



Beyond value chains: emerging lessons from Market Systems Development approaches in Australia's aid program

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** The views expressed in this paper are the authors' alone and
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Abstract

Many aid donors, including Australia, fund programs aimed at helping farmers connect better with input and product markets. Some of these adopt the 'market systems development' (MSD) approach¹. A market system has specific value chains at its core, but more broadly encompasses producers, buyers, sellers (including input and service providers) and employers together with key influencing factors such as policies, regulations and cultural practices. MSD programs seek to reduce poverty by making markets function more effectively, sustainably and beneficially for poor people.

For Australia, MSD was an ambitious departure from more traditional project approaches. 'Pure' MSD involves little or no direct delivery of services to target groups, instead working through partnerships with existing market actors – primarily, but not exclusively, in the private sector. Over the last decade or so, Australia has applied and adapted MSD to suit particular objectives and local circumstances. For example, private sector partnerships are sometimes supplemented with community-based, NGO-led activity to help farmers become 'market-ready' (including by aggregating output) or to address nutrition or gender concerns.

The paper will outline results and lessons learned from global and Australian MSD programs to date, providing insights on questions such as: whether poverty impacts are being achieved and at what scale; whether MSD 'works' in different developing country contexts and with different communities; whether 'systemic change' is being achieved; and how the development benefits from MSD programs might be further strengthened.

¹ Also known as 'Making Markets Work for the Poor' (M4P)

Keywords

Market systems development, value chains, private sector, community-based approaches, Australian aid, poverty, gender

Introduction and Methods

Market Systems Development (MSD) programs – also known as Making Markets Work for the Poor (M4P) – ‘seek to reduce poverty by making markets function more effectively, sustainably and beneficially for poor people’ (The Springfield Centre 2009). The approach recognises the poor as active market participants – as workers, producers and/or consumers – and seeks to address a variety of market failures that disadvantage them. For example, the poor often lack the inputs, services, skills and information they need to be competitive and to adapt to the challenges and opportunities presented by markets. Unfavourable policy and regulatory environments and informal norms can also reduce their ability to benefit from market participation (DFAT 2017a).

MSD has become increasingly popular among aid donors in recent years, in an effort to generate lasting improvements to the lives of the poor. While MSD can be applied in any sector, it is particularly relevant to agriculture given many poor people depend on this for their livelihood. MSD is consistent with current Australian aid policy settings relating to private sector development, private sector engagement and aid investments in agriculture (Commonwealth of Australia, DFAT, 2015a,b,c). In particular, one of the three priorities identified under the *Strategy for Australia’s aid investments in agriculture, fisheries and water* is ‘strengthening markets’.

This paper represents an initial canvassing of evidence and issues arising from implementation of MSD programs. The findings of a global ‘narrative synthesis’ are outlined, followed by more detailed discussion of Australia’s experience. In particular, the paper draws on reviews of three well-established Australian programs – one in Cambodia, one in Indonesia, and one that now operates across five separate countries. The discussion focuses in particular on the issues of achieving scale through systemic change; progressing women’s economic empowerment; and the effectiveness of MSD programs in reaching the poor.

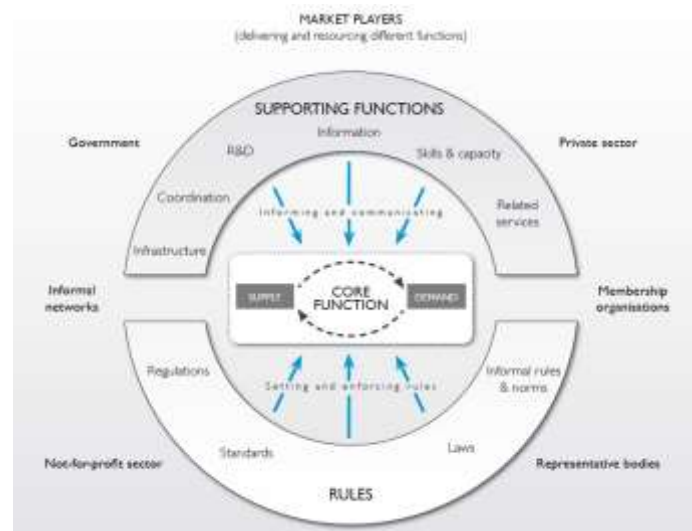
While the global evidence base remains somewhat patchy (BEAM Exchange, 2017), the Australian MSD interventions reviewed are making good progress towards achieving their intended results. Meanwhile, other efforts to help smallholders engage with markets are underway through community-based programs implemented by non-government organisations (NGOs). There is scope to draw on the strengths of both approaches and improve development gains through a ‘hybrid’ model – one element helping private sector actors reach ‘down’ to include more of the poor in markets; the other lifting communities ‘up’ so that they can access new market opportunities. This reach down/lift up model is adapted from the ‘push-pull’

model articulated by USAID and others². Some examples are provided where this hybrid approach is being trialled through Australian aid-funded initiatives, along with perspectives on how it may be applied in future.

MSD basics

MSD is an approach to development based on the ‘market system’ conceptualisation shown in Figure 1. While value chains are at its core, the market system also includes a set of supporting functions delivered and/or resourced by key actors such as government, the private sector and relevant organisations, as well as the policies, regulations and norms that shape market participation and outcomes.

Figure 1: The Market System



Source: The Springfield Centre (2009)

An MSD program begins with a thorough analysis of market systems of particular relevance to the poor – identifying key market participants, constraints and opportunities. It then seeks to facilitate pro-poor improvements in market operations, working with and through specific market actors who have the potential to generate change. These are often private businesses, but can also be the public sector, producer associations or less formal bodies such as farmer or women’s groups.

An important distinction between MSD and more traditional development approaches is that MSD programs seek to stimulate or *facilitate* change through existing market

² USAID (2012, p.2): ‘*Push strategies* are designed to facilitate the transition of the very poor out of a cycle of extreme poverty into a place where they can invest in livelihood streams (e.g., through building household assets, improving social protection, or strengthening capacity to manage risk). *Pull strategies* provide incentives for the more gainful participation of the very poor in economic opportunities so they can continue to improve their wellbeing beyond a project’s life (e.g., by creating less risky entry points or lowering barriers to market entry).’

actors, rather than directly delivering solutions. Consequently, improvements are not dependent on continued donor support.

Achieving scale through systemic change

While MSD programs may appear to comprise a set of relatively small-scale, local level partnerships and interventions, these are always part of a broader strategy to effect fundamental market change in a way that benefits large numbers of poor women and men.

‘Systemic change’ is defined in various ways – some focus on changes in rules and supporting functions, others on changing incentives for market participants, or the structure or dynamics of the system. Scale is one important dimension, but the qualities of sustainability, resilience, inclusion and local ‘ownership’ of the changes are also necessary (DCED 2014). Most importantly, MSD programs need to articulate what changes they are striving to bring about, and how their activities will contribute (Box 1).

Box 1: Systemic change guidance

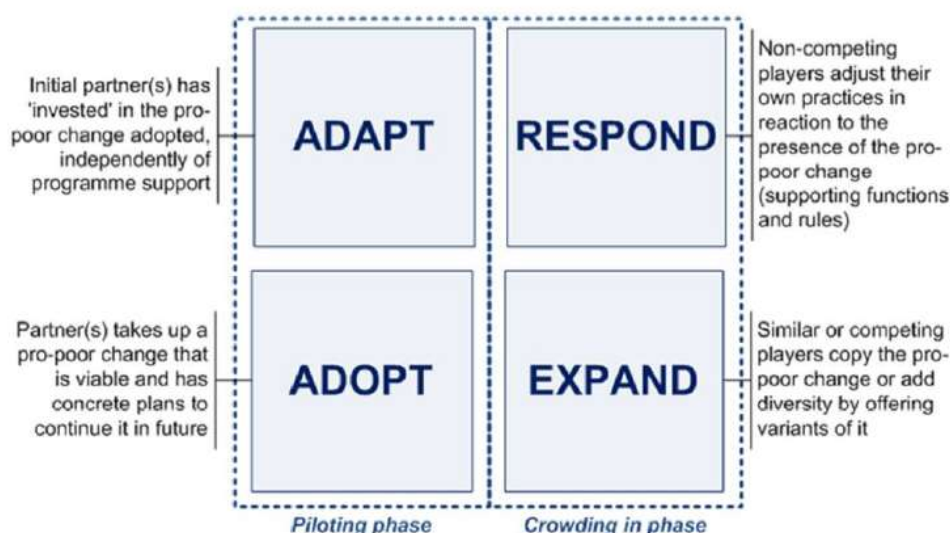
*Programmes aiming at systemic change should articulate an **ultimate vision** for the market, which states what changes they expect to see in the market system and for the target beneficiaries. The programme should also specify a **causal pathway**, to explain how they expect their activities to contribute to this change. This pathway should specify the incentives that different market players have to change behaviour, the mechanisms through which innovations and learning can be transferred from one market player to another, and how programme interventions are expected to influence behaviours, relationships, incentives, rules, or capacities. It is likely to differ from market to market, and potentially even from intervention to intervention....*

...Perhaps the most important aspect is how the pathway is used and updated, in the light of experience and results – more than the exact format of the initial pathway (which could be discussed indefinitely).

(DCED 2014, p.6)

Approaches to systemic change, and frameworks for assessing its success, are necessarily context specific. The commonly-used Adopt/Adapt/Expand/Respond (AAER) framework (Figure 2) is based on ‘copying’ and ‘crowding in’ responses by market actors not directly involved in the MSD program but who become aware of the new benefits and opportunities. In ‘thin’ or less developed markets, alternative tools and approaches focus more on developing multiple complementary interventions within a given sector, and using more flexible forms of support or linking to other programs to strengthen ‘market-readiness’. (This is discussed further in the Results section below.)

Figure 2: The Adopt/Adapt/Expand/Respond framework for systemic change



Source: DCED 2014, p. 5; based on approaches developed by the Springfield Centre.

Measuring impacts in MSD programs

The outcomes of market interventions undertaken through MSD programs are hard to predict in advance and evolve through the life of the program. Consequently, a strong emphasis on monitoring and results measurement is essential – not only for reporting to funders but, even more importantly, to feed back into the implementing team's analysis and decision making cycles.

MSD programs generally use the results measurement standard developed by the Donor Committee for Enterprise Development (DCED).³ This provides a framework and tools for systematic results monitoring, based on proven good practices in private sector development. The DCED also offers optional external audits to further enhance the credibility of results reported.

Elements of the DCED Standard are outlined in Box 2. For each intervention (or partnership), the expected market response is mapped out in a results chain, with assumptions clearly articulated and a hierarchy of indicators identified. Individual results chains sit within a broader sector strategy. The program's results measurement system needs to capture inputs, outputs and outcomes of particular interventions, facilitate aggregation across interventions, account for other relevant market information, and provide a clear methodology for measuring attribution. The results measurement system allows program managers to regularly re-assess progress and assumptions and adjust strategies and approaches accordingly.

³ <https://www.enterprise-development.org/measuring-results-the-dced-standard/>

Box 2: The elements of the DCED Standard (DCED 2017)

1. Articulating the results chain
2. Defining indicators of change, and other information needs
3. Measuring attributable change
4. Capturing wider changes in the system or market
5. Tracking costs and impact
6. Reporting costs and results
7. Managing the system for results measurement

MSD in Australia's aid program

By 2004, agriculture accounted for just 3.5 per cent of global official development assistance (ODA) – down from a high of about 18 per cent in 1979 (World Bank 2007, pp. 41-42). While there were several reasons for this, one factor was the mounting evidence that traditional agricultural and rural development initiatives, focused primarily on boosting production, were often failing to achieve the desired long-term benefits for the poor.

The 2008 global food price crisis spurred renewed donor interest in, and funding for, agricultural development. Meanwhile, a new global literature was emerging on the 'making markets work for the poor' (M4P) approach.⁴ Early flagship applications of M4P, such as the Katalyst program which began in Bangladesh in 2002, demonstrated the potential of this new way of working.⁵

Australia's first foray into M4P/MSD was the Cambodia Agricultural Value Chain (CAVAC) program, beginning in 2010.⁶ This was followed in 2011 by the multi-country Market Development Facility (MDF), which began in Fiji in 2011 and expanded to Timor Leste in 2012, Pakistan in 2013, and Sri Lanka and Papua New Guinea in 2015.⁷ A 2012 review of rural development programs funded by Australian aid reaffirmed the value of adopting a market-focused approach to the sector (Commonwealth of Australia, AusAID, 2012). Australia's largest MSD program, the Australia-Indonesia Partnership for Rural Economic Development (AIP-Rural), was initiated in 2013.⁸ These three programs have all now entered, or are preparing for, follow-up phases, while several others using the MSD approach have recently commenced (see Figure 3).

⁴ The UK-based Springfield Centre (<https://www.springfieldcentre.com/>) was a significant driver of this approach, now more widely known as MSD.

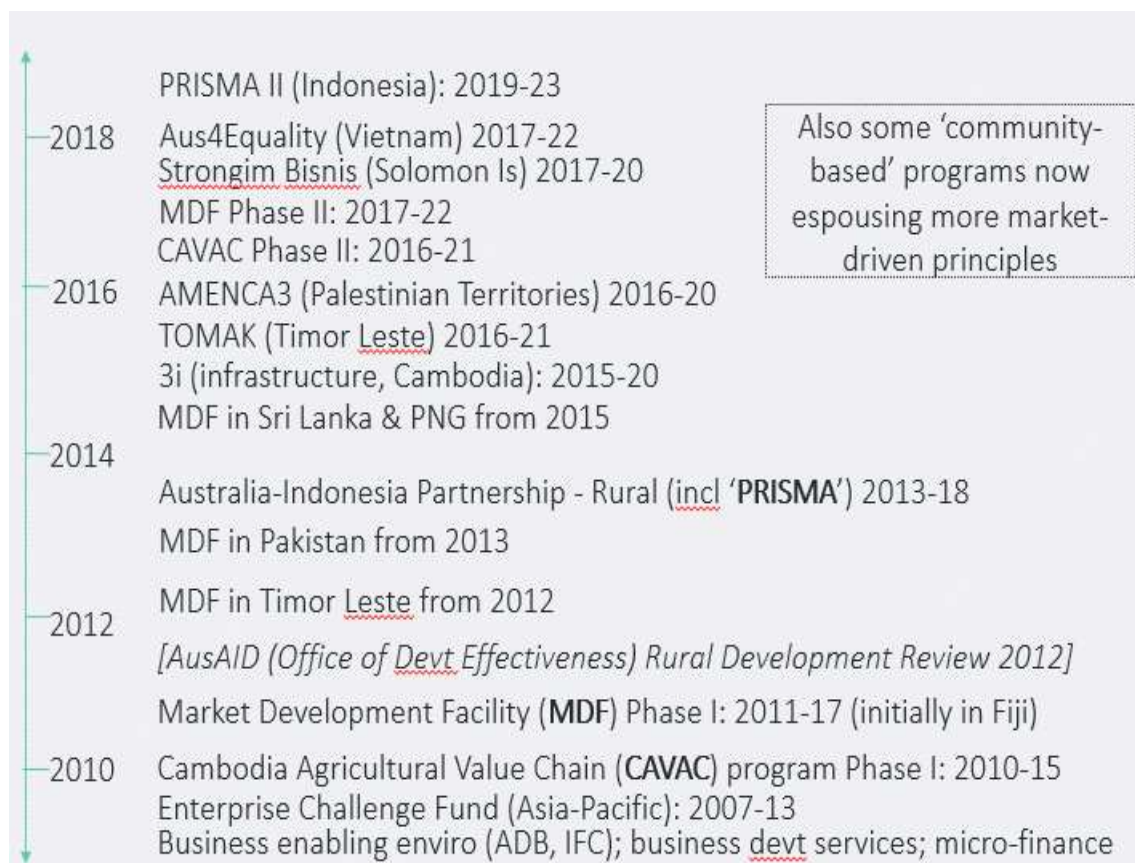
⁵ <http://katalyst.com.bd/>.

⁶ <https://cavackh.org/>

⁷ <http://marketdevelopmentfacility.org/>

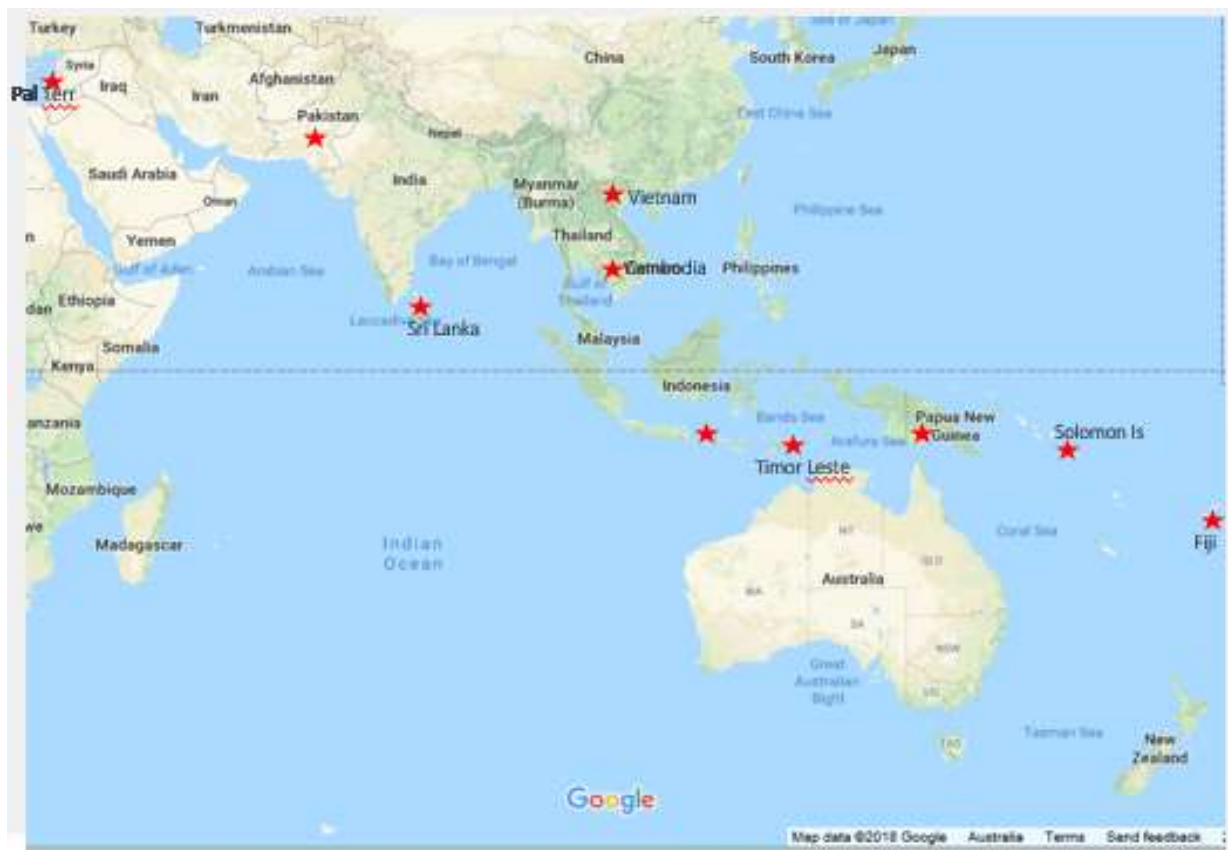
⁸ <https://aip-rural.or.id/en>

Figure 3: Timeline of MSD initiatives in Australia's aid program



Australia's current MSD initiatives span a wide variety of geographies and economies, from dynamic middle-income countries in South and South-East Asia to the relatively 'thin' markets of Timor Leste and the Pacific (Figure 4). This provides a good basis for assessing the value of the approach and deriving 'lessons-learned' across a range of contexts.

Figure 4: Current Australian MSD initiatives



Results of MSD programs

The global evidence

The donor-funded BEAM Exchange collates and presents impact evidence from a wide range of MSD programs worldwide.⁹ In a recent synthesis report, BEAM Exchange (2017) noted that the complexity and specificity of each program makes comparisons and generalisations difficult. They also found that while many programs offered case studies and intervention-level reporting, there are not yet many independent, program-level impact assessments. Nevertheless, having assessed around 100 of the more robust evidence documents available, they were able to conclude that MSD is ‘achieving results in promoting economic development, improving access to services and reducing poverty’ (BEAM Exchange 2017).

The BEAM review found evidence of systemic change across a range of contexts and geographic scales (both national and sub-national).¹⁰ There were more, and

⁹ <https://beamexchange.org/resources/evidence-map/>

¹⁰ Six specific examples were assessed: PROpCom tractor market intervention, Nigeria; FIT programme’s support for radio programmes about business, Uganda; Financial Sector Deepening Kenya; Micro, Small and Medium-Size Enterprise Business-Enabling Environment, Cambodia; Bangladeshi vegetable seed market; Ethiopian Agricultural Growth Programme – Agribusiness and Market Development.

earlier, impacts on the markets' supporting functions – such as availability of new services, technologies, information – than on the underlying 'rules' (see Figure 1). The 'expand' segment of the AAER systemic change framework (Figure 2) was evident more often than the 'adapt' or 'respond' segments. These results are not surprising: adaptations by program partners take time and may only be observable well after the program activities have concluded, while changes by 'non-competing players in supporting systems' will generally be more difficult to capture within programs' normal monitoring frameworks.

Notable from the BEAM report was the limited discussion of poverty impact across reviewed MSD programs. The report concluded that such programs are 'valid' for promoting poverty reduction and 'can' help the poor access services, but did not observe any such impacts. Given all such donor-funded programs are oriented towards making markets function more effectively for and with the poor, further assessment of their poverty impacts is clearly required.

The BEAM overview included only one Australian-funded project – a 2009 review of the Enterprise Challenge Fund¹¹ (which concluded in 2013). Only eight per cent of the documents it reviewed were from South East Asia or Pacific region, while a further 19 per cent were from South Asia. The authors noted the need to expand the evidence base to address more in-depth questions, such as 'who benefits', and 'how and in what circumstances MSD can be most effective'.

The DCED also presents evidence from a range of MSD and other private sector development and engagement programs, focusing on particular steps in the results logic.¹² However, the syntheses of most relevance to MSD simply highlight a few positive (and somewhat dated) examples.

The current paper, and more detailed analysis planned in coming months, is intended to contribute to building a robust evidence base on MSD, particularly from the region of most interest to Australia, the Asia-Pacific.

Evidence from Australia's MSD programs

Cambodia Agricultural Value Chain (CAVAC) program (Phase I, 2010-15)

The objective of CAVAC I was to accelerate growth in the value of agricultural production and smallholder income in rice-based farming systems in three Cambodian provinces. Phase I had two main components: agribusiness development and water management (irrigation systems). By the time Phase I concluded in 2015, around 215,000 farming households had changed their farming practices as a result of CAVAC's interventions. The project expected this number to continue growing as its partners maintained their own activities, resulting in final

¹¹ Available here: <https://www.springfieldcentre.com/mid-term-review-of-ausaids-asia-pacific-enterprise-challenge-fund/>

¹² For instance, donor support changes firms' behaviour; this leads to improved or cheaper products and services for poor people. See <https://www.enterprise-development.org/what-works-and-why/evidence-framework/>

‘outreach’ of around 340,000 households by the end of 2017¹³ (CAVAC, undated). CAVAC Phase II is now underway.

A major focus of CAVAC’s agribusiness component was in the fertiliser market (Table 1). CAVAC provided initial training on technical and farmer engagement methods to twelve fertiliser companies, and then supported seven companies’ own training and on-farm demonstration activities. These interventions aimed to improve farmers’ access to quality information on fertiliser use, both directly from company representatives and via those companies’ wholesale-retail distribution networks.

A recent independent evaluation of Phase I (DFAT 2017) noted that CAVAC’s fertiliser interventions shifted the mindsets and practices of its partner companies and led to retailers being better informed and equipped to advise farmers. CAVAC estimated that rice yields increased by at least 4.4 per cent as a result, giving 96,000 t of additional production. However, CAVAC’s own reporting highlighted the great diversity in both fertiliser use and yields across the farmers sampled. CAVAC did not provide estimates of income gains attributable to the project.

Table 1: Systemic change in Cambodia’s fertiliser market¹⁴

Before CAVAC	CAVAC intervention	Result
Big fertiliser companies competed on price; little other support to retailers or farmers	Provided training on technical and farmer engagement methods to twelve fertiliser companies, then supported seven companies’ retailer training and on-farm demonstration activities	Company mindsets and practices shifted from basic product promotion to providing detailed information on product use. They remain aware of benefits of retailer and farmer training. Most continue to do so, both within and beyond the original project area.
Retailers sold farm inputs but not equipped to advise on use	Company training as above; also worked with government on its training of agro-input dealers	Retailers recognised by farmers as a source of sound advice on product use. Some outlets have company reps regularly on-site
Farmers used fertiliser but poor access to information or advice on appropriate use. High input costs but low yields	Facilitated on-farm demos as above	Farmers’ access to quality information has improved. >139,000 households changed farming practices by end-2015 (projected 245,000 end-2017). Yield impact ~4.4% (variable); 96,000 t additional production; Income gains n/a.

Market Development Facility (MDF Phase I, 2011-17)

The objective of Phase I of the Market Development Facility (MDF) was to achieve a sustainable increase in employment and incomes for poor women and men. MDF

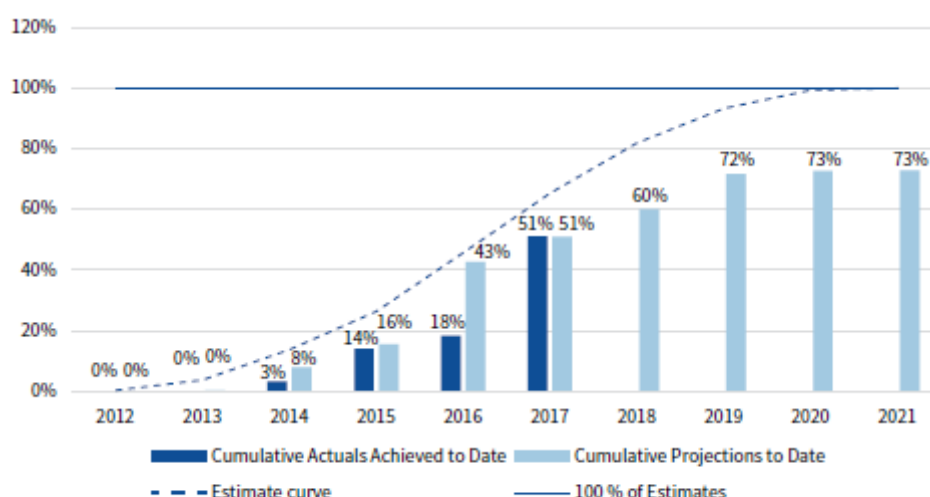
¹³ DCED methodology supports the continued counting of project impacts for up to two years following project completion.

¹⁴ Compiled from information in DFAT (2017b).

commenced in Fiji in 2011, subsequently expanding to Timor-Leste (2012), Pakistan (2013), Papua New Guinea (2015) and Sri Lanka (2015). Phase I concluded in mid-2017 and Phase II is now underway.

As with CAVAC, MDF's projections are based on actual measured results plus an assessment of the on-going benefits that would be generated through existing interventions. This is illustrated in Figure 5 below for Fiji.

Figure 5: Results curve for 'additional income' indicator, Fiji



Source: Palladium (2018), p. 44

Based on partnerships signed by the end of 2016 across all five countries, the MDF implementing team projected that MDF I would result in over US\$111 million in additional income for 200,000 men and women (Table 2). MDF's direct contributions of just over USD4 million through its 125 partnerships were projected to leverage over USD10 million in private sector investment (a leverage ratio of 2.5).

Table 2: Key results from MDF I (Cardno 2017)

Indicator	Confirmed results end-2016	Projected final results from partnerships underway end-2016
Partnerships	125	125
MDF investment (USDm)	2.523	4.105
Private sector investment (USDm)	7.815	10.363
Value of additional market transactions (USDm)	20.155	61.930
Effective outreach* incl jobs	24,170	200,310
Additional jobs (FTE)	549	2,789
Additional income (USDm)	13.275	111.557

* Individual beneficiaries of new income opportunities

MDF I sought to achieve systemic change through 'strategic positioning of a series of partnerships, each reinforcing the other to break down barriers to pro-poor growth'

(Cardno 2017). With the program operating across five very different countries, it tailored its approaches and areas of emphasis to reflect local circumstances.

MDF found that the traditional ‘crowding in’ approach, reflected in the AAER framework of Figure 2, could most readily be applied in large markets such as Pakistan and Sri Lanka. For example, a few MDF partnerships in the livestock fodder market in Pakistan stimulated dozens of other entrepreneurs to adapt and expand MDF’s small-bale silage model, while other businesses responded by offering complementary products and services such as machinery hire (Box 3).

Box 3: Silage in Pakistan

Despite having a significant livestock population, the dairy and meat sectors in Pakistan are not close to achieving their potential. MDF’s sector assessment identified poor animal nutrition as the key constraint to livestock productivity.

Nutritious fodder, such as silage, could improve livestock productivity, but various factors prevented small-scale farmers from either producing or purchasing silage. Existing incentives and awareness raising schemes to promote silage use had not succeeded.

MDF developed a new business model with significant incentives for small-scale farmers to purchase silage, and for medium-scale farmers to commercially produce and sell silage. The innovation was to produce a silage bale at a size and price suitable for small-scale farmers (60kg bales), and distributed appropriately.

After working with several business partners and various silage entrepreneurs, MDF started seeing early signs of systemic change. Its activities were the stimulus for at least 60 independent entrepreneurs to ‘crowd in’. More than 40 of these independently improved and adapted MDF’s initial business model. Dedicated machinery rental businesses also entered the market. Medium to large companies also offered machinery rental services for their customers. The sector has seen more than 16 businesses launch new products and services that complement and support the 60kg silage bale.

Source: Adapted from: MDF Systemic Change Case Study; Cardno 2017, p. 12

In contrast, in the ‘thinner’ markets of Timor Leste there were few competing or complementary businesses able to copy or respond to innovations introduced through MDF. Through its initial partnerships in agribusiness, manufacturing and tourism, MDF concluded that effecting change in the broader market system would require addressing broader constraints facing the private sector. In particular, existing and potential entrepreneurs lacked financial and business management skills and there were few appropriate financial products available to them. Opportunities for interaction between private investors and policy makers were also very limited. These observations led to new MDF interventions involving financial institutions, the investment promotion agency, and the National University of Timor Leste.

Australia-Indonesia Partnership for Rural Economic Development (AIP-Rural)

The objective of AIP-Rural (2013-18) is to increase the agricultural incomes of at least 300,000 poor smallholder farmers by 30 per cent by stimulating greater private and public sector investments that create better access for farmers to inputs and markets. It operates in five provinces: East Java, NTB, NTT, Papua and West Papua. AIP-Rural’s current phase comprises four related projects, the largest of

which is Promoting Rural Income through Support for Markets in Agriculture (PRISMA). A follow-up project ('PRISMA2') is in preparation.

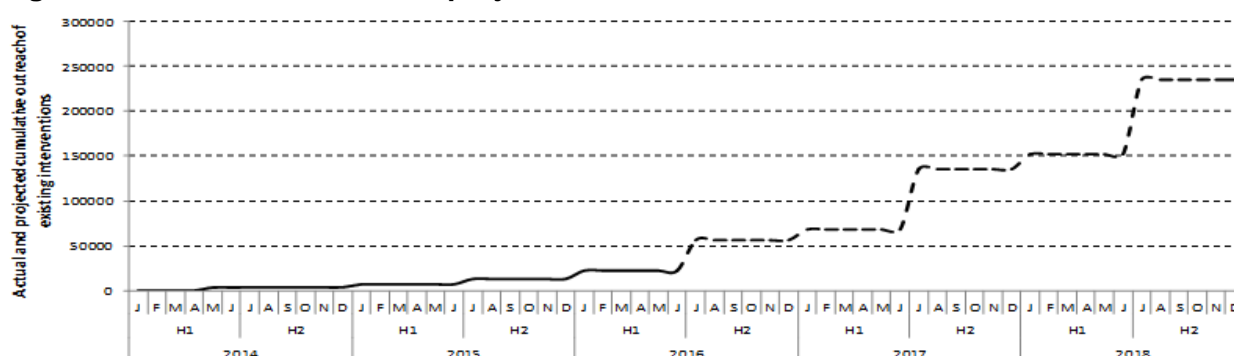
A mid-term review (MTR) found that PRISMA in particular was performing strongly, and the overall program was on track to meet its ambitious targets (DFAT 2016). The MSD approach was assessed to be delivering value for money and showing strong signs of generating sustainable change. However, many interventions were still at a relatively early stage, so definitive evidence of wider systemic change was not yet available. Most interventions remained focused on demonstrating viable business models at local level. A few of the locally-successful partnerships were beginning to generate broader market response (eg pigs – Box 4).

While PRISMA's initial efforts focused primarily on inputs and agricultural practices, the MTR identified a need for further complementary work on 'other types of constraints, relating to processing, quality control, marketing and sector coordination. These types of supporting functions and rules are important for locking in and rewarding sustained productivity and quality, and help to ensure that sub-sectors are able to adapt to changing circumstances over time – that is systemic change' (DFAT 2016, pp. 24-25).

By mid-2016, AIP-Rural's program interventions had improved the access of around 100,000 households to agricultural innovations, while attributable income increases of over 40 per cent could be demonstrated for 22,273 households.¹⁵ Over 68,000 individuals had benefited from the higher income – 32 per cent of whom were women, and 45 per cent of whom were categorised as 'poor' (earning under USD2/day PPP). In addition, 578 small businesses in the target regions had increased their turnover.

The trajectory of actual and projected outreach (income impacts) from AIP-Rural is illustrated in Figure 6, based on interventions as of mid-2016. This does not include results that would be generated from pipeline or other future interventions.

Figure 6: AIP-Rural: actual and project outreach* as of mid-2016



* AIP-Rural defines 'outreach' as the number of households with at least 30 per cent net attributable income increase.

Source: DFAT 2016, p. 9

¹⁵ As of December 2017, this had risen to around 125,000 households with attributable income increases of nearly 150 per cent (pers. comm. Australian Embassy, Jakarta).

Box 4: AIP-Rural: Early signs of systemic change: pigs in NTT

In East Nusa Tenggara (NTT) province – which produces 25% of Indonesia's pork – PRISMA has been engaging with a range of private sector partners to improve productivity and market opportunities. The AIP-Rural MTR identified progress in PRISMA's pig interventions with reference to the AAER systemic change framework, as follows:

- **Adopt:** PRISMA worked with pig breeders and a veterinary services firm to encourage breeders and farmers in Flores to use higher quality breeds and improve husbandry practices. Feed companies were supported to supply and distribute quality feed mixes through their various distributors and major clients, who in turn were supported to provide information to farmers on how to improve practices. As a result, young pigs reached marketable size much more quickly, selling prices increased as a result of the improved quality, and farmers' time spent on pig rearing (eg collecting feed) declined significantly. Feed retailers also benefited from increased sales.
- **Adapt:** Encouraged by the early adoption results and signs of commercial potential, feed companies invested in their distribution and retail networks and introduced smaller pack sizes and new feed mixes suited to the local breed. Breeders invested in improved facilities and artificial insemination and now act as feed agents. Some farmers have become breeders themselves. One feed company hired local field staff and developed their own information leaflets. Another invited its agents to its feed mill as part of a learning and branding strategy.
- **Expand:** All eight main breeders in Flores have adopted the new rearing 'model'. Three additional feed companies have independently entered the market, with some planning to expand into other parts of NTT. Feed sales have increased through a broad network of agents, sub-agents and other actors. This is improving penetration of feed and information into remote areas.
- **Respond:** Over time, other market actors have become supportive of the new model. Banks and credit unions now target lending to the sector. Pig traders are better informed and provide information to farmers. Opportunities to sell fattened pigs are expanding. Some butchers and retailers are beginning to differentiate by quality – paying by weight rather than visual estimates, and making premium cuts available. At least 22 restaurants have expanded their pork menus. Some are developing or considering contract farming relationships with smallholder pig farmers, who will have access to bank credit. At least two feed companies are exploring possibilities for developing local pork processing businesses.

PRISMA's next areas of focus were expected to include end-market functions, such as trading and contract farming, slaughter and butchery, and processing and catering, as well as expansion to other parts of NTT.

Source: adapted from DFAT (2016, Box 6, p. 26)

Gender and women's economic empowerment

Approaches to gender issues in MSD programs have become more sophisticated over time – from a basic 'do no harm' approach and counting of male and female program participants, through to a recognition that effective programs also need to deliver economic empowerment of women.

Australia's MSD programs have explicit women's economic empowerment objectives and consider gender dimensions throughout the program cycle. For example, initial analysis of the market system addresses the implications of gender-based roles and norms; specific opportunities are sought that will promote women's empowerment (eg targeting value chains where women play major roles); and impacts are explicitly monitored and measured, capturing both 'access' (to opportunities, assets, services, support) and 'agency' (socio-cultural dimensions affecting decision-making authority and influence, and manageable workloads).

There are also examples of programs such as MDF helping businesses improve their commercial outcomes through changes in practices that benefit women. A few of these are outlined in Box 5 below.

Box 5: Women's Economic Empowerment through MDF

MDF developed a women's economic empowerment framework in 2015 to help it become 'more deliberate in the inclusion of women throughout the project life cycle', including in selecting priority areas of focus, and to 'bridge the gap' between theory and implementation (Market Development Facility 2017, p. 4). Women's economic empowerment is an important element of MDF's definition of systemic change (Ibid, p. 1). Examples of MDF partnerships aimed at empowering women include:

*In **Fiji**, MDF supported an apparel firm to introduce an employer-sponsored childcare facility on-site, as a means to address staff shortages and improve retention. The childcare facility generated interest by other garment and urban based industry companies to offer similar services.*

*In **Timor-Leste**, MDF partnered with an agro-input retailer to design smaller pesticide sprayers that were easier for women to handle. MDF encouraged the agri-business partner to interact more with its customer base, including women. The business shifted its perspective on women's roles in the sector and identified commercial opportunities related to reducing women's workload.*

*In **Pakistan**, an MDF partner established a women-only work facility with flexible hours to increase production of pitted dates. This set an important precedent in an area where gender norms traditionally kept women in the home with few economic opportunities, at the same time allowing the business to increase its production. Separately, MDF worked with a footwear manufacturer to create a women-only work-line led by an experienced female supervisor. In an industry where companies saw the value of hiring more women, but were hesitant to do so due to reputation challenges in a conservative culture, this innovation demonstrated a way forward for the industry.*

*In **PNG**, MDF partnered with a fresh produce company that paid its suppliers through bank accounts. As few women (relative to men) had bank accounts, women were restricted from supplying to the business. MDF supported the company to expand its network of women fresh produce suppliers by delivering financial literacy training and finding ways to make it easier for women to open bank accounts.*

*In **Sri Lanka**, MDF worked with the country's only Fair Trade-certified handloom company, Selyn, to foster increased women's economic participation. Of Selyn's employees, 95 per cent were women. MDF assisted Selyn to develop marketing material to support their participation at the New York Now 2016 Trade Fair; and to hire a Business Development Consultant to help grow the business, strengthen their market profile, and develop a coherent strategy to target new markets. MDF's engagement with Selyn created direct income-earning opportunities for women as handloom weavers and artisans.*

Source: Examples adapted from Cardno (2017, pp. 65-66)

Discussion

Impact and systemic change

The evidence presented above indicates that the Australian and other MSD programs reviewed are broadly 'on track' in terms of delivering intended development outcomes. Reported indicators show that relatively small investments can impact large numbers of beneficiaries, in terms of outreach (variously defined), farming practices and/or incomes. Moreover, the experience of MDF and other MSD programs shows that making improvements to markets is feasible across a wide range of economic settings. Flexibility and adaptation to local circumstances is key.

Because MSD programs work through market actors rather than directly 'delivering' benefits, their results trajectories typically start slowly and can take a number of years to demonstrate their full potential. This can be a challenge for both funders and partner governments accustomed to more immediate evidence of success. Australian MSD programs generally report a number of more rapidly-available intermediate indicators to provide reassurance of progress.

Importantly, in addition to achieving 'outreach' to their target populations, programs such as CAVAC, AIP-Rural and MDF are firmly focused on, and driven by, an intent to generate broader systemic change. This is evident in the way they articulate program and sector strategies and intervention results chains, and in the way they use monitoring and results measurement to guide and adapt their approaches.

However, it remains challenging to move from local-level changes to more far-reaching 'systemic' change. Deliberate efforts are needed to identify, record and analyse broader market responses, including outside the project area and after project completion. Some specific examples of systemic change are beginning to emerge, but the current evidence base remains somewhat anecdotal. Furthermore, the MSD community is still grappling with defining and assessing systemic change¹⁶.

An interest in achieving greater scale of impact has also led to alternative approaches such as inclusive business platforms¹⁷ and impact investing programs¹⁸. In some circumstances, local MSD programs may be able to draw on these other initiatives in order to expand their policy influence, foster wider dissemination of innovation by major private sector partners, and assist smaller partners to 'graduate' to alternative sources of finance. In Indonesia, for example, AIP-Rural staff participate in relevant working groups of Grow Asia's country platform, PisAgro.¹⁹

¹⁶ See for example Miehlbradt and Posthumus (2018).

¹⁷ Such as Grow Asia: <https://www.growasia.org/>

¹⁸ Such as Pacific Rise (<http://www.pacificrise.org/>) and the forthcoming Emerging Markets Impact Investment Fund (<http://dfat.gov.au/about-us/business-opportunities/tenders/Pages/emerging-markets-impact-investment-fund-tender.aspx>)

¹⁹ <https://www.growasia.org/indonesia>

Strengthening the approach

As noted above²⁰, the BEAM Exchange (2017) review was unable to conclude that poverty impacts are an observed result across MSD programs. Australia's experience shows that such programs can expand producer and consumer markets to include more of the poor, and can deliver income benefits to the poor. However, these programs generally recognise that they cannot expect to reach those beneath a certain threshold, often referred to as the 'poorest of the poor'. Private sector-driven market expansion has an incentive to extend any 'downwards' integration towards the more capable amongst the poorer communities: those with some assets and finance, some risk protection, a minimum level of education and access to information, and a degree of entrepreneurship and empowerment.

The rallying cry of the 2030 Agenda for Sustainable Development – 'leave no one behind' – is reason to look further into how Australia can better facilitate the sustainable (and fair) participation of the very poor in agricultural and other markets.

One hypothesis is that Australia could draw on the power of community-based approaches to help link smallholder farmers, poor communities and vulnerable people to private sector markets. Australia already funds such projects, notably through non-governmental organisations (NGOs), particularly through the Australian NGO Cooperation Program (ANCP, which invested AU\$127.3m in 2016-17). However this type of 'direct delivery' is traditionally seen by MSD advocates as being a recipe for unsustainable impact. As stated above, MSD programs generally do not provide direct benefits to communities, working instead through intermediaries, such as private sector companies. However, the perceived dichotomy between the MSD approach and a community-based market linkages approach may require re-examination. There is emerging evidence²¹ that Australian-based NGOs have continued to adapt their approaches and market analysis such that direct delivery can be more effectively phased out as sustainable linkages are made between poor communities and value chains.

Australian NGO engagement with market development

NGOs in Australia are increasingly orienting their rural development work towards facilitating the beneficial integration of smallholder producers into agricultural markets. Some examples of contemporary approaches are provided below, covering: the Australian Council for International Development (ACFID, the peak body for Australian NGOs working on international development), Oxfam International Australia, World Vision Australia (WVA), Fairtrade Australia New Zealand (FTANZ) and CARE Australia.

²⁰ 'Global Evidence' section

²¹ Of the 39 projects marked as having a 'rural development/agriculture' focus in the Australian NGO Cooperation Program in 2017-18, six specifically referred to markets in the short project description. A further three agricultural projects marked as having a 'livelihoods' or 'food security' focus also referred to markets in the short project description. Four of these projects were managed by World Vision, with four other NGOs managing the remainder.

- ACFID (2016) promoted the work of Australian NGOs in sustainable and inclusive economic development, claiming that NGOs play a ‘key role’ in helping communities understand and take advantage of markets by building trust, creating new linkages with market actors, introducing new technologies and improving smallholder market power. ACFID noted that its member NGOs have a particular focus on increasing inclusion of women and vulnerable groups, including by creating sustainable access to financial services and building economic resilience in the aftermath of disasters. Across its livelihood efforts, ACFID pointed to the importance of small-scale producers, in particular women, as providing an opportunity to stimulate markets, address poverty and improve food security.
- Oxfam Australia has long recognised the power of linking smallholders to markets, establishing Oxfam Australia Trading (OAT) in 1962. OAT has established a parallel but influential international market that provides direct benefit to more than 130 producer organisations in 39 countries, as well as a ‘demonstration effect’ that raises consumer consciousness about ethical treatment of smallholder producers. This complements Oxfam International’s broader approach for the development of smallholder supply chains, which has a dual focus on ‘supporting the development of smallholder enterprises that create linkages with multiple markets’ and on developing the markets themselves²². They achieve this by helping traders adapt business models so they are more inclusive of smallholder farmers, especially women; building smallholders’ power to influence governments and market actors; and facilitating the provision of appropriate financial and agricultural services.
- In addition to publishing recent papers on Inclusive Market Systems Development (World Vision Australia 2018) and Inclusive Aid for Trade (World Vision Australia 2017), WVA currently has the largest footprint of explicit market-linkages programs across DFAT’s ANCP rural development portfolio. This is in line with WV International’s Local Value Chain Development (LVCD) project model, which seeks to help smallholder and vulnerable farmers to ‘analyse markets, gain information, build relationships and act collectively to overcome market barriers and increase profits’ (World Vision International 2015). The model has four key components: participatory market analysis; helping producers work collectively in groups; empowering and training producers; and facilitating links to market actors and service providers (World Vision Australia 2014). Activities such as group formation, farmer training and relationship brokering are emphasised.
- FTANZ uses the Fairtrade International certification model to ensure that smallholder producers are organised into inclusive and democratic cooperatives and that buyers and traders pay them a fair price that enables producers to farm sustainably, without resorting to child labour. This compliance-driven fair trading model ensures that smallholders benefit from international trade, and a premium payment to cooperatives provides

²² <https://policy-practice.oxfam.org.uk/our-approach/private-sector/smallholder-supply-chains>

additional assets that can help producers incrementally improve their productivity and development status²³.

- CARE Australia's policy on linking smallholders to markets is less explicit, but in 2016 it commenced a market linkage program for smallholder cocoa farmers in Papua New Guinea: the Bougainville Cocoa Families Support (BECOMES) project (CARE 2016). BECOMES aims to build the capacity of smallholder farmers, increase their level of 'cooperation and collective action' and encourage the cocoa industry to be more 'responsive' to and inclusive of smallholder farmers. The focus of the program is on women smallholders, attempting to make them more visible, competent and recompensed for much of the unrecognised but critical work they undertake in the cocoa supply chain. While the majority of project resources are focussed on working directly with women, BECOMES also intends to work with government and the cocoa industry to create new women-friendly market opportunities so that 'top-down meets bottom-up'. One of the innovations in the approach is to create a higher quality and more inclusive market for extension service provision.

A common thread through these contemporary NGO approaches is that the following elements are essential to improving the sustainable inclusion of smallholders in private sector agricultural markets:

- Increased capabilities, knowledge and assets of smallholders
- Improved access to quality services (e.g. inputs, extension, finance, transport)
- Expanded organisation, aggregation and market power for smallholders
- Sustainable and fair linkages between producers and private sector market actors
- Ability to retain or regain fair market access when faced with shocks (economic, natural disaster, conflict)

Limitations of an exclusive private sector-driven approach to MSD

This part of the paper proposes a set of reasons why 'pure' MSD programs may be struggling to address deep poverty and contrasts this with more traditional community-based approaches that seek to address poverty directly through community development.

a) Understanding of poor communities and effecting behaviour change

While MSD programs carry out 'poverty analyses' through surveys and other formal intelligence-gathering exercises, they typically do not directly engage with poor communities. There is therefore limited program knowledge of the underlying drivers of poverty, the attitudes and incentives and sociological constraints on advancement. MSD programs typically rely on intelligence from private sector actors to understand the relevant dynamics of poverty for a particular value chain or market segment. Australia's MSD programs have sought to employ professional market analysts and 'deal-makers' who tend to be drawn from a local elite. This limits the ability of these programs to gain a rich understanding of the complex dynamics of rural poverty, and

²³ <http://fairtrade.com.au/What-is-Fairtrade>

may lead to simplistic understanding of barriers to market entry by the poor rather than profound insights. Assumptions of a pure profit motive often don't play out in poor communities²⁴, and even when a market is made 'accessible' to the poor there could be numerous reasons they choose not to take up those opportunities. Only by investing effort in understanding community disincentives to engage can these hidden market barriers potentially be overcome.

Australian-funded NGO programs often commence operations by engaging deeply with intended beneficiary communities. They conduct socio-economic mapping with the communities, analysing strengths, weaknesses, opportunities and threats and developing demand-based plans for development. They often directly employ staff from intended beneficiary communities. Through the course of the project they will remain deeply engaged with those communities to be able to track how well the development interventions are playing out and address blockages to realisation of objectives. This may lead to an over-emphasis on meeting community needs at the expense of ensuring effective alignment with emerging market opportunities, but often this deeper level of connection will be necessary to effect behaviour change by the very poor.

b) Women's economic empowerment (WEE)

Empowerment and economic advancement are two sides of the same coin. Giving a woman greater income can help with economic advancement, but without improving her empowerment, she will be unlikely to benefit sustainably from the increase in income. Australian funded MSD programs would not invest directly in building a 'sense of' empowerment amongst women. This may be why, despite great effort, private sector-driven MSD programs can struggle with WEE²⁵.

The corollary is also true: NGO training workshops that help women believe in their own potential may make a woman feel more empowered, but will not lead on their own to economic advancement. This is why many community-based programs struggle to move from women's empowerment to sustainable WEE with strong poverty impacts.

c) Aggregation of supply, producer market power and social capital

A key constraint to market access by smallholders is the small scale of production. For a smallholder to make the critical step from subsistence to semi-subsistence normally requires finding a way to aggregate their production with others in order to attract buyers interested in economies of scale. The way that aggregation is

²⁴ See Wiggins, S. and Keats, S. (2014). Smallholder engagement with the private sector. EPS-PEAKS-ODI, p.viii: "Poor households probably suffer more from market failures than others. The poor and disadvantaged are most likely to face high transaction costs when dealing with banks, input suppliers and traders; they are most likely to be exploited by monopoly power, since they have few options to circumvent monopolistic intermediaries; they are least likely to have secure rights to the land, water and forests they use."

²⁵ See Humphreys (2014) "There is still some way to go in identifying the best ways to achieve the goal of promoting women's economic empowerment in market systems interventions" including 'underlying empowerment issues', 'overburdening of women and lack of control over the incomes they earn'.

accomplished to a large extent determines the degree to which the smallholder can benefit financially from market access. Intermediary buyers or ‘middle men’ may be essential to creating new market access in the absence of farmer organisation, but often these deliver minimal benefits to the producer (SDC 2012). Where farmer cooperatives and other producer organisations already exist, these can deliver a degree of market power to producers. But while MSD programs often engage with existing organisations, it is generally beyond their scope to get closely involved in strengthening their operations or to establish new ones. The propensity of MSD programs to work primarily with the private sector orients them towards finding scaling solutions that work in favour of the buyer of produce or seller of inputs, potentially at the expense of the producer.

NGO programs are more likely to help producers establish their own organisations to better negotiate favourable market access. Such organisations can be very difficult to establish, and involve the creation of new social capital²⁶. Where they have been successfully established, such as through Fairtrade programs, the benefits flowing to producers can be much more significant. Since the goal is to generate lasting benefits for smallholder farmers, strong consideration of the range of aggregation models available – and a healthy questioning of the models preferred by private sector buyers – is vital.

d) Assets and information

While pure MSD programs are willing to transfer finances to private sector actors to be agents of change for the poor, they would not consider transferring assets or finance directly to the poor. This ‘trickle down’ philosophy is seen by MSD programs as essential for sustainability of impact and the provision of direct assistance to the poor is considered anathema to the approach. This will lock out a substantial population of the poor who cannot access the basic assets such as quality farm inputs, basic farm machinery, storage and warehousing, biosecurity support, transport to market, timely information and the ability to respond to it, and financial services. MSD programs generally do not attempt to reach the poorest populations.

Community-based programs often provide direct asset transfers and/or access to affordable finance to the very poor. Rural livelihoods programs have been doing this for many years and have been able to connect poor communities to higher value markets. However there are also many examples of NGO programs that have not paid sufficient attention to market analysis and understanding of market dynamics, or made the mistake of trying to ‘be’ everything for the community and provide a total solution for market connections. Such an approach is likely to fail when project funding ends. In recent years at least some NGOs have become more effective at linking communities up to private sector input and offtake markets and financial services that can convert newly acquired assets into sustainable market access.

²⁶ See SDC 2012: ‘limiting factors for applying the M4P approach’ include ‘lack of organisation at the producer level’ and a lack of ‘social capital (trust, reciprocity, cooperation)’ <https://beamexchange.org/resources/310/>

e) Vulnerability and resilience

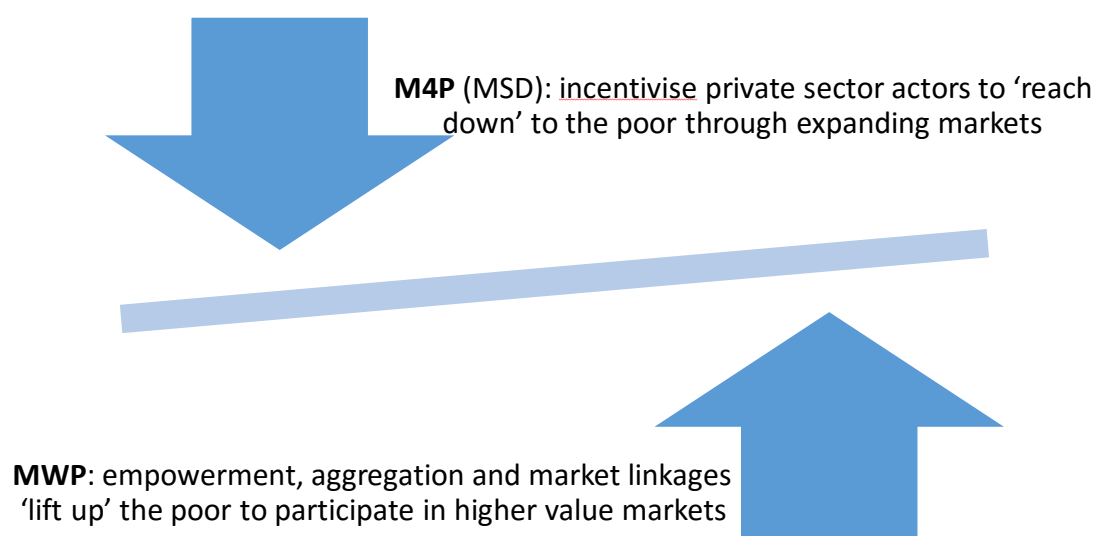
It is clearly necessary to 'shape' markets to better facilitate entry of the poor into those markets. This is a key aim of MSD programs, and they have proven effective in doing so. MSD programs funded by Australia have shown that multiple interventions are necessary to effect systemic change in a particular segment of the market so that benefits can flow to the poor. However, even when such systemic change can be effected, markets are by nature dynamic, and just as the poor were able to enter a market, they can just as easily be ejected from that market, or have their market share dramatically reduced by a private sector actor with much greater resources and business experience. The impact of climate change and the scale of refugee crises are drawing increasing attention to the impact of natural disasters and chronic conflicts on eroding development gains. A cyclone, flood, drought, earthquake or conflict could wipe out market access achieved for the poor – and not just the extreme poor, but any market actor. Those with limited experience of coping with shocks as new market players will likely have less capacity to cope with the shock. MSD programs do not work directly with beneficiaries: markets effectively open up in front of the poor as if out of nowhere. Those that grab this new opportunity may simply find the market door closes again, and without any new coping skills being transferred they can easily fall back into poverty.

As both humanitarian and development actors, many Australian NGOs are skilled at thinking of development through both lenses: helping lift up the livelihoods of communities whilst also giving them skills and promoting positive coping strategies that can help them be more resilient to future shocks. Such efforts, however, are sometimes limited to considering human security and health and education access, but could be expanded to preparing for shocks in key markets that the community relies on for livelihood development.

Potential complementarities: reaching down and lifting up

The above hypotheses need to be tested, but there is theoretical space to accommodate a likely complementarity between the two approaches. This is highlighted, for example, in recent literature on 'push-pull' approaches (eg Garloch 2015; Blaser 2014). While MSD or M4P approaches can help markets reach down to include more of the poor by overcoming market failures that lock them out, 'making markets work *with* the poor' (MWP) approaches can help lift up the poor to make it possible for them to engage sustainably in market activity. This could be characterised as follows:

Figure 7: Reaching down and lifting up



This draws heavily on the ‘push/pull’ concept described by Garloch (2015) for USAID programs, but adds a greater emphasis on building market power for the poor through careful choice of aggregation models and consideration of the need to build resilience to shocks that can eject the poor from new market opportunities. The ‘reach/lift’ terminology also recognises the poor as agents of change rather than objects of market forces, which is more appropriate to DFAT’s broad approach to rural development.

Table 3 is a summary of some of the complementary features of these M4P and MWP programs.

Table 3: Complementarity in summary

MSD/M4P	MWP
External analysis to understand the market dynamics	Insider analysis to understand community dynamics and incentives
Women-specific investments	Efforts to empower women to want to succeed
Expanding the size and relevance of buyer markets	Aggregating and improving quality and consistency of supply
Access to better quality and value of inputs	Effective behaviour change communications to encourage uptake of new opportunities
Can extend markets ‘down’ to those producers who are capable of lifting production	Can help the poorest and most vulnerable communities become market-ready

This gives cause to consider a ‘hybrid’ approach that combines private sector market expansion for the poor with appropriate assets-transfer, empowerment and resilience with poor communities. A potential list of candidate Australian-funded programs that may be considered ‘hybrid’ approaches (depending on how this is to be defined) is summarised below:

Table 4: Hybrid-style programs

Country	Program	Timeframe	Hybrid features
Bangladesh	Chars Livelihoods Program (co-funded with UK)	Completed in 2016	Vulnerable communities living on riverine chars provided with assets (plinths, livestock) and connected to commercial input and produce markets as well as private financial services
Pakistan	AusABBA	Phase 2: 2017-22	FAO forms producer/marketing associations, including with women, and connects them to expanding commercial agri-markets
Sri Lanka	LEED	Phase 1: 2010-17	Part of the program involved ILO helping a papaya cooperative gain Fairtrade access
Afghanistan	AACRS	2014-18	NGOs working to build market readiness of smallholder farming communities, including WEE activities
Palestinian Territories	AMENCA	Phase 3: 2016-21	NGO support programs for farming communities, with emphasis on working with private sector buyers to provide an increasing range of these services and market opportunities
Tonga	Fairtrade Vanilla Project	2015-17	Working with vanilla producers and government to strengthen growers’ association, improve quality and gain Fairtrade certification; linking with Fairtrade buyer for international trade
Timor Leste	TOMAK	2016-21	Designed with both M4P and MWP elements, and a strong nutrition focus. Managing contractor is implementing in association with an international NGO (Mercy Corps); also involves other NGOs already operating locally.

Most of these approaches have involved taking existing programs and pushing them to change directions towards a hybrid approach rather than being expressly designed as hybrid programs²⁷. Likewise there have been attempts to ‘link’ MSD programs with other Australian-funded programs, but the incentives and drivers for such programs to work collaboratively to facilitate market access in the same sector in the same place at the same time are limited. It is the hypothesis of this paper that hybrid programs that deliberately draw on the complementarity of M4P and MWP approaches may be more effective at reaching more of the poor, on better terms and with greater resilience and sustainability than either approach can achieve separately.

DFAT will continue to review existing market linkages programs to test this hypothesis and to understand the circumstances under which MSD and MWP programs should be deliberately combined through a ‘reach down/lift up’ approach to achieve Australian aid program objectives at country or sub-national level.

²⁷ The exception is TOMAK, designed to be DFAT’s first explicitly nutrition-sensitive agriculture program.

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