward linkages particularly in the agriculture business sector has contributed to increasing exports by filling up half empty containers and thereby improving the efficiency of logistics and reducing the cost of transport along the corridors.
70. **Product Certification and standards** – under this project the Rwanda Standards Board works closely with the RDB to support product certification to enhance export competitiveness of participating companies which contributes to increased trade.
71. **Private Sector Advocacy** – Rwandan exporters organize themselves into an export forum to understand common issues and constraints that exporters face and support evidence based research to advocate on these matters under this project which promotes exports.
72. **Export Information Dissemination-** improved information dissemination about opportunities for export into the EAC provided by RDB and the Private Sector Federation updates the exporters of available opportunities which contribute to increased trade.

3.5 SUSTAINABILITY

Sustainability is the continuation or longevity of benefits from the Traidlinks-supported Programme intervention after the cessation of development assistance.

- ❖ What benefits (both social and financial) of the programme are likely to be sustainable and would continue with or without TMEA (staffing and funding)?
- ❖ What mechanisms have been put in place to ensure sustainability of the project achievements and to what extent will benefits realized be replicated in the long term by partners?
- ❖ What are the lessons learnt that are relevant beyond TMEA?

73. The evaluation findings indicate that the overall objective of the programmes was to contribute to the establishment of a sustainable (and eventually commercially viable) export facilitation system across all EAC member states. This would improve at both value chain and firm level the ability to

compete and exploit international trade opportunities. The evaluation team found that the largest budget allocation was for Rwanda, where the programme was intended to work in close partnership with RDB and the NAEB to ensure both transfer of knowledge and sustainable future funding of activities so that they could be continued after the TMEA funding is ended. The evaluation team however, found that the programme worked more closely with RDB compared to NAEB because most of the supported companies were dealing in processed products. There were noticeable activities, outputs, achievements and impact that can be sustainable after the programme has ended.

74. **Socio-political:** The programme has been able to work closely with the public national bodies whose mandate is to promote exports and investments such as RDB in Rwanda and API in Burundi, which has helped in securing political support and coordination for the export development programme. In Rwanda, this has ensured mainstreaming and incorporation of the programme interventions and goals into the Rwanda National Exports Strategy which is a big achievement for the programme in keeping the programme interventions and results sustainable even beyond the programme time frame.
75. In addition this will also ensure that adequate resources are allocated from government budgets to support the sustainability of the programme results; furthermore, this will also help the exporters to find a leveled ground when exporting to another country because the government agencies have a network in the region which can also help resolve issues between countries when exporting. To ensure that this is well maintained, Traidlinks needs to continue working closely with these government bodies to ensure smooth implementation of the programme. Also working with these government institution helps them take up the skills the programme offers and then they are incorporated into government programmes. The RDB has been restructured and Export Department created with over 10 staff available to work closely with the Programme to ensure skills transfer and sustainability.
76. **Financial sustainability:** The evaluation team found that the programme intervention objectives had been mainstreamed and incorporated in the Rwanda National Export Strategy which will be supported by National Budget when the programme comes to an end. However, efforts need to be made to assist the companies to identify and put in place relevant financial mechanisms and strategies to ensure they remain financially sustainable. To address this constraint, the evaluation team found that Rwanda had developed an Export Growth Facility (EGF) under the National Export Strategy (NES) that was designed as a single fund. The EGF has three separate windows for funding: 1) an investment catalyst fund to encourage export focused investments, 2) a matching grant fund for medium sized exporters to meet specific requirements in target markets and 3) an export guarantee facility to underwrite exports for up to 180 days, which will ensure sustainability of programme results.
77. In addition, it is expected that some companies will pay external consultants themselves to work with them and continue the process. It is also expected that, based on lessons learned and results delivered, RDB will support further activities of this type which is a good exit strategy.

78. **Export Capacity:** The need for technical and professional training to build the export capacities is key to the programme sustainability. Training and preparing companies to be export ready before exporting needs to be continuous and therefore needs to be prioritized, within a longer-term training programme. Evaluation findings indicate that Traidlinks trained some of the companies on how to penetrate export markets, and this skill acquired can to some good extent keep them sustainable because they can take themselves to export market without assistance.
79. Sustainability of export growth also depends on the capacity of firms to establish themselves in markets and establish strong and lasting relationships with those markets. Here, firm level support services to develop exporter's capacity to enter markets are necessary and that is why the Government of Rwanda through the NES plans to develop a cadre of qualified and experienced advisers to deliver support to exporters of all sizes in the areas of business development for export and market entry strategies. Evaluation findings show that the NES provides for management of the EAI through a subsidized consulting scheme where companies pay a percentage of the costs of an approved project and the balance is paid by the government which is quite sustainable.
80. The evaluation team found that due to political instability, a number of activities in the extended phase in Burundi had not been implemented and the fact that the programme was still infancy in Burundi, compared to Rwanda, the programme had not yet been integrated in the Burundi national export programmes to ensure sustainability of programme results.
81. **Export linkages in the EAC:** The evaluation team found that the programme has developed market linkages in Uganda, Rwanda and Burundi which when well-maintained can support distribution of products in the region and sustain the programme objectives. The Government of Rwanda through the NES has planned to sustain market linkages and their results through supporting firms by providing free or subsidized support to develop and implement export action plans by certified export advisers; free access to the information services provided by the planned Trade Information Centre, which will provide input to action development and implementation; access to planned Export Growth Facility for qualifying firms; participation of the skilled RDB staff in Market Linkages Programmes; and access to appropriate sector or country focused trade missions and events organized by RDB and NAEB.

4. PROGRAMME MANAGEMENT AND IMPLEMENTATION

82. **TMEA:** The evaluation team found that TMEA was following up and managing the Traidlinks programme through its TMEA Rwanda and Burundi country offices. The TMEA supported Traidlinks programme is managed both at TMEA Head office and at the individual country levels in Rwanda and Burundi. The TMEA head office provides technical and strategic assistance to the country project through the TMEA country offices.
83. The evaluation team also found that TMEA needed to regularly and formally engage with the Traidlinks management and implementation team to ensure good management and coordination between Traidlinks and TMEA during programme implementation which is key for programme success. This was provided for by having a steering committee comprising of RDB, TMEA and Traidlinks where progress reports would be discussed and agreed. However, the evaluation team

found that the steering committee was not functioning and yet this could be the fora where stakeholders can meet and discuss programme progress, challenges and lessons learned so as to meet the programme objectives.

84. **Traidlinks:** The evaluation team found that Traidlinks Programme Management and Implementation Unit in Rwanda is hosted in RDB offices which is commendable because it potentially brings the programme closer to the key beneficiaries and ensures skills transfer. The involvement of relevant and responsible government institution was a good implementation approach in achieving results and the good political will which also needs to be maintained and strengthened further to attain programme objectives. At the supported company level, Traidlinks also deals with the head of the companies that are responsible, accountable and can make final decisions on behalf of the companies which is a good approach in realizing programme objectives. Overall, the Traidlinks programme implementation team was experienced and competent at the work they were doing, however, there is need to improve on the interval of reporting on the programme progress to keep RDB and TMEA up to date as stipulated in the contract.

5. CONCLUSION

5.1 RELEVANCE

85. The programme objectives and interventions are relevant in improving the competitive of companies by addressing their constraints at the firm level that impede their export capacity. The 3 programme components are still relevant and focused and Traidlinks is also still better placed to handle the export development programme in close collaboration with RDB, API, TMEA management and relevant government ministries. Overall, the programme is consistent with the trade policies and administrative systems of the supported countries, government and EAC policies and systems; however Traidlinks could also engage the services of well-established distributors in the EAC to help in widening the export market base.

5.2 EFFECTIVENESS

86. The programme has been able to achieve some of the component outputs as was planned and is contributing to increased trade and chances are high that the remaining unachieved outputs will also be achieved if resources are made available. The programme implementation worked well because the government agencies responsible for exports were to a large extent directly involved in the programme activities to ensure ownership, effectiveness and efficiency of the programme due to the already existing mechanisms and coordination between RDB, API and the private sector.

5.3 EFFICIENCY

87. Traidlinks financial management was handled professionally and the disbursement rates and absorption of funds was good during implementation, however Traidlinks expenditure needs to be within the programme component budgets. Despite the challenges of insecurity in Burundi and

based on the results so far produced in the given time frame and the money spent, there has been good value for money in all the three components in Rwanda and the pilot phase in Burundi.

5.4 IMPACT

88. The programme had result chains, project work plans and monitoring plans that indicated output and outcome indicators and targets. Despite the TMEA-supported Traidlinks Programme having its intermediate outcomes of increasing export values by US\$500,000 in 2 years in Rwanda by December 2015, evaluation findings indicate that this target had been exceeded by June 2015 which indicates that the programme has contributed to the impact of the increased trade through export diversification. In addition the evaluation findings indicate that the programme payback period is 4 years which is fairly short and the internal rate of return is 52% and net return per dollar invested is US\$4.2 which is good. Some identified outputs can be directly attributed to the programme intervention and chances are that these results could not have been achieved without the TMEA Traidlinks tailor-made supported approach.

5.5 SUSTAINABILITY

89. Developing an effective and efficient export system in the EAC is very important to the sustainability and strengthening of exports and business in the EAC as whole. Given the fact that Rwanda has incorporated the programme interventions and goals in her National Export Strategy, chances are high that the programme results will be sustained beyond the programme lifespan; which should also be replicated in Burundi where more programme support is still needed. However, Traidlinks should create and strengthen the EAC trade network for exporters for the programme to be more sustainable in the region by developing a framework for national export agencies in EAC to cooperate effectively and coordinate efforts in wider export promotions, joint sales missions and business networks.

6. KEY CHALLENGES DURING IMPLEMENTATION

90. The evaluation team found that the challenges that were confronting the programme implementation were:

- ❖ **Low number of export ready companies:** In order to be able to export a company needs to have the ability and capacity to export. However, evaluation team found that the numbers of export ready companies were very few and even some companies were not fully committed to the programme.
- ❖ **Low product quality:** Most of the potential companies for support did not have RSB certification Mark (S-Mark) and yet it is a key requirement for the products to be exported.
- ❖ **Lack of access to finance:** Access to export financing, working capital, and long term financing was a problem to developing and sustaining the production capacity of the programme supported companies to meet market requirements.
- ❖ **Lack of experience in export business:** some companies had low level of technical, professional and management skills which are critical to the success and sustainability of the export business.

- ❖ **Cost of raw materials/product competitiveness:** Rwanda and Burundi being landlocked countries have a challenge of producing products that have prices relatively high on market and in turn this reduces their competitiveness in the export market. This is mainly attributed to the additional transport and clearance cost incurred during importing of raw materials used for production and also political instability in Burundi.
- ❖ **Limited availability of skilled workers which led to** low productivity of the labor force, increases the cost of doing business.

7. LESSONS LEARNT

91. The objective of this section is to derive lessons learned through this programme which may be useful for application to the wider TMEA programmes and other projects.

- ❖ **Partnering with mandated government agencies and departments responsible for programme results enhances programme success:** When TMEA Programmes partner with relevant government agencies responsible for exports in the respective countries during implementation of export related initiatives, this enhances the interventions' relevance and the government goodwill which is key in realizing programme results. The lesson learned is that working with the relevant government agencies mandated to implement specific areas of programme intervention is crucial for programme success.
- ❖ **Building technical capacities of relevant stakeholders enhances programme sustainability:** By TMEA enhancing the capacities of relevant stakeholders such as potential and exporting companies and relevant government agencies responsible for exports enables the programme to be sustained even beyond the programme time-frame because the skills and interventions end up being integrated into private sector and the government systems. The lesson learnt is that working with competent stakeholders during programme implementation ensures that the programme results are sustained beyond the programme life-time.
- ❖ **Political instability affects programme implementation and the realization of the programme results in time.** The realization of the results in Burundi was negatively affected by the political instability there. The lesson learnt is that TMEA programmes being implemented in politically unstable environments affects the pace of realizing programme results.
- ❖ **Baseline data:** Having baseline survey and data on target firms improves data quality and assists in informing programme design and setting realistic targets which helps the programme achieve its objectives during implementation.
- ❖ **Follow-ups and monitoring to provide technical assistance enhances the realization of the expected results.** Traidlinks linked the producers/manufactures to the market/buyers and little effort was put on follow ups in inform of technical assistance to ensure that what was agreed upon to be done was actually being put into practice which negatively affected the realization of the results. The lesson learned was that without technical follow ups on programme beneficiaries, they will not be able to fully implement consistently the intervention initiatives as agreed which affects programme sustainability.

8. RECOMMENDATIONS FOR FUTURE DIRECTION

92. In order to maximize the benefits the export development programme offers to Rwanda, Burundi and the EAC as whole and also increase the likelihood of the programme sustainability it is recommended that:

#	Recommendation	Action point
1.	<p>Recommendation 1: Increase awareness and product promotions to key target markets.</p> <p>TMEA should support proactive promotion and awareness of Rwandan and Burundi Products in key target export markets in the EAC and beyond to increase exports growth.</p>	<ul style="list-style-type: none"> ❖ RDB ❖ API ❖ Traidlinks ❖ TMEA Rwanda and Burundi Country Project Offices
2.	<p>Recommendation 2: Improve the capacities of new and existing exporters.</p> <p>TMEA should continue supporting the development of the capacity of new and existing Rwandan and Burundi exporters to identify opportunities and to promote their products in key markets.</p>	<ul style="list-style-type: none"> ❖ RDB ❖ API ❖ Traidlinks ❖ TMEA Rwanda and Burundi Country Project Offices
3.	<p>Recommendation 3: Follow up and monitor the programme supported companies.</p> <p>TMEA should support Traidlinks and RDB/API to follow-up and monitor the programme results achieved such as implementation of the export action plans and market linkages created by visiting the supported companies on schedule. This will strengthen the coordination between Traidlinks, RDB/API and the supported companies which will enhance programme sustainability.</p>	<ul style="list-style-type: none"> ❖ RDB, ❖ API ❖ Traidlinks ❖ TMEA Burundi and Rwanda Country Project Offices
4.	<p>Recommendation 4: Identify and utilize the networks of well-established distributors in the EAC.</p> <p>TMEA should support Traidlinks to identify and work closely with the already well established distributors in the EAC to be able to tap into their distribution channels. The well-established distributors in the EAC have got key linkages and can also influence the level and volumes of goods exported in the region.</p>	<ul style="list-style-type: none"> ❖ Traidlinks ❖ RDB ❖ API
5.	<p>Recommendation 5: Utilize the existing market information platforms to market the products of the programme supported companies.</p> <p>TMEA should support Traidlinks, RDB and API to identify relevant existing market information platforms and recommend them to the programme supported companies for use to market their products.</p>	<ul style="list-style-type: none"> ❖ Traidlinks ❖ RDB ❖ API
6.	<p>Recommendation 6: Integrate the programme intervention activities in the Burundi national export strategy.</p>	<ul style="list-style-type: none"> ❖ API ❖ TMEA Burundi Country

#	Recommendation	Action point
	TMEA should support Traidlinks Burundi Project to replicate the best practices from Rwanda such integrating the programme in their National Export Strategy, having well trained local export advisors and having adequate staff in API who should work closely with Traidlinks to ensure skills transfer.	Project Offices
7.	<p>Recommendation 7: Train and designate the export advisors to build confidence in the stakeholders who need their services.</p> <p>TMEA should support RDB and API to train and put in place a mechanism of designating the trained export advisors for easy access and building confidence in the stakeholders who need their services. To ensure effectiveness and sustainability of export adviser initiative, the advisers should be designated and incorporated into the RDB structure through public-private-partnership.</p>	<ul style="list-style-type: none"> ❖ RDB ❖ API
8.	<p>Recommendation 8: Scale up Traidlinks programme model to support the TMEA export capability programme.</p> <p>Given the good performance of the TMEA Traidlinks supported programme in building the export capacities of the SMEs in Rwanda, TMEA should support scaling up the model to strengthen the TMEA export capability programme to promote export growth.</p>	<ul style="list-style-type: none"> ❖ TMEA head office ❖ TMEA Burundi Country Project Offices
9.	<p>Recommendation 9: Link the programme supported companies to financial institutions.</p> <p>The programme supported companies should be linked to financial institutions to address the challenge of funding.</p>	<ul style="list-style-type: none"> ❖ TMEA Head Office ❖ RDB ❖ API
10.	<p>Recommendation 10: Increase the number of female owned companies that benefit from the programme interventions.</p> <p>TMEA should support initiatives to deliberately increase the number of female-owned companies in Rwanda and Burundi and motivate them to join the programme.</p>	<ul style="list-style-type: none"> ❖ TMEA Head Office ❖ TMEA Country Office ❖ RDB ❖ API
11.	<p>Recommendation 11: Operationalize the programme steering committee.</p> <p>The steering committee that was initially planned for in the programme design needs to be made fully operational and functional to provide a platform that Traidlinks should use for discussion and updating TMEA and other key programme stakeholders such as RDB and API on the programme implementation progress and way forward.</p>	<ul style="list-style-type: none"> ❖ RDB ❖ API ❖ Traidlinks ❖ TMEA Rwanda and Burundi Country Project Offices
12.	<p>Recommendation 12: Carry out baseline survey of target firms before programme implementation.</p> <p>TMEA should carry out baseline surveys and studies to generate</p>	<ul style="list-style-type: none"> ❖ TMEA Head Office ❖ TMEA Burundi Country Project Offices

#	Recommendation	Action point
	<p>baseline data on target firms to improve data quality and assist in setting realistic targets before programme implementation to be able to implement the programme from an informed point of view, addresses the right set of needs and also be able to get good value for money at the end of the programme implementation.</p>	

ANNEXES

ANNEX 1: CASE STUDIES

CASE STUDY 1: EMPOWERING RWANDA MANUFACTURES AND PROMOTING EXPORT GROWTH

1. BACKGROUND

Improving the export market access and linkages of firms to export is a critical focus of many businesses in the EAC. Private enterprises in the EAC face a wide range of challenges that make trading across borders difficult and reduce the competitiveness of firms. However, when there are reduced challenges in exporting this provides an opportunity for firms to increase profit and then re-invest to increase sales, turnover and productivity. Additionally, it increases the competitiveness of domestic firms, at least in the long run, as they become more exposed to dynamic and growing markets. With time this creates an enabling trade regime that helps increase the volume of imports and exports and subsequently contributes to economic growth and poverty reduction. The TMEA Traidlinks supported (Export Development) programme worked with 16 Rwandan companies so as to link them to the markets outside Rwanda. The core business of these companies was agro-processing and manufacturing. One of the successful companies that were supported by the programme was G-Mart Limited who are located in Rwanda-Kigali. The programme was implemented in partnership with, Rwanda Development Board, Kigali Independent University and the relevant private sector stakeholders and the overall programme budget was estimated at about US\$ 1.4million from 2013 to 2015.

This case study profiles G-Mart Limited, a company that was supported by the programme. G-Mart manufactures chalk and was originally selling locally only in Rwanda but started exporting as a result of the TMEA programme intervention.

2. ISSUE ADDRESSED

Export promotion programmes is one of the interventions aimed at improving the EAC economic growth and development reality that is expected to translate into better standard of living and also reduce the poverty levels amongst the people of East Africa. In Rwanda, there are few local consultants available to provide quality hands on technical support to new or growing exporters at a price companies can afford and most companies have limited capacity to expand output to meet significant export demand; companies lack marketing materials and suffer from poor and unattractive packaging including lack of Bar Codes; many companies do not have the appropriate product quality certifications and are weak internal in terms of staff (sales, marketing and export planning and logistics) and finance (cash flow management). The TMEA Traidlinks supported programme interventions came in to develop and transform the Rwanda and Burundi economy through export promotion and to meet its development goals of developing a competitive private sector with the capacity to export value-added products to EAC markets and beyond.

3. RESPONSE AND APPROACH

In 2012, TMEA contracted Traidlinks, an Irish funded NGO with wide experience in the Region and based in Kampala to run a pilot project to help 10 selected Rwandan companies enter the Ugandan market. The Market Linked pilot worked through the Rwanda Development Board (RDB) – the national export

promotion agency by providing training, hands on tailored support to companies to penetrate the Ugandan market including market research, sales missions, and sales follow up. TMEA’s support to RDB was meant to achieve increased exports using four approaches; 1. Market linkages to support enterprise post Traidlinks 2. Provision of a market linkages advisor to support the National Export Strategy implementation. 3. Export development fund; 4. Value chain development

3.1 Key stakeholders

The key stakeholders that were involved in the programme implementation in Rwanda included, TMEA, Rwanda Development Board, Kigali Independent University and Export ready private sector members.

3.2 Project goals

The overall objective of the programme is to enhance the export capacity of Rwanda and Burundi companies to increase trade flows, thus contributing to economic growth and ultimately, poverty reduction. The specific objectives are to:

- ❖ Improve capacity of exporters in Rwanda and Burundi;
- ❖ Improve the export support networks in EAC;
- ❖ Enhance capacity of local service providers to provide support to Rwandan exporters;
- ❖ Create of an EAC Trade network for exporters;
- ❖ Increasing the export trade values

3.3 Project Innovations and Implementation

To combat the challenges in Rwanda and Burundi and transfer skills and knowledge, the project innovation involved the development of productive capacities, improving exports promotion and marketing strategies including provision of business development services to enhance the knowledge of markets requirements and trends by producers and exporters as well as establishing a more supportive business environment were considered as critical steps to growing exports to the region and beyond. In addition, three programme components in Rwanda were developed namely:

- ❖ Marketlinked Programme which aimed at linking Rwandan potential exporters to the EAC market;
- ❖ Export Adviser Initiative which built the capacity and competency of the qualified Rwandan local business consultants to support exporters in preparing and executing their export business plans;
- ❖ Export Capacity Programme that provided direct support technical support to new and existing exporters to identify and/or exploit export growth opportunities.

3.4 Results achieved

Due to the good level of ownership by the programme beneficiaries, working relationships between all involved parties, and cooperation with TMEA, the project has been able to achieve good results. The exporters are increasingly using the skills gained from the programme and even the programme interventions and procedures have been streamlined within Rwanda National Export Strategy. 13 companies out of the 16 supported companies are able to export outside Rwanda

as a result of the programme intervention which is increasing the export values and hence contributing to US\$ 15.7 million in the export values to the EAC and US\$ 2.3 million DRC. Export Advisors were



trained, 9 candidates qualified for award of certificates as export advisers. The export adviser helped the exporting companies to identify export markets and also penetrate the markets. The programme has supported confidence and capacity building in RDB, API and the supported companies regarding export process and procedure and has made them more skilled and confident in export markets.

3.5 Factors of success and Failures

The success of the programme is dependent on the high level of ownership of the beneficiaries which is demonstrated by TMEA closely working and coordinating the programme in partnership with Traidlinks. This good coordination ensured that the transfer of knowledge works smoothly and is particularly efficient in strengthening capacities. Also the good institutional relationship that exists between RDB and API officers and Traidlinks is also important key for the programme success and due to its independence, expertise and neutrality, Traidlinks is accepted by most of the programme beneficiaries. However, identifying motivated committed companies that had the potential to export was not easy because the number of export ready companies was few and also access to affordable finances was challenge to the supported companies.

4. OPPORTUNITIES AND CHALLENGES

Rwanda has incorporated the programme inventions into its Export Development Strategy which will make the programme skills and results sustainable beyond the programme life span. The Rwanda National Export strategy (NES) has an Export Growth Facility and the export finance component of the NES is designed as a single fund. The supported companies that are ready can position themselves to enjoy the benefits of this facility.

4.1 Lessons learned

The following lessons have been learned: Working with companies that are export ready and are motivated and wiling to export helps companies penetrate markets and make good sale hence leading to business growth. Working with the Government agencies responsible for promoting export in the country helps the programme to be relevant to the country and also be able to operate without difficult from the government authorities. There is a need to provide financial support to programme supported companies if they are to be sustainable.

5. BENEFICIARY PROFILE

Ms. Jessie Kalisa Umutoni is the proprietor and managing director of G-Mart Limited, a company that manufactures and packages chalk which is mainly used in schools. G-Mart started in 2010 with about US\$ 33,330 from her savings and her husband, as well as a loan from Zigama CSS bank and is located in Ndera, Gasabo District in Kigali. According to Jessie, it was not easy to start the business although it had always been her dream. When Jessie quit her job to start G-Mart she had three projects in mind: A toilet paper factory, a recycling factory and a chalk factory. But because of her love for education, she settled with the idea of starting a chalk factory. She was raised in a family of teachers where chalk was a common item and she ventured into chalk making in her adult life. She says it was through chalk that she managed to make it in life because she has a good attitude towards doing business and learning new ideas that help her improve on her production skills, marketing and quality of chalk that she produces. So she went to China for training and returned to train her team in production and also established a team for packaging finished products.

Jessie really appreciates the support that TMEA has provided to them through the programme that now she is able to export to wider markets in the EAC and even her business skills, capacity and confidence has been enhanced. She also believes that *“G-Mart market access is not enough but the products needs to be competitive, high quality meeting the relevant standards, well priced, well packaged and well marketed to the users”*. *“The mindset of Rwandans need to change if Rwanda is to move forward,”* she said and lamented: *“Many people here don’t believe that a fellow Rwandan can manufacture something like chalk, and of high quality.”* And that was out of first-hand experience. Even though she is the first person to open a chalk factory in Rwanda, and despite the demand for the product, running the business has not been without challenges. Banks, for example, find it difficult to believe that a woman can start a factory and be able to run it well. Most of the banks Jessie approached for financing expressed doubt that a woman could actually make chalk or find a market for her products. She said, *“We are fully aware that we have to be competitive in the market. We ensure that best quality and personalized services are our basis of successful”*.

The story behind producing chalk is the availability of good quality raw materials with unique properties which makes G-Mart the only Rwanda Company that produces all kinds and shapes of chalk. *“I learned about how to export, marketing and maintain export markets,”* explains Jessie *“I learned a lot from the programme and that helped us improve on quality and especially business planning because when you plan better, you sell more.”* Today G-Mart chalk is ahead of its competitors when it comes to quality and competitive prices.

Prior to project intervention, G-mart was not aware of the export potential of her product (Chalk) in the regions. However, in 2013 and 2014 G-Mart Limited was able to create market links in Uganda and Burundi; thanks go to TMEA for its intervention and support that enabled this happen and her successes in the export markets is attributed to TMEA. She was able to export 2,388 cartons to Burundi and 300 carton to Uganda as a result of the programme intervention. G-Mart Limited says she earns good money from exporting chalk to Uganda and business is promising. In addition she recently landed a big contract with UNICEF and also with the Ministry of Education in Rwanda, and a Uganda-based supply distributor with stores in Uganda which will increase her income and also create employment opportunities. In the world of stiff business competition, where quality products and competitive prices have become a critical hurdle to the survival of small scale manufactures in developing countries, Jessie’s success is encouraging. It shows that with the right support, training and mindset, small-scale manufacturers can adjust their practices and systems to overcome the challenge in the export markets.

6. CONCLUSION

Export Development is an important foundation for trade helping poor countries with many SMEs to find access to new markets and to increase trade flows within the region and beyond. The programme has been able to contribute to increased trade in the region and has also had impact on the beneficiaries by building their capacity and confidence to be able to export. The key to this has been the close partnership between RDB, API, Traidlinks and TMEA that are closely related in terms of their roles and their professional understanding and approach, thus facilitating knowledge transfer and capacity development.

CASE STUDY 2: ENHANCING DELIVERY OF EXPORT ADVISER SERVICE - THE CASE OF EXPORT ADVISERS IN RWANDA

1. BACKGROUND

African countries are becoming increasingly aware of the importance of developing trade capacity in order to achieve effective participation in the regional and world trading system and to reap the full benefits of improved access to these markets (World Bank). There is wide recognition that capacity building and training are prerequisites to economic and social Development and capacity building and training have long been recognized as an important component of most trade development activities. Right from the start of the TMEA Traidlinks export development programme, TMEA placed considerable emphasis on capacity building and skills development, to ensure longer-term sustainability and impact of the outcomes of the programme and it was important that all those involved in the export development programme improved their skills and understanding of all aspects of exporting. The programme was implemented in partnership with Rwanda Development Board, Kigali Independent University and the relevant private sector stakeholders and the overall programme budget was estimated at about US\$ 1.4million from 2013 to 2015. With regard to the priorities to improving the export capacity of Rwanda and the EAC as whole. This case study highlights the benefits of enhancing delivery of export advisory services in Rwanda. The TMEA Traidlinks supported programme is just one of the TMEA programmes that is helping the private sector in Rwanda and in the EAC do business in ways that are not only good for company development but also good for competitiveness and economic development of a country. Mr. Evary Murasa, one of the export advisers that was trained with support from the TMEA supported Traidlinks (Export Development) programme is located in Kigali Rwanda and is featured in this case study.

2. THE ISSUE

The constraints faced by Rwanda potential exporters in accessing EAC markets included and weak exports networks and inadequate exporting skills by the potential exporters and the low productivity of labour. Development of an enabling environment for enhancing export capacities and skills are key for promotion of exports to benefit from the opportunities offered by the EAC markets. Therefore development of productive capacities, improving exports promotion and marketing strategies including provision of business development services to enhance the knowledge of market requirements and trends by producers and exporters as well as establishing a more supportive business environment are considered critical steps to growing Rwanda exports to the region and beyond.

3. RESPONSE AND APPROACH

TMEA contracted Traidlinks, an Irish funded NGO with wide experience in the Region and based in Kampala to run a pilot project to help 10 selected Rwandan companies enter the Ugandan market. The Market Linked pilot worked through the Rwanda Development Board (RDB) – the national export promotion agency by providing training, hands on tailored support to companies to penetrate the Ugandan market including market research, sales missions, and sales follow up.

Following the success of the pilot project, three programmes in Rwanda were developed namely:

- ❖ MarketLinked Programme aimed at linking Rwandan potential exporters to the EAC market.

- ❖ Export Adviser Initiative- Build the capacity and competency of the qualified Rwandan local business consultants to support exporters in preparing and executing their export business plans;
- ❖ Export Capacity Programme- provide direct technical support to new and existing exporters to identify and/or exploit export growth opportunities.

3.1 Key stakeholders

The key stakeholders that were involved in the programme implementation in Rwanda included, TMEA, Rwanda Development Board, Kigali Independent University and Export ready private sector companies and local business consultants.

3.2 Project goals

The overall objective of the programme was to enhance the export capacity of Rwanda and Burundi companies to increase trade values thus contributing to economic growth and ultimately, poverty reduction.

3.3 Project Innovations and Implementation

The TMEA Traidlinks supported programme developed the Export Adviser Initiative component to build the capacity and competency of the qualified Rwandan local business consultants to support exporters in preparing and executing their export business plans. Traidlinks with support from TMEA selected and trained 19 applicants on Export Development. This involved working closely with the Kigali Independent University with the intention of building skills capacity of local consultants. It was a 6-month training with modules focusing on planning; market entry strategies; basics of international trade fairs and exhibitions; exports costing and pricing; exports logistics; packaging and labeling; quality standards; selling in foreign markets; finance in export trade; basics of consulting and was delivered by the experts in these respective areas.

3.4 Results achieved

With support from TMEA, 9 export advisers qualified for award of certificate after the training they had undergone. The export advisers gained skills and knowledge in exporting which has enabled them ease the network of marketing products in the EAC because advisers are conversant with the export business in the EAC and they are able to advise exporters on market requirements. The export advisers narrated that the knowledge and skills gained enhanced their confidence and credence in providing export advisory services to exporters. They further said that this changed their attitudes and the way they carried out their work because of the increased stock of knowledge and capacities they had gained at the end of the training. One of the biggest achievements of the programme was that Rwanda had incorporated the TMEA Traidlinks component of export advisers into its revised national export strategy and this is going to go a long way in ensuring sustainability of the programme in Rwanda.

4. OPPORTUNITIES AND CHALLENGES

TMEA investing in capacity building of individuals and consequently adding to the local stock of knowledge of the export advisers was an essential element in improving their productivity in Rwanda and the EAC as whole because the region will be benefiting from the export related services that they provide hence contributing to an enabling business environment for exporters. Despite these advisers

having been trained, they need to be registered by the Rwanda Development Board so as to gain full recognition by the Rwandan government. According to the export advisers, without them being integrated into the RDB structure, they will not be able to get contracts with companies therefore, RDB should designate and have a database for export advisers that companies can easily access.

4.1 Opportunities

As a result of the TMEA support, Rwanda has been able to incorporate the component of export adviser into its revised National Export Development Strategy which will make the programme results sustainable beyond the programme life span. This will be a great opportunity for the export advisers because they will be recognized and supported by the government of Rwanda. In addition, they will be recognized by the government and they will be able to get opportunities to advise and train exporters at a fee which will help them earn income and on the side of the exporters will have the export advisory services much more closer to them and they will be able to export from an informed point of view and also their confidence in the export markets will be greatly enhanced hence promoting exports.

4.2 Lessons learned

Capacity building is a continuous rather than a discrete process so the trained advisers need to continue having refresher courses and training to improve their knowledge base and become better export advisers.

Political will and commitment from Rwanda Development Board is necessary for successful implementation of the export adviser activities in Rwanda. This will also help them get technical and financial support from the government to ensure sustainability.

The mechanism of export adviser when fully operational in Rwanda and the whole of EAC has the potential to increase intra-regional exports and trade and also increase cooperation within the EAC due to the networks and contacts created.

5. BENEFICIARY PROFILE

Evary Murasa an export adviser located in Kigali Rwanda that was initially providing business solution to traders was trained by TMEA supported Traidlinks programme on export development and with this support his skills in export advising have been greatly enhanced. Evary Murasa now specializes in export promotion advising, enterprise development, social and economic development and provides these services to both private and public sector clients in Rwanda. He says that he does this by designing, implementing successful and effective business services that support the growth of businesses and the community in an effective and professional manner

Evary says that the TMEA supported initiative has enhanced his professional growth in business and will use the skills acquired to encourage the creation of its benefits to communities and expand skills opportunities for young entrepreneurs in Rwanda. Evary has been able to advise some Rwandan exports and help them export and says that with the support from the TMEA and the Rwanda Development Board, he will be able to get more exporters to advise and help them meet export requirements. *“I received so much value from the TMEA Traidlinks supported programme and not just in terms of access to new business advisory opportunities but also through business support, mentoring and skills*

training”, he said. “I am very happy to have worked with the TMEA supported Traidlinks team and grateful for the good collaboration,” he added.

6. CONCLUSION

With some export advisers trained in Rwanda by the TMEA programme, the successful implementation of the export advisory services relies on the number of exporters ready to take up the services and also the level of government to support export promotion. If well implemented, the export advisers have the potential to bring remarkable changes and improvement on export service delivery and this will enable exporters enjoy and benefit from the services provided.

CASE STUDY 3: WORKING WITH EXPORTERS TO ENHANCE THEIR EXPORT CAPACITY - THE CASE OF SOSOMA INDUSTRIES LIMITED IN RWANDA

1. BACKGROUND

The overarching goal of Rwanda's Vision 2020 is to transform the country into a lower middle income economy by improving its competitiveness while ensuring unity and inclusive growth and development. Significant strides towards achieving this vision have been made especially regarding improvements in the country's business environment and competitiveness. The African economic outlook 2014 indicated that the Rwandan government has priority to support export growth and diversification, bolster private sector development and leap-frog the various impediments that continue to hinder the contribution of the country's private sector to national development. This in turn indicates that exporting quality and competitive products through market linkages by small- and medium-scale companies or enterprises in Rwanda enables them contribute to the national economic development of the country and export earnings in Rwanda increased by an estimated 33% in 2013. According to the global competitiveness report 2014-2015, Rwanda is ranked in 62nd position in the world, in Africa, 3rd position and number one in the East African Community which indicates that Rwanda has become even more competitive and that the business and investment environment of the country is improving.

Sosoma Industries Ltd in Rwanda, located about 4km from Kigali Airport is one of the companies that we feature in this case study and was supported by the TMEA supported Traidlinks (Export Development) programme that worked with 16 export ready companies. The programme was implemented at an estimated budget of about US\$ 1.4 million from 2013 to 2015.

2. THE ISSUE

Companies in Rwanda were facing challenges in the export markets, because they lacked skills and confidence to enter these markets and proper market information on product preference, information about their goods, including price and demand and therefore could not make informed decision when exporting. This also made it difficult for the companies to know if it was worthwhile entering the export markets. Sosoma Industries Ltd manufactures quality fortified corn soya, blend fortified super maize meal, roasted soya flour, red and white sorghum flours and other seasonal goods that are distributed throughout the Rwanda. Sosoma joined the TMEA Traidlinks programme for support as it looked to develop an innovation strategy to enter new markets in the EAC and also improve their export capacity. The TMEA Traidlinks supported programme interventions addressed these constraints that the companies were facing through the TMEA export promotion programme and good collaboration with the supported companies that improved their export capacity and created good export linkages in EAC and this also helped the supported companies to unleash their full export potential.

3. RESPONSE AND APPROACH

TradeMark East Africa (TMEA) programme aims to improve trade competitiveness in East Africa by reducing transport time/costs and improving the trade environment. It targets an increase in trade of 10% (above trend) by 2016, contributing to sustained economic growth and poverty reduction. TMEA was officially launched in February 2011 as a specialist not-for-profit agency to implement a programme to promote trade growth in East Africa. TMEA is currently funded by the UK, Belgium, Canada, Denmark,

Finland, Netherlands, Sweden and USA. TMEA's secured budget to date totals about £330 million (US\$ 540 m). The programme is currently scheduled until December 2017 with the possibility of a new programming phase beyond that. In 2012, TMEA contracted Traidlinks, an Irish funded NGO with wide experience in the Region and based in Kampala to run a pilot project to help 10 selected Rwandan companies enter the Ugandan market. The Market Linked pilot worked through the Rwanda Development Board (RDB) – the national export promotion agency by providing training, hands on tailored support to companies to penetrate the Ugandan market including market research, sales missions, and sales follow up.

Following the success of the pilot project, three programmes in Rwanda were developed namely:

- ❖ MarketLinked Programme aimed at linking Rwandan potential exporters to the EAC market.
- ❖ Export Adviser Initiative- to build the capacity and competency of the qualified Rwandan local business consultants to support exporters in preparing and executing their export business plans;
- ❖ Export Capacity Programme- to provide direct technical support to new and existing exporters to identify and/or exploit export growth opportunities.

3.1 Key stakeholders

The key stakeholders that were involved in the programme implementation in Rwanda included, TMEA, Rwanda Development Board, Kigali Independent University and Export ready private sector companies, local business consultants and the relevant private sector stakeholders.

3.2 Project goals

The overall objective of the programme was to enhance the export capacity of Rwanda and Burundi companies to increase export trade flows, thus contributing to national economic growth and ultimately, poverty reduction.

3.3 Project Innovations and Implementation

Sosoma narrated that *“the TMEA Traidlinks supported programme helped us address fundamental issues of capacity and export process planning, including making better use of the skills gained from the programme and also how to identifying export bottlenecks and how to overcome them. The Export Development Programme team supported by TMEA worked with us over several months to develop our export action plan and also enhance our export capacity. This included mapping out areas we could look to prioritize, and giving clarity over the future direction of the business for the company in terms of exporting. We have also benefited from the workshops and export missions that the TMEA Traidlinks supported programme has been running. They really encouraged us to take a step back from the day-to-day working environment and look at things from a different angle in terms of strategic development of the export business,”* said the Sosoma Sales and Marketing Manager.

3.4 Results achieved

Based on market survey findings that was done in 2013 by Sosoma, the business plan 2014-2018 projection forecasts that the TMEA Traidlinks programme support will contribute to an increase of turnover of 20% per year, from US\$1.5 million to US\$ 3.2 million. The programme was able to get very good political support from the Government of Rwanda through Rwanda Development Board that was hosting the TMEA Traidlinks Rwanda project. **In set is a picture of some of the products that Sosoma is exporting.**



“The support we have received from TMEA has been fundamental to us and has improved our business turned over the past 2 years of working together and we are committed to growing bigger. This growth has created an additional 38 full time posts, providing much needed jobs for the surrounding rural community including 48% men and 52% women and employs. The programme has contributed to Sosoma products being made available in shops wide in Rwanda, and in the foreign countries like Uganda, Burundi by building their export capacity, confidence and marketing skills. Success is perhaps best measured by the fact that we have been able to accommodate rapid growth and enhance our export capacity and skills. This in turn has allowed us to our changes to meet future customer demand,” the Sales and Marketing Manager said.

4. OPPORTUNITIES AND CHALLENGES

Sosoma Industries Ltd’s mission is to be a credible and regional reference business in agro-processing in the EAC and leader in food manufacturing and marketing, whose products by their quality and variety contribute to consumer pleasure and wellness. Over the past years, Sosoma has managed to foster a business culture focused on innovation and product differentiation mainly in agro-processing. Having markets in Rwanda, Burundi and Uganda and its innovative culture permeates production operations, sales and marketing as well as research and development. This has enabled the company to progressively expand and penetrate previously untapped market segments in the EAC which has been supported by TMEA closely working and coordinating the company. The challenges that Sosoma has met are considerable as it functions in a highly competitive manufacturing sector. Sosoma was one of the few companies in Rwanda with potential to export that was enhanced by the TMEA support. Like any other SMEs in a developing country, access to affordable finances was still a challenge to Sosoma.

4.1 Opportunities

As a result of the TMEA support, Rwanda has been able to incorporate the programme inventions into its Export Development Strategy which will make the programme skills and results sustainable beyond the programme life span. This will be a great opportunity for the manufacturers because they will be supported by the Rwanda government. The Revised Rwanda National Export Strategy (NES) has an Export Growth Facility and the export finance component of the NES is designed as a single fund, the

Export Growth Facility (EGF) with three separate windows for funding: 1) an investment catalyst fund to encourage export focused investments, 2) a matching grant fund for medium sized exporters to meet specific requirements in target markets and 3) an export guarantee facility to underwrite exports for up to 180 days, which Sosoma can access and utilize.

4.2 Lessons learned

Strong political drivers in the government institutions responsible for trade and exports are very critical and vital for the success and sustainability of the export development programme in Rwanda.

A suitable platform for discussing the progress of the programme implementation is essential for resolving and giving the programme direction to meet set targets. Constant consultations with key stakeholders and beneficiaries are important in order to synchronize programme activities and timing and a full sharing of information is absolutely necessary for effective utilization of resources and efforts. Technical support to the programme supported companies is essential to achieving the planned objectives.

5. BENEFICIARY PROFILE

Sosoma Industries Ltd is a Rwandan Company established on 1st November 2008 and is located about 4km from Kigali Airport and deals in agro-processing. Sosoma is administered by a Board of Directors composed by five members elected for a term of three years. The company has three main departments that include: Production, Quality Control Department, Sales & Marketing Department and Administration & Finance Department.

Sosoma is one of Rwanda’s successful agro-processing companies, which employs 38 motivated permanent staff, 48% men and 52% women who make the staff majority. The company buys some of its raw materials like maize grains and soya beans from small scale farmers in Rwanda. With Sosoma’s positive attitude towards business and support from the TMEA, Sosoma believes that success is possible despite overwhelming odds and circumstances in business.

The company manufactures a range of products that include Sosoma 1, Sosoma 2, Sosoma 2 Fortified, Corn Soya and Super Maize Meal, Roasted Soya Flour, Red and White Sorghum Flours. The flours produced are mainly for porridge and are from grains of soya, sorghum, maize and wheat. 73% of products are certified with Standardization Mark (S-Mark) from Rwanda Standards Board. Sosoma products are one the tools that Rwanda can use in eradicating extreme poverty and hunger, reducing child mortality and improving maternal health through consumption of the products. In set are



some of the samples from Sosoma that were used for marketing during the market linkages.

Sosoma noted that the meet-the-buyer events and mission that were supported by the TMEA programme successfully supported business engagements with potential buyers and distributors of their products; in addition, mentoring Sosoma was a source of learning and development which enhanced their export capacity and enterprise skills. With the skills and capacity enhanced in exporting, Sosoma believes they can perform better in the export markets by competing more effectively, cultivate more loyal customers and spotting better export opportunities. They consider that their future success depends on the ability to reach out to both new and existing customers, current and future distributors.

6. CONCLUSION

Sosoma Industries Ltd is an innovative company with a team committed to growing the export business and continually looking for ways of improving business operations. Therefore, with the export capacity built by the TMEA programme, Sosoma has the potential to meet the local needs and export requirements and also have potential to create employment opportunities.

ANNEX 2: ASSESSMENT CRITERIA

This was the assessment criteria used by the evaluation team.

#	EVALUATION ASPECT	ASSESSMENT CRITERIA	CRITERIA FOR RATING				
			Excellent (5)	Very good (4)	Good (3)	Fair (2)	Poor(1)
1.	Relevancy	<p>Assessing and establishing whether the Programme:</p> <ul style="list-style-type: none"> ❖ Is in line with the trade policies and administrative systems of Rwanda and Burundi Governments and the EAC policies and systems. ❖ Is consistent with the TMEA policies and priorities and synergetic with other activities; ❖ Relates to existing needs assessments and opinions of the stakeholders and donors. 	Consistent and exceeds all the assessment criteria for relevancy	Consistent with all the assessment criteria for relevancy	Consistent with most of the assessment criteria for relevancy	Partially consistent with the assessment criteria for relevancy	Serious problem and not consistent with all the assessment criteria for relevancy
2.	Effectiveness	<p>Assess and ascertain the extent to which:</p> <ul style="list-style-type: none"> ❖ Activities were performed and outputs produced/achieved or were likely to be achieved; 	100% of all planned activities performed and output targets realized in time.	75% to 99% of all planned activities were performed and output targets realized in time.	60% to 74% of all planned activities were performed and output targets realized in time.	45% to 59% of all planned activities were performed and output targets realized in time.	Less than 44% of all planned activities were performed and output targets not realized in time.
3.	Efficiency	<p>Analyses of the Programme budget, cost and benefits, planned activities and realized results and establish the extent to which the Programme was economical, efficient and effective in achieving good</p>	100% of all planned activities performed and output targets and benefits	75% to 99% of all planned activities were performed and output targets and benefits realized within time and planned budget.	60% to 74% of all planned activities were performed and output targets and benefits realized within time and	45% to 59% of all planned activities were performed and output targets and benefits realized within time and planned budget.	Less than 44% of all planned activities were performed and output targets and benefits not realized




#	EVALUATION ASPECT	ASSESSMENT CRITERIA	CRITERIA FOR RATING				
			Excellent (5)	Very good (4)	Good (3)	Fair (2)	Poor(1)
		Value for Money (VfM).	realized within time and planned budget.		planned budget.		within time and planned budget.
4.	Impact	Assess and establish: <ul style="list-style-type: none"> ❖ the increase in the value of exports from programme supported companies (US\$); 	> 500,000	>=400,000<500,000	>= 300,000<400,000	>= 200,000<300,000	<200,000
5.	Sustainability	Assess and establish whether: <ul style="list-style-type: none"> ❖ Social and financial benefits are likely to be sustained. ❖ The value chains and supported companies have the ability to compete and exploit regional and international trade opportunities; ❖ Existence of competent personnel and structures to sustain the results achieved. 	Exceedingly sustainable social and financial benefits and competent personnel	Very sustainable social and financial benefits and competent personnel	Sustainable social and financial benefits and competent personnel	Partially sustainable Social and financial benefits and competent personnel	Social and financial benefits and personnel are not sustainable

Note:

Excellent : >4.49 =<5.0	Very good : >3.49 =<4.49	Good : >2.49 =<3.49	Fair : >1.49 =<2.49	Poor: >0 =<1.49
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ANNEX 3: CONFIDENCE LEVELS

These are the confidence levels that were used to determine the extent of the available level of evidence to support the evaluation team’s assessment.

#	CONFIDENCE LEVEL	CRITERIA	COLOUR	
1.	High	All the evidence needed to support the evaluation team’s assessment was available.	Green	
2.	Medium	Most of the evidence needed to support the evaluation team’s assessment was available.	Yellow	
3.	Low	Partial evidence needed to support the evaluation team’s assessment was available.	Red	

ANNEX 4: PROGRAMME ACTIVITY ASSESSMENT

Annex 4 gives the criteria for assessment using a scale of 1(poor), 2(fair), 3(good), 4(very good) to 5(excellent). Confidence levels low (Red), medium (Yellow) or high (Green) to indicated the available level of evidence to support the evaluation team’s assessment.

#	ACTIVITY	ACTIVITY STATUS AS AT JUNE 2015	ASSESSMENT	CONFIDENCE LEVELS
BURUNDI PROJECT PILOT PHASE ACTIVITIES				
1.	Company assessment/selection and Preparation	Completed	4	High
2.	Sample collection and couriering	Completed	4	High
3.	Market research and buyer feedback to companies	Completed	4	High
4.	Sales Visit Preparation	Completed	4	High
5.	Sales missions/ Individual Sales Visits by executives to	Completed	4	High
6.	Action Plan formulation	Completed	4	High
7.	Light touch Follow up	Not done	1	High
Overall activity assessment in Burundi pilot phase			4	High
BURUNDI EXTENDED PHASE ACTIVITIES				
1.	Hold capacity needs assessment sessions for SMEs	Started but halted	1	High
2.	Provision of trainings to SMes	Started but halted	1	High
3.	Business plans development assistance to target SMEs	Started but halted	1	High
4.	Organisation of sales missions and other marketing events for SMEs	Started but halted	1	High
Overall activity assessment in Burundi			1	High
RWANDA PROJECT ACTIVITIES				
MarketLinked Programme				
1.	Preparation workshop with TMEA/RDB and other stakeholders	Completed	4	High
2.	Samples collected and distributed to potential buyers	Completed	4	High
3.	Market Research, buyer identification carried out	Completed	3	High
4.	Stakeholders' feedback on Market Research collected	Completed	3	High
5.	Dragons Den workshop organized	Completed	4	High
6.	Sales Mission preparation	Completed	4	High
7.	Sales mission to Uganda with selected companies	Completed	4	High
8.	Closing workshop for participating companies	Completed	4	High
9.	Consultations with TMEA and partners on lessons	Completed	3	High

	learned			
10	Policy workshop on lessons learned from the pilot phase	Completed	4	High
11	Report on pilot phase and way forward	Completed	3	High
12	Clients meetings to follow up on progress with backstopping support from local consultant	Completed	4	High
13	Prepare TOR for second MLP and launch RFP	Completed	4	High
14	Tender process launched for submission of Expressions of Interest (EoI) for service providers to undertake the assignment	Completed	4	High
15	Service provider is selected and contracted	Completed	4	High
16	Development of business plan for the selected (8) companies taken to Bujumbura	Completed	4	High
17	Create MLP Alumni Network in Rwanda	Completed	3	High
18	Create MLP Alumni Network in the EAC	Not complete	1	High
Export Advisors Initiative				
19	Selection of Export Advisor candidates for training	Completed	2	High
20	Training of the export advisors	Completed	4	High
21	Assessment of the trainees	Completed	3	High
22	Awarding of certificates	Completed	4	High
Export Capacity Programme				
23	Visit and interview enterprises to assess their eligibility	Completed	4	High
24	Select enterprises to join the programme	Completed	4	High
25	PerfromExport Capacity Audits (ECA) on the enterprises to determine readiness to export	Completed	3	High
26	Design and discuss Export Action Plans (EAP) for the selected companies	Completed	3	High
27	Build the capacity of the selected companies to address the skills gaps	Completed	4	High
Overall activity assessment in Rwanda			4	High

ANNEX 5: PROGRAMME RESULTS ASSESSMENT

Annex 5 gives the criteria for the assessment using a scale of 1(poor), 2(fair), 3(good), 4(very good) to 5(excellent). Confidence levels: low (Red), medium (yellow) or high (Green) to indicate the available level of evidence to support the evaluation team's assessment.

#	Outcome / Output	Timing		Output /outcome Indicators	Baseline Data	Targets	Actual Results as at June 2015	Assessment	Confidence Levels	Evaluator's Comments
		Start	End							
Burundi Programme (This Programme is still in infancy stage: started in July 2014)										
1.	Intermediate Outcomes: Increase in value of exports from Burundi companies participating in ECP/MarketLinked.	01/07/2014	01/06/2016	Value of exports from Burundi companies participating in ECP/MarketLinked	0	\$74,000	0	-	High	There is poor progress towards realization of the outcome
2.	Immediate Outcomes 1: Targeted companies export to new markets/buyers	01/07/2014	31/03/2016	No. of MoUs/ contract/orders concluded between exporters and buyers	0	20	0	-	High	
		01/07/2014	31/03/2016	No of surveyed companies that export to new buyers in Uganda and Rwanda	0	20	0	-	High	
3.	Immediate Outcomes 2: Enhanced export capacity for targeted companies	01/07/2014	31/03/2016	Increase in volume of exports from Burundi companies participating in ECP/MarketLinked	0	-	0	-	High	
4.	Output 1: Companies Gain Experience in Export Market Investigation	01/01/2015	31/03/2016	Number of companies which take part in individual or group sales visits	0	15	0	1	High	Little progress made
5.	Output 2: Export Advisor Initiative	01/01/2015	31/03/2016	Number of EAI candidates trained	0	1	0	1	High	Little progress

#	Outcome / Output	Timing		Output /outcome Indicators	Baseline Data	Targets	Actual Results as at June 2015	Assessment	Confidence Levels	Evaluator's Comments
		Start	End							
	candidates trained			Number of EAI candidates awarded certificate of completion for the training	0	1	0		High	made Little progress made
6.	Output 3: Export capacity company audits completed	01/01/2015	31/03/2016	Number of companies interviewed as part of export capacity audits	0	15	0	1	High	Little progress made
7.	Output 4: Export Action Plan developed by targeted companies	01/01/2015	31/03/2016	Number of companies which develop export action plans	0	15	0	1	High	Little progress made
8.	Output 5: MarketLinked sales mission and other marketing opportunities for SMEs completed	01/01/2015	31/03/2016	Number of companies (unique) which take part in individual or group sales visits	0	15	0	1	High	Little progress made
Overall assessment of results in Burundi extended phase								1	High	Poor
PILOT PHASE OUTPUTS										
1.	Output 1: Export Action Plan developed by targeted companies	01/01/2014	30/06/2015	Number of companies which develop export action plans	0	5	4	4	High	Output realized
2.	Output2: MarketLinked sales mission and other marketing opportunities for	01/01/2014	30/06/2015	Number of companies (unique) which take part in individual or group sales visits	0	5	8	4	High	Output realized

#	Outcome / Output	Timing		Output /outcome Indicators	Baseline Data	Targets	Actual Results as at June 2015	Assessment	Confidence Levels	Evaluator's Comments
		Start	End							
	SMEs completed									
Overall assessment of results in Burundi pilot phase								4	High	Very Good
Rwanda Project										
1.	Intermediate Outcomes: Increase in value of exports from Rwandan companies participating in ECP/MarketLinked.	31/07/2013	31/12/2015	Value of exports to EAC from Rwandan companies participating in ECP/MarketLinked	0	>= US\$ 500,000	US\$ 569,725	-	High	There was good progress towards increased export value. (One company that had export value to EAC of 15.165 Million was excluded because it was out of range)
2.	Immediate Outcomes 1: Targeted companies export to new markets/buyers	01/01/2012	31/12/2015	No. of MoUs signed between exporters and buyers	-	-	7	-	High	
		01/01/2012	31/12/2015	No of surveyed companies that export to new buyers in Uganda and Burundi	-	-	-	-	High	
3.	Immediate Outcomes 2: Enhanced export capacity for targeted companies	01/01/2012	31/12/2015	Increase in volume of exports from Rwandan companies participating in ECP/MarketLinked	0	-	-	-	High	
4.	Output 1: Pilot phase of Market Linked programme to first market (Uganda) is implemented	01/01/2012	31/07/2012	Number of companies which take part in individual or group sales visits	0	=15	15	4	High	Output realized

#	Outcome / Output	Timing		Output /outcome Indicators	Baseline Data	Targets	Actual Results as at June 2015	Assessment	Confidence Levels	Evaluator's Comments
		Start	End							
5.	Output 2: Export Advisor Initiative candidates trained and certified	30/11/2013	30/06/2014	Number of EAI candidates trained	0	=15	17	4	High	Output realized
		30/11/2013	30/06/2014	Number of EAI candidates awarded certificate of completion for the training	0	5	9	4	High	
6.	Output 3: Export capacity audits completed	31/07/2013	30/06/2014	Number of companies interviewed as part of export capacity audits	0	40	60	4	High	Output realized
7.	Output 4: Export Action Plan and Mentoring developed/ delivered with companies	31/07/2013	30/06/2015	Number of companies which develop export action plan	0	12	15	4	High	Output realized
8.	Output 5: Sales visits completed	31/07/2012	30/06/2015	Number of companies (unique) which take part in individual or group sales visits	15	>=15	25	4	High	Output realized
Overall assessment of results in Rwanda								4	High	Very good

ANNEX 6: ANALYSIS OF COMPANIES INTERVIEWED AND RESPONSES

The objective of the questionnaire was to contribute to the evaluation of the TMEA-supported Traidlinks Programme in Rwanda and Burundi and was administered to 18 out of the 23 targeted companies. The responses to this questionnaire provided feedback to the evaluation team in relation to the main evaluation criteria used to assess the programme. The answers of this questionnaire helped to identify the results and the best practices used under the different programme components. The conclusions of this evaluation helped to formulate recommendations.

#	Survey Questions	Responses Choice (%)					
1.	Are you aware of the purpose of the TMEA-supported Traidlinks Programme in your country on improving export competitiveness?	No		Yes		No Answer	
	Percentage Response	0%		100%		0%	
2.	Gender /sex	Male		Female		No Answer	
	Percentage Response	74%		26%		0%	
3.	Country of respondent	Burundi		Rwanda		No Answer	
	Percentage Response	28%		72%			
4.	In which markets was your company selling goods before the TMEA-supported Traidlinks Programme intervention?	In your country	Within the EAC	In Africa	Rest of the world	Not at all	No Answer
	Percentage Response (Some companies were selling to more than one market)	83%	33%	17%	6%	0%	0%
5.	In which markets is your company selling goods as a result of the TMEA-supported Traidlinks Programme intervention	In your country	Within the EAC	In Africa	Rest of the world	Not at all	No Answer
	Percentage Response? (Some companies were selling to more than one market)	78%	44%	17%	11%	11%	0%
6.	To what extent do you think the TMEA-supported Traidlinks Programme has improved the capacity of your organization?	Excellent	Very Good	Good	Fair	Poor	No Answer
	Percentage Response	28%	11%	50%	11%	0%	0%

#	Survey Questions	Responses Choice (%)					
7.	To what extent do you think the TMEA-supported Traidlinks Programme has improved the capacity of exporters in your country?	Excellent	Very Good	Good	Fair	Poor	No Answer
	Percentage Response	22%	17%	56%	5%	0%	0%
8.	To what extent do you think the TMEA-supported Traidlinks Programme has improved the export support networks in the EAC?	Excellent	Very Good	Good	Fair	Poor	No Answer
	Percentage Response	22%	33%	11%	17%	6%	11%
9.	To what extent do you think that the TMEA-supported Traidlinks programme enhanced the capacity of local service providers and Business Support Organisations (BSOs) to provide support to exporters in your country?	Excellent	Very Good	Good	Fair	Poor	No Answer
	Percentage Response	28%	39%	28%	0%	5%	0%
10.	To what extent do you assess the programme participation and ownership by the beneficiaries?	Excellent	Very Good	Good	Fair	Poor	No Answer
	Percentage Response	11%	33%	33%	23%	0%	0%
11.	To what extent do you think the TMEA-supported Traidlinks Programme approaches used address the needs and priorities of your organization?	Excellent	Very Good	Good	Fair	Poor	No Answer
	Percentage Response	22%	11%	39%	28%	0%	0%
12.	To what extent do you think the TMEA-supported Traidlinks Programme approaches used address the needs and priorities of your country?	Excellent	Very Good	Good	Fair	Poor	No Answer
	Percentage Response	22%	17%	17%	39%	0%	5%

ANNEX 7: EXPORT VALUES OF THE SUPPORTED COMPANIES (CODED FOR CONFIDENTIALITY)

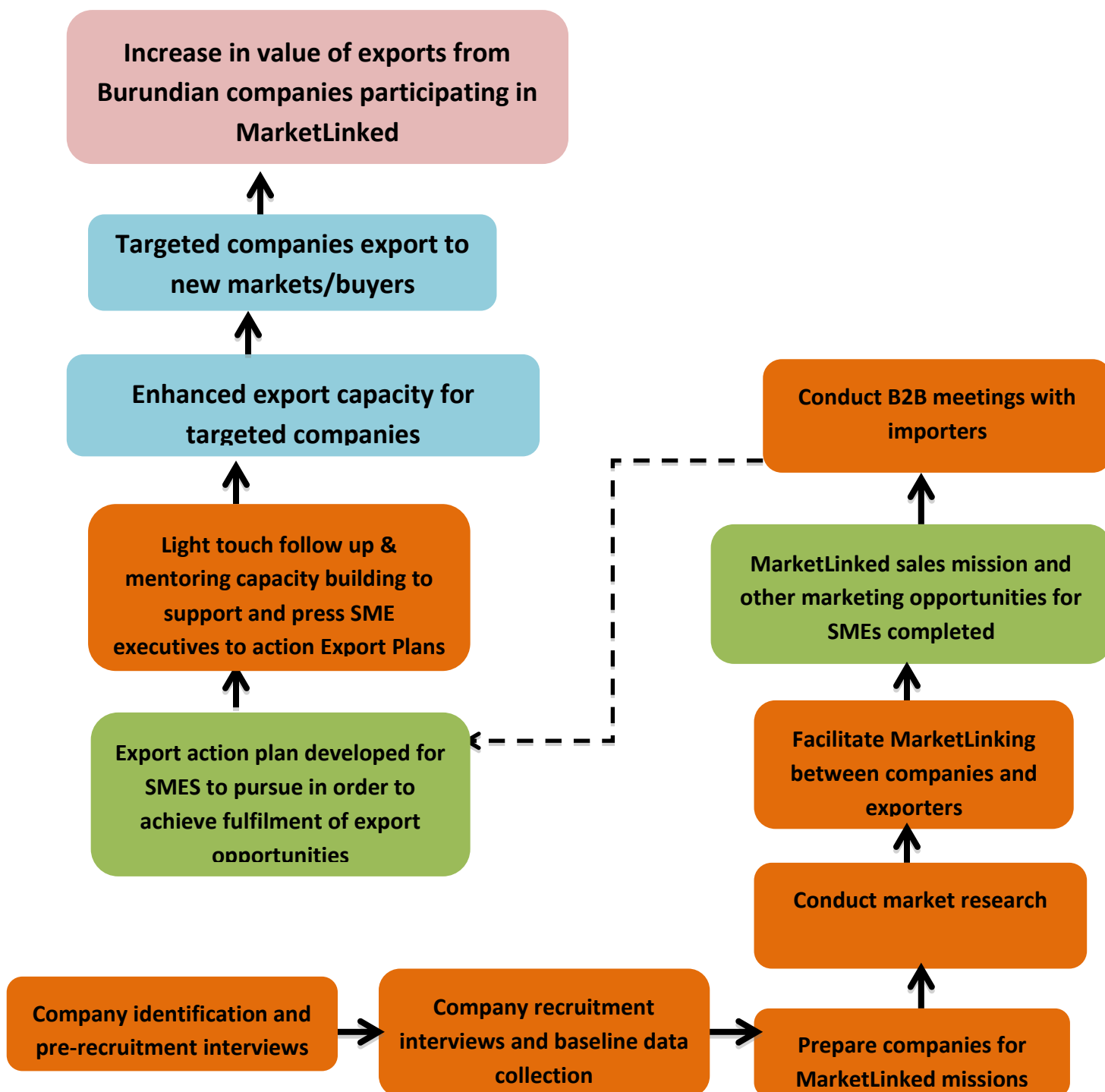
#	COMPANY CODE	TOTAL VALUES AND INCREMENTS (US\$)	YEARS			
			2012	2013	2014	JANUARY TO JUNE 2015*
Programme intervention contributed to the companies' capacity to increase export values (A, D, G, K)						
1.	A	Value	81,721	114,769	187,819	77,171
		Increment	-	33,047	73,051	(110,648)
2.	D	Value	2,019	138,173	150,836	22,676
		Increment	-	136,154	12,664	(128,160)
3.	G	Value	4,613	141,721	324,014	94,488
		Increment	-	137,108	182,293	(229,526)
4.	K	Value	5,378	213,629	5,187,868	2,388,185
		Increment	-	208,252	4,974,239	(2,799,683)
Programme intervention contributed to the companies' capacity to start exporting (B, C, E, F, H, I, M)						
5.	B	Value	-	2,337	3,597	2,744
		Increment	-	2,337	1,260	(853)
6.	C	Value	-	-	-	1,142
		Increment	-	-	-	1,142
7.	E	Value	-	-	-	292
		Increment	-	-	-	292
8.	F	Value	-	15,253	-	15,292,079
		Increment	-	15,253	(15,253)	15,292,079
9.	H	Value	-	2,796	12,911	-
		Increment	-	2,796	10,115	(12,911)
10.	I	Value	-	-	-	57,000
		Increment	-	-	-	57,000
11.	M	Value	-	-	5,316	1,623
		Increment	-	-	5,316	(3,693)
Programme intervention contributed to enhanced export capacity but export values reduced (J, L)						
12.	J	Value	1,018,032	739,234	222,230	60,020

#	COMPANY CODE	TOTAL VALUES AND INCREMENTS (US\$)	YEARS			
			2012	2013	2014	JANUARY TO JUNE 2015*
		Increment	-	(278,797)	(517,004)	(162,210)
13.	L	Value	2,128,383	24,160	129,701	23,481
		Increment	-	1,704,224)	(294,459)	(106,220)
Programme intervention contributed to enhanced export capacity but companies yet to start exporting						
14.	N	Value	0	0	0	0
		Increment	0	0	0	0
15.	P	Value	0	0	0	0
		Increment	0	0	0	0
16.	Q	Value	0	0	0	0
		Increment	0	0	0	0
Grand Total Value to EAC (US\$)			1,445,937	788,975	829,436	15,734,943
Grand Total Value to DRC (US\$)			1,794,210	1,003,096	5,394,856	2,285,958
Grand Total Value to EAC & DRC (US\$)			3,240,147	1,792,072	6,224,292	18,020,901

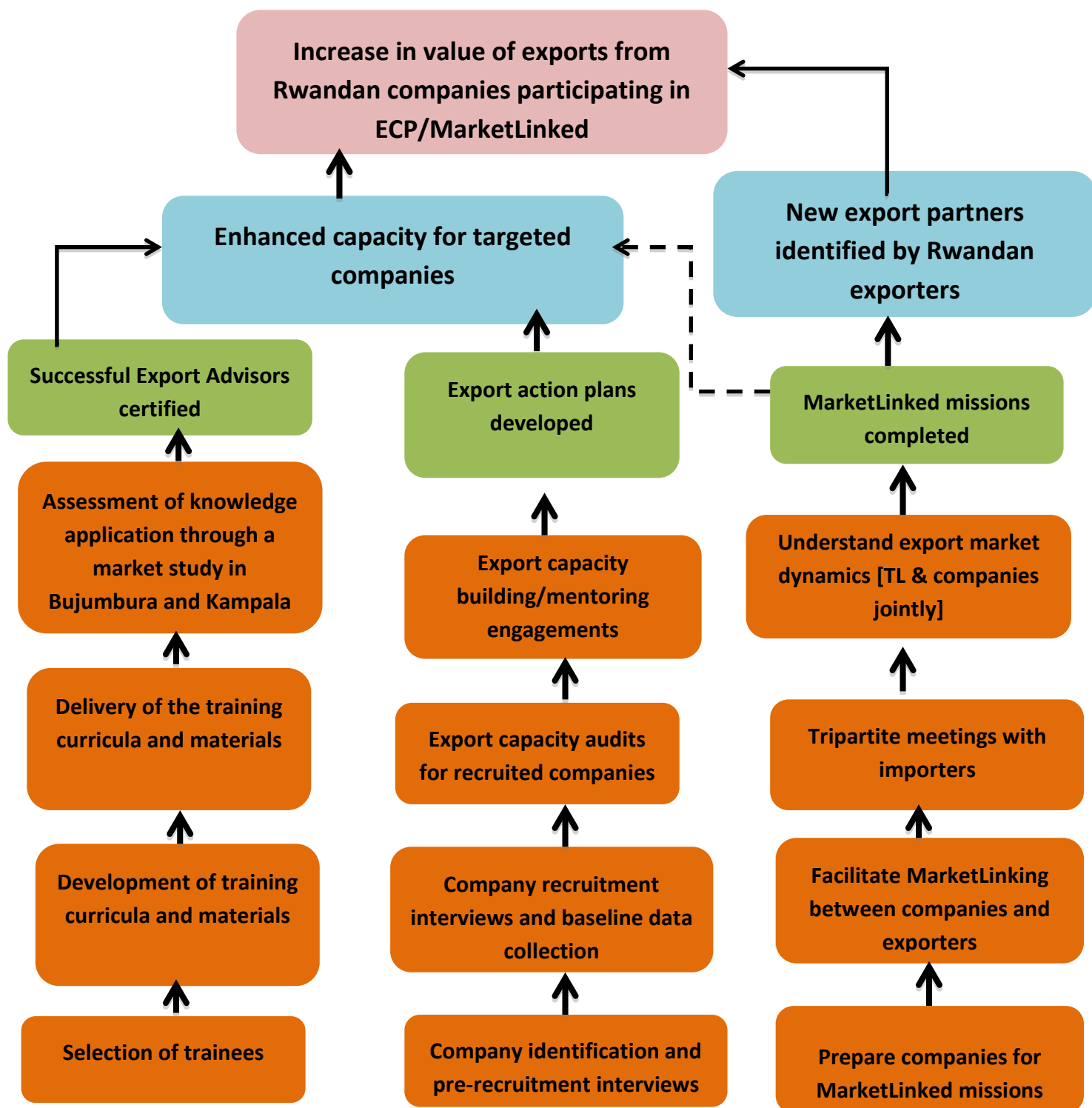
* Totals for only 6 months

Source: Rwanda Revenue Authorities Programme supported companies

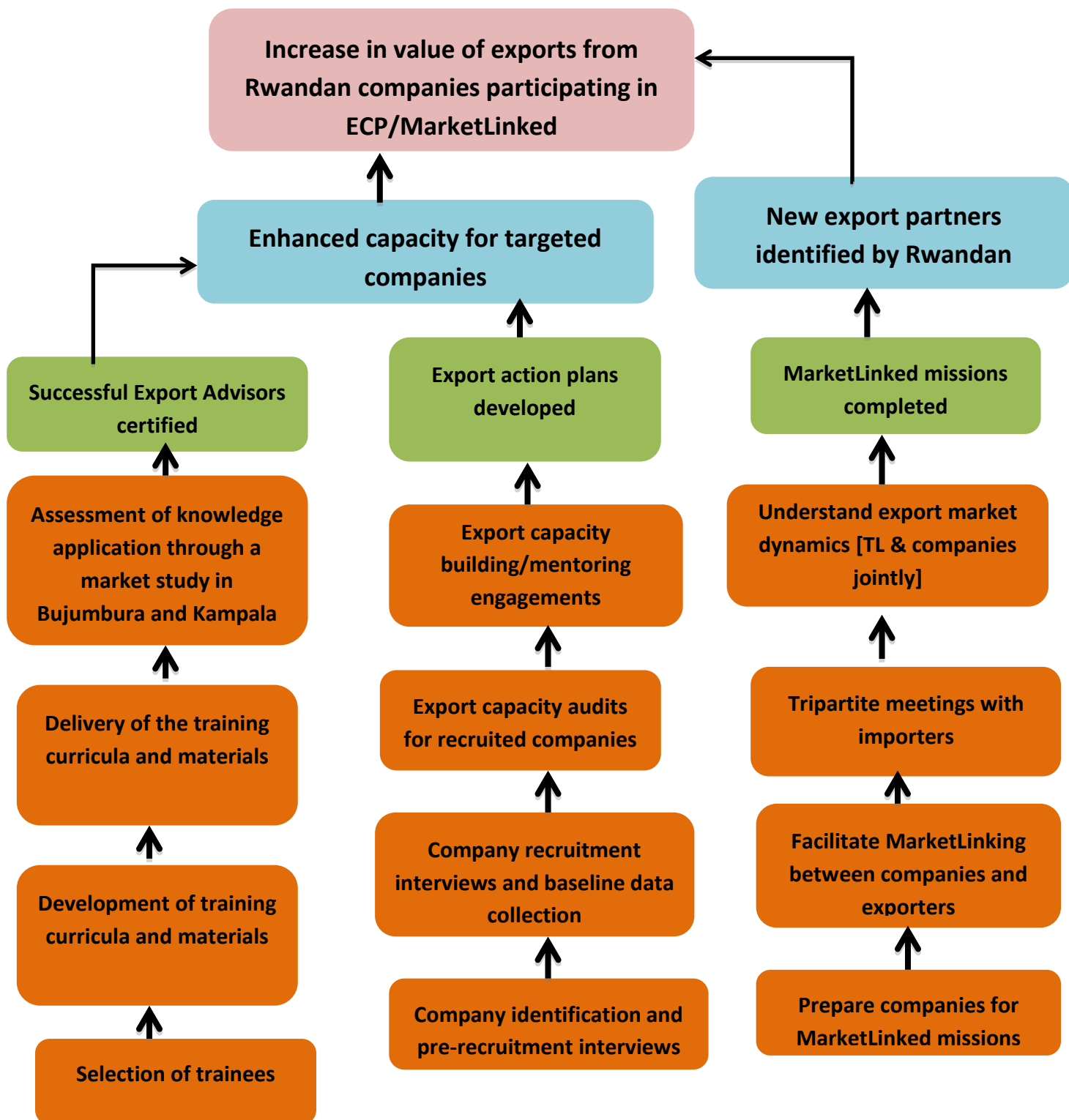
ANNEX 8: BURUNDI PILOT PHASE PROJECT RESULT CHAIN



ANNEX 9: BURUNDI EXTENDED PHASE PROJECT RESULT CHAIN



ANNEX 10: RWANDA RESULT CHAIN



ANNEX 11: LIST OF STAKEHOLDERS CONTACTED

#	COUNTRY	INSTITUTION	STAKEHOLDER'S NAME AND DESIGNATION	SEX	CONTACT DETAILS
1.	Burundi	Trade Mark East Africa-Burundi	Name: Amine Nzoyihera Designation: Programme Manager	M	E-mail: amine.nzoyihera@trademarkea.com
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		Business Support Organization	Name: Steven Muneza Designation: Consultant	M	E-mail: stevemuneza@gmail.com
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			Name: Mark Priestly Position: Senior Director Country Programs (Also former Country Director, Rwanda)	M	E-mail: mark.priestly@trademarkea.com
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		Swiss Contact	Name: Debora Randall (to join in via Skype) Position: Consultant, Export Capability	F	E-mail: debora@deborarandall.com
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		Kampala	Name: Ouma Steven Designation: Export Consultant/Distributor	M	Tel:+256712325916
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ANNEX 12: LIST OF DOCUMENTS REVIEWED

1. Annual Project Performance Report.
2. API Strategy.
3. Burundi Market Linked Programme Document.
4. Burundi Trade Integration Diagnostic Study (2012).
5. Contract for Implementation of an EAC Trade Promotion System.
6. Interim Progress Report to Burundi Market Linked Programme September 2014.
7. Interim Report to TMEA 1st October 2014 to 31 December 2014.
8. MoU between the Burundi Agency for Investment Promotion (API) and TMEA.
9. Mutual Commitment between RDB and Traidlinks.
10. PAPER J - TMEA Theory of Change – Explanation.
11. Press Release on the Market Linked Programme in Rwanda.
12. Project Appraisal Report (PAR).
13. Project Monitoring Plan- Burundi.
14. Project monitoring plan- Rwanda.
15. Project Risk Report.
16. Project Work Plan.
17. Report on Burundi Sales Mission to Kigali, Rwanda 15th -19th March 2015.
18. Rwanda National Export Strategy.
19. Sample Quarterly Reports.
20. Status Report of the Market Linked Programme in Rwanda July 2012.
21. Terms of Reference for the implementation of an EAC Trade Promotion System.
22. TMEA Market Linked Pilot Rwanda Phase 2.
23. TMEA Project Sheet.
24. Traidlinks Proposal for Support to Companies in the Burundi Export Sector.
25. Traidlinks MoU with the Burundi Agency for Investment Promotion (API).
26. Traidlinks Results Chain – Burundi.