

AENOR

BluePrint
Strategic Advisors Ltd.



**CONSULTANCY FOR
STANDARDS AND SANITARY
AND PHYTOSANITARY (SPS)
PORTFOLIO EVALUATION**

FINAL REPORT

FEBRUARY 2025



TRADEMARK AFRICA (TMA)

Project Title:	CONSULTANCY FOR STANDARDS AND SANITARY AND PHYTOSANITARY (SPS) PORTFOLIO EVALUATION	
Contract No.:	PO/20240452	
Country:	Kenya, Uganda, Rwanda, Tanzania, Ethiopia and Somaliland	
	Contracting Authority	Contractor
Name:	TradeMark Africa	AENOR Conocimiento
Address:	2nd Floor, Fidelity Insurance Centre Waiyaki Way, Westlands Nairobi, Kenya	Calle Genova 6 28804 Madrid Spain
Tel. number:	+254 723 118 217	+34 91 432 60 00 +34 673 29 62 69
Email address:	jane.nyawira@trademarkafrica.com	vhernandezc@aenor.com
Contact person:	Ms Jane Nyawira	Ms. Veronica Hernandez
Experts:	Lead Consultant: Mr Carlos Calcopietro MEL Expert: Mr Ricardo Bisso MEL Expert: Mr Asha Owuor Standards Expert: Mr Geoffrey Mbuguah SPS Expert: Ms Dorcas Kalele	

TABLE OF CONTENTS

TABLE OF CONTENTS	3
ACRONYMS	5
EXECUTIVE SUMMARY	7
1. INTRODUCTION	11
1.1. Background.....	11
1.2. Context of the portfolio	12
1.3. Objectives of the evaluation	13
2. INTERVENTION LOGIC	16
2.1. The project intervention logic	16
3. METHODOLOGY OF THE EVALUATION.....	21
3.1. Trade flow analysis	21
3.2. Key informant interviews with key stakeholders	23
3.3. Firm-level survey	23
3.4. Study limitations.....	24
4. MAIN FINDINGS	27
4.1. Relevance	27
4.2. Efficiency.....	37
4.3. Effectiveness and impact.....	40
4.4. Sustainability.....	49
4.5. Lessons Learned	51
5. CONCLUSIONS AND RECOMMENDATIONS.....	54
ANNEX 1 – DOCUMENTATION AVAILABLE.....	59
ANNEX 2 – STAKEHOLDERS MET	63
ANNEX 3. TMA STRATEGY 2 RESULTS CHAIN AS DEFINED IN THE EVALUABILITY ASSESSMENT REPORT	66
ANNEX 4 – INDICATIVE EVALUATION QUESTIONS, DATA SOURCES AND METHODS.....	68
ANNEX 5. TOOLS OF THE EVALUATION	72
ANNEX 6. TRADE FLOW ANALYSIS	89
ANNEX 7 – DATA MATRIX REQUEST	104
ANNEX 8 - FIRM-LEVEL SURVEY QUESTIONNAIRE	105
ANNEX 9. SURVEY RESULTS.....	118
ANNEX 10. CASE STUDIES.....	140
ANNEX 11. BORDER REJECTION RATES IN MAJOR GLOBAL MARKETS	149

Figure 1. Reconstructed Theory of Change of the Evaluation	20
Figure 2. Evolution of Rwanda's tea exports to the world and to the EAC	22
Figure 3. Distribution of the sample per country	24
Figure 4. Aggregate Rejection Rate in major global markets (grand total).....	34
Figure 5. Frequency of reasons for rejections of products.....	35
Figure 6. Distribution of the sample per sector of activity	36
Figure 7. Stock of Standards per category type (Source: UNBS Annual report).....	37
Figure 8. Benefits of S2 interventions to the communities as perceived by interviewed firms...	40
Figure 9. Where are the potential markets located	44
Figure 10. Percentual change in the median value of jobs per country	46

Table 1. Number of exporting firms per country in 2023 and 2017	41
---	----

ACRONYMS

AfCFTA	African Continental Free Trade Area
AfT	Aid for Trade
ATMIS	Agricultural Trade Management Information System
AU	African Union
BSI	British Standards Institute
COMESA	Common Market for East and Southern Africa
DCED	Donor Committee on Enterprise Development
EABC	East Africa Business Council
EAC	East African Community
EAGC	Eastern Africa Grain Council
ECAE	Ethiopian Conformity Assessment Enterprise
EIF	Enhanced Integrated Framework
ENAO	Ethiopian National Accreditation Office
ESA	Ethiopian Standards Agency
EU	European Union
FCDO	Foreign, Commonwealth & Development Office
FPC	Fresh Produce Consortium
GAP	Good Agricultural Practices
GHPs	Good Hygiene Practices
GMPs	Good Manufacturing Practices
HACCP	Hazard Analysis and Critical Control Point
IGAD	Intergovernmental Authority on Development
ISO	International Standards Organisation
KAM	Kenya Association of Manufacturers
KEBS	Kenya Bureau of Standards
KEPHIS	Kenya Plant Health Inspection Service
KII	Key Informant Interviews
MEL	Monitoring, Evaluation, Learning
MICE	Meetings, Incentives, Conferences and Exhibitions
MINAGRI	Ministry of Agriculture and Animal Resources (Rwanda)
MOU	Memorandum of Understanding
MRA	Mutual Recognition Agreement
MSMEs	Micro, Small and medium-sized enterprises
NAEB	Rwanda National Development Export Board
NSBs	National Standards Bodies
NMIE	National Metrology Institute of Ethiopia
MSD	Market Systems Development
PSFU	The Private Sector Foundation Uganda
SIDO	Small Industries Service Organization
RAB	Rwanda Agricultural Board
RDB	Rwanda Development Board
RICA	Rwanda Inspectorate, Competition and Consumer Protection Authority
RSB	Rwanda Standards Board
SACU	Southern Africa Customs Union
SDG	Sustainable Development Goals
SIDO	Small Industries Development Organization (Tanzania)
SQCC	Somaliland Quality Control Commission
S2	TMA's Strategy 2
SPS	Sanitary and Phytosanitary measures
SQI	Standards Quality Infrastructure
STDF	Standards and Trade Development Facility
RECDTS	Regional Electronic Cargo and Driver Tracking System
TAHA	Tanzania Horticultural Association
TBS	Tanzania Bureau of Standards
TFDA	Tanzania Food and Drug Authority
TMA	TradeMark Africa

TPHPA	Tanzania Plant Health and Pesticides Authority
TPSF	Tanzania Private Sector Foundation
ToC	Theory of Change
TPSF	Tanzania Private Sector Foundation
UNBS	Uganda National Bureau of Standards
UNIDO	United Nations Industrial Development Organisation
USAID	United States Agency for International Development
VIBE	Value-added Initiative to Boost Employment
WITS	World Integrated Trade Solutions

EXECUTIVE SUMMARY

Introduction

TradeMark Africa (TMA) is an Aid-for-Trade organisation that was established in 2010, with the aim of growing prosperity through increased trade. TMA operates on a not-for-profit basis working closely with regional intergovernmental organisations, national Governments, the private sector, and civil society organisations to achieve its goals. TMA's Strategy 2, implemented between 2017 and 2023, aimed to tackle a significant obstacle to international trade: the lack of standardization in certain commodities. By addressing this issue, TMA sought to facilitate trade within the East African Community (EAC) and beyond.

To achieve this goal, TMA work largely focused on the public sector with the aim of improving services whose spill-over effects would benefit the private sector. Direct work with the private sector was limited to awareness raising and capacity building initiatives.

A component of this effort was the accreditation and operationalization of laboratories in partner countries. By ensuring that these laboratories met stringent standards, TMA helped to establish a framework for quality control and assurance. These efforts were complemented by its work to align national regulations with the EAC SPS Protocol and collaboration with organizations such as the World Trade Organization's (WTO) Standards and Trade Development Facility (STDF).

The Standards Quality Infrastructure (SQI) portfolio under this evaluation spanned over 6 countries in Eastern Africa and the Horn of Africa. By strengthening standards harmonization and capacity building for regulators and producers, the SQI portfolio helped to address a significant barrier to trade in East Africa: standards compliance.

Evaluation objectives and scope

The evaluation aimed to assess the performance and lessons learned from the support provided by TMA under Strategy 2 in the area of Standards and SPS measures, with a focus on the extent to which the portfolio under evaluation addressed the standards compliance as key barrier to trade in East Africa. The scope of the evaluation is at the portfolio level using as evidence eight selected projects, implemented in six countries, within the Standards and SPS portfolio based on a previously carried out evaluability assessment.

Evaluation methods and limitations

The evaluation methods included: desk review and research of project reports and other relevant available documents; the reconstruction of a joint Theory of Change; and the collection of primary data both via key informant interviews with stakeholders and a firm-level survey among a sample of firms in all relevant countries.

Some relevant challenges and limitations regarding the information available must be kept in mind. The lack of standardized format for the reports across the different projects and uneven amount of content limited the comparability of findings. Also, the lack of reporting that relates results and money invested limited the possibility of a detailed Value for Money analysis.

In addition, the long implementation period of the projects (about 7 years) and relatively long time since the projects' end and this evaluation led to a limited availability of the stakeholders to be interviewed, the provision of very limited quantitative information and a potential bias in the accuracy of responses given by respondents that might not remember in detail what happened during the project execution.

The survey design, focusing on firms that have benefited from the services of NBS and / or private sector organisations, may also limit the ability to generalize results for the complete universe of firms in the relevant countries.

Finally, the presence of other donors and projects with somehow similar objectives made it difficult to determine attribution of TMA intervention.

Therefore, the evaluation relied for most of its findings on the generally positive feedback received from the interviews and surveys, plus the data that could be extracted from the documentation. It cannot provide the desirable level of detail, but at this time not possible, information on how the portfolio performed in terms of strict timeframes and quantitative results. Unfortunately, without such information, also the attribution between results and TMA investments could not be calculated.

Key Findings

The evaluation found, in general terms, that the TMA interventions within its S2 complied with the OECD Criteria.

Relevance

The TMA portfolio was aligned with political decisions at the continental, regional and national levels of the countries involved supporting economic integration in the region. This alignment with the will towards further integration both at the EAC and at the countries corresponded with those decisions that were already in place when S2 started in 2017 but also with those that appeared later, such as the AfCFTA initiative, EAC's 6th Development Strategy and others.

Efficiency

The S2 portfolio implementation endeavoured to keep to a planned schedule of activities and found ways to continue its roll out in the different countries even when circumstances such as Covid or the delays in the approval of quality regulations hindered its scheduled plans. An example of TMA responsiveness to unexpected circumstances was the STEF programme.

Effectiveness and Impact

The projects have had a positive impact on businesses, including micro, small, and medium-sized enterprises (MSMEs), contributing to job creation, gender equality, and environmental protection.

Overall, the companies surveyed reported a median increase in sales, with some having increased much more the volume sold. Firms also indicated positive changes in the time needed for conformity assessment, with a reduction in the average time of about 44% (from 7 months in 2017 to 4 in 2023) as well as a reduction in the costs of over 50% in the median value.

Over 80% of the businesses surveyed agree that their efforts towards compliance have given them the potential to sell more products in their usual market and in new markets; experiencing an increase of 14% in the number of exporting companies in the sample compared to 2017.

This enhancement of market access seemed fuelled by a good level of awareness among the businesses on the importance of being certified, with over 75% of interviewed businesses being aware before the assistance by TMA.

However, the trade flow analysis did not reveal a particular change in the volumes traded which could be attributed to the project with the exception of the Rwandan tea exports where a very positive upward trend, that could be related with the presence of the project, was observed. Nevertheless, it may be kept in mind that national trade figures respond to large variations in the

quantities trade, which are difficult to be influenced by individual projects alone (more detail provided in Annex 6).

The evaluation also noted that the projects have had a positive impact on social objectives, such as promoting women entrepreneurs and creating jobs – the overall median number of employees per business experienced an increase of over 24% from 2017 in the surveyed sample. Stakeholders have also reported that the efforts towards compliance with mandatory and/or voluntary technical requirements have benefited the community, including towards protecting the environment.

Sustainability

Regarding sustainability, it is considered that the activities initiated by TMA's S2 projects have a good chance of being sustained over time, thanks to businesses' motivation and governments' commitment to continuing economic integration.

Overall, the S2 portfolio has made significant contributions to promoting economic integration, improving the competitiveness of businesses, and supporting social and environmental objectives.

Key recommendations

1. Keep the mix of MSD and Aid for Trade. In terms of gathering information for further projects within a future S3, it is certainly advisable that TMA continues its practice of working directly with the stakeholders including engagement with private firms and their organizations in order to define goals and activities along the appropriate public offices.
2. Maintain the vocation to get involved in the coordination of the multiple activities required for progress in the harmonization of standards and quality compliance.
3. Use as much as possible African expertise, to adapt innovation and content to the African context and build into the successful experiences in the continent.
4. Keep presence in the countries involved, in the preparation and implementation of the projects, for closer contact with beneficiary authorities and firms. A key learning from this exercise has been that direct and personal relation with stakeholders is fundamental for timely cooperation and the national teams are a critical tool for it.
5. Improve the monitoring, evaluation and learning (MEL) function, to align with TMA's Guidelines Project Cycle Management of 2024. Beyond helping with the coordination of a wide array of diverse activities, proper monitoring will be proof of TMA's track record, loaded with its rich experience in the subject of trade integration and quality improvement. Making the provision of specific information, in a standardized format, within fixed periods should be a condition for a further disbursement of TMA funds. This seems already to be a point where TMA is acting upon based on the efforts to construct a quantitative baseline for some of the most recently designed projects (e.g., TUTS in Uganda).
6. Involve stakeholders during project design will enhance their understanding of their roles and involvement at the project onset, thus enhancing delivery of project outcomes. Additionally, an integrated multi-stakeholder approach is essential for leveraging synergies for utilization of resources among partners and stakeholders for effective delivery of outcomes and ultimate impact using cost-effective measures.
7. Ensure that authorities and donors monitor to what degree resources available for compliance do match the increase in demand for services that results from the awareness raising and capacity building interventions of the projects. Lack of alignment might result in

perceived worsening of services and might also discourage the compliance efforts of newly interested firms.

It makes sense then to consider that these many interrelated elements (and even more at the level of global trade) should be tackled by an organization which is able to coordinate them. However, in the process of geographical expansion of TMA, following developments in implementation of the AfCFTA, this evaluation recommends that, during the next years, the organisation keeps a focus on what has done best under S2. One of these areas of work is, definitely, Standards and SOS support. To conclude, and by the same token, this recommendation emphasizes the need of doing so with a strong monitoring and evaluation system.

1. INTRODUCTION

1.1. Background

TradeMark Africa (TMA) is an Aid-for-Trade organisation that was established in 2010, with the aim of growing prosperity through increased trade. TMA operates on a not-for-profit basis and is funded by Belgium, the Bill and Melinda Gates Foundation, Canada, Denmark, the European Union, Finland, France, Ireland, the Netherlands, Norway, the United Kingdom and the United States of America. TMA works closely with regional intergovernmental organisations, including the African Union (AU), the African Continental Free Trade Area (AfCFTA) Secretariat, the East Africa Community (EAC), the Intergovernmental Authority on Development (IGAD), the Common Market for East and Southern Africa (COMESA), the Southern Africa Customs Union (SACU), national Governments, the private sector, and civil society organisations. At the time of the start of Strategy 2, TMA operated in 8 countries, all EAC member states, Democratic Republic of Congo and Ethiopia.

TradeMark Africa's (TMA) Strategy 2 (S2), covering the period from 2017/18 to 2022/23 focused on enhancing and facilitating trade in EAC and beyond by addressing two primary objectives:

1. **Reducing Barriers to Trade:** It focused on identifying, monitoring, and eliminating non-tariff barriers (NTBs) that hinder trade within the East African Community (EAC). Efforts included strengthening institutional capacities to effectively respond to and resolve NTBs, as well as improving cooperation and dialogue between public and private sectors to tackle the root causes of these barriers.
2. **Improving Business Competitiveness:** It also emphasized on enhancing the competitiveness of businesses across critical sectors such as transport and logistics, horticulture, tourism, and e-commerce. Initiatives under this objective included supporting export capabilities, fostering public-private sector dialogue, and promoting investment to create jobs and drive economic growth.

The strategy was organized into four workstreams; Intermediate Outcome 1.1 – sustainable and efficient transport infrastructure; Intermediate Outcome 1.2 – improved trading standards and sanitary and phytosanitary (SPS) measures; Intermediate Outcome 1.3 – effective trade systems and procedures and Intermediate Outcome 1.4 – improved trade regulatory environment.

Through these efforts, the organisation aimed to unlock economic potential, leading to sustainable and inclusive prosperity in the region. The anticipated outcomes included job creation, poverty reduction, economic growth, increased government revenue, enhanced economic welfare, and greater economic resilience.

Intermediate Outcome 1.2 was aimed at *improving trading standards and sanitary and phytosanitary (SPS) measures*. This workstream had two distinct components:

1. Strengthening of national and regional standards quality infrastructure (SQI) mainly through building the technical capacity of national standards bodies (NSBs). It also involved support to the EAC with its efforts to simplify and harmonise standards across the region.
2. Improvement of the regional SPS system, which concerns food safety, animal health and plant health. Increased focus on SPS measures was an area of increased emphasis for TMA in Strategy 2.

S2 interventions under the Standards and SPS portfolio sought to address barriers to access to markets for commodities that are relevant for the enterprises and government agencies and in so doing serve to facilitate international trade (including intra-EAC trade). Key aspects of the workstreams in the strategy were:

- *Regional harmonisation of standards*, a process of accreditation of designated laboratories in partner countries and adoption of a harmonised format of the Certificate of Conformity with the ultimate objective of achieving mutual recognition and product certification to avoid duplication. The chosen approach S2 was, with a few exceptions, to work primarily with public actors. This pursued the objective of fostering an environment more favourable to the adoption of standards and compliance with technical requirements by the private sector, which was expected to benefit as a spill-over effect of the action rather than as a direct beneficiary.
- *Strengthening SPS frameworks: TMA SPS measures* interventions were designed to foster intra-EAC trade and improve exports from the EAC partner countries to the international market. It included, among other approaches, the alignment of national regulations to the EAC SPS Protocol and cooperating with other international organisations such as WTO Standards and Trade Development Facility (STDF) to further expand work in this area.

1.2. Context of the portfolio

Standards

The EAC Standardisation Quality Assurance Metrology and Testing Protocol requires in its Article 13 the elimination of non-tariff barriers to trade within the region. A significant milestone in the implementation of this integration goal was the approval of the EAC SQMT Act which laid the institutional foundations for regional quality infrastructure.

The SQMT Act specified that the member states mutually recognise their quality marks as equivalent. Due to strong asymmetries in economic development, and the level of development of the national quality infrastructure, this goal has not yet been achieved. However, a number of instruments and advances towards the realisation of the objectives of the SQMT Act, 2006 have taken place¹:

- Development and implementation of the EAC Principles and Procedures for the Development and Harmonisation of EAC Standards (current version from 2022) to ensure that EAC Standards harmonisation is consistent with best practices as defined in the WTO TBT Agreement and the WTO Code of Good Practice on the topic.
- Harmonised 1878 EAC standards as of July 2022 to facilitate intra-EAC, regional and international trade in a number of sectors, further enhanced in the most recent version of October 2024. In addition, the Catalogue of Harmonised Standards is published enhancing access and publicity of the harmonised standards².
- Registered rise in Partner States adoption of harmonisation standards from 45% in 2018 to above 87% in 2022.
- Development and implementation of plans to further advance towards harmonisation, including the SQMT Strategic Plan 2018-2023 and the Regional Standardization Plan (RSP) 2020-2023; both under revision and approval process.
- Established and operationalised **Technical Subcommittees** to undertake specific SQMT activities and to facilitate coordination in their implementation by the EASC and SQMT Office.

¹ <https://www.eac.int/trade/sqmt/sqmt-act-implementation>

² <https://www.eac.int/trade/trade-documents/category/sqmt>

SPS³

Article 108 (c) of the EAC Treaty and Article 38 (1C) of the EAC Customs Union Protocol provide for Partner States to harmonize SPS measures in order to facilitate trade within the community and with other trading partners.

The EAC Protocol on SPS Measures (EAC SPS Protocol) includes provisions on Partner States' cooperation on matters of human, plant, and animal health and food safety and harmonizing their policies, laws, and programs while implementing principles of equivalence, regionalism, transparency, and risk assessment using science-based approaches. The EAC SPS Protocol is largely aligned with the WTO SPS Agreement; however, a few discrepancies exist, for instance, the EAC SPS Protocol contains an objective to enhance SPS in the region through a science-based approach grounded on a common understanding among the Partner States, without expressly providing for such to be based on international standards as referenced in the WTO Agreement.

Although the EAC SPS Protocol is in place, enactment of the Phytosanitary (Plant Health) Measures Act remains pending, so a binding legal framework for the enforcement of EAC SPS measures and instruments is not yet in place.

The EAC SPS Protocol requires that Partner States transparently share information relating to animal and food safety related risks. To this end, an SPS information-sharing platform is being developed to enable electronic sharing and access of trade documents with the support of TMA⁴.

With regard to implementation of regional SPS measures at both the national and regional levels within the EAC, there have been challenges associated with among other: duplication and overlaps in regulatory functions that increase the cost of trade; insufficient notification by Partner States when they update laws or introduce new regulatory rules (as evidenced by the low utilization of the Tripartite web-based reporting mechanism); lack of confidence between enforcement agencies in different countries within the EAC; poor access to market information; lack of understanding and interpretation of the SPS standards and regulations; ineffective pest and disease management, lack of surveillance data; absence of necessary phytosanitary documentation; limited use of the ePing system⁵, a UN - WTO platform facilitates tracking SPS and technical barriers to trade measures.

1.3. Objectives of the evaluation

The evaluation aimed to assess the performance and lessons learned from the support provided by TMA under Strategy 2 in the area of Standards and SPS measures, with a focus on the extent to which the portfolio under evaluation addressed the standards compliance as key barrier to trade in East Africa. In addition, provide recommendations that can be included either in the design of future support projects or during their implementation for enhancing its portfolio's effectiveness in promoting trade, which are of essential interest to TMA, considering the continued support that it plans for the Standards Quality Infrastructure and SPS systems at an individual nation and at regional levels would be generated.

³ This section is based on the information available on the report: [African Continental and Regional Sanitary and Phytosanitary Approaches and Alignment with SPS Good Regulatory Practices](#), January 2024 by Feed the Future, US Government Global Hunger and Food Security Initiative.

⁴ <https://www.eac.int/agriculture/sanitary-and-phytosanitary-measures-sps>

⁵ UN-WTO Platform <https://www.epingalert.org/>

In 2023, upon the request by TMA⁶, the Foreign, Commonwealth and Development Office's (FCDO) Evaluation Quality Assurance & Learning Service conducted an evaluability assessment of TMA's Standards and SPS portfolio. The objective was to inform the scope, timing and design of a planned evaluation of Intermediate Outcome 1.2 Improving Trading Standards and SPS measures. The work was started in June 2023 and completed in July 2023. The evaluability assessment team reported to TMA's Results and Impact Director throughout the process and worked in a collaborative way with TMA Standards Quality Infrastructure (SQI) Leads in order to distil findings to inform the assessment. The assessment resulted in 8 projects selected to be evaluated in general, however the assessment itself reported on the limitations on the data available indicating that while the evaluation can report on the plausible contribution of TMA's standards and SPS portfolio towards the outcome, it would not be able to provide detailed assessments on how each intervention contributed.

The eight projects considered by this evaluation are:

Table 1: Unit of Analysis – Synthesis Data

Project Title and Scope	Project Code	Implementation Period	Objectives / Main Actions	Key Stakeholders
Regional				
Standards & Quality Infrastructure – SQI/SPS	2603	2018 – 2023	Build a sustainable regional QI System in the EAC to support the implementation of the EAC Common Market, leading to reduced technical barriers to intra-EAC trade in the individual EAC Partner States. The programme interventions were designed to achieve the following: 1. Increase regulatory coordination at the regional and international level to reduce multiplicity of mandatory quality requirements. 2. Improve the capacity of firms and SMEs to comply with Standards and Technical Regulations for relevant markets 3. Enhance the capacity of regulatory agencies (NSBs, FDAs and affiliate agencies) to enforce compliance to set Standards and Technical Regulations.	East Africa Community (EAC) Secretariat East Africa Business Council (EABC) National Standards Bodies (NSBs) Other regulatory agencies Private sector through Business Member Organisations (BMOs).
STEFF – SQI/SPS	5506	2020 – 2022	Mitigate the effects of the COVID19 pandemic on trade in Eastern and Southern Africa by delivering a series of interventions designed to reduce barriers to trade and support businesses within the region to continue to trade safely. The programme was organized into 7 implementing clusters including Cluster 5 on Standards and SPS interventions. Cluster 5 supported calibration of testing equipment for COVID by national agencies in Rwanda, Kenya and Uganda. It also supported the development, harmonization and application of health and safety, risk control, testing and inspection and approval procedures, protocols and guidance for PPE and hygiene products and SPS measures in Malawi in priority value chains.	National and regional COVID-19 task forces committees and National Oversight Committees in Kenya, Rwanda, Malawi, Uganda

⁶ EQUALS, Evaluability Assessment – TMA – Improving Trading Standards and SPS Measures. Undertaken by Valerie McDonnell-Lenoach, Claire LeBlanc & Neil Pogorelsky. FINAL - Version 2, August 2023

Somaliland and Ethiopia				
Somaliland Standards and SPS – SQI/SPS	5112	2022 – 2023	The harmonization process was done on selected four categories of products namely: a) Civil and construction materials b) Petroleum and detergent products c) Water, cereals, and cereal products d) Oil fish and confectionery products. In total , 19 highly traded products standards were harmonized with the main emphasis on food products. The Ethiopian Standards Bureau provided technical assistance and support to Somaliland Quality Control Commission on the adoption of standards developed in Ethiopia to support cross border trade. TMA, in collaboration with SQCC in Somaliland, successfully executed an extensive procurement process, equipping the SQCC food laboratory at Berbera Port. This critical initiative significantly enhanced Somaliland’s conformity assessment processes by improving local testing capacity, reducing the time and costs incurred by traders in accessing both local and regional markets. The laboratory establishment was complemented by comprehensive staff training and the purchase of additional testing equipment	Somaliland Quality Control Commission. Ethiopian Agriculture Authority Ethiopian Standards Agency (ESA) Ethiopian Conformity Assessment Enterprise (ECAE) National Metrology Institute of Ethiopia (NMIE) Ethiopian Chamber of Commerce and Sectoral Association Addis Ababa Chamber of Commerce Ethiopian Horticulture producers and exporters association Berbera Corridor Authority (indirect beneficiary) Traders and consumers (indirect beneficiaries)
Ethiopia Standards Harmonization project / SQI	5412			
Uganda				
UNBS Laboratory Equipment SQI.SPS	3613	2019 - 2023	Procurement of laboratory equipment for UNBS. It helped develop testing capacity at laboratories both in and outside Kampala, where testing capacity was insufficient, and delivered training and capacity enhancement to both lab workers and traders. Under this programme, 1-2 thousand MSMEs were trained in good practices and improved standards compliance. Lab technicians were trained in test types previously not covered by UNBS labs. Also significant for trade facilitation, prior to the intervention, traders outside of the Capital area had to ship samples long distances to have them tested in the UNBS labs in Bweyogerere. With the support of TMA significant lab capacity was developed in Gulu, Mbale and Mbarara, which reduced the time, cost, and risk of damage of samples for traders. These actions contributed to simplification of trade with neighbouring countries (i.e. South Sudan)	UNBS as the implementing agency The Private Sector Foundation Uganda (PSFU) MSMEs as beneficiaries DANIDA as the funding party EU and NL (complementary projects)
Tanzania				
Tanzania Standards and Quality Infrastructure / SQI	3714	2016 - 2023	Improvement of service delivery mechanisms to TBS stakeholders, including capacity building / boosting of operational efficiency initiatives targeting its internal and external stakeholders. The project sought to strengthen key areas core to the operations of the bureau: <ol style="list-style-type: none"> 1. Developing a training program on Standards mainly targeting Micro, Small and Medium Enterprises (MSMEs). 2. Developing an integrated Standards, Quality, Metrology and Testing (iSQMT) system that automates the key administrative processes used by TBS to offer services to its stakeholders. 3. Developing a National Quality Policy Framework to establish guidelines and procedures in the development, administration, regulation and enforcement of standards in Tanzania. 4. Developing a standards harmonization and accreditation program that 	Tanzania Bureau of Standards (TBS). Tanzania Plant Health Authority Private Sector Support Organisations: Tanzania Horticultural Association (TAHA), Tanzania Private Sector Foundation (TPSF). Small Industries Development Organization (SIDO) National Fish Quality Control Authority. Tanzania Pesticide Institute. TBS lab personnel, and Traders

			supports TBS in domesticating regionally harmonized standards and also to have their systems, processes and service delivery processes accredited.	
Rwanda				
Rwanda Quality and Standards / SQI	3813	2018 - 2023	Training and certification of Agrifood enterprises from selected food chain categories against ISO 22000/RS 184 HACCP. Mentoring of local consultants, young graduates and key enterprise staff into sector specific food safety to become experts and RSB auditors/trainers to audit/train on FSMS. The project focused on delivering capacity to meet food safety management standards in Rwanda's tourism and hospitality management sector, as well as limited work in the animal feed logistics sector.	Rwanda Standards Board (RSB) Rwanda Development Board (RDB) Rwanda National Development Export Board (NAEB) Participating enterprises FCDO
Rwanda Sanitary and Phytosanitary Measures / SPS	3814	2018 - 2022	Support for agricultural and Livestock commodities and their systems to comply with SPS measures and other export markets and third-party certification requirements. It was aimed at accelerating transformation of Rwanda's agricultural sector contributing to national capacities to increasingly export high valued, market-oriented agricultural and livestock commodities that meet internationally accepted SPS standards.	Rwanda Inspectorate, Competition and Consumer Protection Authority (RICA) Rwanda Agriculture and Animal Resources Development Board (RAB) Ministry of Agriculture and animal resources – MINAGRI Exporters (slaughterers and coffee industries)

2. INTERVENTION LOGIC

2.1. The project intervention logic

As already mentioned in section 1.1. above, Intermediate Outcome 1.2 in **TMA's overarching theory of change (ToC) is improved trading standards and sanitary and phytosanitary (SPS) measures**. TMA's Strategy 2 Monitoring, Evaluation and Learning (MEL) Strategy (15 July 2020) sets out two theories of change – one for Standards and another for SPS work. The evaluability assessment reviewed TMA's Strategy 2 MEL Strategy (15 July 2020) and presented two theories of change – one for Standards and another for SPS work (see Annex 3).

In brief, TMA's Strategy 2 defined several **key assumptions** underlying TMA's standards work notably the **strong demand and uptake from industry for standards**, led by international and consumer pressure for compliance. Secondly the ToC assumes **increased awareness and compliance by the private sector with standards**, which may be constrained by information barriers, access to technology, knowledge and reliable and affordable testing services.

Other assumptions identified by the evaluability assessment are:

- Harmonised standards are applied consistently across the region;
- Prospect of lower costs spurs greater demand for certification/compliance by business;
- Compliance is affordable;
- Partner SPS agencies comply with regional and international agreements and partners NQIs comply with provisions of regional and international agreements;
- Greater access catalyses improvement in quality;
- Business has the capacity and means to convert knowledge into action;

- Greater compliance with international standards and SPS measures leads to better market access.

Overall, the evaluability assessment recognized that the ToCs for the two areas of SQI/SPS are assessed as sufficient for evaluation purposes as:

- They explain the changes that are expected to happen as a result of TMA Standards and SPS interventions;
- They provide the detail needed on the cause and effect and different change pathways;
- They specify the assumptions underpinning these change processes allowing the testing of whether change happened as expected;
- They are plausible with evidence supporting many of the pathways and linkages presented;
- They are testable as the ToCs could be interrogated by articulating a series of testable hypotheses.

As among the aspects of interest for TMA are the results obtained by the projects in increasing the number of MSMEs that comply with obligatory and voluntary standards, the questionnaires were deemed to ask respondents to provide information on the advances towards both types of quality requirements.

Having in mind the above guidelines provided to this evaluation team, the inception report proposed **a reconstructed and updated joint intervention logic**, which encompassed all lines of action (activities) carried out in the projects under the Strategy 2 Results chain for Standards and SPS for the purpose of conducting this portfolio review and the reformulation of an overall objective and outcomes of the interventions with their related indicators. This logic joints the two results chains of TMA strategy 2 for standards and SPS in consideration of:

- the unit of analysis for the evaluation work being the whole portfolio of projects working on both topics which makes appropriate to have a single ToC in which the expected path of change can be followed;
- the fact that for both results chains the casual link assumptions were mostly identical, and the paths of change had enough similarities so they could be integrated into a single ToC. Like this, in both cases, the activities in the results chains focused on three main work streams to achieve the same desired final outcomes of reduced barriers to trade and improve business competitiveness; those were to improve the regulatory framework, to enhance the capacities of institutions providing the relevant services and to develop the level of awareness and understanding of these issues among the private sector;
- and the fact that considering the importance of agribusiness among the value chains with highest potential for exporting in the beneficiary countries, it is expected some degree of coordination among both areas of work.

The joint intervention logic ensures, to a large extent, that the specific objectives of the interventions complement each other to deliver the intended results and impact. More particularly, it confirms that the design and focus of the interventions are internally coherent and consistent with sector development goals and strategies/policies at the national and EAC levels, as well as with TMA's sector development goals and strategies/policies. Furthermore, it assesses whether the design of the programmes/projects (and related monitoring frameworks) has considered cross cutting themes and/or needs of marginalised groups.

The reconstructed intervention logic was discussed and updated together with TMA teams to ensure that it appropriately reflects the strands of work in which the projects actually focused during implementation.

In simple terms the **Reconstructed ToC** goes from activities to outcomes following this logical path:

IF →	governments of the countries involved show determination in improving their national quality standards and then in harmonising them with region
AND →	public institutions that promote and control quality standards, including SPS, are adequately engaged to improve their institutional arrangements and operations, so that they are better able to communicate the benefits of standards and offer quality services that are timely and affordable...
AND →	the public institutions and private sector organisations do have the capacity to promote the understanding of voluntary standards and mandatory technical regulations among relevant businesses
IF →	the adoption of standards is harmonized regionally, along with the streamlining of customs procedures, so that it is easier to enter regional export markets with less repetition and duplication of controls, and therefore with lesser costs and use of time;
AND →	the quality infrastructure institutions receive enough support, in terms of training, knowledge and means to implement their responsibilities and enforce technical regulations, standards, SPS measures and conformity assessment procedures consistently...
AND →	interventions are demand driven, responding to an existing demand for compliance among the private sector, and are designed to help the supply side meet the demand enlarging access to services delivered in a timely manner and more cost-efficiently, causing a sufficient impact to turn into higher quality and safety of products and services...
AND →	the message for the firms regarding the importance of higher quality compliance is rightly delivered so that they seek to improve their quality as a feasible endeavour, and as a tool to increase sales, both to a local public with higher quality awareness, as well as to export markets...
AND →	the projects are able to eventually surmount unexpected events such as a sanitary crisis (i.e. Covid),
THEN →	the number of businesses including SMEs, cooperatives, groups of producers, smallholders, women and youth entrepreneurs that will perceive compliance with technical regulations and standards as a way to sell more products/services locally and/or internationally will increase creating further demand for QI services and their improvement,
AND →	as an answer to that demand relevant SQI and SPS regional and national institutions and systems enhance the services they provide reducing costs and time for firms
AND →	the enhanced market access resulting from the streamlined customs procedures and harmonized standards and from the continuous commitment of the private sector towards compliance lures more business to seek export and import operations, either at the regional level (EAC or Somaliland-Ethiopia), at an overall African level, or to high value markets such as the EU

AND →	the objectives of the TMA projects are reached, resulting in reduced barriers to trade and improved business competitiveness.
-------	---

The figure below displays the above sequence of the intervention logic in a standard **ToC graph**:

Reconstructed Theory of Change of the Evaluation



Figure 1. Reconstructed Theory of Change of the Evaluation

3. METHODOLOGY OF THE EVALUATION

The methodology for the evaluation comprised a mix of methods to obtain qualitative and, as much as possible, quantitative information to assess the portfolio.

It was organised around four main phases:

- Inception phase, aimed at the familiarisation of the team with the interventions to be evaluated, take stock of the already available documentation, relevant stakeholders, finalise the evaluation questions (Annex 4) and design the evaluation tools (Annex 5) which would guide the following steps of the work.
- Data collection phase which, started from September-December 2024, had as an objective to obtain an adequate understanding of the context, implementation processes and, generally, of the relevant actions under the portfolio to allow the Evaluation team to provide responses to the questions formed. A mix of data collection methods was used:
 - Primary (i.e. Key Informant Interviews, firm-level survey), explained in more detail in the following subsections.
 - Secondary (e.g., external data sources, new documentation obtained...). Sources included more documentation collected by the team during the field visits / KIII as well as publicly available information online. Annex 1 depicts the list of all the sources that were finally used to prepare this final report.
- Data analysis and synthesis. After the end of the data collection period in late December 2024, the analysis of the information included two main sections: the analysis of the survey results, and the preparation by the evaluation team members involved in the field work of summaries reporting on the main findings and conclusions of the work. All this information conformed the basis for the full analysis of the portfolio.
- Reporting. Preparation of the draft final report, objective and balanced, that provide a view of the achievement of results of the portfolio. Strengths and weaknesses identified will lead logically to realistic and, whenever possible and appropriate, operational recommendations. In addition, the team worked in the preparation of the chosen case studies which are included as Annex 10 of this document.

The following subsections provide more detail on the methodology used in three key areas of the work carried out: trade flow analysis, KII and firm-level survey.

3.1. Trade flow analysis

In coordination with TMA and based on the activities actually implemented, the following value chains were selected for this analysis:

1. Rwanda – HORECA (hotels/restaurants/caffes), Dairy, Meat, Green Beans, Coffee, Tea
2. Tanzania – Horticulture, Grains
3. Kenya – Grains, Horticulture
4. Uganda – Grains
5. Ethiopia – Horticulture
6. Somaliland – Import food commodities (17 commodities traded between Ethiopia and SL, for standards harmonisation work and scope of conformity assessment)

The analysis looked for relationships that could link the activity of the projects with the export flows from the countries where the projects were implemented, in terms of contribution.

The period of the analysis was 2017-2023 and the source of data was the International Trade Centre (ITC), with the exception of Somaliland for which, due to its recognition status, information is not available in international sources; and the HORECA in Rwanda, for the type of product.

To draw conclusions on the potential contribution of the TMA projects, the sequence for the analysis of each country's exports was as follows:

- First, the Evaluation availed itself of a “wide picture” of each country's competitiveness by looking at the information in World Bank's (WITS, World Integrated Trade Solution) list of each country's five largest exports.
- In parallel, a review of past trends of exports of agricultural products in general (relevant to the period of Strategy 2) was done for each country, on the basis that most of the commodities listed above are agricultural in nature. This allowed for an assessment of whether the trends of the products change positively or negatively, which provided an indication of whether there is a plausible contributory link to the TMA Standards and SPS interventions when compared to the general trend of each country (going up or down or keeping stable) in exporting its commodities.
- Finally, for each of the broadly defined products selected, the evaluation looked at the evolution of each country's exports trends, in order to contrast them with the results of the projects in terms of facilitation of MSME exports. This has provided preliminary insights about the contribution of the different projects to the general objective of facilitating trade.

As the EAC is the most relevant region for the TMA projects, this evolution considered as target markets both the World in general and more specifically the EAC, making the hypothesis that, since TMA's S2 projects have tended to facilitate trade within the EAC, a potential different behaviour between the evolution of the exports of a product within the EAC and to the world might be evidence of this effect.

As a result of the analysis, two documents (in Word and Power Point) explaining in more detail the methodological approach and results were made available to TMA (see Annex 6). As was expected, in most instances it was difficult to draw a conclusion about the effects of the projects in the evolution of the international trade of the countries based on these macro level figures. Only in the case of Rwanda's tea exports, there is a very positive upward trend was observed during the period of analysis that could be related with the presence of the project.

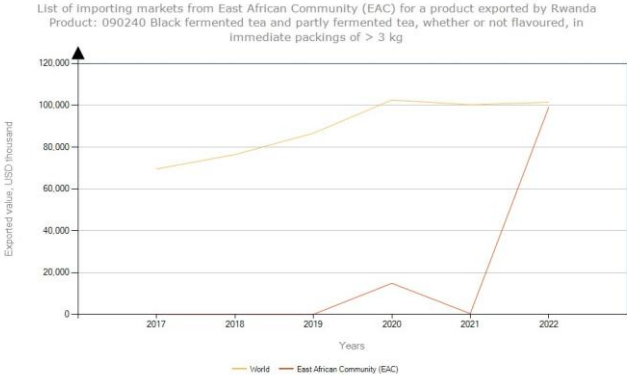


Figure 2. Evolution of Rwanda's tea exports to the world and to the EAC

3.2. Key informant interviews with key stakeholders

Key Informant Interviews (KIIs) aimed at interviewing a sample of actors and beneficiaries involved in the implementation of selected projects with the purpose of gathering their perspectives on the results and lessons derived from the execution.

These interviews were a fundamental element of the assessment as they allowed the team to have exchanges with the representatives of organisations that had participated in the implementation of the projects and thus were better prepared to provide information on its achievements, challenges and lessons. The interviews took place both in person and remotely, depending on the specific case and availability of the counterparts.

Interviews were implemented using stakeholders' relevant KII guides, prepared as key tools of the evaluation during the Inception phase and were aimed at obtaining two types of information namely qualitative, on the overall implementation process, and quantitative, on specific elements which had been pointed out as relevant by TMA in the Data Matrix Request form (see Annex 7).

The KIIs were conducted in a two-step approach with a first round of preliminary visits in October 2024 and a second round of visits done in November and early December⁷. This approach was adopted following the suggestion of TMA and concurrence by the evaluation team. The first round aimed at both creating rapport with the institutions and facilitating their subsequent participation. The second round aimed at conducting detailed in-depth interviews with the stakeholders to elicit their assessment of the projects' performance along the set performance criteria and indicators.

The information on stakeholders met can be found in Annex 2.

3.3. Firm-level survey

As per the TOR, the firm-level survey was aimed mostly to make a connection of any identified change in export volumes to the interventions. However, the evaluation exercise implemented the survey with a wider perspective, in which the firm-level survey was conducted as a key element of the assessment to collect both quantitative and qualitative data using a semi-structured questionnaire.

The path of change of S2 foresaw that TMA's work supporting the public quality infrastructure systems of the beneficiary countries towards achieving a more conducive environment for the compliance with technical requirements and standards would ultimately lead to benefits in the private sector. Consequently, even if, in general, TMA did not work directly with the private sector, this survey was a key element of the assessment.

The survey targeted to have a representative sample of companies that were beneficiaries of the TMA S2 support. Due to the timeline and characteristics of the evaluation, the selected approach involved the facilitation by involved stakeholders of list of target firms that could be considered for the survey..

The main sources of the firm lists were as follows:

- Somaliland: firms' names as mentioned in the Key Team conversation with SQCC during the field visit.
- Ethiopia: EHPEA.
- Uganda: UNBS, which provided a list of firms that have used their services, and EAGC (firms that attended a training).
- Tanzania: TAHA, EAGC (firms supported via assistance or training).

⁷ All target countries were visited twice, with the only exception of Somaliland where, due to the electoral cycle that took place during the period planned for field work, encouraged the team to make the most of the initial visit, and treated it as an in-depth work instead of just an introductory time.

- Kenya: KEPHIS (companies that attended their trainings), as well as public information on members of private sector associations.
- Rwanda: RSB, which provided the list of firms that had either obtained or were working towards certification.

The implementation of the survey was done following the questionnaire drafted during the preparation of the Inception Report, with some minor adjustments; the final version of it as used for Cohort 2 can be found in Annex 8.

In spite of the difficulties to obtain the lists of firms to be surveyed and related delays in the implementation, which made necessary to extend the period of data collection until 20th December 2024, the overall number of companies successfully interviewed was quite high reaching a total of 179 companies, considerably higher than the expected number at the time of preparation of the Inception report.

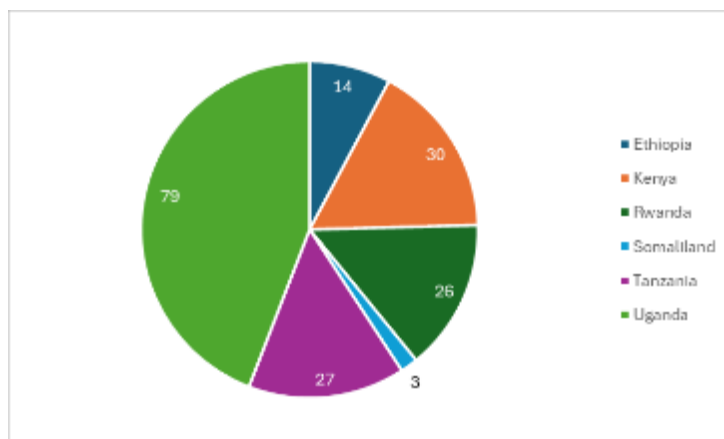


Figure 3. Distribution of the sample per country

Responses received in the two cohorts' links were combined in a single Excel file, together with five responses that were mistakenly encoded in the testing environment of Cohort 2 by the enumerators, for analytical purposes.

Data management to ensure comparability of responses coming from the two links and subsequent detailed analysis took place in late December 2024 and early January 2025. Annex 9 includes full details of the survey results.

3.4. Study limitations

The project implementation faced a number of challenges and limitations that shaped some aspects of the work carried out as well as the findings reached.

General limitations

Some relevant challenges were found in relation to the information available for the eight projects selected as evaluable, including:

- Lack of a standardized format for the reports across the different projects in the portfolio, in terms of presentation, content and periods to be covered.
- Uneven amount of report content from the different projects, with some with much more information than others.
- Lack of reporting that relates results and money invested, especially in terms of results obtained by the MSMEs as a consequence of project activities.

This general lack of written information (i.e., monitoring reports) coming from the projects made necessary to try requesting substantial information from the stakeholders, particularly on quantitative aspects, which might not have been collected or adequately archived at the time as part of their internal monitoring system; and thus, was not available.

The evaluation sought to solve the identified gaps by the engagement with different stakeholders, however, it was only possible to do so partially (specially in the case of quantitative information). It was difficult for many authorities and businesspeople to find concrete information due to:

- The long period since the projects started (7 years since 2017).

- The relatively long period that had passed between the time of evaluators' engagement with stakeholders (October 2024) and the dates when the projects had ended (2022 or mid-2023). This reduced the level of engagement from the stakeholders, as those involved in the project implementation sometimes were not working anymore for the institution or have moved on to new projects and priorities, thus overall having less information about the projects and, when available, it was less detailed.
- The diversity of activities that included the S2 projects, which diffculted the recollection of each one, the lists of companies that were involved, or their results as a consequence of the interventions.
- Some stakeholders' availability to be interviewed or to provide the requested information was low, maybe caused by either "stakeholder fatigue", the amount of their present work, or uncertainties about continuation of future funding from TMA. And in most cases, the level of detail of the provided information (particularly quantitative) limited the possibility of carrying out in-depth analyses.

This limited level of responsiveness of the stakeholders for the provision of information (particularly of quantitative nature) extended the data collection phase, requiring several follow-ups and the involvement of the TMA country teams or technical teams to support the process (for example, with members of the technical Standards and SPS team accompanying the evaluation team for the second visit to Rwanda and Ethiopia), what even if helpful did not always yield positive results.

In addition, it was very difficult to determine attribution of TMA interventions, particularly considering the presence of other donors and initiatives with somehow similar objectives. This being the reason why the report refers mostly to TMA contributions.

Methodological limitations

With regards the trade flow analysis, the possibility to use an econometric analysis, via a difference-in-difference (DID) model⁸, to estimate a causal effect between TMA's interventions and trade evolution was considered. However, it was determined that at the current stage there is not enough information to adequately implement this approach. The DID requires, in order to test the parallel trend assumption, that data points after the "treatment" (in our case the projects) is used. Considering that most of the projects finalised in 2023 and that trade data for 2024 is not yet available at the time of preparation of this report (in some cases not even for 2023) this type of study was impossible. However, it could be advisable to carry out this type of exercise in the medium-term (once enough information after treatment to obtain robust results is available) to further analyse the effects, and potential contribution, of TMA portfolio in the trade volumes of the supported commodities.

Concerning the **firm-level survey sampling**, as explained, it was determined that the sample would be obtained with the support of stakeholders involved (NBS, business support organisations and private sector organisations) via the provision of lists of firms which have used / benefited from their services. Due to this design, the survey managed to capture, above all, the experience of organisations that are already somewhat familiarised with standards and technical requirements. While this might limit the validity of some results for the general universe of firms in the selected countries (e.g., question related to their customers requiring certified products), it is well focused to understand better the process undergone by those pioneering and the impact of this process on their activities. In particular, it allowed to acquire quantitative information with regards some issues (for example, perceived and reported costs

⁸ The difference-in-difference technique is a quasi-experimental design that makes use of longitudinal data from treatment and control groups to obtain an appropriate counterfactual to estimate a causal effect. It is typically used to estimate the effect of a specific intervention or treatment by comparing changes in outcomes over time between a population that is enrolled in a program (the intervention group) and a population that is not (the control group). DID relies on the assumption that, in absence of treatment, the unobserved differences between treatment and control groups are the same overtime. DID requires data from pre-/post-intervention in order to test the assumption of parallel trends.
(Source: <https://www.publichealth.columbia.edu/research/population-health-methods/difference-difference-estimation>)
DID is often used to explore potential effects of policy interventions on trade.

and time) which were set as central for our analysis and that a different sample composition might not have allowed to gather.

When such limitations or potential bias to extend the validity of results have been identified, they are explicitly mentioned in the related finding.

4. MAIN FINDINGS

4.1. Relevance

Quality of Design – Needs of the regulators and businesses in the East African Community (EAC) and individual countries included in the sample

The TMA intervention under S2 has been highly relevant in the period covered by the evaluation (2017-2023) and is and will continue to be so, in a context defined by these concurrent aspects:

- a) A Report of July 2024 from the African Export Import Bank⁹ states that Eastern Africa, as a subregion, has shown and continues to present good macroeconomic prospects for integration: it is calculated to grow 4.5 % this year due to the decrease in the prices of commodities that the subregion imports, and the expected stabilization of the economies of driving countries such as Kenya and Ethiopia, who will advance towards fiscal stability. However, it urges more intra-African trade integration based in the size of the economic opportunity it entails. This points out that African countries that trade with each other are to that extent isolated from the risks of importing products from non-African countries whose products such as energy and food have prices that may suddenly increase sharply. This phenomenon of external shocks may be due to causes such as global geopolitical tensions, armed conflicts, increased protectionism, and weather disasters originated in climate change. The set of products that the bank assesses as having the highest export potential, which represent 70% of this total export potential, coincide with those addressed by S2 projects, as it includes specially vegetables, food, tea, vegetable oils, beauty products and rice (other products in the set are ferrous materials, chemicals and apparel). One specially promising product for exports of East Africa towards the rest of Africa is tea, which was also supported by the S2. As an example of this, it can be mentioned the increase in the tea exports from Rwanda observed in the trade flows analysis. Indeed, a plausible logic behind this increase is probably the presence of the Regional Tea Auction in Mombasa; but it could be thought that the improvement in Rwandan firms' compliance with common SPS requirements and overall progress towards regional harmonisation in the EAC provide the needed environment to get advantage of this opportunity.
- b) The World Bank also notes the positive outlook of East Africa¹⁰. The overall economic activity in Eastern and Southern Africa has grown 2.2% in 2024 (1.7 in 2023). The EAC was the best performer of the Region, with a growth rate of about 4.7% in 2024 and an impressive forecast of 5.7% expected in 2025-2026. Four countries where the S2 implemented its projects (Kenya, Rwanda, Tanzania and Uganda) were, according to the Bank, the largest contributors to the good EAC performance. By January 2025, the World Bank expects the following growth for years 2025-2026: Kenya, 5% and 5.1%; Rwanda, 7.8% and 7.5%; Tanzania, 5.8% and 6.2%; Uganda, 6.2% and 10.8%.
- c) The relevance of S2 relates also with its alignment with UN SDG goals. It primarily promoted more trade and competitiveness hence serving to reduce poverty (SDG1). However, S2 has also contributed to gender equality (SDG5) by aiming to include small women traders in its activities; and to promote Decent Work and Economic Growth (SDG8), specially by including the youth among the beneficiaries of the projects. Women and young traders were involved either individually in the activities of the different projects, or as part of association groups and cooperatives. SDG16 was also targeted by the S2 portfolio as it promotes peaceful and inclusive societies for sustainable development. In accordance with subgoal 16.6 "Develop effective, accountable and transparent institutions at all levels" supported institutions at several levels, such as the EAC and the SQI and SPS institutions in each country.

⁹ https://media.afreximbank.com/afrexim/African-Trade-Report_2024.pdf

¹⁰ [The World Bank in Eastern and Southern Africa](#) and [World Bank Global Economic Prospects, Sub Saharan Africa, page 7.](#)

- d) Finally, In the face of COVID 19, the S2 portfolio reacted also well, with an impressive set of actions by project STEF 5506, Safe Trade Emergency Facility, in the facilitation of cross border trade of essential epidemic-related sanitary elements, such as mouth masks. With this crucial action the Strategy 2 also tied in well with SDG 3, Good health and wellbeing.

TMA designed and implemented the Safe Trade Emergency Facility (STEF) to mitigate the effects of the COVID-19 pandemic on trade in the Eastern and Southern African region by delivering a series of interventions designed to reduce COVID-19 related barriers to trade and to support businesses within the region to trade safely. The programme was organized into 7 implementing clusters including Cluster 5 on Standards and SPS interventions. Cluster 5 supported calibration of testing equipment for COVID by national agencies in Rwanda, Kenya and Uganda.

It also supported the development, harmonization and application of health and safety, risk control, testing and inspection and approval procedures, protocols and guidance for PPE and hygiene products and SPS measures in Malawi in priority value chains.

e) **The East Africa Community (EAC) Policy and Strategies...**

EAC Vision 2050¹¹ remarks the need of expanding intra-African trade with value-addition in selected value chains. The EAC aims to foster intra-Africa and inter-regional trade by removing bottlenecks, strengthening linkages and widening industrialisation. This evaluation, as an introductory remark, postulates that there has been a **high level of correlation between TMA activities under Strategy 2** (henceforth S2) **and these EAC objectives**. The documentation reviewed and the data collected during the course of the evaluation is analysed in the next chapters of this report to support this initial assertion.

Let's start by reviewing the instruments designed by EAC to implement the Vision – the 5th EAC Development Strategy and, since 2021, the 6th EAC Development Strategy¹². Very adeptly, S2 aligned with objectives stated in both strategies such as accelerating and consolidating sustainable production, productivity, value addition, trade and marketing in key regional growth and productive sectors, with particular emphasis on rural development, agriculture, fisheries, livestock, food and nutrition security and high-value Industrialisation.

Indeed, Chapters 4 and 5 of the 6th EAC Development Strategy are correlated with S2, especially in regard to the institutional framework, as it sets out the mechanisms for wider stakeholder engagement at regional level as well as synergizing within the continental and global ones. A closer look at the 6th EAC Development Strategy brings an even clearer view of how S2 activities under implementation since 2017 were aligned with it. The Strategy defines its key drivers at regional level, which include strengthening the manufacturing capacity and value chains in the region; consolidating and strengthening regional integration initiatives; capacity building of trade facilitation institutions; enhancing trade facilitation; promotion of EAC exports to external markets; prioritizing key services sectors for trade development and investment; supporting agriculture and food security and sustainability; and re-igniting tourism and re-orienting the tourism value chains.

Furthermore, TMA's S2 had adopted some years earlier several of the specific points indicated in the EAC 6th Strategy's Key Priority Areas for period 2021/22-2025/26. To demonstrate that, it is noteworthy to list the aspects where the TMA portfolio subject of this evaluation and four of the EAC priorities closely coincided.

- **Key priority area 2** (Provision of Customs Services that facilitate legitimate trade and investment in the region) includes the following:

¹¹ <http://repository.eac.int/bitstream/handle/11671/567/EAC%20Vision%202050%20FINAL%20DRAFT%20OCT-%202015.pdf?sequence=1&isAllowed=y>

¹² <http://repository.eac.int/bitstream/handle/11671/1952/5th%20EAC%20Development%20Strategy-%20Final%20Version.pdf?sequence=1&isAllowed=y>
<https://www.scribd.com/document/525812029/6th-EAC-Development-Strategy>

- ✓ Continue to pursue the harmonization of policies, laws, and regulations. This is a task that was at the centre of S2 efforts at EAC and all of the portfolio countries. The programme was a trade facilitation tool specific to standards, technical regulations and associated conformity assessment processes. It was designed to enhance quality infrastructure related to standardisation, metrology and accreditation of conformity assessment systems.
 - ✓ Strengthen public and private sector partnerships to streamline and strengthen trade and investment. TMA pursued this by facilitating compliance procedures and custom processes that eased the access of SME firms to government quality services. Its projects were designed to facilitate private sector compliance to technical regulations and standards for traded goods in the EAC region.
 - ✓ Skills upgrading. TMA conducted training sessions in all the countries involved in S2.
 - ✓ Implement regional commitments and obligations to ensure smooth trading. S2 activities worked with National Standards Bodies (NSBs), other regulatory agencies and the private sector through Business Member Organizations.
 - ✓ Aligning regional integration commitments to WTO and other best practices for select sectors at the global level. S2 was aligned with WTO regulations and several projects worked closely with its activities.
- **Key Priority Area 3** aims at strengthening the productive sectors to improve production and productivity, increase value addition, and domesticate regional commitments includes:
- ✓ Expand production and productivity to create adequate supply potentials to meet the regional demand. S2 reinforced the competitiveness of several value chains, mostly in the agro-food sector but also in other sectors such as Cosmetics.
 - ✓ Strengthen the regional value chains to increase the value of export commodities. S2 contributed to value addition in the different products, by promoting compliance with international quality standards.
 - ✓ Further regional trade liberalization in the goods and service sectors. S2 promoted the harmonization of EAC standards, as well as those for products traded between Somaliland and Ethiopia. In these last two cases, TMA promoted also their broader alignment with regional standards.
 - ✓ Improvement of agricultural productivity & resilience, value addition and facilitation of movement of agricultural goods to enhance food security in the region. As mentioned above farm products such as meats and agricultural products such as grains and horticulture were targeted by several S2 portfolio projects, thus contributing to their movement across the EAC region including towards the countries where a food security risk may develop.
 - ✓ Developing and strengthening of the regional competitive and sustainable Productive Sectors to support the regional and global integration process. In this regard, among the several value chains promoted by S2, the upgrade of Rwanda tourism and hospitality institutions (hotels, restaurants, etc.) is one of many successes, as it changed business perception of the importance of the food quality compliance.
- **Key Priority Area 7** (Developing and strengthening the capacity of all EAC Organs and Institutions to effectively execute their mandates) incorporates:
- ✓ Institutional transformation at the regional level, including skills development. S2 projects included training sessions of both public officers at NSBs and other institutions, as well as consultants and representatives of the MSME sector.
 - ✓ Strengthen the mandates and capacities of the regional institutions and organs and national coordination to effectively manage the pace of regional integration. As mentioned above, S2 was involved in activities with National Standards Bodies (NSBs), other regulatory agencies and the private sector through Business Member Organizations.

- ✓ Take better and appropriate interventions that ensure full and efficient utilization of the human resource base in the region in the integration process, especially while implementing the common market. TMA included training sessions for public officers and the private sector in all of its S2 projects.
 - ✓ Deepen stakeholder involvement and participation including grass root representation, in all matters related to the integration process. TMA ensured the participation of both public officers as well as private MSMEs, including very small ones that were involved individually or as part of groups or cooperatives.
- **Key Priority Area 8** (Increasing visibility of EAC, stakeholder knowledge and awareness, and participation of EAC citizens in the integration process) considers among others:
- ✓ Enhancement and strengthening of partnerships and engagement with the private sector and civil society. A Rapid Assessment conducted on TMA's SQI projects concluded that the programme "responds to the needs and priorities of the EAC and the NSBs of facilitating trade through free movement of goods by reducing technical barriers to trade".

... And Beyond the EAC

It is also worth mentioning that the S2 portfolio under analysis was coherent with the EU's support for the **African Continental Free Trade Area (AfCFTA)** and with the **AfDB's Strategy for Agricultural Transformation in Africa (2016-2025)**¹³. Indeed, one of the latter's four goals is to develop export-orientated value chains in production where the continent has a comparative advantage. This will be analysed in detail in chapter four, Main Findings, under the Relevance section.

To conclude these introductory remarks, two examples at national level¹⁴ are useful here to reinforce the hypothesis that S2 interventions were coherent with country level development strategies.

As a strong proof of **Ethiopia's** commitment to facilitate and promote its international trade, the meeting of its high authorities that took place as recently as December 2024 with WTO officials reaffirmed Ethiopia's strong commitment to accelerating its WTO accession and emphasized Ethiopia's Government's needs for continued capacity-building. S2 support to the government of Ethiopia has been timely and surely helped to reinforce Ethiopian interest on reaching international quality standards. The launch of harmonized standards between Ethiopia and Somaliland was conducted during the last week of December 2021. The harmonization process was done on selected four categories of products namely: a) Civil and construction materials b) Petroleum and detergent products c) Water, cereals, and cereal products d) Oil fish and confectionery products. In total, 19 highly traded products standards were harmonized with the main emphasis on food products.

The WTO acknowledges the challenges faced by Ethiopia in the process of WTO accession, envisaged for 2026, and called for robust capacity building and technical support to implement accession commitments. This process will also help with Ethiopian engagement in the African Continental Free Trade Area (AfCFTA). To align Ethiopia's national development plans and potential international trade obligations. The meeting stressed the role of technical support, of the type provided by TMA, as it helped the public sector and focused on regional harmonization of standards, in cooperation with the WTO Standards and Trade Development Facility (STDF).¹⁵

Moreover, S2 was in line with Ethiopia's efforts to link with other international organizations, such as its participation in the Enhanced Integrated Framework (EIF)¹⁶, a partnership globally supported by 24 international donors and which helped develop institutional capacity-building in Ethiopia through the

¹³ https://www.afdb.org/fileadmin/uploads/afdb/Documents/Policy-Documents/Feed_Africa-Strategy-En.pdf

¹⁴ To be dealt with in detail in Chapter 4 of this evaluation.

¹⁵ <https://standardsfacility.org/>

¹⁶ <https://enhancedif.org/>

establishment of an EIF National Implementation Unit (NIU). Even when EIF project funding had ended these mechanisms now oversee four trade-related government projects that are funded by other development partners.

Relating to **Somaliland**, the S2 matched well its 3rd Development Plan (NDP) 2023-2027¹⁷, which in turns is aligned with Somaliland National Vision 2030¹⁸. Specifically, TMA's support is coherent with Somaliland's strategies, focused on trade facilitation and economic cooperation, which note the importance of "...deepening economic integration through bilateral MOUs, especially in the subregion. These platforms will facilitate partnerships between Somaliland traders and their partners, especially the MSMEs..."¹⁹

This ties closely with TMA efforts to help the Somaliland Quality Control Commission (SQCC), including the reinforcement of the food quality lab at Berbera port, with an investment close to 0.5M USD. The MOU reached through TMA intervention between the governments of Somalia and Ethiopia, a first step towards a future Mutual Recognition Agreement (MRA) is also a very positive step towards regional integration. Also point 3 of the National Development Plan, which states as an objective "Eliminating tariff and non-tariff barriers to regional trade routes" goes along well with the support provided to SQCC in defining quality standards for a large number of products specially adjusting Somaliland norms to the EAC SPS Protocol, which is essential as to a large degree the exports of Somaliland are animal products.

Alignment of the projects with the TMA Strategy 2 Theory of Change – Reduction of technical barriers to trade in the region

S2 strategy has been implemented alongside the AfCFTA goal of reducing barriers to trade within the African continent and its goal of advancing in the trade of value-added products, which needs that the quality standards are harmonized, and that the private sector complies with them.

As recently as December 2024, the EAC reported that it has held the 2nd edition of the East African Community (EAC) Regional Quality Awards²⁰ concluded in Kampala, Republic of Uganda. Showing its commitment to the SQI, the event was organized by the EAC Secretariat itself, in collaboration with the International Trade Centre (ITC). The awards were instituted to "promote an embedded quality culture in East African Enterprise to ensure business growth while contributing to sustainable development".

EAC members can boost the competitiveness of MSMEs by supporting them to implement quality practices which would enable them to reach into AfCFTA market with a GDP of USD 2.9 trillion and 1.4 billion consumers. The work carried out by TMA during S2, helping to build the capacities of the national bodies and contributing to the private sector awareness, also enhances the firms' ability to tap the potential of African markets beyond the EAC.

The S2 has been also well aligned with the increasing political will prevailing among African governments towards integration, including EAC members and Ethiopia. This is demonstrated by the growing number of trade and cooperation agreements that have been signed in the recent years. The implementation of the S2 strategy projects coincided with the first ten years of the Africa 2063 Agenda²¹, whereas the African Union acknowledges the essential importance of trade in the development of the continent and therefore of the reduction of barriers to intra African trade. Since 2018, only one year after S2 implementation began, the AfCFTA, the African Continental Free Trade Area emerged²², also with the goal of decreasing barriers to trade and supporting the continent's SMEs. It is the largest free

¹⁷ <https://somalilandstandard.com/government-launches-the-third-national-development-plan-ndp-iii/>

¹⁸ <https://www.fao.org/faolex/results/details/en/c/LEX-FAOC203927/>

¹⁹ Outcome 5, Third Somaliland National Development Plan, quote 10 above

²⁰ The EAC Regional Quality Awards celebrate excellence in quality and are part of a broad effort to promote an embedded quality culture in East African enterprises to ensure business growth while contributing to sustainable development.

<https://www.eacmarkup.org/newsroom/latest-news/east-african-community-eac-regional-quality-awards-celebrate-excellence-in-quality-standards>

²¹ <https://au.int/en/agenda2063/overview>

²² <https://au-afcfta.org/>

trade area in the planet, and it comprises the 55 members of the African Union and 8 regional economic communities with the objective of creating a single regional market that would allow the unimpeded flow of services and goods and promote Africa's position in the world market.

It's also worth noting that the COMESA-EAC-SADC Tripartite Free Trade Area (TFTA) Agreement came into effect on July 25, 2024²³, with 14 of the 29 member countries having already ratified it. Among those 14 are Rwanda, Uganda and Kenya, 3 countries consistently assisted by TMA under the S2. The TFTA consists of 3 of Africa's regional communities: the Common Market for Eastern and Southern Africa; the East Africa Community and the Southern African Development Community. The Tripartite comprises, in total, 26 countries of the Continent.

In view of all of these integration agreements, the evaluation notes that the S2 interventions tied in with the existing subregional commitments of AfCFTA member states at the continental level, and with the need to harmonize various policies and trade agreements to be aligned with African Union objectives.²⁴ Annex 6 of AfCFTA agreement addresses the technical barriers to trade. Its Article 2 indicates its goal of implementing the provisions of the Protocol on Trade in Goods concerning Technical Barriers to Trade. It applies to standards, technical regulations, conformity assessment procedures, accreditation, and metrology in the State Parties. Annex 7 addresses Sanitary and Phytosanitary measures. Its Article 3 states that SPS measures will be guided by the provisions of the WTO Agreement on the Application of Sanitary and Phytosanitary Measures.

However, it should be noted that there are still challenges to African integration, as for instance the long negotiations on rules of origin, which have postponed reaching the potential of the AfCFTA. But progress was achieved in 2023: 48 tariff concessions were submitted by nations that represent 87% of African Union members. Risks such as impact of climate change, security issues, increase in geopolitical tensions, higher interest rates or inflationary pressures, can also limit cross border trade and the funds available to finance international commerce.

On the positive side, in helping solve the challenges of integration, the S2 strategy was coherent not only with the political decisions of African nations, but also with those of the EU and several other donors. Just as an example, GIZ regional support to East Africa has assigned priority and focuses today, primarily, on trade in services, trade in goods, investment, competition, digital trade, and women & youth.

Conformity assessment processes and procedures – Extent to which TMA-supported actions have been aimed at achieving regional conformity agreements

A good example towards mutual recognition and regional conformity agreements has been provided by TMA efforts under S2 to help the Somaliland Quality Control Commission (SQCC), including the reinforcement of the food quality laboratory at the Berbera port, with an investment close to 500,000USD. The MOU reached through TMA intervention between the governments of Somalia and Ethiopia, a first step towards a future Mutual Recognition Agreement (MRA), is a positive step towards regional integration.

In more general terms, at EAC level, the S2 project interventions were fully aligned with the EAC Vision 2050 whose goal is to have harmonized standards for all goods in the region and in conformity with WTO regulations, decreasing non-tariff barriers to trade in the whole region. Towards this objective, TMA supported the EAC's technical regulations framework for cosmetics and packaged foods; the EAC Standards and Conformity Assessment Bill; the EAC Metrology Bill; and standards harmonization in general. All of these actions have contributed to smooth out trade operations in the EAC region as the

²³ <https://www.eac.int/press-releases/157-trade/3141-comesa-eac-sadc-tripartite-trade-area-to-come-into-force-25th-july.-2024>

²⁴ Compiled annexes to the on the establishment of the continental free trade area
https://au.int/sites/default/files/documents/37121-doc-Compiled-Annexes_AfCFTA_Agreement_English.pdf

goods traded need to undergo one standards-related conformity assessment process only to access the rest of the EAC common market.

An example of TMA successful efforts in promoting common compliance standards has been assessed in the horticultural sector. In Tanzania, for instance, stakeholders were trained on standards/technical regulations requirements with focus on horticulture products. In Rwanda, in addition to catering and animal feed, the Rwanda Bureau of Standards (RBS) informed the evaluator that companies in the tourism sector (hotels) were also supported by the TMA project.

Moreover, as part of the Safe Trade Emergency Facility (STEF) programme, TMA supported the development and dissemination of a communications strategy for the horticulture sector to improve engagement among stakeholders, including policymakers and the general public. It included training and promotional videos, information materials and e-newsletters.

According to a recent baseline exercise conducted in Uganda²⁵, stakeholders emphasized the critical importance of improving SPS compliance to reduce export rejections and confirmed the relevance of the horticulture value chain that deserves support in promoting trade. They recommended focusing on strengthening quality control, improving post-harvest management, and digitalizing inspection processes in alignment with ongoing initiatives aimed at enhancing risk management in Uganda's horticulture.

With regards to the export rejection level, the quantitative information provided by the stakeholders did not contain any detail on the topic so an in-depth analysis on a country level was not possible. Considering this lack of direct information, the evaluation looked at existing international data sources which might provide verifiable information on the topic.

In this manner, the UNIDO knowledge hub on Standards Compliance Comparison²⁶, which reports on border rejections for food and feed products in major global markets (i.e., Australia, China, European Union, Japan and United States) based on the records of these global markets generally was used as source, even though the available data does not reach the end of project implementation. As shown in Figure 4, the analysis of the aggregate rejection rates does not show a clear tendency, with ups and downs²⁷. The revision of the data available for unit rejection rate (URR), that represents the number of rejections per US\$1 million of imports, and thus accounts for changes in the volume of exports providing a cleaner measure of the rate of non-compliance; provides a similar picture. For the five countries for which the information is available, i.e., Ethiopia, Kenya, Rwanda, Tanzania and Uganda, the URR is quite constant, with some variation per global market (and a seemingly positive trend when trading with the EU for Uganda); but quite consistently performing better than the rates for World Bank income group where the country belong (see Annex 11 for the full graphs per country and Global market).

²⁵ Baseline Report - The Uganda Trade Support (TUTS) Project, Prepared by: Bayite-Kasule, Stephen & John K. Walugembe, October 2024.

²⁶ <https://hub.unido.org/rejection-data/data-explorer>

²⁷ The graphic has been prepared based on the aggregate rejection rate tables available in the UNIDO knowledge hub and included in Annex 11.

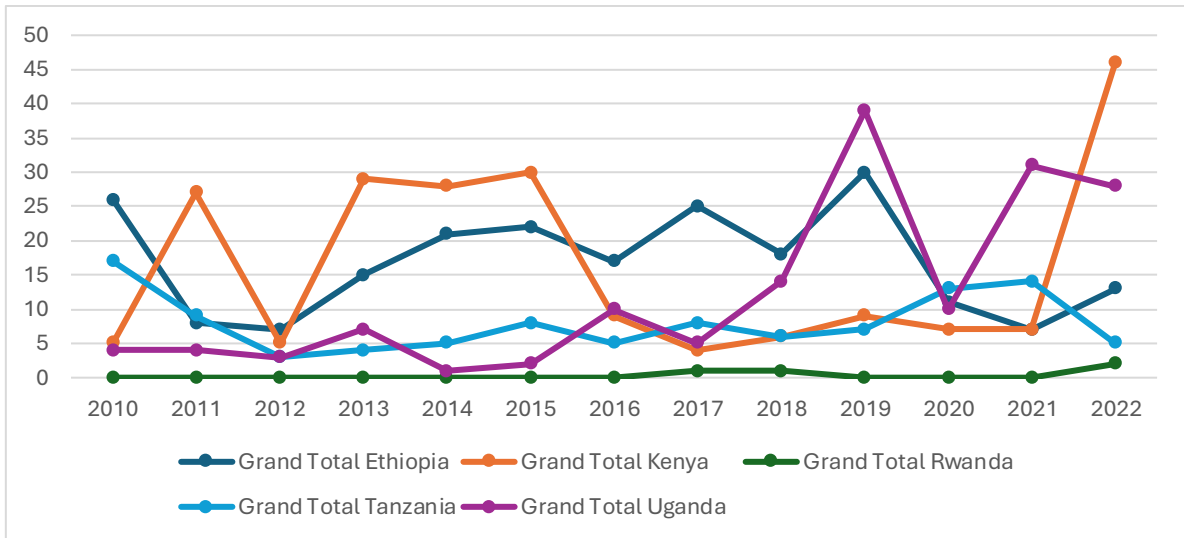
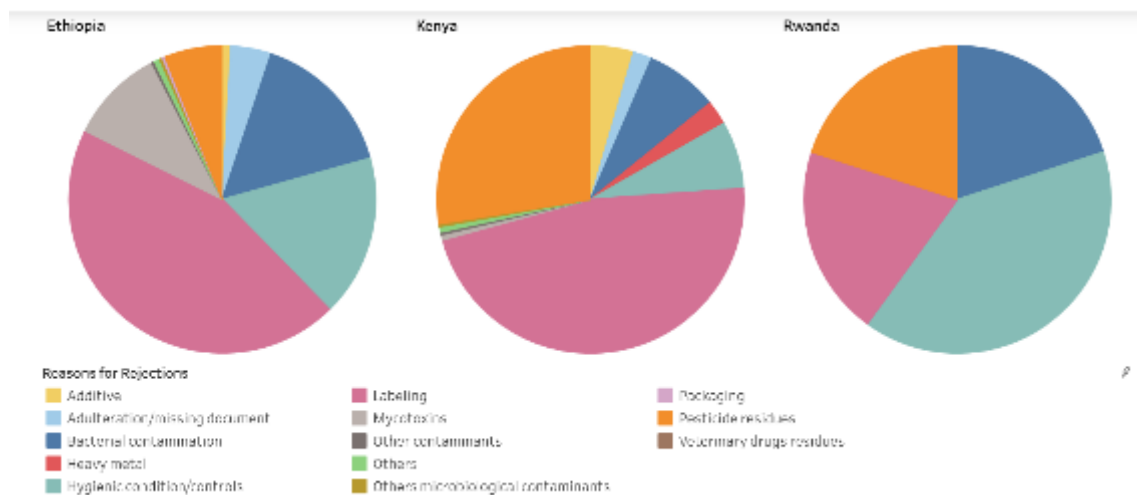


Figure 4. Aggregate Rejection Rate in major global markets (grand total)

It is of course also relevant to consider the reasons behind the rejections. The below pie charts show the frequency of reasons for rejections of products exported from select countries given us indications of areas where further capacity building and support are required to attain or improve international trade standards compliance.

In the case of our main five countries (Somaliland is not included in this exercise since its recognition status prevents it from being part of the international data sources), it can be observed that key topics still are labelling; hygienic conditions and controls; pesticides residues, and bacterial contamination, among other.



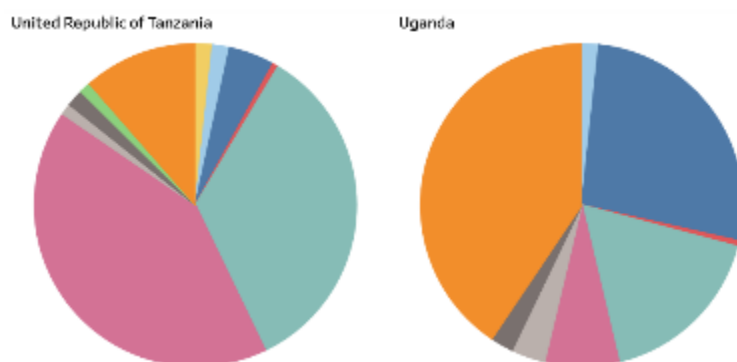


Figure 5. Frequency of reasons for rejections of products.
Source: UNIDO knowledge hub on Standards Compliance Comparison

But it is also noticeable that the reasons for rejection vary from a global market to other. In this manner, when looking at the reasons for rejection per destination market, it can be found that:

- For Ethiopia, labelling is the main reason of rejection in Australia and US markets, while hygienic conditions/controls and the presence of additives are the main reasons for Japan and China, respectively. In the case of the EU both the presence of mycotoxins and bacterial contamination are similarly important.
- For Kenya, again labelling is the main issue when trading with Australia and the US, the presence of heavy metals is the main reason for rejection with China, and pesticides residues are the top problem with the EU. This latter issue is also prevalent in the trading with Japan, together with problems in the documentation.
- For Rwanda, detailed information is only available for the EU, where pesticides residues represent the single reason for rejection, and the US, where hygienic conditions/controls are the most relevant.
- For Tanzania, the main reason for rejection in Australia and the US is labelling, while additives, bacterial contamination and hygienic conditions / controls are the most relevant for China, the EU and Japan, respectively.
- For Uganda the main rejection reasons are as follows: Australia – labelling, China – problems with the documentation, EU and Japan – pesticides residue; US – hygienic conditions / controls.

All the graphs per country and destination market can be found in Annex 11.

Implementation of the EAC Common Market Protocol (Article 3) objective of free movement of goods in the EAC region – Contribution of projects under review

EAC Vision 2050 remarks the necessity of expanding intra-African trade with value-addition in selected value chains. EAC aims to increase intra-Africa and inter-regional trade by removing bottlenecks, strengthening linkages and widening industrialisation. The evaluation found a high level of coherence between TMA activities and these EAC objectives.

Concerning the instrument designed by EAC to implement the vision, the evaluation found that during the intervention the S2 portfolio was aligned with the 5th EAC Development Strategy and, since 2021 with the 6th EAC Development Strategy, published in November of that year.

Very adeptly, S2 aligned with its main objectives of “accelerating and consolidating sustainable production, productivity, value addition, trade and marketing in key regional growth and productive sectors, with particular emphasis on rural development, agriculture, fisheries, livestock, food and nutrition security and high-value Industrialisation”.

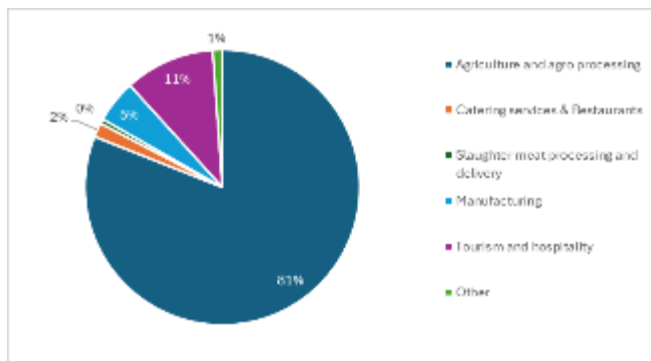


Figure 6. Distribution of the sample per sector of activity

In the survey conducted by this evaluation (See Figure 6), 81% of the companies interviewed (expected beneficiaries of the support provided by S2) were part of the agriculture sector, a percentage that would increase to close to 85% if other food-related sectors such as slaughterhouses, caterers and restaurants were considered.

The TMA projects, with their interest in SPS, Good Manufacturing Farming, HACCP etc., did promote the farm and food sectors extensively, in all the portfolio countries. The

promotion of quality in horticulture was an object of special consideration in several countries.

Another of the many possible examples of work with the agribusiness value chains was the facilitation of grain exports. This was also an achievement of S2 interventions at the EAC level. Compliance with the quality standards of grains was supported by capacity building, testing for aflatoxin and linking traders with reputable transport companies. SMEs have been able to mill flour that complies with the required EAC quality standards which has enabled them to diversify their exports to South Sudan, Rwanda and the Democratic Republic of Congo.

In terms of the trade in products of higher value addition, a good example are the standards agreed for a health-related sector such as cosmetics. At the end of 2022, the East African Standards Committee (EASC) approved a framework that facilitates the free flow of cross border trade in cosmetics (value chain that received support from the Regional SQI/SPS project with the drafting of technical regulations framework) among EAC Partner States, while keeping consumer protection at an adequate level. The framework consisted of standards for a dozen cosmetic products.²⁸ Cosmetics was also a value chain considered outside the EAC region, at binational level, for trade between Somaliland and Ethiopia. Training was provided in SL for the specialized laboratory in Cosmetics and the British Standards Institute (BSI) completed there a standards adoption project for 5 pharmaceutical products and cosmetics.

As per EAC information, as of July 2022, there were 1878 EAC harmonised standards to facilitate intra-EAC, regional and international trade in a variety of sectors, with a number of other standards declared due for gazettelement as to facilitate Partner States adoption.²⁹

Looking at the Catalogue of Harmonised EAC Standards (2022), out of the 642 entries over 64%, i.e. 414, have been published in 2017 and after; being 249 of those first edition of the standard. TMA work through the SQI/SPS project supported this outcome, not only through direct assistance in the harmonisation of 24 standards but also through the overall support in coordination and technical assistance to EAC and EABC.

In addition, the EAC also reported a rise in Partner States adoption of harmonised standards from 45% in 2018 to above 87% in 2022 by all the Partner States following monitoring and validation missions in both years leading to reduced standards related NTBs. Considering the wide range of sectors and own initiatives by the EAC is of course not possible to quantify a specific contribution from TMA to these results. However, considering the area of activities in which TMA portfolio has worked during S2, which included support via the SQI/SPS project to increase regulatory coordination at the regional and international level (support to review legal frameworks) as well as the national level work to enhance the capacity of regulatory agencies (e.g. technical assistance and capacity building to partner states'

²⁸ The full list of products is listed in the Final Report – Rapid Assessment of the Standards and Quality Infrastructure Project, submitted to Trademark East Africa by the consulting firm AYAAH (Uganda), 12 September 2022.

²⁹ <https://www.eac.int/trade/sqmt/sqmt-act/270-sector/trade/sqmt>

responsible institutions), that has probably helped to the identified increase in the adoption of the harmonised standards, it can be concluded a positive contribution towards the standard harmonisation in the region.

At the national level, the UNBS Annual Report for the financial year 2023-2024³⁰ refers to 19 East African Standards and 17 International Organisation for Standardisation (ISO) Standards being developed in the relevant period by the Ugandan institution; leading to an overall stock of 652 adopted Regional Standards in 2023/2024 (Figure 7). It can be appreciated an increase in the period 2020/21 to 2022/23 of 63 regional Standards³¹ adopted. A positive contribution from TMA's initiatives could be argued considering that the Regional SQI/SPS project intended to support not only the development of harmonised standards but also its adoption.

SN	Summary	2019/20	2020/21	2021/22	2022/23	2023/24
i	Total Indigenous Uganda Standards		765	773	774	767
ii	Total adopted International standards		3205	3334	3381	3393
iii	Total adopted Regional Standards		579	623	642	652
iv	Overall Total of Uganda's standards	4052	4549	4730	4797	4812

Figure 7. Stock of Standards per category type (Source: UNBS Annual report)

4.2. Efficiency

TMA supported projects – Degree of deliverance in an economic and timely way

As described in the Relevance section above, the TMA portfolio under S2 was extremely timely in the sense that trade (especially intra-African) was and will continue to be one of the most powerful mechanisms to increase firms' size, competitiveness and their capacity for job creation. Moreover, because the customer base, as shown by the results of the survey commented on above, was already requiring better levels of compliance in the different products. This occurred in parallel with the political will existing in the different countries' leadership towards deepening regional commercial ties.

But the supported projects were also timely in terms of sustaining a good level of activity, pursuing their goals, even when they faced problems. Timely reaction and flexibility are demonstrated throughout the portfolio. Indeed, the biggest challenge during the period of analysis (2017-2023) was the COVID19 pandemic. The portfolio responded efficiently, i.e. the Safe Trade Emergency Facility (STEF), a specific TMA project that provided support in facilitating the export and import of elements such as supplies and disinfectants that were essential in the handling of the pandemic. As an example of the results from STEF, two Safe Trade Zones for small scale cross-border traders were completed and made operational, which helped to restore confidence, promoting public health actions while ensuring the safety of traders. Also, a Regional Electronic Cargo and Driver Tracking System (RECDTS) was transformed, developed and operationalized in cooperation with the EAC. RECDTS quickly improved on the huge cargo traffic disruptions caused by the pandemic and reduced the border clearance time. In the case of the Busia border between Uganda and Kenya the time for clearance was reduced by 78%.³²

³⁰ <https://unbs.go.ug/attachments/menus/34/UNBS%20Annual%20Report%20FY%202023-2024.pdf>

³¹ Regional Standards include both adopted East African Standards and adopted African Regional Standards. The information on the yearly evolution per category is not available; however, according to the report only 11 out of the 652 total adopted Regional Standards is an African Regional one, so it can be inferred that most of the change is due to the adoption of East African Standards.

³² Final Report, Independent Evaluation of Trademark East Africa's Safe Trade Emergency Facility, STEF, by Ayaah Consult, January 2023

Other instances of flexibility found by the evaluation have to do with the response of project management to delays in the disbursement of funds. Causes may have been different on a case-by-case basis, ranging from donors' own financial processes to delays in Governments or EAC authorities' approvals of the new quality regulations. Although these delays resulted in the interruption of activities and temporary decline in the enthusiasm of firms, when the funds arrived the projects resumed the activities as planned.

A few other examples are also worth quoting as described hereby:

- A Good Practices Guide for Horticulture Production and Marketing Handbook was prepared in the regional project with the Eastern Africa Grain Council (EAGC), although it had not been planned but was found necessary for capacity building of farmers on the general food safety and environment management principles. This was in recognition that, whereas EAGC is focused on grain, the smallholder farmers are all round operating diverse enterprises to secure their livelihoods of which small-scale horticulture production is an "alternative enterprise".³³
- In Somaliland, part of the complaints noted were that TMA did not perform an accurate need assessment process for its training activities. Nevertheless, the project reached most of its objectives including the harmonization of standards with those of Ethiopia for 17 relevant products.
- In Kenya, a new Digital Seed and Plant Variety certification system was supported by a service provider based in India. Although, initially, it did not work in a stable manner, an agreement with an Indian company that provided technical assistance enabled experts to travel to Kenya and solved the problem.
- In the case of Uganda, stakeholders report the challenge related to payment being initially lower than expected due to the applicable withholding tax (15% on consultancy fees paid to a citizen of one of the EAC partner states) by the Kenyan authorities. However, TMA managed to solve the issue and transfer additional funds avoiding the potential need to scale down activities.

Value for Money (VfM) – Achievements in terms of costs and benefits

Strict value for money calculations have not been possible as the evaluation managed to gather, only in a few cases, information on the monetary gains by the MSMEs as a direct result from the TMA-sponsored projects. Indeed, according to the ToC, some of the expected outcomes directly affect the private sector, but overall were not the direct beneficiaries with whom TMA engaged. However, the evaluation sought to find evidence whether the projects were efficient in allocating resources to small companies in their quest towards compliance.

One of the large questions that were present at the beginning of the evaluation was **to what extent the markets that beneficiaries serve, or could serve, were already requesting products with proof of quality compliance**, as the existence of this demand was one of the hypotheses underlying the Theory of Change of S2. The evaluation survey results seem to reveal that the S2 rightly assumed the existence of a demand for certification services from the private sector, that were prompted by their customers to advance to certification or other steps towards compliance. Indeed, about 54% of firms strongly affirmed, and another 30% agree that their products needed compliance with one or another quality standard. Therefore, the projects would adequately be responding to the demands of firms. (See Annex 9) However, it is important to highlight in this point that this number is probably affected by the way in which the sample for the survey was constructed: as the source of the data were institutions that TMA had supported in these topics, it is likely that those companies have a higher level of awareness than the average firm in each of the countries; thus, overrepresenting the level of awareness. While this might affect the validity of the results for the general population of firms, it is still true that the companies that

³³ End of Project Report, Supply Chain Support for Resilience, Relief and Recovery for Cross-Border Food Security-Grains and Horticulture, 01 August 2022

have taken steps towards compliance with standards and technical requirements report a previous level of awareness by their customer / client-base.

Another question of the survey targeted the demand side enquiring to what **extent final customers are already aware of the benefits of buying products that are certified or have undergone conformity assessment**. Results confirm that S2 was right in offering firms ways to access certification or other means to advance towards a higher quality. Indeed, almost 50% of survey respondents strongly agreed with the fact that customers are more aware of the benefits of buying quality-controlled products, with an additional 36% just agreeing with that. Thus, around 86% of benefited firms are dealing with clients that demand quality products, a factor that spurs companies in that direction and augurs well for future TMA activities aimed to enhance compliance.

Value for money – Achievement of a fair distribution of benefits among the intended beneficiaries

Results from the firm-level survey showed that, with the exception of Ethiopia, the companies that benefited from the S2 portfolio are mostly SMEs, which aligns with the intention of the S2. The SMEs in Kenya represented the larger bracket (median number of their employees was 206), while those in Rwanda, Somaliland, Tanzania and Uganda had a median number of employees of 68, 55, 22 and 8, respectively. The case of Ethiopia is probably due to a bias in the evaluated, as the list of companies was provided by the Ethiopian Horticulture Producers and Exporters Association, which had companies already exporting and which tend to be larger in size.

The survey also shows that 81% of companies interviewed were involved in agriculture and agro processing followed by tourism sector, in which SMEs and MSMEs can also thrive. Tourism was noted as one of the growing sectors, for instance in Rwanda, where the Meetings, Incentives, Conferences and Exhibitions (MICE) industry is gaining a lot of attention both regionally and internationally. The results align with the situation in EAC countries with a large proportion of its economy depending on farm-related sectors in which most of the players are SMEs.

Benefits provided by S2 invested resources to the communities

A majority of firms interviewed agrees that the S2 interventions had benefited their surrounding communities, with only a small percentage (2.45%, i.e., 12 respondents) stating that they do not think a contribution towards the community has taken place (see Figure 8). A quarter of all responses pointed out that the TMA support created more jobs in their businesses, while another 14% indicated that there had been more job creation, although in general, not in their businesses.³⁴ Looking at the detailed information regarding the overall number of employees provided in the survey, 98 firms reported an increase with a median number of employees in 2023 (in the overall sample) of approximately 25 people, compared to 14 in 2017 (median value)³⁵. On the other hand, almost a quarter (24%) of responses indicated that there have been positive results for the natural environment and 25% point that the TMA projects had empowered women.

³⁴ A good number of respondents (66) marked both “Have contributed to create more jobs in my business” and “Have contributed to create more jobs, but not in my business”. While this seems a contradiction, considering the responses for this question were closed-ended and that there was not a third option referred to only general creation of jobs, it is understood that this combination of responses has been provided by firms that consider that jobs have been created both in their business and more in general.

³⁵ As explained, considering the difference in business size within the sample, the median value is considered a better reference than the simple average.

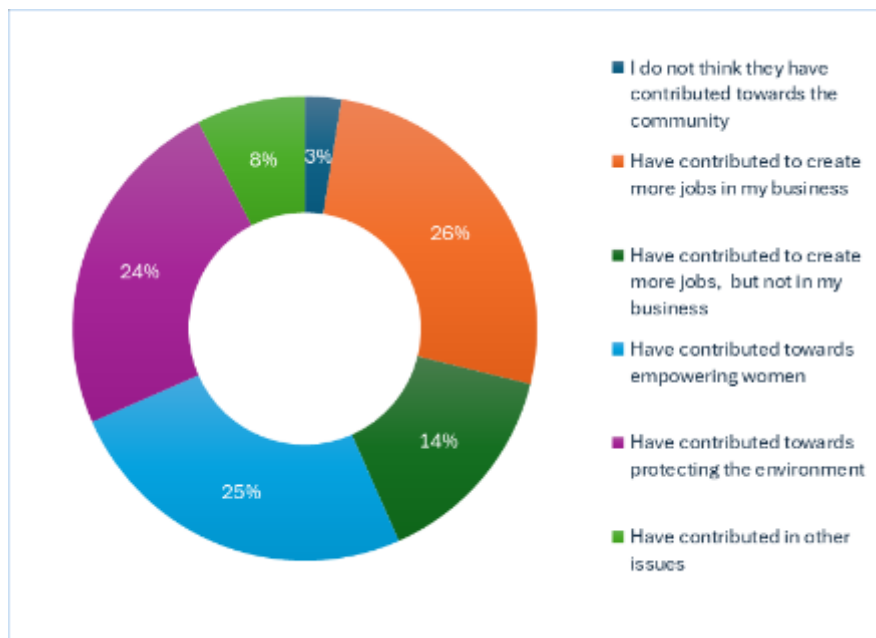


Figure 8. Benefits of S2 interventions to the communities as perceived by interviewed firms

4.3. Effectiveness and impact

Contribution of TMA to enhancement of market access for MSMEs in the portfolio countries

The evaluation found that, among portfolio beneficiaries, above 84% of respondents agreed/strongly agreed that they have increased the potential to sell more products in their usual markets as a consequence of their efforts to comply with the quality standards. Moreover, around 80% agreed or strongly agreed on the potential to sell in new markets as a result of their quality. Indeed, companies reported achievements averaging increases in their sales of USD 118.759, with a median increase of USD13.060. This large difference between the average increase and the median one may be due to the average reflecting sizable exports by big companies, such as those contacted in Ethiopia, while the median, more accurately, reflects the reality of sales increments in most MSMEs across the region.

In terms of the improvement in sales as a result of the interventions, only 15% beneficiary companies DID NOT increase their sales while the large majority, 85% DID increase them. About 30% of firms (approximately 54 businesses) reported that their conformity assessment work resulted in considerable increases in sales, of 40% and above. When looking at the actual sales values provided for 2017 and 2023, it can be observed an increase in the median values (ranging from 18% to over 100%) in all countries, excepting Uganda. These results in sales that resulted from the work towards conformity are even more remarkable in the context of a decline in general company sales in the period under analysis, with average declines of total sales close to 20%. These figures seem to imply that, work aimed at compliance really paid off for the firms that benefited from the project even in an economic context that may have been hardened by COVID19 and other national or regional problems, such as droughts, etc. Therefore, improvements in quality may be considered as a good conduit towards increasing the resilience of companies even in the face of tougher market conditions. With respect to the achievements made by beneficiary firms in foreign markets, according to the survey, the number of exporting companies increased 14% as a result of the activities with the project – 56 companies exporting in 2017 and 64 in 2023, as shown in table 1.

	2023		2017	
	Number of firms	% over country sample	Number of firms	% over country sample
Ethiopia	14	100%	14	100%
Somaliland	2	66,7%	1	33,3%
Uganda	9	11,4%	9	11,4%
Kenya	29	96,7%	28	93,3%
Tanzania	6	22,2%	3	11,1%
Rwanda	4	15,4%	1	3,8%
OVERALL	64	35,75%	56	31,28%

Table 1. Number of exporting firms per country in 2023 and 2017

These positive results among beneficiary firms are probably a result of their enhanced access to testing, certification and conformity assessment services, as reported by about 79% of the firms surveyed. Additionally, the enhanced access to quality services can be tied with an increase of firm customer base, which in recent years became more aware of the benefits of buying products that are certified or have undergone conformity assessment procedures. About 85% of respondents agreed or strongly agreed that awareness had increased. As the portfolio included customers sensitisation and awareness activities, this change in the demand towards more compliance may be considered also, at least partially, a result of TMA projects.

Reductions in time and cost of testing and issue of certificates of conformity – Extent of TMA contribution to achievement of goals

Available stakeholders' responses indicate an improvement in the efficiency of the provision of services by the Conformity Assessment bodies targeted by the evaluated projects in S2.

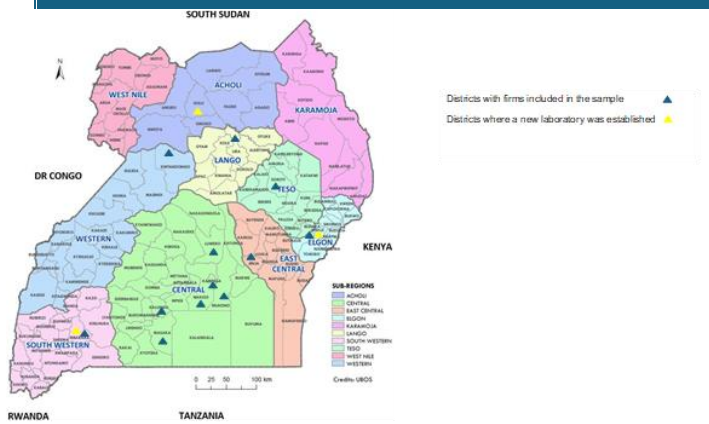
In the case of Tanzania, TAHA refers to improvements in the services received from public institutions (TBS and TPHPA) by the firms. In particular, the ATMIS (Agricultural Trade Management Information System) system for phytosanitary issuance is pointed out as a key element to improve the country's trading system. According to TAHA, when asked about the time it took in 2017 versus 2023, the time to get a phytosanitary certificate from TPHPA was reduced from about a week to one day only (if other requirements have been met).

Similarly, TAHA refers to a reduction in the cost for firms to obtain certification of about 80% with a range from 4,500USD in 2017 to 2,500USD since 2022, as a consequence of the capacity building and equipment received by TBS.

In the case of Uganda, UNBS reports a reduction in both the turnaround time for analysis (which dropped from an average 25 days to about 10 when comparing 2017 to 2023) and time for certification, now on average 4 months. In the case of certification, UNBS states that even though efficiency has improved the increase in applicants for certification is not matched with increase in resources (auditors, analysts and vehicles). On costs, UNBS refers to an average cost of UGX 2.500.000 (approx. 680USD) which varies from UGX950.000 and 4.000.000 depending on the annual turnover of the company and the test based on the product³⁶.

³⁶ These improvements are also found when looking at the results of the survey. Responses to question 14 revealed that almost 60% of firms experienced shorter times to obtain certification or other proof of quality in manufacturing, farming or processing, including HACCP, Global GAP, ISO, etc. As mentioned before, this matches up with an increased accessibility of conformity assessments. If considering reduction of the number of months needed to obtain a certification in year 2023 as compared with year 2017, firms reported in the survey that the periods were shortened by 44%, with an overall median value going from 5 months to 2 months.

A CLOSER LOOK TO THE UGANDA CASE



Considering the work developed by the supported project in Uganda to increase the availability of its services at the regional level, it is worthy to take a closer look to it.

Of the 17 firms interviewed in northern districts (such as Lira and Kiryandongo), 13 responded being in agreement or strong agreement with the sentence “In recent years, I have experienced a shorter time to obtain certification (...)” , with only 2 companies being in disagreement (another one did not respond to the question and the final one neither agree nor disagreed). Reported time

to obtain the certification in 2023 was a bit less than 2 months on average, going down from over 4,5 months in 2017.

A similar situation is found in firms located closer to the new regional laboratory in Mbarara (districts of Mbarara, Masaka and Kalungu), where out of the 18 firms, 9 strongly agree with the claim of having experienced shorter periods, 6 agree and the remaining 3 neither agree nor disagree. Reported time decrease from about 4 months reported in 2017 to below 2 in 2023.

Of the 17 companies that were interviewed in the districts of Mbale, Soroti and Jinja all but three agree or strongly agree with the given sentence. Of the other 3, one disagrees and two neither agree nor disagree. When looking at the follow-up question, only one of the companies that provided responses for both years (14) reported an increase in the time (from 1 to 2 months). On average, the reported improvement goes from close to 6 months (5,7) in 2017 to slightly above 2 in 2023.

Finally, with regards to the sample in districts of the central region close to the capital (Kampala, Wakiso, Luwero, and Mukono) (27), responses tell a bit of a different story: 12 firms strongly disagree and 2 disagree with the sentence (but only in one case they provide data in the follow-up question for both 2017 and 2023, reporting an increase of 2 months); 3 neither agree nor disagree; 6 agreed and 3 strongly agreed (one did not reply). In the follow-up question, time in 2023 was reported to be about 2.8 months on average going down from 3,75 in 2017 (but only 10 companies provided information from that year).

When looking at the detail of the 12 firms which strongly disagree, 8 are in Kampala (a total of 11 firms were interviewed in Kampala district, with the other 3 responses being positive) and 4 in Wakiso. It seems that the further away from the central laboratory, the feedback gets more positive what might be a sign of a positive impact derived from the establishment and operationalisation of the three regional labs. However, unless that establishment affected the Headquarters Laboratory in any way (for example, staffing), something for which there is no clear evidence (as UNBS reports the recruitment of 12 staff members in the regional labs), it is still a somewhat surprising result since one could expect that the availability of other labs could reduce the overall demand in the central lab and allow for more timely provision of services.

Another possible explanation for this is that to achieve a perception of higher impact might be easier in the more distant regions, where level of service has clearly changed, than in the bigger cities where the services have kept a similar level.

When observing the **costs**, the survey shows an overall decrease of 21% on average throughout the portfolio from a median cost in 2017 of 1,120USD to 520USD in 2023, with larger benefits for firms in Rwanda (minus 65%) followed by Uganda (-45%). However, the survey reported a large increase in

Somaliland of 129%, and in Kenya of almost 44%, and, to a lesser degree, in Tanzania of more than 13%³⁷.

It is here worth clarifying that the survey asked about the cost for the respondents of obtaining a certification. In this manner, the cost reported might be affected by the number of certified products or management systems that they have; as it is expected that the cost is reported as a global amount, and not by single certification. For example, if the same company has now more product certifications than in 2017, it might report an increase in its cost, even if the relevant NSB has not raised prices; this will also happen if a company that was not certified in 2017, now is certified.

In the case of Somaliland, where quality compliance work is still incipient, the increase may be specific to one or few cases where the amount of complexity of the compliance process may have been very high. A closer proximity to quality laboratories resulted in lower costs of production for the enterprises, as their human resources and the samples had to travel less. Also, by the reduction in the need for repeat testing that were caused by wrong results arising from sample problems that had been poorly handled during their transportation to central laboratories.

These reductions in costs and times makes MSMEs more competitive and boost business in the region.

Increase in the number of MSMEs advancing towards and complying with standards requirements

The survey results also unveil an impressive figure close to 94% of companies that in different ways benefited from the projects did concretely engage in activities towards complying with mandatory or voluntary standards.³⁸ A total of 146 firms further provided information on the type of activity they pursued. Out of those, 79 (54%) aimed to obtain both Product Certification and Process Certification; 48 (32.8%) aimed to obtain Product Certification only; and 19 (13%) aimed to obtain just Process Certification. As just an individual example of the results obtained by the projects, the table below show figures provided for Rwanda:

**Summary of Enterprise’s certification status on food safety standards
(ISO 22000: 2018 FSMS and RS 184: 2017 HACCP)**

Number of companies	18
Companies in process of closure for raised non-conformities prior to certification decision	7
Stage 1 and/or 2 audits conducted	25 (including 18 already certified)
Application received by RSB	31
Companies that are still in the food safety management systems implementation process and have not yet applied for certification	26

Source: Rwanda Evaluation Country Report – Rwanda Standards Board

Assumptions made in the Theory of Change – Compliance with expectations

The S2 portfolio was based on a Theory of Change that embraced a remarkably broad number of activities, countries and institutions. It handled not only the promotion of quality standards in each country, but also their harmonization with those of other countries; the provision of hardware for quality labs; the implementation of easier border procedures, such as the One Stop Border Post facilities; and even in the face of the pandemic, the easing of trade in personal health products.

Therefore, a logical question for this evaluation was what kind of motivation existed, in the stakeholders of very different countries and sub-national regions, that would be strong enough to spur government

³⁷ These increases deserve further analysis at the time of implementation of TMA's S3 in the near future.

³⁸ It must be clarified that some of the companies included in the Survey as beneficiaries, for various reasons, did not take concrete steps towards compliance but just participated in trainings.

officials, EAC officials, business organizations and private sector stakeholders towards a large change in regulations, intra company procedures towards compliance, and cooperation with other nations. The Survey conducted by the evaluation throws some light in this regard. Its results in terms of awareness of companies on the need that their products comply with a quality certification indicate that almost 78% of the MSMEs interviewed were agreeing or strongly agreeing that they were conscious about this need at the beginning of the TMA S2 individual project intervention.

This strong motivation from the MSME sector was then amplified by all the efforts of sensitization, technical training, awareness building, and improvement on the availability of quality services performed by the projects.

At the same time, the firms’ managers said that they were aware that continuous “pull” from their customers holds. Indeed, 84% of firms agreed or strongly agreed that their customers keep requiring that the products that they source from their businesses are certified or have other proof of compliance with a quality standard.

Another characteristic of demands by firms that worked along the support provided under S2 is that their target markets are in a relevant number located outside their own country and, therefore, need the type of trade help that was at the core of the Strategy.

There were two questions related to the desired markets to reach:

- One referred to markets they would like to access, with export markets representing 48.75%, with the rest of the answers referring to a variety of local markets (which probably also need certification, such as supermarkets, schools, hotels...), and then
- A question referring to where those markets are located. In this case, several answers were allowed (e.g. exporting within EAC, exporting to African countries outside EAC, other markets) and led to almost 70% of responses being referred to markets abroad.

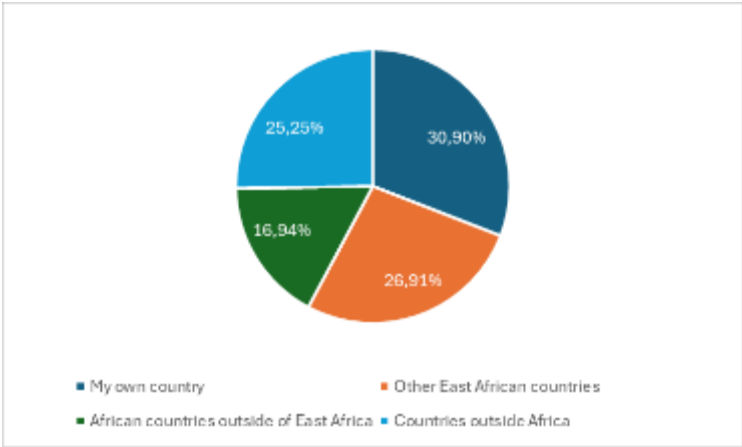


Figure 9. Where are the potential markets located

It can be then said that the political will that was mentioned in the Relevance section greatly helped achieving two first Outcomes, while the third one, related to the private sector, was driven by the firms’ demand for quality services that they deemed necessary to continue to expand their operations, both in the local markets and, in some cases, in the international ones.

Further up in the Theory of Change, the successes in the achievement of the intermediate outcomes brought as a result that both Outputs: the reduction of barriers to trade and firm’s improved profitability and competitiveness were also reached to a large extent.

A strong characteristic of TMA intervention, and very probably a large factor in the implementation of Outputs, has been the use, whenever possible, of African expertise to deliver technical assistance. A good point in case is the implementation of support to SQCC in Somaliland, with the extensive help of

Ethiopian expertise provided by the Ethiopia's Standards Agency, the National Metrology Institute, the National Accreditation Office, and the Conformity Assessment Enterprise.

In regard to expectations, something that may have surprised the program officers was the swift and effective response of stakeholders to the contingency of COVID19, as described in the results described in STEF's final report.

Another factor that may have exceeded expectations is the variety of voluntary standards that were mentioned in the survey, beyond those that are mandatory. Firms mentioned a large number of them, such as SMETA³⁹ (a largely ethical audit); S-Mark⁴⁰ (the European electrical standard); YUM food safety⁴¹ (for restaurants and food suppliers); Spring Avocado, Fair Trade, Halal, etc.

Examples of unintended consequences/impacts from the intervention

In the period 2017–2023, a series of global events that could not be expected in advance posed challenges and enabled impacts that were not foreseen at the beginning of S2 implementation.

One was, of course, the COVID19 pandemic, which disrupted and changed most human activities and brought logistic delays due to the need for reorganization of all personal contact, for instance, in the case of planned training sessions across the entire S2 portfolio. The pandemic brought also, with the successful STEF intervention, an amount of goodwill among stakeholders that would not have been expected without TMA's response.

Stakeholders also mentioned, regarding the project in Rwanda, an unexpected consequence of Brexit as DFID funding was cut short, but, fortunately, it could be replaced after a while by FCDO (British institution that integrated the role of DFID). On a more positive side, the success of quality measures implemented by a number of hotels and restaurants in Rwanda were later spilled over towards other caterers, a positive achievement that augurs good perspectives for the continued effects of the project there. Also in Rwanda, the ProDev Case Study (see Annex 10) mentions an unintended impact such as the development of a new product line (fish feed), which resulted in a positive milestone for the company associated with the certification.

The project also had consequences beyond the portfolio countries. One example that the evaluation found was that trade disputes between South Sudan and Uganda on Maize quality, leading to rejection of Ugandan Maize, were resolved through harmonized testing and sampling protocols; with the testing being done at the Gulu regional laboratory (supported by the project).

In the case of Tanzania, TAHA reported that as a consequence of TMA's project, specifically the improvement in product certifications and compliance with SPS requirements, firm competitiveness increased. This assessment is aligned with the findings in the survey, where 48% of Tanzanian respondents agreed that their efforts towards compliance improved their competitiveness; and it is also backed by the responses with regards to their potential to sell more products in their usual markets or to sell in new markets (in both cases 59% of responses agreed that was the case). It allowed Tanzanian producers to trade in the regional and international markets, mentioning as exemplified the South African, Chinese and Indian markets.

Cross cutting issues – Impact of the projects in terms of poverty reduction, gender, inclusion and environment

In terms of job creation, while the survey did not collect information on the type of employment, information on number of employees (overall, younger than 35 years old, female, and employees with disabilities) was asked for both 2023 and 2017 (or closer year when information was available, as some

³⁹ <https://www.nsf.org/sustainability/supply-chain-sustainability/smeta-ethical-audits>

⁴⁰ <https://www.intertek.com/product-certification-marks/s/>

⁴¹ <https://www.foodsafeworld.com/auditing/yum-food-safety-audits/>

businesses might not have been operating at the time). From this analysis it was observed an overall positive effect on job creation among the surveyed firms, not only in the overall number of employees (where all countries have positive results) but also for younger employees and women which in some cases had a higher increase than the overall number. Figure 10 summarises the percentual increase in the median value of jobs per country and overall sample in the three types⁴².

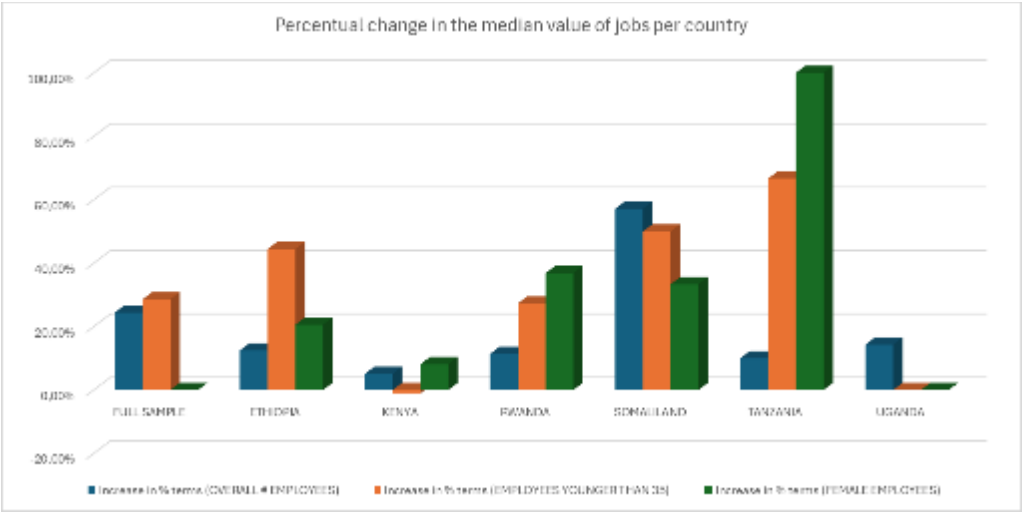


Figure 10. Percentual change in the median value of jobs per country

Stakeholders seem to have an overall positive view regarding the contribution of the portfolio under evaluation to cross-cutting issues.

Thus, UNBS mentions that the enhancement in the analytical testing capacity in the regions and the related reduction in the cost of doing business to the MSMEs has stimulated growth and the creation of employment for youth and women (as they have a higher representativity among MSMEs) causing ripple effects. UNBS also states that this has supported the Ugandan government programme of the Parish Development Model⁴³. Looking at the survey findings, it can indeed be observed an increase in the overall employments with an average increase of about 45%. (14,29% in median value), as well as an increase in the average number of female employees and employees younger than 35 years old (however, this increase is not found when looking at the median value).

On its side, the Private Sector Foundation of Uganda⁴⁴ (PSFU) also perceives positive impacts from the support provided to UNBS on gender (i.e., empowering women entrepreneurs, particularly in cross border trade, through capacity building programmes) and environment (i.e., support to development of infrastructure such as eco-packs and logistics hubs that consider environmental sustainability as a factor).

In a similar way, in the case of Tanzania TAHA mentions Pack houses certifications as an example of where job creations to youths and women have occurred as in most of these facilities their workers are youth and women’s doing daily activities.

Specific data on the number of packhouses certified was not provided by the stakeholders; however, the survey information seem to back this assessment of women and younger people benefiting from the process. In the case of Tanzania, where 17 respondents (63% of the country sample) indicated to be either cooperative or member of producers group, the increase in the median value of employees

⁴² Data on changes in employees with disabilities was not included as in most cases the median value for both years was 0, with the exception of Ethiopia and Kenya (where median values passed from 3 to 2,5, and 1 to 0,5 respectively).
⁴³ <https://documents.worldbank.org/en/publication/documents-reports/documentdetail/099062124022028331/p1797941000fc9011937b15fa669752d99>
⁴⁴ <https://www.psfuganda.org/>

younger than 35 years and women (as shown in Figure 10) is particularly high and, as a percentage, larger than the percentual increase in the overall number of employees.

With regards to the survey results, as mentioned in the Efficiency section, when answering the question “Did S2 invested resources were beneficial also for the communities as a whole?”, the Survey provided a view of stakeholders’ perceptions on the **impact of the portfolio in the wider communities** where they were implemented. Only 3% of respondents perceived no benefits outside the stakeholders themselves.

Moreover, all the improvements in the quality of goods, and in particular in those of farm products for human consumption, have a direct impact on the community as they tend to improve health and hygiene. An example is the improvement in the management of hotels and caterers as it happened in Rwanda. Even more directly **related to essential human health** was the support provided by the S2 in the face of the pandemic, facilitating the move of essential health inputs.

As much as the Output on competitiveness of the firms was reached, it also promoted employment as better **quality products enable firms to** enter new markets (almost 80% of the sample stated that as a result of their compliance efforts they have now the potential to enter new markets), implying the **creation of more jobs**.

Although the evaluation did not assess the impact of S2 on the environment, it is very probable also that a general move towards **a better process of the products at the firm level may translate in a better use of manufacturing inputs and therefore to less materials being discarded**. The same phenomenon of more orderly manufacturing processes may also have an **effect on the use of energy per unit of output**, something that would also contribute to the environment. Additionally, the **decrease in distances travelled and the corresponding savings in CO2 emissions** as S2 enabled the function of new regional labs, like in Uganda, **can be counted as an environmental benefit**. Plus, even more importantly, the energy saved by the implementation of harmonized standards which avoided all the use of lab machinery and travel related with previously duplicated analysis of compliance.

Pertaining to the **spread of services among disadvantaged groups**, the survey shows that approximately 13% of respondents were members of cooperatives, or producer groups. Although small firms are probably underrepresented among the respondents to the survey, this percentage shows **S2 efforts to incorporate small stakeholders, including women traders**. As much as they benefited from the projects S2 had an impact on gender. The Rapid Assessment conducted in 2022 on the Standards and Quality Infrastructure Project highlights that the projects did and special effort to include microenterprises and that those are mostly headed by women.⁴⁵ In Rwanda, an End of Project Report conducted in 2022 showed that 30% of participants in the different activities were women (83 out of a total 269 participants)⁴⁶. In Tanzania, a survey performed for SQL and SPS brings a useful observation. It found that a majority of the MSMEs are formally owned by men (64%), although many of those are daily managed by women. The document recommends that the sensitization programs should not consider only the business owners, but also the people who effectively manage their business on a daily basis⁴⁷.

⁴⁵ Final Report for Rapid Assessment of the Standards and Quality Infrastructure Project, by TradeMark South Africa. Pg. 22

⁴⁶ End of Project Report, Technical Support for Agricultural and Livestock commodities and their systems to comply with Sanitary and Phyto-Sanitary measures (SPS) and other export market third- party certification requirements SPS Rwanda, by AESA, March 2022, pg. 60

⁴⁷ Standards, Quality Infrastructure and SPS Programme in Tanzania, Baseline Survey Draft Report, 2022

A CASE STUDY OF HOTEL DES MILLE COLLINES (RWANDA)

Context

Hotel Des Mille Collines, located in the central business district of Kigali, was started in 1973 as the premier grand hotel of the country and is **owned by a female entrepreneur**. The four-star hotel has 112 rooms, a bar, a café, three conference rooms that could accommodate around 400 guests, a restaurant, a swimming pool, and tennis courts. The hotel is one of the most famous hotels in Rwanda owing to the fact that it opened its doors and provided shelter to about 2,000 people who were saved in 1994 during the Genocide. The hotel has also for long been known to promote local artists as well as the Rwandan Culture and produce, using 90% of local produce. Currently, the hotel has a workforce of 174 out of which 40 are women.



The hotel has a **program that provides mentorship to students in technical, vocational, education and training (TVETs) and high school students** to embrace a career in the hotel industry. The hotel learned about the capacity building and certification program for food operators by Rwanda Standard Board (RSB) and TMA in 2019. The hotel was among the first comers into the program, although by the time, they already had their own Standards operating Procedures (SOPs) but wanted to benchmark with international standards and align with them to know at which level they were performing, what could be done further to add value to their operations. They quoted that the support has been through continuous audits from RSB who have been very supportive in providing the necessary support. Through the support from RSB, they have received support from young professionals who understand and maintain the system.

The hotel learned about the capacity building and certification program for food operators by Rwanda Standard Board (RSB) and TMA in 2019. The hotel was among the first comers into the program, although by the time, they already had their own Standards operating Procedures (SOPs) but wanted to benchmark with international standards and align with them to know at which level they were performing, what could be done further to add value to their operations. They quoted that the support has been through continuous audits from RSB who have been very supportive in providing the necessary support. Through the support from RSB, they have received support from young professionals who understand and maintain the system.

Result

Interaction with the hotel proprietor indicated that they have had great learnings from the certification process which has helped them to align their processes with the requirements for the Hazard Analysis and Critical Control Points (HACCP) system. The system has enabled the hotel to set a criteria that help to identify, evaluate and control hazards that may pose adverse health effects due to food contamination. Some of the improvements that the hotel has integrated into their operations include aligning suppliers' systems (for instance receiving and handling of produce), segregation of food storage in which they have embraced separation in the storage areas for raw produce and dry food stuff which has helped minimize food contamination. This has enhanced food safety compliance as well as enhanced trust to their clients. The HACCP system has also helped in tracking and identification of root causes of any issues that arise along the process.

Impact

- Through support by Rwanda Standards Board, the hotel attained food system certification for RS 184: 2017 for the following scope of activities: purchasing of raw materials (which includes a criterion for the suppliers), reception, storage, preparation, cooking, serving, hygiene, maintenance, human resources as well PRPs performed internally and outsourced (pest control, waste management, one part of cleaning).
- Through the establishment of the system, they have been able to understand together with their fresh produce supplies i.e. the farmers about what is acceptable to be used in farming and protect animal health, how to transport the food etc.
- Two of the hotel's fresh produce suppliers have been certified, for the HACCP system, by RSB which has helped to streamline their processes with the hotel's internal inspection processes with continuous monitoring along the critical control areas for enhanced delivery of quality and safe food.
- The certification has enhanced the hotel's capacity to implement the food safety and quality system that starts from the farm level to services at receiving point, handling, processing until the serving point.



- The certification has enhanced the hotel’s potential to tap into the international market, in which they are already receiving some requests to host international conferences.
- All the hotel’s staff are now well trained in the HACCP system and are keenly taking every step of its implementation which has enhanced continuous improvement of food safety processes.
- The hotel has increased enhanced its reputation and customer confidence leading to growth of its outside catering scope to around 50people

Challenges

- The main challenge experienced was the consequences of covid 19 which somehow slowed down the implementation pace and increased the costs of implementation.
- Staff turnover: trained hotel staff become more competent and are pouched by other organizations. This necessitates repeat training which is an additional cost.

Who benefits

The hotel quality manager was delighted to say that “certification against HACCP has been a powerful marketing tool for us, we are proud that anyone receiving our products is safe, we have become more competitive as we present our quotations or in tendering processes competing for contracts locally and internationally”.

Trade Flow Analysis

The trade flow analysis did not reveal a particular change in the volumes traded which could be attributed to the projects.

Nevertheless, it may be kept in mind that national trade figures respond to large variations in the quantities trade, which are difficult to be influenced by individual projects alone (more detail provided in Annex 6).

For example, as the great majority of the products traded are agricultural or based in agricultural produce, it may be considered that in many instances a very sharp variation in the volume traded, for instance a sharp decline, could be a consequence of weather events (likely to become increasingly stronger as a result of climate change).

This is not surprising since while compliance with technical requirements (particularly those related to food safety) are a minimum necessary to access most International markets, the capacity for actual entry depends on many other factors, not always related to standards issues, such as knowledge of the market, branding, and management and logistics expertise, among others.

However, this does not mean that S2 projects have not contributed positively towards the market access aim as shown by other findings from the KII and survey.

4.4. Sustainability

Extent to which NSBs and SPS agencies are likely to be sustained following completion of TMA support

The interest of the private sector is a strong factor towards granting time sustainability for the achievements reached by S2. This has been assessed by the evaluation through indicators such as “number of businesses that increased sales as a result of the interventions”, as well as by the answers provided by firms saying that “customers keep demanding higher quality in products”.

The 6th EAC Strategy (see Relevance section), emphasizes political will at that regional level, expressed in the Vision for the coming years. Regional integration mechanisms also offer generous incentives to foreign corporations for investing in manufacturing in the portfolio countries. The Relevance section also

described the points of view expressed by economists, which coincides on the advantages of trade integration. And, on top of EAC's policies, the continent-wide AfCFTA brings one more strong reason for further trade liberalization.

The perspective of GDP growth in the coming future, as shown as World Bank's overview of each of the countries in the S2 portfolio⁴⁸ is also positive, continuing a trend that showed as the countries recovered after the COVID19 pandemic. Growth in the national GDPs will contribute to diminish private sector complains against foreign competition and thus enhance the perspectives for deepening trade integration.

Further, trade tensions in the USA vis-a-vis China and other countries, as well as the disruptions created by the conflicts in the Middle East and in the Ukraine, may contribute to a further prioritization of trade among African countries themselves. This should translate in a continuing support by governments and donors to the quality infrastructures' changes that enable a fluid flow of goods.

Examples of exit strategies after closure of individual projects

In general, TMA has encouraged national quality institutions to charge fees for the services they provide, and, to certain extent, has monitored at what degree they do so. Charging for services will provide more funds to keep the existing SQI functioning and to continue its innovation process in the face of quality requirements that markets trends will increasingly request.

In Uganda, for instance, the evaluation found that the sustainability of the changes made with the support of the project was helped by:

- Public-Private Partnerships (PPP) – Collaboration with businesses ensures continuous feedback and adaptation of services to meet market demands;
- Institutional Capacity – UNBS's ability to independently maintain and expand testing services has been enhanced through staff training and infrastructure upgrades;
- Pursuing International Accreditation to support export market and consumer protection;
- Obtaining more Government support for funding to support TMA initiatives for UNBS to effectively execute its mandate; as an example, it can be mentioned that the regional laboratories were built with national funds and TMA supplied equipment utilizing project funding;
- Regional Integration: Support more harmonization of standards in other trade traded commodities.

As pointed by the Rapid Assessment of the SQI project⁴⁹, it may be realistic to also expect that some institutions will require continuing support from donors or national governments. The OECD and the WTO report Aid for Trade at Glance 2024 highlights the importance that support towards better trade has for the international organizations and even more importantly, for the OECD governments, mostly western industrialized countries that fund development.

A recent (June 2024) joint OECD–WTO Aid for Trade ministerial exercise underscored the role that trade can play in fostering economic growth and sustainable development⁵⁰. *“Aid for Trade remains a critical element of our collective commitment to ensuring that the benefits of trade are shared more widely, particularly with developing economies and least-developed countries (LDCs). ...Aid for Trade can play to support economic growth, poverty reduction and sustainable development. Recognizing the significant challenges faced by developing economies and LDCs, ministers underscored the need to*

⁴⁸ “The East African Community was the best performer in the subregion, with a growth rate of 4.7% in 2024 and an expected rate of 5.7% in 2025–26. Kenya, Rwanda, Tanzania, and Uganda were the largest contributors to the East African Community's growth performance.” <https://www.worldbank.org/en/region/afr/eastern-and-southern-africa>

⁴⁹ Op.cit., page 35

⁵⁰ https://www.oecd.org/en/publications/aid-for-trade-at-a-glance-2024_7a4e356a-en.html

enhance trade-related capacity building and support to facilitate their integration into the global economy.”⁵¹

The Evaluation revealed that the portfolio developed its projects by engaging with the private sector, including business associations that may gather information on the situation of many SMEs, and also with the public authorities, directly or through the EAC organs. This dual approach may be a good practice in terms of fostering sustainability of TMA actions.⁵²

TMA has also approached sustainability including the training of local professionals, many of them young, which can sustain the work initiated in each of the countries reviewed by this evaluation. For instance, in Rwanda, the evaluation found that the project design was inclusive. The Rwanda Standards Board, RSB, recruited 15 local consultants, 60 young professionals and 68 enterprises divided into three food chain categories; there was integration of the SMEs with the young professionals to enhance the SMEs capacity and expertise; and several trainings were conducted including awareness on the implementation of food safety management systems standards (ISO 22000 and RS 184) and auditing. These were provided to 57 young professionals, 15 local consultants, 68 key enterprise staff, and 32 RSB staff. Eventually, RSB employed 4 of the young professionals who were part of the project to support in product testing and standards.

4.5. Lessons Learned

TMA's approach to trade integration through the S2 sponsored projects has shown several strong points, and a few challenges, which inform into the lessons learned in this evaluation, which are described below:

1. Strengths

Combined approach

A recent study, dated September 2024 on Aid for Trade, was presented in Nairobi in October 2024, during a Seminar held by the Donor Committee on Enterprise Development (DCED)⁵³, an organization that gathers most of the donor agencies interested in private sector development. Key points of the study expressed that DCED's market systems approach has potential in:

- Enabling enterprises to take advantage of opportunities to expand exports – opportunities that trade policy and regulatory reform and increased market access associated with accession to, and implementation of, trade agreements have delivered.
- Trade facilitation, which involves working with governments and other actors to unilaterally improve delivery of trade-related services and regulations and reduce impediments and cost of implementation. This contrasts with trying to directly change trade-related policies, a process which is often constrained by international agreements and the processes of negotiating these agreements. The research suggests that market system approach programmes are active in this space.

⁵¹ While the document stresses the need for further aid, especially for LDCs in Africa and Asia, along with the continued support to agriculture, it also alerts in regards that “the shift towards loans over grants observed in recent years presents challenges. The trend was particularly marked in 2022, with loans driving growth in Aid for Trade disbursements and a widening gap in the share of loans (65 per cent) versus grants (35 per cent).”

⁵² However, as it has already been commented before, the overall S2 actions in the field of Standards and SPS was primarily focused on supporting public institutions.

⁵³ <https://www.enterprise-development.org/dced-global-seminar-1-3-october-2024-nairobi/>
<https://www.enterprise-development.org/wp-content/uploads/DCED-Global-Seminar-2024-Synthesis-Report.pdf>

It may be interesting for TMA's future interactions with donors to further explore what DCED calls a difference between its Market Systems Development (MSD) and the thinking of "traditional" aid for trade thinking:

"Many Aid for Trade programs include components aimed at helping businesses take advantage of international trade opportunities. Common activities are information dissemination activities, targeted enterprise training, structures for helping gather information about markets, and sometimes support for dealing with particular aspects of target market trade regulations. There is often focus on streamlining trade logistics including the implementation of border controls. Historically, there has been less in the way of working with businesses to identify systemic impediments. Rather programs assume that they are removing policy or regulatory barriers and that is sufficient."

The Evaluation of the TMA portfolio revealed that the S2 combined both approaches, as it developed its projects by engaging with the private sector⁵⁴, including business associations that may gather information on the situation of many SMEs, and also with the public authorities, directly or through the EAC organs.

This dual approach may be a special feature of TMA, very useful for future projects. The S2 portfolio in fact utilized what can be described as a useful mix of an MSD approach, based strongly in the needs of firms, as expressed in its numerous needs assessments, together with an Aid for Trade Approach (AFT), focusing on adding, changing or adjusting the existing regulations, for instance standards.

TMA can emphasize in its dialogue with donors and other stakeholders the unique and useful characteristics of this mixed approach.

Comprehensive array of activities

S2 also embraced a notable array of different activities, from supporting the availability of testing equipment, to training officers and MSMEs, establishing One-Stop Border Posts, advising EAC, defining standards, harmonizing them among countries (even in Somaliland), etc. It can be said that, with enough coordination, all these activities reinforce each other, as for instance in the sharing of useful information from one activity to another.

Africa-to-Africa

S2 used African expertise whenever it was possible, saving costs and bringing experiences that the portfolio countries feel closer to their own, rather than those that could come exclusively from more industrialized countries. It also helps to establish working relations among the institutions, setting the bases for future cooperation and trust.

Track record

As its experience with trade facilitation in the East African region began with its S1 several years ago, TMA's S2 brought to the table a considerable amount of knowledge of stakeholders, possible ways for improvement and MSMEs necessities.

In country presence

TMA had a physical presence in each country, which facilitates the mobilization of experts to start the foreseen activities on time, and the detection of needs and problems that may appear during implementation.

⁵⁴ During interviews with TMA's directors, the evaluation team got the impression that, even though in some cases there was work more directed towards the private sector, this was not the core of the strategy: benefits to the private sector were expected more as a spill-over effect or as support given by the Beneficiary Institutions, but not as consequence of direct engagement with TMA. As a possible option in future strategies, this approach will probably need to be strengthened.

2. Challenges

The evaluation found a relevant challenge at the beginning of the inception phase which was the uneven availability of monitoring reports across the different projects in the portfolio. When projects activities are as varied in nature, such as supporting one stop border posts, or helping EAC to harmonize regional standards, or providing quality labs with equipment, and they are implemented in different countries and regions, it is important that TMA timely assembles information on the results achieved by the projects.

This would not only help provide inputs from TMA headquarters directives to the portfolio stakeholders but also help the performance of external evaluations in the future.

The lesson learned is that a stronger emphasis in the establishment of project monitoring schemes and a reporting system, as well as the archiving of these information from the technical teams at TMA headquarters, is needed to ensure access to full information when is necessary at any stage of the project management cycle. Of particular importance is the collection and filing of quantitative information.

Auspiciously, the Programme and Project Cycle Management Guidelines⁵⁵ that will lead the implementation of S3 consider this point extensively, in its 8th section “Project Implementation 3: Monitoring, Evaluation, Learning (MEL)”. The Guidelines note that MEL is critical to ensure that projects deliver meaningful results, emphasizing the measurement of advances towards outputs and outcomes through a Monitoring Plan. The Guidelines include rule 25 which mandates that a MEL budget be allocated, and rule 28 which establishes quarterly periods for monitoring reporting and semestral ones for reviews of the monitoring plans. These measures will contribute to, among other substantial benefits, to differentiate, as it is a priority of the Guidelines, between results wholly attributable to TMA and those achieved in cooperation with other development partners. The Guidelines’ rule 26 also point to the necessary establishing of baselines within 6 months of the beginning of project implementation, as well as the need to develop a sustainability plan (rule 27). These rules will also help to achieve solution-oriented dialogues with the different stakeholders. Whenever possible, evaluations should be carried out closer to the end-date of project activities, so it is easier to have access to key people involved in the project both from TMA (i.e. local TAs and teams hired for leading the implementation) and from the stakeholders and beneficiaries.

In the contexts of Sub-Saharan countries, where there is frequent presence of multiple development partners, a timely recording of achievements will ensure that TMA results are properly registered, thus reducing the need to reach for stakeholders’ memory or perceptions, which may be blurred after a certain time. At the time of this evaluation, TMA role and activities were not well remembered by some of the firms interviewed, which even under the indirect design of Strategy 2, were the final intended beneficiaries of the projects.

It is advisable that, even under more indirect methods of implementation, the memorandum of understanding that could apply with relevant stakeholders, includes obligations for the visibility of the role and “brand” of TMA. This will contribute to the sustainability of TMA as an Africa based and managed development institution, and its establishment as a partner of excellence for its development partners and funding agencies.

⁵⁵ Programme and Project Cycle Management Guidelines, Trademark Africa, Revised October 2024

5. CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

This section contains the conclusions of the evaluation, organised as much as possible by the DAC evaluation criteria to facilitate their connection with the analysis previously made in relation to the Relevance, Efficiency, Effectiveness and Impact, and Sustainability of the actions supported under the TMA S2 in the domain of Standards and SPS.

- The S2 portfolio has demonstrated **Relevance**, as it was aligned with political decisions at the continental, regional and national levels of the countries involved. This alignment with the will towards further integration both at the EAC and at the countries corresponded with those decisions that were already in place when S2 started in 2017 but, in particular, with those that appeared later, such as the AfCFTA initiative, EAC's 6th Development Strategy and others.
- The S2 portfolio developed well also in terms of **Efficiency**, as its implementation endeavoured to keep to a planned schedule of activities and found ways to continue its roll out in the different countries even when circumstances such as Covid or the delays in the approval of quality regulations hindered its scheduled plans. An example of TMA responsiveness to unexpected circumstances was the STEF programme, as well as the project developed with the EA Grain Council.

The projects adjusted well also to the demands of firms, as shown in the results of the survey, where entrepreneurs confirm that their clients want products of better quality and are aware that the market required them to further engage in processes that guarantee compliance with quality regulations.

It must be noted again that the survey sample has, due to the source of the list of companies, some biases, possibly over-representing the results of companies that already have made efforts towards compliance and thus are more likely to provide goods to aware clients. Nevertheless, the high percentage found still indicates an increasing level of awareness among their customer base (which is understood in many cases is not the final consumer but other companies part of the value chain), and the relevance for those business to achieve compliance. This way, and in alignment with recommendations from the interviewed firms and responses from stakeholders, sensitization and awareness raising are still important topics to consider. But also, it is relevant to consider the potential pull that bigger and possibly more aware companies in later links of the value chain might cause among producers and handlers, where they can contribute to create the adequate environment for compliance.

The evaluation also found that, in spite of the private sector not being objective of direct engagement by TMA in S2, it can be observed that some positive spill-over effects, coming from the support to the Quality Infrastructure system and its institutions, have reached the private sector, including MSMEs in our sample. This is of particular importance not only because they represent a large proportion of the private sector in the target countries but also because they tend to be in a large proportion headed by women traders and young entrepreneurs. The Survey unveiled that stakeholders find that the evaluated projects have helped social objectives such as the promotion of women entrepreneurs, jobs creation and a contribution towards a better environment.

- Concerning **Effectiveness and Impact**, the companies surveyed declared that their involvement in the projects resulted in a median increase in sales, with some having increased much more the volume sold. Firms also responded positively to the changes in the time needed for conformity assessment, as well as a reduction in the costs. The projects performed also very well in the number of firms that used the S2 activities to advance towards process and/or product certification, with 54% of them advancing to both, showing the extent of awareness that many firms have in relation with the need for better quality goods.

The motivation of companies towards higher quality standards was helped by S2 achievements in terms of standards harmonization, which made it possible for companies that comply with regional standards to access markets beyond the domestic ones. Motivation was also enhanced by the projects' numerous activities of sensitization and awareness building. A very important element was also the large effort to make quality services to be more accessible to companies, resulting from activities such as provision of metrology equipment and corresponding training, and the adequation of regional labs.

As mentioned above, stakeholders perceive that the projects have helped the community surrounding the enterprises. Regarding those cross-cutting issues, it can also be deduced that all the efforts towards SPS compliance had a direct effect on human health, as they result in foodstuffs that follow stricter safety standards. Although the evaluation did not measure the impact of S2 on the environment, it may be concluded that the activities that follow procedures, such as the harmonization of standards, save also resources and shorten travels, with direct consequences towards a better environment.

The TMA activity in terms of reducing barriers to trade produced, according to the firm-level survey, direct results in terms of costs and the shortened duration of procedures. But these were seldom quantitatively reflected and time-fixed in project documents and could only (occasionally) be recalled by stakeholders.

The trade flow analysis did not reveal a particular change in the volumes traded which could be attributed to the project. Nevertheless, it may be kept in mind that national trade figures respond to large variations in the quantities trade, which are difficult to be influenced by individual projects alone (more detail provided in Annex 6). For example, as the great majority of the products traded are agricultural or based in agricultural produce, it may be considered that in many instances a very sharp variation in the volume traded, for instance a sharp decline, could be a consequence of weather events (likely to become increasingly stronger as a result of climate change). This is not surprising since while compliance with technical requirements (particularly those related to food safety) are a minimum necessary to access most International markets, the capacity for actual entry depends on many other factors, not always related to standards issues, such as knowledge of the market, branding, and management and logistics expertise, among others. However, this does not mean that S2 projects have not contributed positively towards the market access aim as shown by other findings from the KII and survey.

- In terms of **Sustainability**, the evaluation found that there are good grounds to affirm that the activities initiated by the projects have higher chances of sustaining themselves, primarily because the strong driving factor of businesses' motivation will continue and is expected to continue as the macroeconomic perspectives of the countries involved for the coming years are good. Moreover, governments seem to realize that trade integration should continue, which should spur them to finance the SQI in their countries to keep pace with the trends in global markets such as the new EU import regulations.

RECOMMENDATIONS

The section on Lessons Learned already mentioned the strong points of S2 which can be continued under a new S3 strategy. In parallel, the challenge found in terms of the monitoring activities will be solved by a enforcement of the MEL actions mandated in TMA's new Guidelines for Programme and Project Cycle Management.

From those the recommendations that derived are:

1. Keep the mix of MSD and Aid for Trade. In terms of gathering information for further projects within a future S3, it is certainly advisable that TMA continues its practice of working directly with the stakeholders including engagement with private firms and their organizations in order to define goals and activities along the appropriate public offices.
2. Maintain the vocation to get involved in the coordination of the multiple activities that progress in the harmonization of standards and quality compliance require.
3. Use as much as possible African expertise, to adapt innovation and content to the African context and build into the successful experiences in the continent.
4. Keep presence in the countries involved, in the preparation and implementation of the projects, for closer contact with beneficiary authorities and firms. A key learning from the exercise has been that the direct and personal relation with stakeholders is fundamental for a timely cooperation and the national country teams are a fundamental tool for it.
5. Improve the monitoring, evaluation and learning (MEL) function, to align with TMA's Guidelines Project Cycle Management of 2024. Beyond helping the coordination of a wide array of diverse activities, proper monitoring will be proof of TMA's track record, loaded with its rich experience in the subject of trade integration and quality improvement. This seems to already be a point where TMA is acting upon based on the efforts to construct a quantitative baseline for some of the most recently designed projects (e.g., TUTS in Uganda).
6. Involve stakeholders during project design to enhance their understanding of their roles and involvement at the project onset, thus enhancing delivery of project outcomes. Additionally, an integrated multi-stakeholder approach is essential for leveraging synergies for utilization of resources among partners and stakeholders for effective delivery of outcomes and ultimate impact using cost-effective measures.
7. Ensure that authorities and donors to monitor what degree resources available for compliance do match the increase in demand for services that results from the awareness raising and capacity building interventions of the projects. Lack of alignment might result in perceived worsening services and might also discourage the compliance efforts of newly interested firms.

With a view to the planning of a future strategy, the following suggestions may be added:

- **Look at the new sources of comparison of SQI in the different countries.** As complementary tools to engaging firms and authorities to define the projects it may be useful to consider the international rankings on SQ infrastructure that have appeared since S2 began, such as that of UNIDO'S [Quality Infrastructure Index](#) of 2024. This index provides a general ranking of countries' QI, going from the most developed to those still emerging. The ranking combines 5 Dimensions, that are captured with 38 indicators. The 5 dimensions are Metrology, Standardization, Conformity Assessment, Accreditation and Policy, which, if analysed separately can provide hints on where TMA may most effectively contribute. They also may help the dialogue with governments, as they show the relative position of each country within the geographical region they belong to. The website

also offers easy access to country profiles with basic data for each economy. Another index is the [Global Quality Infrastructure Index \(GQII\)](#) developed by experts from private consulting firms and is supported by the Germany's Federal Ministry for Economic Cooperation and Development (BMZ). This index ranks the countries in three dimensions namely metrology, standardization, and accreditation.

- **Maintain awareness raising and capacity building actions as relevant sectors of action, with particular attention to the private sector and MSMEs.** As said before, while the results of the firm-level survey might seem to show a high-level of awareness among the private sector in the relevant countries, this is an element where the construction of the sample might have had a big effect. Recommendations from stakeholders and from the firms interviewed consistently refer to the need of further sensitization, awareness raising and training actions on certifications needed and related processes, including in instances where new requirements might be imposed (and thus aimed to firms already more familiar with the standards and technical requirements). In this sense, the continuous engagement of private support organisations and private entities as a key tool to expand the reach and sustainability of project efforts is recommended. Similarly, the need to keep supporting national institutions themselves to build their capacities and reinforce their services is also a relevant element, also linked to the recommendation found in the survey to ensure a level playing field in which mandatory requirements are applied consistently for all actors⁵⁶.
- **Mainstream environment even more into the projects.** This is a mandate of EAC and national governments and donors that should be incorporated even more fully in an S3 planning. Beyond all the considerations that have to do with climate change and how it affects the planet and Africa especially, there are also mandatory requirements such as those that the EU will enforce. Thus, to be considered also by an S3 in preparation for 2025 is the EU Deforestation-free Regulation (EUDR). This is part of the EU's Green Deal initiative that aims to prevent the import of deforestation-linked commodities into the EU. The new rules will take effect on December 30 2025 for large European companies and on June 30, 2026 for Europe's small and micro enterprises. The EUDR covers seven commodities (i.e., cattle, cocoa, coffee, oil palm, rubber, soya, and wood), as well as many derived products listed in the annex to the regulation (e.g., meat products, leather, chocolate, coffee, palm nuts, palm oil derivatives, glycerol, natural rubber products, soybeans, soy-bean flour and oil, fuel wood, wood products, pulp and paper, printed books).
- **Look to the (already) coming future.** Results from the evaluation point to a positive effect linked to deepening of digitalization efforts both from the stakeholders perspective (e.g., TAHA in reference to ATMIS system for phytosanitary issuance, the mention from PSFU to trade information portal or the IEICS system in Kenya, even if in this later case TMA's support was beyond the scope of this evaluation) and interviewed firms (which made some mentions to the benefits that online services could bring). It is thus advisable that TMA continues its efforts in this line of work. In addition, in relation to ways to move forward on the positioning of TMA as a conduit for the adoption of Standards and SPS measures by the different African countries it may be also interesting to look at the developments that are occurring in the field of Artificial Intelligence, AI, and are related to trade issues. The use of AI for international trade raises, as for many other areas of human activity, both enthusiasm and anxiety. So much so that in 2024 the WTO issued a report with the title "[Trading with intelligence How AI shapes and is shaped by international trade](#)". Experience-sharing on AI is also slowly emerging in other WTO bodies". For instance, the Committee on Sanitary and Phytosanitary Measures (SPS Committee) recently held a thematic session to explore the utilization of technological solutions, including AI and machine learning, in the field of SPS. Experts point to a number of questions regarding the use of AI in trade, such as "how to ensure that regulations do not

⁵⁶ In this sense, it should not be forgotten that business informality rates also play a role in this process and that, therefore, efforts to increase standards and technical regulations compliance by the private sector as a whole should not overlook possible effects and limitations linked to this.

become obsolete as AI rapidly evolves; how to ensure a lifecycle compliance of AI and AI-embedded products with relevant requirements under standards and technical regulations; and how to ensure postmarket surveillance of AI and AI-enabled products". The report points to the importance of establishing coordination among the WTO itself and other relevant entities that are currently discussing the issues of AI and trade. This signals that the developments of policies and guidance relevant for AI regulation should be followed as they happen in different organizations.

- **Depth and Variety.** Finally, a comment that relates to TMA's discussions of its roles in a Theory of Change for a S3 as it expands into more countries in the continent. It is about whether:
 - a) a very wide variety of activities do enhance the effectiveness of TMA intervention, under the assumption that they synergize and reinforce each other, or
 - b) S3 should be concentrated in fewer areas of activities where TMA has a deeper cumulative expertise.

It must be considered that progress towards better product quality and trade integration requires a variety of related aspects that should be encompassed, namely, quality bodies have the capabilities to verify compliance; processes are recognized by third parties to allow the trade of the products; firms have positive incentives and find accessible operational inspection services and those who do not comply are penalised; SMEs have the facilities to invest in infrastructure, training, etc; consumers are willing to pay more for quality, and so on.

It makes sense then to consider that these many interrelated elements (and even more at the level of global trade) should be tackled by an organization which is able to coordinate them. However, in the process of geographical expansion of TMA, following developments in implementation of the AfCFTA, this evaluation recommends that, during the next years, the organisation keeps a focus on what has done best under S2. One of these areas of work is, definitely, Standards and SOS support. To conclude, and by the same token, this recommendation emphasizes the need of doing so with a strong monitoring and evaluation system.

ANNEX 1 – DOCUMENTATION AVAILABLE

General Documents and Sources

- ICT4T Portfolio Evaluation, Presentation of key findings to TMA Evaluation Committee, February 27th, 2024
- Evaluation of TradeMark Africa's ICT-For-Trade (ICT4T) Portfolio in Strategy 2 (2017-2023). Final Report, 27th March 2024
- Endline Evaluation of the Uganda Programme on Sustainable & Inclusive Development of the Economy (UPSIDE) Project, December 2023, submitted to TradeMark Africa (Uganda) with support from the Danish International Development Agency (DANIDA) in partnership with the Government of Uganda, December 2023
- Evaluability Assessment – TMA – Improving Trading Standards and SPS Measures, undertaken by Valerie McDonnell-Lenoach, Claire LeBlanc & Neil Pogorelsky (EQUALS 2), Final, Version 2, August 2023
- Preliminary Findings from Evaluability Assessment, 26 July 2023
- Independent Evaluation of TradeMark East Africa, Deliverable 3B: Performance Evaluation, Final Report, prepared by by: Keri Culver, Andy Cook, John Spilsbury, Ozlem Akkurt and Saltanat Rasulova (OPM, Cardno, TripleLine), September 2019
- The African Continental Free Trade Agreement – <https://au-afcfta.org/>
- The EAC Vision 2050, Arusha, Tanzania, August 2015
<http://repository.eac.int/bitstream/handle/11671/567/EAC%20Vision%202050%20FINAL%20DRAFT%20OCT-%202015.pdf?sequence=1&isAllowed=y>
- EAC 5th Development Strategy (2016/17 – 2020/21) – Accelerating a People-centred and Market-driven Integration.
<http://repository.eac.int/bitstream/handle/11671/1952/5th%20EAC%20Development%20Strategy-%20Final%20Version.pdf?sequence=1&isAllowed=y>
- EAC 6th Development Strategy (2020/21 – 2025/26), February 2021
<https://www.scribd.com/document/525812029/6th-EAC-Development-Strategy>
- Feed Africa Strategy for agricultural transformation in Africa 2016–2025, African Development Bank Group, 2016 – https://www.afdb.org/fileadmin/uploads/afdb/Documents/Policy-Documents/Feed_Africa-Strategy-En.pdf
- The Standards and Trade Development Facility (STDF) <https://standardsfacility.org/>, 2023 Annual Report <https://largenetwork.com/prod/wto-stdf/ar-2023/>
- The Enhanced Integrated Framework (EIF) <https://enhancedif.org/>, 2023 Annual Report https://enhancedif.org/system/files/uploads/EIF_Annual_Report_2023_E_Web_1.pdf
- African Trade Report 2024 – Climate Implications of the AfCFTA Implementation, African Development Bank – https://media.afreximbank.com/afrexim/African-Trade-Report_2024.pdf
- Economic Outlook of Sub-Saharan Africa, Africa Pulse, The World Bank, October 2024 – <https://openknowledge.worldbank.org/server/api/core/bitstreams/baea7aea-da11-45e8-82ec-101ac5f1e6ab/content>
- East African Community (EAC) Regional Quality Awards, MARKUP II – <https://www.eacmarkup.org/newsroom/latest-news/east-african-community-eac-regional-quality-awards-celebrate-excellence-in-quality-standards>
- Agenda 2063: The Africa We Want – African Union, <https://au.int/en/agenda2063/overview>
- COMESA-EAC-SADC Tripartite Trade Area to come into force 25th July, 2024, posted in Trade, EAC – <https://www.eac.int/press-releases/157-trade/3141-comesa-eac-sadc-tripartite-trade-area-to-come-into-force-25th-july,-2024>
- The Global G.A.P. – <https://www.globalgap.org/>
- Synthesis Report DCED Global Seminar, Nairobi, 1-3 October 2024 – <https://www.enterprise-development.org/wp-content/uploads/DCED-Global-Seminar-2024-Synthesis-Report.pdf>
- Supply Chain Support for Resilience, Relief and Recovery for Cross-Border Food Security-Grains and Horticulture, End of Project Report, 01 August 2022
- Rwanda Development Board, Annual Report 2023

Regional project 2603 – Standards & Quality Infrastructure

- Rapid Assessment of the Standards and Quality Infrastructure Project, Final Report, 12 September 2022, by Ayaah Enterprises Ltd, Kampala.
- Standards and Quality Infrastructure Annual Project Performance Report – Financial Year Progress Report, 28 May 2024 (five versions between 2018 and 2023).
- Project Risk Plan, 23/04/2023
- Project Work Plan, 23/04/2023
- Regional SQI Project 2603 Results Chain

Regional project 5506 – STEF Standards and SPS

- Safe Trade Emergency Facility (STEF) Programme, Final Evaluation Report, by Ayaah Consult, January 2023

Somaliland Project 5112 – Somaliland & Ethiopia Standards Harmonization

- Somaliland Standards & SPS (Sanitary and Phytosanitary Standards) Monitoring Plan, 24/04/2023
- Project Risk Plan, 24/04/2023
- Project Workplan, 30/5/2023
- New quality standards promise better trading future for Somaliland industries, Press Release, 4 August 2021
- Memorandum of Understanding between Somaliland Quality Control Commission (SOCC) and Ethiopian National Quality Infrastructure Institutions accounted for the Ministry of Trade and Industry of the Federal Democratic Republic of Ethiopia, Ethiopian Standards Agency (ESA), Ethiopian Conformity Assessment Enterprise (ECAE), National Metrology Institute of Ethiopia (NMIE), and Ethiopian National Accreditation Office (ENAO), 18 December 2019
- Launch of Somaliland National Standards, Presentation, undated
- SQCC Inception Report, BSI, 16 December 2019
- Consultancy Services for Development and Adoption of Priority Standards for Somaliland Quality Control Commission (SQCC) PO/20190322, BSI, Monthly Report: September 2020
- Monthly Report-February 2020
- SQCC Standards Development Summary, speech points, undated
- Analysis Report on Stakeholders consultations on the priority standardisation needs for regional trade integration, 13 October 2020
- Standards Development Activities Plan, undated
- SQCC Closure Report (and Annexes), prepared by BSI, 29 March 2021
- Government launches the Third National Development Plan (NDP III), March 15, 2023 – <https://somalilandstandard.com/government-launches-the-third-national-development-plan-ndp-iii/>
- Somaliland National Vision 2030 – <https://www.fao.org/faolex/results/details/en/c/LEX-FAOC203927/>
- Analysis Report on Stakeholders consultations on the priority standardisation needs for regional trade integration, prepared by BSI, 14 October 2020
- Report of the Somaliland Quality Control Commission (SQCC), Metrology Function Gap Assessment, NMIE experts mission report to SQCC, Somaliland, July 2021
- Report of the Regional Public Private Sector Consultative Engagement on the Implementation of The EAC SPS Protocol: Measures and Constraints, 26 to 27 October 2022, Panari Hotel, Nairobi Kenya.
- Report on Sensitization Forum for Exporters of Cut Flowers, Fruits, Vegetables and Herbs on New EU Regulations and other Market Requirements held at Lake Naivasha Resort on 10th March 2020
- Report of Stakeholders Awareness Workshop on Export Market Requirements held at Merica Hotel Nakuru on 12th March 2020
- Training on International Commodity Trade Procedures and Processes, Grain Business Institute, November 22nd-24th 2021

- Training on International Commodity Trade Procedures and Processes, Grain Business Institute, November 22nd-24th 2021

Ethiopia project 5412 – Somaliland & Ethiopia Standards Harmonization

- Standards Harmonisation Project Monitoring Plan, 30/05/2023
- Standards Harmonisation Annual Project Performance Report, Financial Year Progress Report (two versions 2020 and 2021), May 2024
- Project Risk Plan, 23/4/2023
- Project workplan, 30/5/2023
- Initial Proposal from TMEA to DFID Ethiopia Proposal for Berbera Corridor, undated
- <https://africabusinesscommunities.com/agribusiness/trademark-africa-partners-with-ethiopian-agricultural-authority-to-digitize-certification-process/>
- Memorandum of Understanding between TMA and Ethiopian Agriculture Authority and Ethiopian Horticulture Producers Association, 18 November 2022
- Private sector compliance with SPS controls, inspection & certification procedures and health and safety standards during COVID-19 pandemic: Perspective from Ethiopian Commercial Horticulture Industry, submitted by Insights Consult, April 2022
- Report on the Exposure Visit of Ethiopian SPS Officials to Kenya by local SPS Consultant Sisay Hailu, May 2024

Uganda Project 3613 – UNBS Laboratory Equipment

- UNBS Laboratory equipment Project Monitoring Plan, 30/05/2023
- UNBS Laboratory equipment End of Project Performance Report. Financial Year Progress, 28 May 2024 (4 different versions since 2019 to 2023)
- Project Risk Plan, 30/5/2023
- Project Workplan, 30/05/2023
- Baseline Report - The Uganda Trade Support (TUTS) Project, Prepared by: Bayite-Kasule, Stephen & John K. Walugembe, October 2024
- UNBS Laboratory equipment Annual Project Performance Report, Financial Year Progress Report Jul 2019 - Jun 2020, 28 May 2024
- UNBS Laboratory equipment Annual Project Performance Report, Financial Year Progress Report Jul 2021 - Jun 2022, 28 May 2024
- Endline Evaluation Of The Uganda Programme On Sustainable & Inclusive Development Of The Economy (Upside) Project, December 2023, submitted to TradeMark Africa (Uganda) with support from the Danish International Development Agency (DANIDA), in partnership with the Government of Uganda. Written by Paul Bagabo, Rita Mwase and George Lugalambi
- Annual Performance Report, FY 2023/2024, Uganda National Bureau of Standards.

Tanzania Project 3714 – Tanzania Standards and Quality Infrastructure (SQI)

- Improving TBS's Efficiency and Effectiveness in the Development and Implementation of Standards in Tanzania. Implementing Partner: Support to Tanzania Bureau of Standards (TBS). Baseline Report. A survey was carried out during the Dar es Salaam Trade Fair (Saba-Saba). A sample of 190 random SMEs from different parts of Tanzania were interviewed by 4 enumerators. Survey undertaken 4th to 9th July 2016.
- Contract for LT TA to TBS between TMEA and BSI, August 2017
- Financing Agreement between TMEA and TBS, August 2018
- Quality and Standards Programme Project Monitoring Plan, 30/05/2023
- Standards and Quality Infrastructure End of Project Performance Report, Financial Year Progress, 28 May 2024 (five versions since 2017 to 2023)
- Project Risk Plan, 30/05/2023
- TBS Results Chanin 15/05/2016
- Standards, Quality Infrastructure and SPS Programme in Tanzania, Baseline Survey Draft Report, submitted by Bridge Consult, April 2022

- Tanzania Bureau of Standards, A Brief Report on the Project for Standards, Quality Infrastructure (SQI) and Sanitary & Phytosanitary (SPS) supported by Trademark Africa (TMA), Prepared by Eng. G. Kaisi, TMA Project Coordinator, 13th November 2024

Rwanda Project 3813 – Rwanda Quality and Standards

- Contract for supply, delivery installation and commissioning of coffee sorting and grading machines and related accessories for national agricultural Export Board (NAEB)-Rwanda
- Technical Assistant to Support National Agriculture Export Board (NAEB) Coffee Sorting and Grading Facility, Number PRQ20180219. Inception Report by Dominique Savio Nkunda, January 2019
- Baseline Study on Stakeholders Uptake and Perception of Rwanda Standards Board (RSB) Services and Development of 2019-2026 Strategic Plan - Inception Report, July 2019
- RSB Food Safety Project with TMEA: Monitoring Plan (Excel table)
- Consultancy Services on Food Safety Capacity Building and Certification Program for Agrifood Enterprises in Rwanda, End of Project Report, prepared by: Millenium Management Consultants Limited (MMCL) June 2023
- Rwanda Quality and Standards Annual Project Performance Report, Financial Year Progress Report (five versions since 2018 to 2023), May 2024
- Project Risk Plan, 30 May 2023
- Project Workplan, 30/05/2023

Rwanda Project 3814 – Rwanda Sanitary and Phytosanitary (SPS) Measures

- Sanitary and Phytosanitary (SPS) measures Project Monitoring Plan, 30 May 2023
- Sanitary and Phytosanitary (SPS) measures Annual Project Performance Report, Financial Year Progress Report (four versions between 2018 and 2022), May 2024.
- Technical Support for Agricultural and Livestock commodities and their systems to comply with Sanitary and Phyto-Sanitary measures (SPS) and other export market third- party certification requirements, Inception Report, prepared by AESA, 31 October 2019
- Technical Support for Agricultural and Livestock commodities and their systems to comply with Sanitary and Phyto-Sanitary measures (SPS) and other export market third- party certification requirements, Number: PO/20190227, implemented by RICA and NAEB, Draft End of Project Report, March 2022
- Project Risk Plan, 30/5/2023
- Project Workplan, 30/5/2023
- Excel File Monitoring Plan and Results Chain, 7/9/2020

ANNEX 2 – STAKEHOLDERS MET

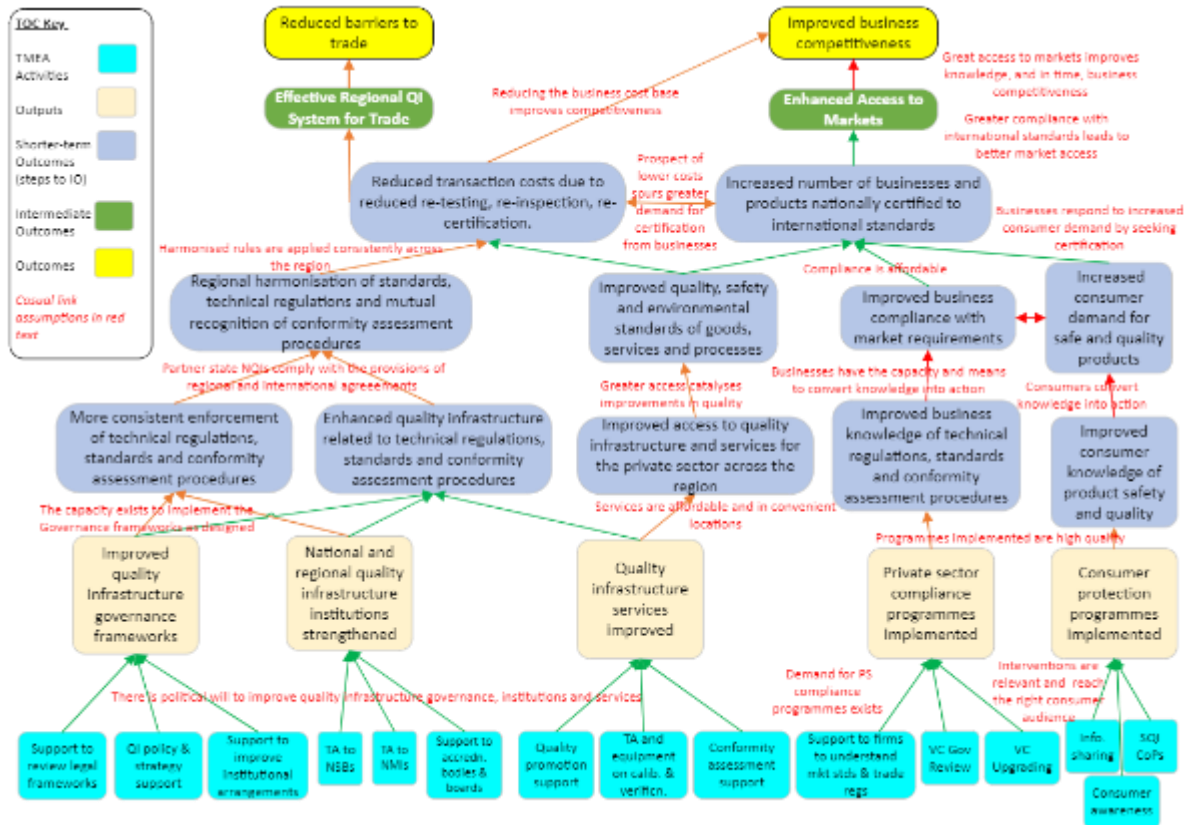
Country	Name	Position	Institution
Ethiopia	Tewodros Zegeye	CEO	EHPEA
Ethiopia	Mici Micky	Head of Training and Compliance	EHPEA
Ethiopia	Wondale Habtamu	Head Ethiopian NPPO	Ethiopian Agriculture Authority
Ethiopia	Tamirat Tesema	Lead Executive Officer, Plant Quarantine	Ethiopian Agriculture Authority
Ethiopia	Meles	Lead Executive Officer, Plant Input and Product Testing Laboratory	Ethiopian Agriculture Authority
Ethiopia	Gashew Tesfaye	Deputy General	Ethiopia Conformity Assessment Enterprise
Ethiopia	Yilma Mengistu Mamo	Standards Development Lead	Institute of Standard of Ethiopia
Ethiopia	Nesredin Nazir	Director, Quality and Training	National Metrology Institute of Ethiopia
Ethiopia	Yohannis Woldegebriel	Director, Arbitration Institute and Customs Prosecutors Head	Addis Ababa Chamber of Commerce
Ethiopia	Sisay Hailu	Local TA	TMA
Kenya	Lucy Ikonya	Manager, Trade Affairs, Standards Development and Trade Department	KEBS
Kenya	George Mwaura	Trade Affairs, Standards Development and Trade Department	KEBS
Kenya	Faith Ndunge	Head Trade & Standards	KEPHIS
Kenya	Lucy Mitaru	Plant Inspector	KEPHIS
Kenya	Pamella Kipyab	Project Coordinator	KEPHIS
Kenya	Carolina Kavuu	Senior Seed Inspector	KEPHIS
Kenya	Isaac Nyateng	Plant Inspector	KEPHIS
Kenya	Esther Abonyo	Programme Management Officer	KEPHIS
Kenya	Bernard Mukoye	Chief Inspector	KEPHIS
Kenya	Joseph Kigamwa	Deputy Director	KEPHIS
Kenya	Okisegere Ojepat	CEO	Fresh Produce Consortium
Regional	Penina Gichuru	M&E Manager	EAGC
Regional	Jacinta Mwai	Portfolio Market Information and Communication	EAGC
Regional	Paul Ochuna	Country Program Manager, Uganda, Rwanda and South Sudan	EAGC
Regional	Stella Apolot	Principal Standards Officer	EAC

Regional	Fahari Marwa	Principal Agricultural Economist	EAC
Regional	Allen Asiimwe	Chief of Programmes	TMA
Regional	Eugene Torero	Regional Director, Horn of Africa and Rwanda	TMA
Regional	Andrew Edewa	Director, Standards and SPS Measures	TMA
Rwanda	Olivier Kamana	Permanent Secretary	Ministry of Agriculture and Animal Resources
Rwanda	Jean Pierre Bajeneza	Ag. NCD Manager	Rwanda Standards Board
Rwanda	Jane Nyamvumba	Director, Systems Certification Unit	Rwanda Standards Board
Rwanda	Antoinette Mbabazi	Acting Director General	RICA
Rwanda	Gaspard Simbarikure	Veterinary Hygiene and Quarantine Specialist	RICA
Rwanda	Jean de Dieu Kamurase	Quality Assurance and Regulatory Division	NAEB
Rwanda	Fred Gakigana	Emerging Commodities Quality Assurance and Regulation Specialist	NAEB
Rwanda	Agnes Mukakimenyi	Export Marketing Analyst	Rwanda Development Board
Rwanda	Manasseh Ndahabwa	Operations Manager	ProDev Rwanda Ltd
Rwanda	Claire Kangwage	Marketing Manager	Hotel Des Mille Collines
Rwanda	David Butera	Programme Manager	TMA Rwanda
Rwanda	Gabriella Rugina	Administration Assistant	TMA Rwanda
Somaliland	Mohamed Abdi	Director, Standards	SQCC
Somaliland	Mustafa Ali	Director, National Quality Testing Laboratory	SQCC
Somaliland	Mohamed Abdi	Director, Planning and Policy	SQCC
Somaliland	Khadar Abdulahi	Director, Inspection & Quality Assurance	SQCC
Somaliland	Asman Abdi	Director, Certification	SQCC
Somaliland	Abrahman Abdulahi	Programs Officer	TMA
Tanzania	Anthony Chamanga	Chief Development Manager	TAHA
Tanzania	Donasian Severine	Programs Coordinator	TAHA
Tanzania	Zacharia Kiputa	Standards Coordinator	TAHA
Tanzania	Gilliard Daniel Mollel	Production Lead	TAHA
Tanzania	Gaspar Mdee	Head of Programs and Enterprise Development	TPSF
Tanzania	Kennedy Rwehumbiza	Head of Research and Policy Advocacy	TPSF
Tanzania	Godfrey Mondli	Policy Analyst	TPSF
Tanzania	Melkiado January	Principal Business Development Expert	SIDO
Tanzania	Gervas Kaisi	Certification Manager	Tanzania Bureau of Standards
Tanzania	Mwajuma Hamza	Executive Director	Tanzania Women Chamber of Commerce
Uganda	Patricia Bageine	Deputy Executive Director	UNBS
Uganda	Joseph Iberet	Head of Chemistry Laboratory	UNBS

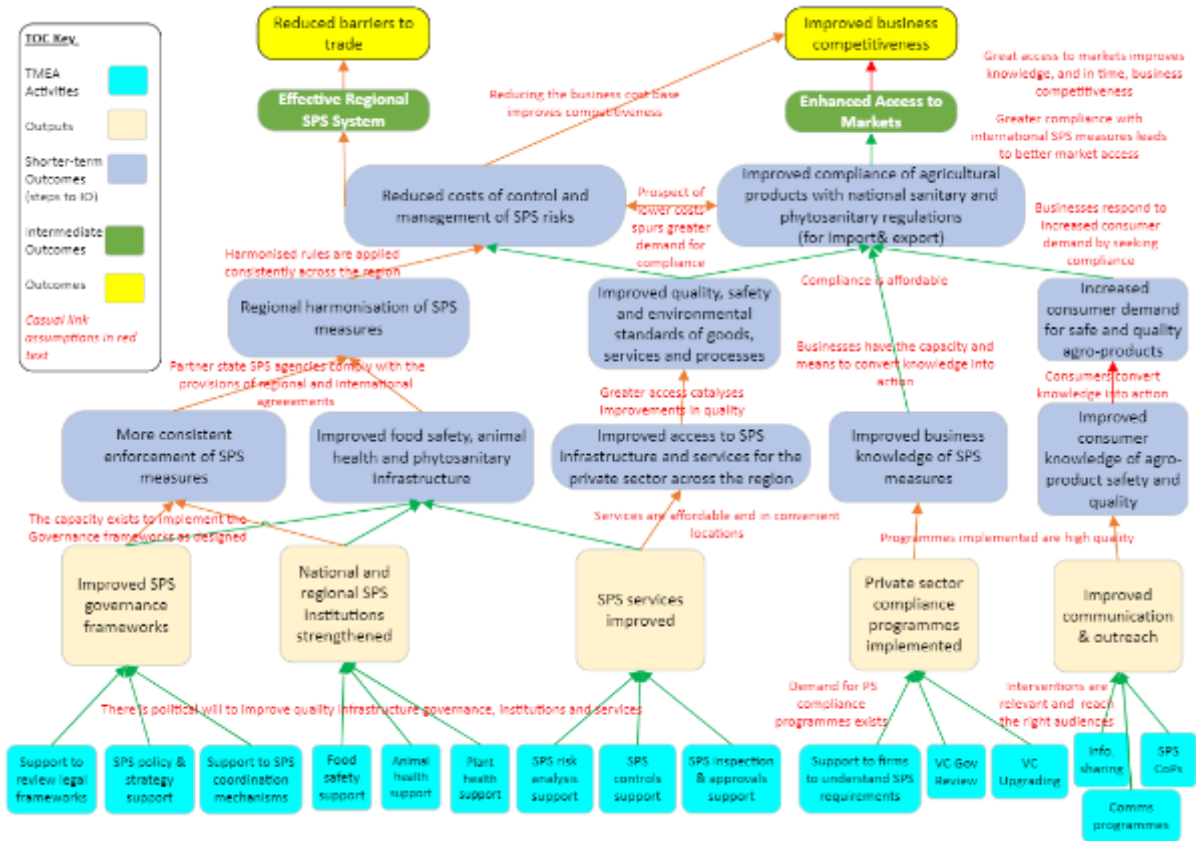
Uganda	Aziz Mukota	Manager of Testing	UNBS
Uganda	Eva Ekanya	Senior Trade & ICT Policy & Sector Coordinator	PSFU
Uganda	Ronny Mulongo	Manager, Member Services	PSFU
Uganda	Julius Byaruhanga	Director, Policy Advocacy	PSFU
Uganda	Ali Kalema	Local TA	TMA

ANNEX 3. TMA STRATEGY 2 RESULTS CHAIN AS DEFINED IN THE EVALUABILITY ASSESSMENT REPORT

TMA Strategy 2 – Results Chain – Standards



TMA Strategy 2 – Results Chain – SPS



ANNEX 4 – INDICATIVE EVALUATION QUESTIONS, DATA SOURCES AND METHODS⁵⁷

Question	Quantitative Sources	Qualitative Sources	Methods
Relevance			
Have TMA supported interventions related to SQI and SPS been designed responding to the needs of the regulators and businesses in the East African Community (EAC) and individual countries included in the sample?		Project documents resulted from the evaluation knowledge management exercise presented in Annex 1 – Documentation Available KIIs with TMA Programme Managers KIIS with NSBs and SPS agencies Interviews with East African Business Council and private sector KIIs with EAC Committee and Secretariat	Contribution Analysis
Have the projects been aligned with the TMEA Strategy II theory of change aimed at reducing technical barriers to trade in the region?		TMA Strategy II documents Equals' Evaluability Report	Contribution Analysis
To what extent have TMA supported actions aimed at achieving mutual recognition of conformity assessment processes and procedures?		Project documents KIIs with TMA Programme Managers KIIS NSBs and SPS agencies Interviews with East African Business Council and private sector KIIs with EAC Committee and Secretariat	Contribution Analysis
To what extent have the projects under review contributed to the implementation of the EAC Common Market Protocol (Article 3) objective of free movement of goods in the EAC region?		KIIs with EAC Committee and Secretariat KIIs with TMA Programme Managers	Contribution Analysis
Efficiency			
Have the TMA supported projects been delivered in an economic and timely way?	Regional trade data Survey of administrative records of NSBs and SPS agencies Survey of firms. Available evaluation reports	KIIs with TMA Programme Managers KIIS NSBs and SPS agencies Interviews with East African Business Council and private sector KIIs with EAC Committee and Secretariat	Statistical Analysis Contribution Analysis

⁵⁷ It will be a factsheet of the specific interventions of the different projects to guide the KI on the impact of the projects run by TMA,

	Annual Review reports	FGDs with beneficiaries	
Have they been achieved with good Value for Money (VfM) in terms of costs and benefits?	Data available on harmonization of standards and the conformity assessment Survey of administrative records of NSBs and SPS agencies Survey of firms. Available evaluation reports	Review of national procedures that foster support both male and female owned business of different sizes by reducing the technical barriers to trade in the region without discrimination. Review of cost requirements which affect small businesses more than the big counterparts.	Statistical Analysis Contribution Analysis
Have the projects ensured that the benefits were fairly distributed among the intended beneficiaries (achievement of VfM Equity)?		Assessment of supporting initiatives in terms of compliance with gender equality or the nature of and size of businesses, especially for vulnerable groups such as women small-scale cross-border traders. KIIs with TMA Programme Managers KIIS NSBs and SPS agencies	Contribution Analysis
Effectiveness and impact			
Has TMA contributed to enhanced market access in targeted commodities through harmonization of standards and/or enhanced capacity in standards and SPS?	Regional trade data Survey of firms ⁵⁸	KIIs with TMA Programme Managers KIIS NSBs and SPS agencies Interviews with East African Business Council and private sector KIIs with EAC Committee and Secretariat FGDs with beneficiaries	Statistical Analysis Contribution Analysis
To what extent has TMA contributed to reductions in time and cost of testing and issue of certificates of conformity?	Regional trade data Survey of administrative records of NSBs and SPS agencies Survey of firms. Available evaluation reports Annual Review reports	KIIs with TMA Programme Managers KIIS NSBs and SPS agencies Interviews with East African Business Council and private sector KIIs with EAC Committee and Secretariat FGDs with beneficiaries	Contribution Analysis
Is there an increase in the number of MSMEs adopting and complying with standards requirements	Administrative records of NSBs and SPS agencies	KIIs with TMA Programme Managers KIIs with NSBs and SPS agencies	Contribution analysis

⁵⁸ Note that the Evaluation Team, with TMA support, will collect information from the National Bureaus of Standards / SPS agencies to determine who to target in the survey work.

		Interviews with East African Business Council and private sector KIIs with EAC Committee and Secretariat FGDs with beneficiaries	
Have the assumptions in the Theories of Change held and change happened as expected?	Annual Review reports Available evaluation reports	KIIs with TMA Programme Managers KIIs with NSBs and SPS agencies Interviews with East African Business Council and private sector KIIs with EAC Committee and Secretariat FGDs with beneficiaries	Assumptions validation
Have there been any unintended consequences/impacts from the intervention?		KIIs with TMA Programme Managers KIIs with NSBs and SPS agencies Interviews with East African Business Council and private sector KIIs with EAC Committee and Secretariat FGDs with beneficiaries	Analysis of unintended consequences
Cross cutting theme – what has been the impact of the projects in terms of poverty reduction, gender and inclusion and the environment ?	Available evaluation reports Annual Review reports	KIIs with TMA Programme Managers FGDs with indirect beneficiaries including women traders and consumers.	Gender and inclusion analysis, assessment of environmental impact.
Sustainability			
Was a sustainability and exit plan prepared prior to project closure and was it implemented?		KIIs TMA Programme Managers KIIS NSBs and SPS agencies	Triangulation analysis of findings from interviews
To what extent is the capacity of NSBs and SPS agencies likely to be sustained following completion of TMA support?		KIIs TMA Programme Managers KIIS NSBs and SPS agencies	Triangulation analysis of findings from interviews
To what extent is the equipment/laboratories procured by the programme like to be maintained and remain in use going forward?		KIIs TMA Programme Managers KIIS NSBs and SPS agencies	Triangulation analysis of findings from interviews
To what extent is the private sector incentivised to seek compliance with SPS measures and standards?		KIIs TMA Programme Managers KIIS NSBs and SPS agencies FGDs private sector	Triangulation analysis of findings from interviews

		KIIs with East Africa Business Council, EAC Standards Committee	
Lessons Learned			
What are the key learning touchpoints from the implementation of TMA's standards quality infrastructure interventions ?	Annual Review reports Available evaluation reports	KIIs with TMA Programme Managers KIIs with NSBs and SPS agencies	Distilling lessons from implementation of standards and SPS projects

ANNEX 5. TOOLS OF THE EVALUATION

Semi-guided interview questionnaire to key stakeholders

The below questions are a basic guidance for collecting information by the expert team ensuring a level of coherence among the various projects.

Questionnaire for institutions involved in supporting revision of legal frameworks

DATE: _____

NAME OF KEY EXPERT: _____

1. Project name and country(ies) of activity: ____
2. Name of the Institution: ____
3. Position (role) of the respondent: ____

4. What would you describe as the main challenges faced by your country and the overall EAC region in terms of the governance and legal frameworks ruling the quality infrastructure and SPS frameworks? Do you think that the actions of TMA have supported to improve the situation?

5. What type of assistance did you receive from TMA to support the improvement of the quality infrastructure legal, policy and strategic framework in your country or region (EAC)? Was your institution involved during the design of the action? Out of the assistance received, which one do you consider was more useful to improve the performance of the institution's responsibilities in these topics?

6. What would you describe as the main achievements of this collaboration? Do you think that the support provided by TMA has led to sustainable changes in how the technical requirements (mandatory, voluntary) are requested and enforced?

7. Could you provide information about the number of mutual recognition frameworks and harmonization agreements relevant to the project in which your institution has worked since 2017?

How many of them have been signed? If possible, please provide the number of agreements signed before 2017 as well.

For those that have not been signed, what are the main reasons preventing it from happening?

8. With regards to the governance frameworks alignment to WTO SPS and TBT agreements and international standards, could you provide information about the number of these frameworks in which your institution has worked since 2017?

How many of them have been approved? If possible, please provide as well information on the number existing by 2017.

For those that have not been approved yet, what are the main reasons preventing it from happening?

9. For the agreements signed and frameworks approved, could you provide information on their practical application?

10. What have been / are the main difficulties for the harmonization process? Have TMA contributed to improve the situation?

11. What would you describe as the main challenges faced during your cooperation with TMA and how they were overcome?

12. What measures are in place to ensure the sustainability of the changes made through or with the support of the project?

13. Do you think your institution is better prepared now (compared to before TMA support was received) to comply with its responsibilities within the Quality Infrastructure system? Can you provide examples of in what ways the project has contributed?

14. Do you think that the developments carried out, with the support of TMA, have led to a better environment for compliance with technical requirements by the private sector? If so, in which ways?

15. If you were to mention a weakness in the implementation of the TMA project, what was the main one?

Were steps taken during the implementation of the project towards solving that problem; i.e. unawareness of companies, lack of financial means at the local institution, lack of training of institution's officers, costs of services too high for companies, etc? Can you describe them?

16. Which measures in your view could make future TMA assistance project(s) more successful?

Questionnaire for EAC partners

DATE: _____

NAME OF KEY EXPERT: _____

1. Project name and country(ies) of activity: ____
2. Name of the Institution: ____
3. Position (role) of the respondent: ____
4. What would you describe as the main challenges faced by the EAC region in terms of the governance and legal frameworks ruling the quality infrastructure and SPS frameworks? Do you think that the actions of TMA have supported to improve the situation?
5. What type of assistance did you receive from TMA to support the improvement of the quality infrastructure legal, policy and strategic framework in the region? Was your institution involved during the design of the action?
6. What would you describe as the main achievements of this collaboration? Do you think that the support provided by TMA has led to sustainable changes in how the technical requirements (mandatory, voluntary) are requested and enforced?
7. Could you provide information about the number of mutual recognition frameworks and harmonization agreements relevant to the project in which your institution has worked since 2017?
8. How many of them have been signed? If possible, please provide as well the number of agreements signed before 2017.
9. For those that have not been signed, what are the main reasons preventing it from happening?
10. For the agreements signed, could you provide information on their practical application?
11. What have been / are the main difficulties for the harmonization process? Have TMA contributed to improve the situation?
12. Could you provide figures on how much has increased the value of traded goods among EAC countries in the last 5 years?
13. Has there been an increase in the number of products being traded among EAC countries in the last five years (is there a larger variety of goods or services being traded?) Do you have figures or estimations on how this variety has broadened?
14. Can you estimate how much have the TMA projects contributed to the changes in the amount of goods traded and their variety?
15. Do you have data on how have changed the costs of obtaining a quality standard certification as average in the EAC region? And per country?
16. Do you have data on the increase in the number of accredited or internationally recognised services in the EAC region? And per country?
17. Do you have figures on the increase in the number of businesses that meet attain a given SPS standard in the region? And per country?
18. Do you have figures on the increase or decrease in the numbers of rejections due to issues of compliance in the region?
19. Could you comment on the political will that there is in the region to financially sustain and enlarge the different countries efforts towards: 1) Regionally harmonise standards. 2) Increase the number of firms that obtain a Quality certification

Questionnaire for institutions involved in supporting the improvement of institutional arrangements, including for SPS coordination

DATE: _____

NAME OF KEY EXPERT: _____

1. Project name and country(ies) of activity: _____
2. Name of the Institution: _____
3. Position (role) of the respondent: _____
4. Type of institution and service they provide: _____
(e.g., business association, cooperative, government or public body, implementing partner, NGO, other (specify)).
5. Economic sector where the institution provides services / operates: _____
(e.g., agriculture and agro-processing, construction, tourism and hospitality, textile and leather, manufacturing, ICT, mining, health, education, other (specify)).

6. In which type of activities did you engage with TMA to support the improvement of the quality infrastructure system in your country or region (EAC)? Was your institution involved during the design of the action? Out of those, which one do you consider was more useful to improve the performance of the institution usual responsibilities?

7. What would you describe as the main challenges faced by your institution to comply with its obligations within the quality infrastructure system in your country? Do you think that the actions of TMA have supported to improve the situation?

8. What would you describe as the main achievements of this collaboration? Could you provide some examples of successful stories?

9. What would you describe as the main challenges faced and how they were overcome?

10. Do you think that the support provided by TMA has led to sustainable changes in how the technical requirements (mandatory, voluntary) are requested and enforced? What would you describe as the main changes achieved, e.g., improvement in availability (more services are available or services are available in more places), reduction of costs, reduction of time needed to invest in the process, etc.?

11. If so, what measures are in place to ensure the sustainability of the changes made through or with the support of the project?

12. Do you think your institution is better prepared now (compared to before TMA support was received) to comply with its responsibilities within the Quality Infrastructure system? Can you provide examples of in what ways the project has contributed?

14. Do you think that the developments carried out, with the support of TMA, have led to a better environment for compliance with technical requirements by the private sector?

15. Which kind of support from TMA do you think that contributed the most to improve MSMEs' ability to be more competitive and or facilitate their market access?

- | | |
|---|-----|
| The training and technical assistance received | [] |
| The financial support that received the institution | [] |
| The role of the project in convening important stakeholders | [] |
| The support to acquire specific equipment | [] |

Other type/s of support:

16. Which was the reason, in your view, that made some companies decide NOT to advance towards compliance with technical requirements (mandatory, voluntary) in spite of the assistance provided by the TMA project? (E.g., not sufficiently aware of the relevance of standards, they did not seem relevant for their usual market, they do not have the necessary infrastructure, equipment or resources,...)

17. Could you provide a list of the companies that benefited by the TMA project? (**If not provided before**)

18. What is the approximate % that those companies represent over the total target of companies (companies that could have benefited from the project but did not)

19. If you were to mention a weakness in the implementation of the TMA project, what was the main one? Were steps taken during the implementation of the project towards solving that problem? Can you describe them?

20. Do you think that the support obtained from the TMA project has benefited the community by creating more jobs, and/or empowering women, and/or protecting the environment? If so, could you please provide some examples?

21. Has the support from the TMA project lead to jobs being created within your own institution (e.g. for operating the equipment installed, or for the extension of services provided)?

22. Could you provide information on the number of young people and women working for your organisation? Have this experienced any change in recent years?

23. Which measures in your view could make future TMA assistance project(s) more successful?

QUESTIONS REGARDING QUANTITATIVE INFORMATION

The following questions are aimed at trying to obtain quantitative information for the analysis. It is important to highlight that, as previously indicated, all this information is foreseen to be requested in written from stakeholders as preparatory time shall be needed. The below questions will be an opportunity to reiterate / explain the request (if response to the written request has not yet been obtained at the time of the KII), obtain clarifications, or best possible estimations from stakeholders (if at the time of the in the KII, the feedback from the stakeholders to the written request shows that no specific figures can be provided to the evaluation team).

24. Can you provide information on levels of compliance of business with SPS? Please provide the number of businesses that comply with mandatory SPS measures by 2017 and by end of 2023.

25. Can you provide information on the value of rejections of products aimed for exportation due to issues of compliance with quality and safety of products? Please provide the value of rejections by 2017 and by end of 2023.

26. Can you provide information on the time it takes for a private sector operator to obtain services related to conformity assessment processes, or in completing the customs requirements for exporting? If possible, please provide the information on the time it took by 2017 and by end of 2023.

27. Can you provide information on the approximate cost for firms to obtain certification? If possible, please provide information on the time it took by 2017 and by end of 2023.

28. Improved quality of products. Can you provide information on the number of products that obtained a quality certification? If possible, please provide information by 2017 and by end of 2023.

29. Expanded product certification of obligatory or voluntary or quality standards (other than SPS). Did the number of certified products traded increase? If possible, please provide the number by 2017 and by end of 2023.

30. Has the number of public health incidents reported decreased? If possible, can you provide information on the number of incidents by 2017 and by end of 2023.

31. Did the number of accredited or internationally recognised services increased? Please provide the number by 2017 and by end of 2023.

WITHIN THIS QUESTIONNAIRE, AND FOR PROJECTS THAT INCLUDED THE PURCHASE OF LAB EQUIPMENT (including 3613, Uganda's NBS Laboratory Equipment, and Somaliland project 5112), SOME ADDITIONAL SPECIFIC QUESTIONS ARE ADDED:

- a. To what extent the equipment projected to be bought at the beginning of the project could actually be purchased? Can you provide figures?
- b. If not all was purchased, which were the reasons?
- c. To what extent is being used the equipment that was purchased? Which services are provided with them?
- d. How many staff at the institutions were trained (please provide number if possible) to use the equipment? How many are now capable to use the equipment provided by the project?
- e. How many companies were assisted or have benefited of the availability of the equipment since the start of the TMA supported project? Could you provide a list (if not done before).
- f. If not all the purchased equipment is being used, what are the reasons?
- g. To what extent was the equipment and correspondent training decentralized to regions outside the capital? (in the case of Uganda, to Gulu, Mbale and Mbarra). Please provide specific examples and figures, whenever possible.

Questionnaire for organisations involved in supporting businesses to understand market standards and trade regulations

DATE: _____

NAME OF KEY EXPERT: _____

1. Project name and country(ies) of activity: ____
2. Name of the Institution: ____
3. Position (role) of the respondent: ____
4. Type of institution and service they provide: ____
(e.g., business association, cooperative, government or public body, implementing partner, NGO, other (specify)).
5. Economic sector where the institution provides services / operates: ____
(e.g., agriculture and agro-processing, construction, tourism and hospitality, textile and leather, manufacturing, ICT, mining, health, education, other (specify)).
6. In which type of activities did you engage with TMA to support the improvement of the quality infrastructure system in your country or region (EAC)? Was your institution involved during the design of the action?
7. What would you describe as the main challenges faced by the business you support to advance towards compliance with technical and or voluntary requirements?
8. Do you think that the developments carried out, with the support of TMA, have led to a better environment for compliance with technical requirements by the private sector?
9. What would you describe as the main achievements of this collaboration? Could you provide some example of successful stories?
10. What would you describe as the main challenges faced during your collaboration with TMA on the project and how they were overcome?
11. Do you think that the support provided by TMA has led to sustainable changes in the understanding of the private sector of technical requirements (mandatory, voluntary) and their approach towards compliance? What would you describe as the main changes achieved?
12. Which kind of support from TMA do you think that contributed the most to improve MSMEs' ability to be more competitive and or facilitate their market access?

The training and technical assistance received	[]
The financial support that received the institution	[]
The role of the project in convening important stakeholders	[]
The support to acquire specific equipment	[]
Other type/s of support:	
13. Do you think the competitiveness of the firms supported in your country have increased thanks to this process? Have they improved their access to other markets? And their sales? Please try to provide quantitative information on these topics (from baseline, 2017, to end of 2023).
14. What measures are in place to ensure the sustainability of the changes made through or with the support of the project?
15. Do you think your institution is better prepared now (compared to before TMA support was received) to comply with its responsibilities to support firms competitiveness and access to markets? Can you provide examples of in what ways the project has contributed?

16. Which was the reason, in your view, that made some companies decide NOT to advance towards compliance with technical requirements (mandatory, voluntary) in spite of the assistance provided by the TMA project? (E.g., not sufficiently aware of the relevance of standards, they did not seem relevant for their usual market, they do not have the necessary infrastructure, equipment or resources,...)

17. Could you provide a list of the companies that benefited by the TMA project and the type of assistance they benefited from? (**If not provided before**)

18. What is the approximate % that those companies represent over the total target of companies (companies that could have benefited from the project but did not)

19. If you were to mention a weakness in the implementation of the TMA project, what was the main one?

Were steps taken during the implementation of the project towards solving that problem; i.e. unawareness of companies, lack of financial means, lack of knowledge, etc? Can you describe them?

20. Do you think that the support obtained from the TMA project has benefited the community by creating more jobs, and/or empowering women, and/or protecting the environment? If so, could you please provide some examples?

21. Which measures in your view could make future TMA assistance project(s) more successful?

QUESTIONS REGARDING QUANTITATIVE INFORMATION

The following questions are aimed at trying to obtain quantitative information for the analysis. It is important to highlight that, as previously indicated, all this information is foreseen to be requested in written from stakeholders as preparatory time shall be needed. The below questions will be an opportunity to reiterate / explain the request (if response to the written request has not yet been obtained at the time of the KII), obtain clarifications, or best possible estimations from stakeholders (if at the time of the in the KII, the feedback from the stakeholders to the written request shows that no specific figures can be provided to the evaluation team).

22. Can you provide information on levels of compliance of business with SPS? Please provide the number of businesses that comply with mandatory SPS measures by 2017 and by end of 2023.

23. Can you provide information on the value of rejections of products aimed for exportation due to issues of compliance with quality and safety of products? Please provide the value of rejections by 2017 and by end of 2023.

24. Can you provide information on the time it takes for a private sector operator to obtain services related to conformity assessment processes, or in completing the customs requirements for exporting? If possible, please provide the information on the time it took by 2017 and by end of 2023.

25. Can you provide information on the approximate cost for firms to obtain certification? If possible, please provide information on the time it took by 2017 and by end of 2023.

26. Improved quality of products. Can you provide information on the number of products that obtained a quality certification? If possible, please provide information by 2017 and by end of 2023.

27. Expanded product certification of obligatory or voluntary or quality standards (other than SPS). Did the number of certified products traded increase? If possible, please provide the number by 2017 and by end of 2023.

Questionnaire for other donors

In the assumption that this profile of KI stakeholders has worked in projects that have similar objectives as those of TMA Strategy 2.

1. Have you communicated and/or coordinated with TMA during the implementation of your assistance?
2. Was the interaction with the TMA project prior to its implementation, or began already in the stage of its design?
3. In which way you think your project complements the TMA project?
4. Was there any area where there was an overlap that perhaps should have been avoided?
5. Or where overlaps, if they existed, positive in the sense of reinforcing the impact of yours and TMA projects?
6. Can you share any lessons learned from your project that may be useful for future versions of the type of project TMA had?
7. Are there approaches that seemed to be more effective in terms of elaboration and adoption of standards/support to SQI institutions/ promoting that MSMEs adopt the standards/facilitate border processing of goods?

Survey of Firms – Questionnaire Protocol

DATE: _____

NAME OF ENUMERATOR: _____

FOR THE ONLINE FORMAT:

(Please take a few minutes to complete this questionnaire. The information you provide will remain confidential and the results will be analysed and reported collectively. Your views in combination with those of others are important in helping to improve service delivery provided by the TMA. Thank you for participating in this survey.)

Notes:

Here and below ‘TMA’ could be replaced by the specific name of the local TMA project, or alternatively make no mention of the TMA activities in an effort to capture the benefits that the companies may have received even if they are not aware of the presence of the TMA project or funding by TMA--. In general, questions referred to overall perception of benefits or changes in the services provided to firms do not include a specific mention to TMA for the mentioned reason.

A. FOR ALL COMPANIES

COMPANY DETAILS

1. Name of the company/ establishment (To provide a name is optional in the online survey)

2. Kindly indicate the Country/region where your company is located

Ethiopia Kenya Rwanda Somaliland Uganda Tanzania

3. Kindly indicate the number of employees of your business establishment

Number of employees at the end of 2023: [...]

Number of employees in 2017 (or earliest available date in case the business was not in operation in 2017): [...]

4. Institutional type of your business establishment (only one response possible)

Check

Private enterprise	<input type="checkbox"/>
Cooperative	<input type="checkbox"/>
Public	<input type="checkbox"/>
NGO	<input type="checkbox"/>
Member of a producers group	<input type="checkbox"/>
Other: Please specify _____	<input type="checkbox"/>

If a private enterprise, indicate if it is women-owned/managed Yes No

5.a Kindly indicate the sub-sector of your business establishment (only one response possible):

Agriculture and agro processing

- Construction
- Tourism and hospitality
- Textile and leather
- Manufacturing
- ICT
- Mining
- Health
- Education

If other, please specify:

5.b. Does your company currently export goods or services?

YES NO

5.c Did your company export goods or services in 2017?

YES NO

5.d. Did your company in recent years engage in any activity towards complying with mandatory or voluntary requirements for marketing your products / services in your local market or abroad (even if a certification was not obtained)? (e.g. compliance with requirements in terms of Food Safety, product quality standards, management system standards, etc.).

YES NO

5.e. If YES, what type of process did you carried out? (Check all that apply)

- I implemented measures so my process / product comply with mandatory requirements by the relevant authorities to trade my goods in the market obtaining a certification
- I implemented measures so my process / product advanced in the compliance with mandatory requirements by the relevant authorities to trade my goods in the market but did not complete a certification
- I implemented measures so my process / product comply with voluntary standards that can be valued by the consumers obtaining a certification
- I implemented measures so my process / product advanced in the compliance with voluntary standards that can be valued by the consumers but did not complete a certification

5.e. In case of voluntary standards, what type of certification have you obtained or are working in implementing? (Check all that apply)

- Product quality certification
 - Process (management system) certification (i.e. Quality Management Systems, Food Safety Management Systems, Environmental Management Systems).
- Please specify the specific standard(s):

5.f If NOT, why? (Check all that apply)

- I was not aware of the relevance of complying with technical regulation and / or standards
- I am aware of the importance of standards but they are not relevant for my usual market or markets that I think I could enter
- I do not have the necessary infrastructure or equipment to advance towards the relevant certification / proof of compliance
- I do not have the necessary human resources or the necessary level of skills
- It is too expensive
- It takes too much time

6.a What is your potential market? (customer category not currently being served e.g., export market, supermarkets, etc.): ---

6. b This market is located in:

- My own country
- African countries outside East Africa
- Other East African countries
- Countries outside Africa (e.g., European Union, United Kingdom, etc.)

B. FOR COMPANIES THAT ENGAGED IN A PROCESS TO OBTAIN CERTIFICATION OR OTHER QUALITY STANDARD⁵⁹

In some of the following questions a sentence is given and you are asked your opinion, from Strongly Disagreement to Strong Agreement.

7. I was keenly aware of that my products need to be Certified or have other type of proof of a quality standard / requirements compliance **before** the start of the (...TMA) project.

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	N/A
[5]	[4]	[3]	[2]	[1]	

8. The customers of my type of products do require that they be certified or have other proof of compliance with a quality standard.

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
[5]	[4]	[3]	[2]	[1]

9. Which services provided by your country quality infrastructure institutions have you used in recent years?

- Testing
- SPS Standards
- Certification of Product
- Certification of Management System
- Other, please specify

10. In case you have been a direct beneficiary from TMA support in recent years, which service(s) has your company benefited from?

- Awareness raising /sensitisation
- Training / Capacity Building

⁵⁹ This section is foreseen to appear only for those that have marked "YES" in response 5.d

- [] Direct technical assistance
- [] I have not received services from TMA
- [] Other, please specify:

10.a I am satisfied with the quality of the services / support provided by TMA.

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
[5]	[4]	[3]	[2]	[1]

11. As a result of my efforts to comply with quality standards my firm has the potential to sale in new markets, or more products in my usual market.

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
[5]	[4]	[3]	[2]	[1]

11.b If you agree or strongly agree, could you please indicate which new markets have you entered?

[...]

11.c Could you provide an approximate value of your trade volume to these new markets?

[...]

12. I think my firm competitiveness has improved as a consequence of my efforts to comply with technical requirements and/or voluntary standards.

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
[5]	[4]	[3]	[2]	[1]

12.b In case you now comply with voluntary standards of relevance for your business, can you indicate which voluntary standards you consider have had significance for reaching new markets?

[...]

13. As a result of your effort towards conformity assessment or certification, did your sales increased and by how much?

50% and above	30-40%	20-30%	10-20%	0-10%	No increase
[5]	[4]	[3]	[2]	[1]	[]

Could you indicate your sales volume by end of 2023? (please indicate the currency)

Could you indicate your sales volume by 2017 (or earliest available data point)? (please indicate year of the information and currency)

14. To what extent do you agree with this sentence?

In recent years, I have experienced a shorter time to obtain certification or other proof of manufacturing, farming or processing quality t (HACCP, GAP, ISO, etc.).

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	N/A
[5]	[4]	[3]	[2]	[1]	[]

14.b Can you provide an estimation of how long (in months) has taken for you to obtain certification now?

14.c. Can you provide an estimation of how long (in months) was taking to obtain certification by or around 2017?

15.a To what extent do you agree with this sentence?

In recent years, I have observed a reduction in the cost of obtaining certification or other proof of manufacturing/ food producing or processing quality (cost of the external verification process).

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	N/A
[5]	[4]	[3]	[2]	[1]	[]

15.b Can you provide an estimation of how much has it cost you to obtain certification now?

15.c. Can you provide an estimation of how much did it cost you to obtain certification by or around 2017?

16. To what extent do you agree with this sentence?

In recent years, I have observed a higher availability of certification and conformity assessment services.

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	N/A
[5]	[4]	[3]	[2]	[1]	[]

17. To what extent do you agree with the sentence?

In recent years my customers are more aware of the benefits of buying products that are certified or have achieved other conformity assessment.

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
[5]	[4]	[3]	[2]	[1]

18. Do you think that the support obtained from TMA in the area of Standards and SPS and your efforts towards compliance with mandatory and/or voluntary technical requirements have benefited the community? In which way?

[] I don't think they have contributed towards the community

[] Have contributed to create more jobs in my business

[] Have contributed to create more jobs, but not in my business

[] Have contributed towards empowering women

[] Have contributed towards protecting the environment

[] Have contributed in other issues, please specify:

19. What recommendations would you propose to improve the services provided by the institutions working on certification and conformity assessment of products and/or services?

Guidance Questionnaire for Focus Groups

DATE: _____

NAME OF EXPERT: _____

A. FOR ALL COMPANIES

FIRMS DETAILS

1.a Number and names of companies present in the group:

1.b Of those, how many have been assisted by the TMA project?

2. Country/region where the focus group meeting takes place

Ethiopia [] Kenya [] Rwanda [] Somaliland [] Uganda [] Tanzania []

3. Average size of the businesses present in the group

Size (based on no. of employees)	Check
1-5	[]
6-30	[]
31-100	[]
100+	[]

4.a Types of the business establishment present in the group

	Indicate how many of each type
Private enterprise	[]
Cooperative	[]
Public	[]
Farmer	[]
Other: Please specify _____	[]

4.b How many of them are women-owned/managed Absolute number [] % of the group []

5.a Indicate how many firms belong to each sub-sector

Agriculture and agro processing	[]
Construction	[]
Tourism and hospitality	[]
Textile and leather	[]
Manufacturing	[]
ICT	[]

Mining []
Health []
Education []

If other, please specify:..... []

5.b. Which is the potential market most common for the group? (“potential market” refers to customer category not currently being served e.g, export market, supermarkets, etc.):

Where do the companies operate? (Indicate the number of companies)

[] This country [] Other East African countries
[] African countries outside East Africa [] Countries outside Africa (e.g., European Union, United Kingdom, etc.)

5.c. Which percentage of the firms in the group export goods or services? []%

5.d. What activities towards conformity with mandatory or voluntary requirements for marketing the products/ services in their local markets or abroad have they taken?

Have they obtained certification or are still working in implementing them?

What standards are they the most interested in complying with? What are their main reasons for this interest?

5.e What would they consider the main obstacles or challenges that must be faced when trying to comply with technical requirements or voluntary standards? (for example, costs, lacks of resources, time consuming....)

5.f. Do they think that those obstacles have improved in recent years (approximately from 2017 onwards)? Do they think that now they experience a shorter time to obtain certification? Do they think that now the cost is lower? Try to obtain concrete examples on their experiences.

5.g What are their main perceived benefits from this process? Have they entered new markets? If so, which ones? Have they consolidated their position in their current market? Have they increased their sales (in their old or new markets)? If possible, collect examples of their experiences.

6. Did they know about mandatory or voluntary technical requirements and the potential of compliance for their business before TMA interventions?

6.b. Do they think that it is necessary for them to be competitive in their sector of activity to comply with voluntary requirements? Do their customers require them to be certified or have other proof of compliance with quality standards in order to buy their products?

6.c Have they perceived any change in their customers attitude and level of awareness towards these issues in the last few years? Please collect examples.

7. What type of services provided by their country quality infrastructure institutions have they used in recent years? (e.g., testing, SPS standards, certification of products, certification of management systems, other). Are they satisfied with them? Please collect reasons / examples of why they are satisfied or not. 7.b How do they think the services could be improved to make them more suitable for their needs?

8. Have they benefited directly from TMA project activities? If so, which type of services (e.g. awareness raising, training, direct technical assistance...)

8.b Are they satisfied with the services received? What would they think are the main benefits from this participation? What would be the main weaknesses or challenges of this assistance? Would they have any recommendation for future assistance projects?

9. Do you think that the support you have received from TMA project has benefited the community by creating more jobs, and/or empowering women, and/or protecting the environment? If so, could you please provide some examples?

ANNEX 6. TRADE FLOW ANALYSIS

A search on the relationship between TMA S2 results and overall trade in the project countries

Methodological approach

This document describes an analysis for relationships that can link the activity of the projects with the increase in trade in the countries where the projects were implemented. The relationship between the incidence of the TMA project activity and the general evolution of the trade of a product at a national scale is very difficult to attribute. However, an outlook at the international trade statistics may bring clues or relevant factors which suggest a certain degree of contribution.

7. Value chains. We have looked for the value chains that were selected in the Inception Report
 - Rwanda – HORECA, Dairy, Meat, green beans, Coffee, Tea
 - Tanzania- Horticulture, Grains
 - Kenya - Grains, Horticulture
 - Uganda- Grains
 - Ethiopia - Horticulture
 - Somaliland - Import food commodities traded between Ethiopia and SL
8. Period of coverage. TMA requested to collect data between 2017 and 2023. However, in some cases, the statistics are not available yet for 2023.
9. Source. The source of data is the International Trade Centre an institution based in Switzerland that is related to both the WTO and the UNCTAD.
10. The process:
 - First attention was directed to groups of products that all the countries have in common (agricultural commodities).
 - After that, we looked at the products that were identified for each country in the inception report, with the closest definition. For all the countries we used HS10, as representative of the group of Grains; and HS 07 Vegetables, for the group of horticulture.
 - In order to make the analysis more meaningful, in the instances where a product within a broad sector was included with a more specific description in the World Bank's lists of the 5 top country exports, we looked also at the product with the WB's HS code. This was for instance the case of Milleted Rice within the broad sector of Grains.
 - Lastly, we directed our view to the other specific products in the list (i.e. for the case of Rwanda).
 - In some cases, when the overall curve of exports did not show an increase overtime but there is some evidence through journalistic news of a new positive upward movement, this market was also looked at, such as the case of Rwanda's meat exports towards Congo.
 - For the market for quality food in Rwanda's HORECA sector, we looked at the figures from Rwanda's Board of Development, in terms of the incoming tourism, especially that of incentives and conferences (MICE).

11. Preliminary findings. An initial outlook observes the curve of exports of the product from each country in the period. This allows a view for its overall trend upwards, downwards, or variable mixing ups and downs. For instance, a sharp increase after the initiation of the projects may point to the positive results obtained by the project for that product and country.

In addition, given the emphasis that TMA's Strategy 2 placed on the EAC, we gathered graphs that show the degree of difference or similitude between the evolution of a country's export of a product to the World and to the EAC in particular.

A hypothesis of this analysis is: since TMA's S2 projects have tended to facilitate trade within the EAC → those cases where the graphic curves of the evolution of the exports of a product within EAC and to the world show a different pattern → it may be implying the results of S2 activities. For instance,

- if the export of a product from a certain country to the EAC has increased, while the export to the World has decreased, it may be related to the activity of the TMA projects in facilitating trade.
 - also, when a curve of exports to EAC shows an upward slope with a sharper upward movement than that shown by the curve of exports to the World.
 - in the cases, such as Rwanda's exports of vegetables to the World and to EAC, when the exports to the World have shown sharp up and downs while exports to the EAC have continued moving in a more stable way, we may assume that a possible result of intra EAC regulations being now more consistent along time. The comparison is with other markets where a change in regulations may have applied causing strong ups and downs in the quantities exported.
 - in the cases where both the exports to the World and those to the EAC moved roughly in the same direction, but there was a delay in the peaks (for instance if the exports of a product to the world peaked in 2020 and those to the EAC peaked in 2021), we may hypothesize that the activity of TMA S2 resulted in benefits over time. This could be the case if the world markets in general were freer than those of the EAC, with EAC regulations becoming streamlined as result of the projects.
12. Challenges. Nonetheless, as the great majority of the products traded are agricultural or based in agricultural produce, we may assume that in many instances a very sharp variation in the volume traded is probably a consequence of weather events, such as dry spells that may restrict the quantities available to be exported. Globally, weather events become increasingly strong as a result of climate change.

Something similar may happen with strong variations in the prices of the product exported, which, in the case of commodities, is very frequent, depending on global demand and supply.

As was expected, in most instances, it is difficult to draw a conclusion about the effects of the projects in the evolution of trade when looking at macro-economic figures.

Results

East Africa's growth performance

The African Development Bank:

East Africa has been Africa's fastest-growing region in recent years. It is home to several of the fastest-growing economies, including Ethiopia, Kenya, Rwanda, Tanzania, and Uganda.

2

Graphs prepared with data from the International Trade Centre ITC (WTO & UNCTAD).

We look:

- First at the evolution of total trade within the EAC, to show the general context in which the countries of the region operated during the period.
- Then, to the grouping of products that all the countries have in common: the Agricultural products
- After that, a view at the products that were selected in the inception report, taking the closest definition in the HS Harmonized System. For the countries where horticulture and grains were selected, we used HS 10 Cereals as representative of the group of Grains, and HS 07 Vegetables for the group of Horticulture.
- Towards the end a look to some other specific products that are closely identifiable in the HS nomenclature.

The interaction with the stakeholders will provide additional information about how the project contributed to the evolution of the trade in these products.

3




Has the macro context helped/hinder the growth of exports of the selected commodities in S2 countries?

- This is an outlook of the general trend of exports during the period, as shown by the curves prepared with base on international data.
- Most selected commodities are agricultural products.



4



An additional view to detect possible TMA influence on exports

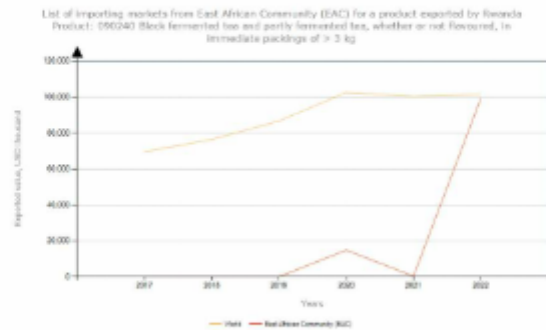
- In addition, on account of S2 intense work with EAC we look at the relationship between countries exports to the World, and their exports specifically to EAC.
- If for instance the exports to EAC grow more than those to World it may be an indication of TMAs work on EAC harmonisation, standards and SPS.

(Note: More details of this search for contribution are given in the note: A search on the relationship between S2 results and overall trade in the project countries).



5

An example of a curve that may be caused by S2 facilitating process. **Rwanda's Tea** exports to World and to EAC. Preliminary Note impressive growth to EAC since 2021



6

Selected Commodities per country indicate a majority of agricultural products

- Rwanda – HORECA, Dairy, Meat, Green beans, Coffee, Tea
- Tanzania- Horticulture, Grains
- Kenya - Grains, Horticulture
- Uganda- Grains
- Ethiopia - Horticulture
- Somaliland - Import of food commodities (commodities traded between Ethiopia and SL for standards harmonization)

7

The statistical information, per country, that is being reviewed

- Top 5 exports
- Agricultural Exports to the World and to the EAC
- Country Vegetable exports (Horticulture) to the World and to the EAC
- Country Cereal exports (Grains) to World and to the EAC
- Specific Rwandan products selected; their exports to World and EAC
- The case of the Somaliland Region

8

World Bank WITS: Countries top 5 exports show predominance of agricultural products

• Somaliland information is from Somaliland source

ETHIOPIA	
Coffee, not roasted or decaffeinated	Product Code 09011
Tannin seeds	Product Code 120743
Other vegetables, fresh or chilled, nes	Product Code 070999
Fresh cut flowers and buds	Product Code 060313
Roots and tubers with high starch content	Product Code 071999

KENYA	
Black tea (fermented & partly fermented tea)	Product Code 090340
Fresh cut flowers and buds	Product Code 060313
Petroleum oils, etc. (incl. crude) preparation	Product Code 271800
Coffee, not roasted or decaffeinated	Product Code 09011
Tannin seed (incl. concentrate)	Product Code 121400

RWANDA	
Gold in unwrought forms, non-monetary	Product Code 730911
Petroleum oils, etc. (incl. crude) preparation	Product Code 271600
Black tea (fermented & partly fermented tea)	Product Code 090340
Instruments and appliances for medical or veterinary use	Product Code 901890
Coffee, not roasted or decaffeinated	Product Code 09011

SOMALILAND	
Live sheep and goats (at 0.5kg/1)	Product Code 0104
Cattle	Product Code 010613
Goats (at 0.5kg/1)	Product Code 0102
Gold jewelry (at 0.4g/kg)	Product Code 7113
Watermelon	Product Code 08011

SOMALIA	
Gold in unwrought forms, non-monetary	Product Code 730911
Iron ores and concentrates	Product Code 260000
Coffee, not roasted or decaffeinated	Product Code 09011

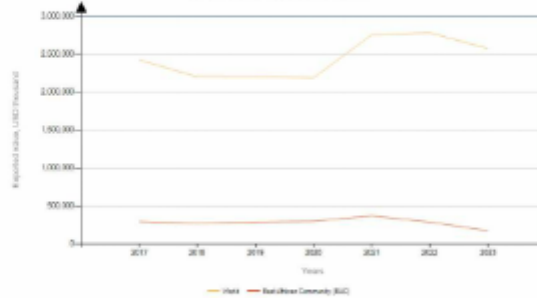
UGANDA	
Gold in unwrought forms, non-monetary	Product Code 730911
Coffee, not roasted or decaffeinated	Product Code 09011
Cocoa beans, whole or broken, raw or roasted	Product Code 180100
Petroleum oils, etc. (incl. crude) preparation	Product Code 270000
Protein concentrate	Product Code 230119

9

Ethiopia Agric. Exports to World and to EAC

Preliminary Note: exports value rather stable during the period, at around 2.5 billion USD, slight decline in EAC market since 2021

List of importing markets from East African Community (EAC) for a product group exported by Ethiopia
Product group: Agricultural products



10

List of importing markets from East African Community (EAC) for a product group exported by Ethiopia Product group: Agricultural products

Sources: ITC calculations based on Ethiopian Revenues and Customs Authority statistics since January, 2007.

ITC calculations based on UN COMTRADE statistics until January, 2007.

Unit: US Dollar thousand

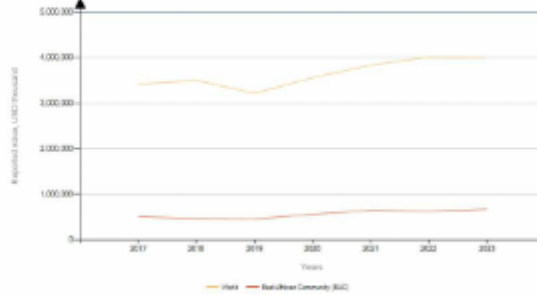
Importers	Exported value in 2017	Exported value in 2018	Exported value in 2019	Exported value in 2020	Exported value in 2021	Exported value in 2022	Exported value in 2023
World	2423930	2201398	2199412	2188792	2755917	2782051	2574475
East African Community (EAC) Aggregation	292566	268822	286980	297421	367224	285886	172805
Somalia	241081	254975	264923	289195	358481	262925	141202
Kenya	50837	13155	20875	7624	7858	22029	31070
Uganda	54	65	54	93	753	655	474
Rwanda	41	2	55	194	115	108	54
Congo, Democratic Republic of the	47	160	92	265	11	51	5
Burundi	505	883	289	41			107
Tanzania, United Republic of	3	82	689	3	6		14

11

Kenya agric. exports to World and EAC.

Preliminary Note: Slight upward trend in both World and EAC markets, perhaps influenced by S2 since 2019

List of Importing markets from East African Community (EAC) for a product group exported by Kenya
Product group: Agricultural products



12

List of importing markets from East African Community (EAC) for a product group exported by Kenya Product group: Agricultural products

[Sources: ITC calculations based on Kenya national bureau of statistics since January, 2011.](#)

[ITC calculations based on UN COMTRADE statistics until January, 2011.](#)

Unit : US Dollar thousand

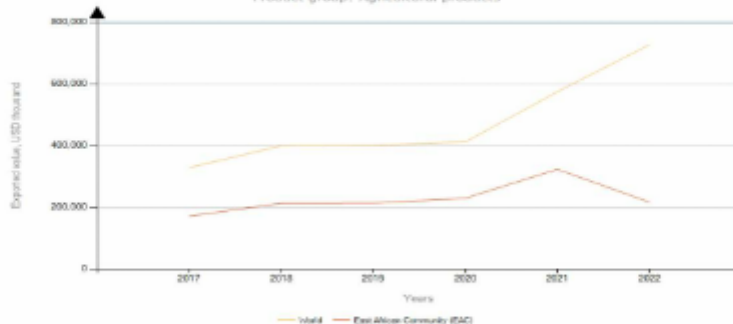
Importers	Exported value in 2017	Exported value in 2018	Exported value in 2019	Exported value in 2020	Exported value in 2021	Exported value in 2022	Exported value in 2023
World	3418094	3503392	3217932	3560214	3815991	4015361	4008524
East African Community (EAC) Aggregation	507332	465216	455321	561404	644165	626867	668210
Uganda	362830	167617	181461	234135	222236	232123	236188
South Sudan	70385	64535	57477	109166	71034	77541	119438
Somalia	125256	94750	77435	72081	78183	92377	105168
Congo, Democratic Republic of the	47311	53355	44288	48173	121284	58734	72052
Tanzania, United Republic of	55967	35309	30543	37134	64596	67647	61128
Rwanda	31029	34706	43281	49311	64795	84847	56920
Burundi	14550	14944	19531	11400	22046	13598	17316
Kenya	0	0	1284	0			

13

Rwanda agricultural exports to the World and EAC.

Preliminary Note: similar upward trend until 2021, then EAC market declines to 2018 level

List of importing markets from East African Community (EAC) for a product group exported by Rwanda
Product group: Agricultural products



14

List of importing markets from East African Community (EAC) for a product group exported by Rwanda Product group: Agricultural products

Sources: ITC calculations based on The Common Market for Eastern and Southern Africa (COMESA) statistics since January, 2022.

ITC calculations based on UN COMTRADE statistics since January, 2019 and until January, 2022.

ITC calculations based on The Common Market for Eastern and Southern Africa (COMESA) statistics since January, 2015 and until January, 2019.

ITC calculations based on UN COMTRADE statistics until January, 2015.

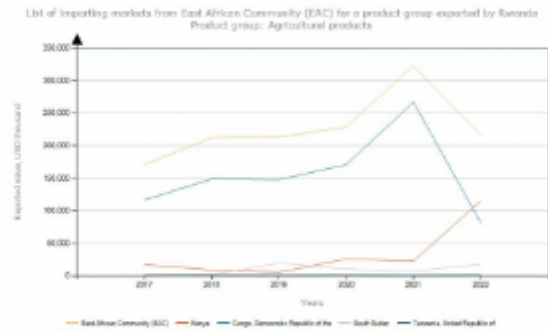
Unit : US Dollar thousand

Importers	Exported value in 2016	Exported value in 2017	Exported value in 2018	Exported value in 2019	Exported value in 2020	Exported value in 2021	Exported value in 2022
World	201851	327095	397491	396849	409046	571501	726648
East African Community (EAC) Aggregation	137674	169810	211115	211154	226464	320435	216371
Kenya	31110	17353	8948	5374	25868	22654	115026
Congo, Democratic Republic of the	94029	115510	147214	145866	168461	264461	81868
South Sudan	1164	474	1636	19539	10523	6982	17967
Tanzania, United Republic of	786	766	975	2166	665	2397	720
Somalia	0	42	35	1595	125	745	400
Uganda	7865	33192	45014	26882	20629	23194	320
Burundi	2729	2472	7285	9772	189	0	20

15

Rwanda. A closer look to its agric. exports to EAC only.

Preliminary Note: while the trend is highly influenced by the exports to Congo, which decline in 2021, there is a consistent increase since 2019 towards the Kenyan market.



16

List of importing markets from East African Community (EAC) for a product group exported by Rwanda Product group: Agricultural products

Sources: ITC calculations based on The Common Market for Eastern and Southern Africa (COMESA) statistics since January, 2022.

ITC calculations based on UN COMTRADE statistics since January, 2019 and until January, 2022.

ITC calculations based on The Common Market for Eastern and Southern Africa (COMESA) statistics since January, 2015 and until January, 2019.

ITC calculations based on UN COMTRADE statistics until January, 2015.

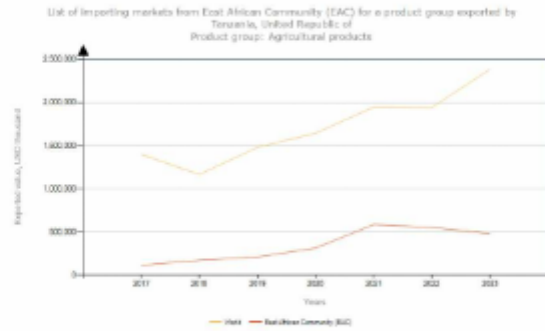
Unit : US Dollar thousand

Importers	Exported value in 2018	Exported value in 2019	Exported value in 2020	Exported value in 2021	Exported value in 2022
World	397493	398849	409046	571597	726646
East African Community (EAC) Aggregation	211111	211194	226864	320439	216371
Kenya	8946	5374	25868	22654	115026
Congo, Democratic Republic of the	147214	145866	168461	264461	81864
South Sudan	1636	19530	10523	6982	17963
Tanzania, United Republic of	975	2166	665	2397	721
Somalia	31	1595	129	749	400
Uganda	45016	26882	20679	23196	320
Burundi	7281	9772	189	0	70

17

Tanzania agric. exports to World and to EAC.

Preliminary Note: similar upward trends, although with slight decline in the EAC markets since 2021



18

List of importing markets from East African Community (EAC) for a product group exported by Tanzania, United Republic of Product group: Agricultural products

Sources: ITC calculations based on UN COMTRADE statistics since January, 2021.

ITC calculations based on National Bureau of Statistics – NBS statistics since January, 2016 and until January, 2021.

ITC calculations based on UN COMTRADE statistics until January, 2016.

Unit : US Dollar thousand

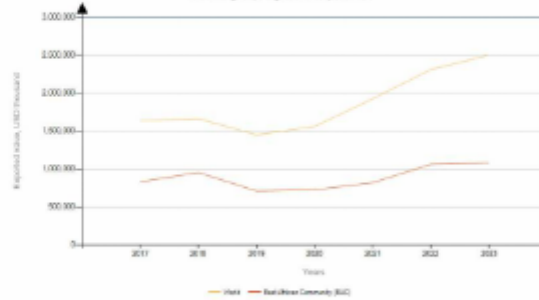
Importers	Exported value in 2017	Exported value in 2018	Exported value in 2019	Exported value in 2020	Exported value in 2021	Exported value in 2022	Exported value in 2023
World	1397070	1166578	1480442	1643732	1947662	1942138	2383775
East African Community (EAC) Aggregation	114076	173175	209579	313804	586424	553090	480392
Uganda	186	29850	54248	106103	19091	162515	176358
Congo, Democratic Republic of the	27802	38692	42451	40862	62974	82416	121656
Rwanda	8164	12261	18754	50162	98399	115504	87811
Kenya	72751	85154	84221	98690	198552	154490	62400
Burundi	3779	6832	8305	17193	28132	26922	19718
South Sudan	0	0	0	0	7370	10872	10253
Somalia	166	321	1599	794	82	371	194
Tanzania, United Republic of	1225	58	0	0			

19

Uganda agric. exports to World and to EAC.

Preliminary Note: Similar upward trend, possibly influenced by TMA project since 2019.

List of Importing markets from East African Community (EAC) for a product group exported by Uganda
Product group: Agricultural products



20

List of importing markets from East African Community (EAC) for a product group exported by Uganda Product group: Agricultural products

Sources: ITC calculations based on Uganda Bureau of Statistics (UBOS) statistics since January, 2017.

ITC calculations based on UN COMTRADE statistics since January, 2016 and until January, 2017.

ITC calculations based on Uganda Bureau of Statistics (UBOS) statistics since January, 2015 and until January, 2016.

ITC calculations based on UN COMTRADE statistics until January, 2015.

Unit: US Dollar thousand

Importers	Exported value in 2017	Exported value in 2018	Exported value in 2019	Exported value in 2020	Exported value in 2021	Exported value in 2022	Exported value in 2023
World	1635476	1660188	1446485	1557603	1921430	2305945	2496535
East African Community (EAC) Aggregation	829629	950577	706284	722103	816410	1056761	1075433
Kenya	437003	485301	317732	335266	356683	416068	415926
South Sudan	210092	271824	234232	207953	264541	344435	254290
Congo, Democratic Republic of the	87351	88164	101140	111218	135678	161395	183861
Rwanda	67116	76476	10726	30	45	47375	157287
Tanzania, United Republic of	15126	15622	23923	40675	33460	45663	34828
Burundi	12606	13064	18295	26830	25475	39898	28645
Somalia	315	126	236	130	514	2118	664

21

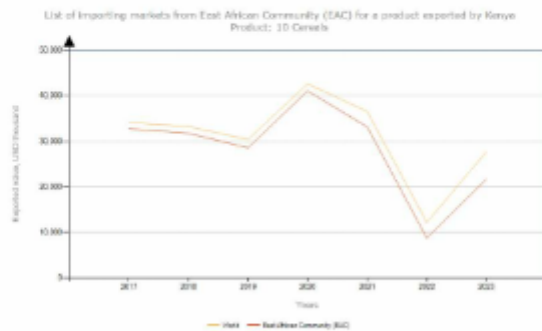
A closer look at Value Chains, I

Grain exports of the 3 countries where they were selected as value chains of interest: Kenya, Tanzania and Uganda

22

Kenya Cereal exports to World and to EAC.

Preliminary Note: large concentration of exports to EAC. Values in 2023 recovering towards 2017's 30 million USD



23

List of importing markets from East African Community (EAC) for a product exported by Kenya

Product: 10 Cereals

Sources: ITC calculations based on Kenya national

bureau of statistics statistics since January, 2011.

ITC calculations based on UN COMTRADE

statistics until January, 2011.

Unit: US Dollar thousand

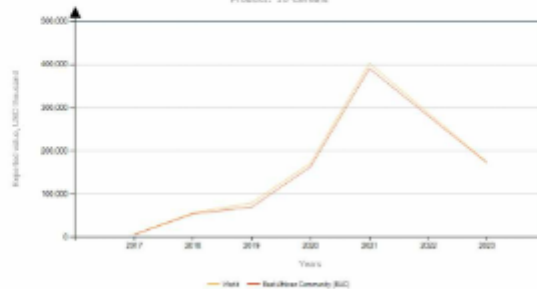
Importers	Exported value in 2017	Exported value in 2018	Exported value in 2019	Estimated value in 2020	Exported value in 2021	Exported value in 2022	Exported value in 2023
World	34225	32224	38407	40204	36220	22277	27720
East African Community (EAC) Aggregation	31262	31772	28576	48234	33534	4030	21739
Egypt	17248	11645	18021	17181	17748	5118	13642
South Sudan	7544	13895	6794	14225	9990	1779	4042
Burundi	322	295	338	52	1845	344	1338
Congo, Democratic Republic of the	62	28	3	1	268	228	648
Rwanda	4527	5842	4798	9428	891	424	648
Tanzania, United Republic of	1738	1398	642	495	2724	368	272
Senegal	1312	302	73	4	109	592	191

24

Tanzania Cereal exports to World and EAC.

Preliminary Note: almost all exports concentrate on EAC, with a large increase since 2017, partially reversed since 2021

List of importing markets from East African Community (EAC) for a product exported by Tanzania, United Republic of
Product: 10 Cereals



25

List of importing markets from East African Community (EAC) for a product exported by Tanzania, United Republic of
Product: 10 Cereals

Sources: ITC calculations based on UN COMTRADE statistics since January, 2021.
ITC calculations based on National Bureau of Statistics – NBS statistics since January, 2016 and until January, 2021.
ITC calculations based on UN COMTRADE statistics until January, 2016.
Unit : US Dollar thousand

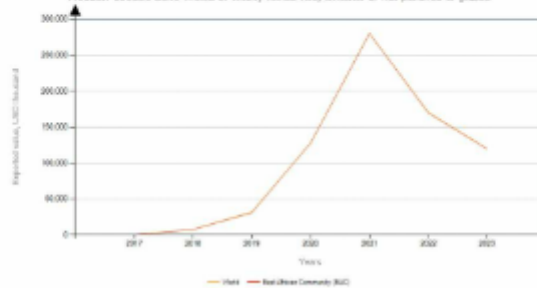
Importers	Exported value in 2017	Exported value in 2018	Exported value in 2019	Exported value in 2020	Exported value in 2021	Exported value in 2022	Exported value in 2023
World	6813	53809	79420	171571	402637	207739	170517
East African Community (EAC) Aggregation	5744	54874	69009	143414	399896	202070	173314
Algeria	14	27349	35123	80700	169174	122366	115994
Burkina Faso	1407	427	10309	25523	64206	56643	26490
Kenya	1189	14634	10980	27854	112710	82507	21390
Malawi	876	5694	7689	7927	14214	14496	8434
North Sudan	0	0	0	0	467	3094	3393
Comoros, Democratic Republic of the	1031	710	3441	1434	2806	3850	1814
Tanzania, United Republic of	7	0	0	0	0	0	0

26

Tanzania Cereals 2, a closer look: milled rice as is one of Tanzania's 5 top exports, to World and to EAC

Preliminary Note: very similar trend as grains in general, with peak in 2021

List of importing markets from East African Community (EAC) for a product exported by Tanzania, United Republic of
Product: 100630 Semi-milled or wholly milled rice, whether or not polished or glazed



27

ANNEX 7 – DATA MATRIX REQUEST

Indicator	2017	2023
Traded value in US\$ of proposed value chains No. Of new markets that products accessed		
No of Governance frameworks aligned to WTO SPS and TBT agreements and international standards in place		
No of mutual recognition frameworks and harmonization agreements relevant to the project in which your institution		
No of harmonized standards achieved with TMA support (before 2017 and on the period 2017-2023)		
No of businesses that meet attain a given SPS standard		
No of young people and women working for your organisation		
Levels of compliance of business with SPS		
Value of rejections of products aimed for exportation due to issues of compliance with quality and safety of products		
Time it takes for a private sector operator to obtain services related to conformity assessment processes, or in completing the customs requirements for exporting		
Approximate cost for firms to obtain certification Costs of standards and SPS services for TMA supported value chains in US\$		
No of products that obtained a quality certification		
Level of SPS quality certification accorded traded goods No. of public health incidents reported Cases of associated public reports		
No of accredited or internationally recognised services		

ANNEX 8 - FIRM-LEVEL SURVEY QUESTIONNAIRE



Project implemented by

AENOR

TMA PORTFOLIO EVALUATION - ENUMERATORS (2)

This survey is part of the ongoing **THEMATIC EVALUATION OF TRADEMARK AFRICA'S STANDARDS AND PHYTOSANITARY (SPS) PORTFOLIO** aimed at **assessing the impact** in the economic sectors of the supported countries (Kenya, Ethiopia, Uganda, Tanzania, Somaliland, Uganda, Rwanda).

The perspectives of the private sector and companies supported are considered a fundamental element to ensure a comprehensive and transparent evaluation process, where the potential impact of TMA activities to contribute to facilitating market access, standards harmonization and compliance can be adequately considered.

Your views and insights will help in our learning process and guiding future planning of project activities. So, we appreciate you taking a few minutes to respond to the questionnaire.

The information you provide will remain confidential and the results will be analysed and reported collectively.

Thank you for participating in this survey.

A. COMPANY INFORMATION

*0. Enumerator's name:

*1. Name of the company / establishment

*2. Kindly indicate the country where your company is located

- | | | |
|----------------------------------|--------------------------------|------------------------------|
| <input type="radio"/> Ethiopia | <input type="radio"/> Kenya | <input type="radio"/> Rwanda |
| <input type="radio"/> Somaliland | <input type="radio"/> Tanzania | <input type="radio"/> Uganda |

***3. Kindly indicate the number of employees of your business establishment at the end of 2023**

Overall number	<input type="text"/>
Employees younger than 35 years old	<input type="text"/>
Female employees	<input type="text"/>
Employees with disabilities	<input type="text"/>

***3.b Kindly indicate the number of employees of your business establishment in 2017 (or closer available date as per your records):**

Overall number	<input type="text"/>
Employees younger than 35 years old	<input type="text"/>
Female employees	<input type="text"/>
Employees with disabilities	<input type="text"/>
If different than 2017, please indicate the year of the information	<input type="text"/>

***4. Kindly indicate the institutional sector of your business establishment (only one response possible)**

<input type="radio"/> Private enterprise	<input type="radio"/> Cooperative	<input type="radio"/> Public
<input type="radio"/> NGO (local)	<input type="radio"/> NGO (International)	<input type="radio"/> Member of a producers group
<input type="radio"/> Other (please specify)	<input type="text"/>	

*5.a Kindly indicate the sub-sector of your business establishment (only one response possible)

- | | | |
|---|-------------------------------------|---|
| <input type="radio"/> Agriculture and agro processing | <input type="radio"/> Construction | <input type="radio"/> Tourism and hospitality |
| <input type="radio"/> Textile and leather | <input type="radio"/> Manufacturing | <input type="radio"/> ICT |
| <input type="radio"/> Mining | <input type="radio"/> Health | <input type="radio"/> Education |
| <input type="radio"/> If other, please specify: | | |

*5.b Does your business currently export goods or services?

- Yes No

*5.c If yes in 5b above, which goods or services is your business exporting (list)?(If not exporting, please indicate N/A)

*5.d Did your business export goods or services in 2017?

- Yes No

*5.e If yes in 5d above, which goods or services did your business export in 2017 (list)?(If not exporting, please indicate N/A)

*5.f Has your business engage in recent years in any activity towards complying with mandatory and / or voluntary requirements for marketing your products/services in your local market or abroad (even if a certification was not obtained)? (e.g., compliance with requirements in terms of food safety, phytosanitary measures, product quality standards, management systems standards, etc.)

Yes

No

*5.g If YES, what type of process did you carry out? (Check all that apply)

I implemented measures so my process/product complies with mandatory requirements by the relevant authorities to trade my goods in the market obtaining a certification

I implemented measures so my process/product advance in the compliance with mandatory requirements by the relevant authorities to trade my goods in the market but did not complete a certification

I implemented measures so my process/product complies with voluntary standards that can be valued by the consumers obtaining a certification

I implemented measures so my process/product advanced in the compliance with voluntary standards that can be valued by the consumers but did not complete a certification

N/A

Other (please specify)

*5.h In case of voluntary standards, what type of certification have you obtained or are working in implementing? (Check all that apply)

- Product quality certification
- Process (management system) certification (i.e., Quality Management Systems, Food Safety Management Systems, Environmental Management Systems)
- N/A

Please specify:

*5.i In case of mandatory technical requirements, what type of certification have you obtained or are working in implementing? (Check all that apply)

- Product quality certification
- Process (management system) certification (i.e., Quality Management Systems, Food Safety Management Systems, Environmental Management Systems)
- N/A

Please specify:

*5.j If you did not engage in any activity towards complying with mandatory and voluntary requirements during manufacturing/production or marketing of your products/services in your local market or abroad, why not? (Check all that apply)

- | | | |
|--|--|--|
| <input type="checkbox"/> I was not aware of the relevance of complying with technical regulations and/or standards | <input type="checkbox"/> I am aware of the importance of standards but they are not relevant for my usual market or markets that I think I could enter | <input type="checkbox"/> I do not have the necessary infrastructure or equipment to advance towards the relevant certification / proof of compliance |
| <input type="checkbox"/> I do not have the necessary human resources or the necessary level of skills | <input type="checkbox"/> It is too expensive | <input type="checkbox"/> It takes too much time |
| <input type="checkbox"/> If other, please specify | | |
-
-

*6. Which markets would you like to access? (customer categories that you are not currently serving, e.g., export market, supermarkets, hotels, etc.)

*6.b This market is located in: (Check all that apply)

- | | | |
|--|---|---|
| <input type="checkbox"/> My own country | <input type="checkbox"/> Other East African countries | <input type="checkbox"/> African countries outside of East Africa |
| <input type="checkbox"/> Countries outside Africa (e.g., European Union, United Kingdom, etc.) | | |

COMPANIES THAT ENGAGED IN A PROCESS TO OBTAIN A CERTIFICATION OR OTHER QUALITY STANDARDS

In some of the following questions a sentence is given and you are asked your opinion, from 1 - Strongly Disagreement to 5 - Strong Agreement. Please choose the option that better suits your perspective as follows: 1. Strongly disagree; 2. Disagree; 3. Neither agree nor disagree; 4. Agree; 5. Strongly agree.

*7. I was aware that my products needed to be Certified or have other type of proof of quality before the assistance by TMA.

Strongly disagree Strongly agree N/A

1 2 3 4 5

*8. My customers require that the products they source from my business are certified or have other proof of compliance with a quality standard.

Strongly Disagree Strongly Agree

1 2 3 4 5

*9. Which services provided by your country institutions that provide quality/standard or certification related services have you used in recent years?

Testing Quality standards SPS standards

Certification of a Product Certification of Management Systems

Other (please specify)

*11. As a result of my efforts to comply with quality standards, my firm has the potential to sell more products in my usual market.

Strongly Disagree

1

2

3

4

5

Strongly Agree

*11.b As a result of my efforts to comply with quality standards, my firm has the potential to sell in new markets.

Strongly Disagree

1

2

3

4

5

Strongly Agree

*11.c If you agree or strongly agree, could you please indicate which new markets have you entered (if any)?

11.d Could you provide an approximate value of your trade volume to these new markets? Please indicate the value and currency used (e.g., your local currency or US dollar).

*12. I think my firm competitiveness has improved as a consequence of my efforts to comply with technical requirements and/or voluntary standards.

Strongly Disagree

1

2

3

4

5

Strongly Agree

N/A

12.b In case you now comply with voluntary standards of relevance for your business, can you indicate which voluntary standards you consider to have had significance for reaching new markets?

*13. As a result of your effort towards conformity assessment or certification, did your sales increase and by how much?

- 50% and above 30-49% 20-39%
 10-19% 0-9% No increase

13.b Could you indicate your sales volume (income) for the period January 2023 - December 2023 ?

Volume (in Tn)

Income (amount)

Please indicate currency

13.c Could you indicate your sales volume (income) by 2017, or closer available data point?

Volume (in Tn)

Income (amount)

Please indicate currency

Please indicate the year (if different than 2017)

*18. Do you think that your efforts towards compliance with mandatory and/or voluntary technical requirements have benefited the community? If yes, in which way?

- I do not think they have contributed towards the community
- Have contributed to create more jobs in my business
- Have contributed to create more jobs, but not in my business
- Have contributed towards empowering women
- Have contributed towards protecting the environment
- Have contributed in other issues, please specify:

*19. What recommendations would you propose to improve the services provided by the institutions working on testing, certification and conformity assessment of products and/or services in your country?

15.b Can you provide an estimation of how much did it cost you to obtain certification by 2017 (or closer date for which you have information)?

Cost

Please indicate the currency

Please indicate the year (if different than 2017)

*16. In recent years, I have observed more availability or accessibility of testing, certification and conformity assessment services

Strongly disagree 1 2 3 4 5 Strongly agree N/A

*17. In recent years my customers are more aware of the benefits of buying products that are certified or have undergone conformity assessment

Strongly disagree 1 2 3 4 5 Strongly agree N/A

ANNEX 9. SURVEY RESULTS

This annex summarises the analysis of the responses collected by the enumerators' team which worked in the countries of relevance, i.e., Ethiopia, Kenya, Rwanda, Somaliland, Tanzania and Uganda, over November and December 2024.

A final brief note, after this analysis, is provided on the few responses received to the online version of the survey, which due its reduced number and variability of the quality / detail of the information obtained in the various responses was decided to keep separate.

A total of 179 responses were obtained, with the following distribution per country (Q2), type of organisation and sector of activity:

Country	Number of respondents	% over total
Ethiopia	14	7,82%
Kenya	30	16,76%
Rwanda	26	14,53%
Somaliland	3	1,68%
Tanzania	27	15,08%
Uganda	79	44,13%
Total	179	100,00%

Firms per institutional sector (overall and per country) (Q4)

	Ethiopia	Kenya	Rwanda	Somaliland	Tanzania	Uganda	Overall	% over total
Private enterprise	14	27	24	1	10	77	153	85,47%
Cooperative			1	2	8	2	13	7,26%
Member of a producers' group		1			9		10	5,59%
Public		1	1				2	1,12%
Other - Producer group with other smaller firms in it		1					1	0,56%
Overall	14	30	26	3	27	79	179	100%

Firms per sector of activity (overall and per country) (Q5a)

	Ethiopia	Kenya	Rwanda	Somaliland	Tanzania	Uganda	Overall	% over total
Agriculture and agro processing	14	28	3	1	27	72	145	81,01%
Tourism and hospitality		1	18				19	10,61%
Manufacturing			2	2		5	9	5,03%
Catering services & restaurant			3				3	1,68%
Processing (not specified)						1	1	0,56%
Shareholding Company						1	1	0,56%
Slaughter meat processing and delivery		1					1	0,56%
Overall	14	30	26	3	27	79	179	100%

With regards to the size (per number of employees) of our sample (Q3), the following table summarises the most relevant information:

It is relevant to mention that in some of the countries a particularly big company included in the sample might act as outlier and skew the results for the overall country. For this reason, and to have a clearer idea of the company size in our sample, per number of employees, the following table reflects both the average and the median value per country. In a sample where its uniformity might be affected by atypical values, the median is a more accurate description.

	Number of employees of the establishment in 2023 (OVERALL)		Number of employees of the establishment in 2023 (younger than 35 y.o)		Number of employees of the establishment in 2023 (female employees)		Number of employees of the establishment in 2023 (employees with disabilities)	
	#	Increase from 2017(%)	#	Increase from 2017(%)	#	Increase from 2017(%)	#	Increase from 2017(%)
Overall Avg.	349,11	6,40%	235,64	4,29%	209,95	29,47%	2,78	59,37%
Overall Median	25,50	24,39%	18,00	28,57%	8,00	0,00%	0,00	N/A
VALUES PER COUNTRY								
ETHIOPIA								
Avg.	2881,64	8,00%	2440,82	5,41%	1846,71	50,19%	31,67	59,79%
Median	700,00	12,45%	455,00	44,44%	425,00	20,57%	2,50	-16,67%
KENYA								
Avg.	517,83	18,62%	328,20	16,03%	300,60	13,53%	2,30	56,82%
Median	206,50	5,09%	136,00	-1,09%	126,50	8,12%	0,50	-50,00%
RWANDA								
Avg.	82,31	18,69%	60,23	22,44%	40,42	16,52%	0,35	0,00%
Median	68,50	11,38%	49,00	27,27%	39,00	36,84%	0,00	N/A
SOMALILAND								
Avg.	196,67	461,90%	130,00	550,00%	108,67	3522,22%	3,33	N/A
Median	55,00	57,14%	30,00	50,00%	4,00	33,33%	0,00	N/A
TANZANIA								
Avg.	73,37	61,58%	22,78	52,99%	30,22	50,00%	0,33	80,00%
Median	22,00	10,00%	10,00	66,67%	8,00	100,00%	0,00	N/A
UGANDA								
Avg.	19,91	45,31%	13,89	29,00%	6,53	41,62%	0,09	19,74%
Median	8,00	14,29%	5,00	0,00%	2,00	0,00%	0,00	N/A

The following table summarises the number of firms which reported an increase during the period of reference (2023 vs. 2017) per type of employment:

Number of firms	Overall	Employees younger than 35 years	Female employees	Employees with disabilities
Reporting increase	98	89	78	24
Report a decrease	33	43	32	7
Report no change*	36	30	58	135
Do not provide information	12	17	11	13
% of firms reporting increase over the firms providing information	58,68%	54,94%	46,43%	14,46%

*In the case of "Report no change", it should be highlighted that a relevant part of it are cases where both data for 2017 and 2023 were 0. For example, in the case of employees with disabilities most firms (116) reporting no change did not report having any employee with disabilities.

Q.5 b-e. EXPORTING STATUS OF THE SAMPLE

COMPANIES EXPORTING	2023		2017	
	#	% over sample	#	% over sample
Ethiopia	14	100%	14	100%
Somaliland	2	66,7%	1	33,3%
Uganda	9	11,4%	9	11,4%
Kenya	29	96,7%	28	93,3%
Tanzania	6	22,2%	3	11,1%
Rwanda	4	15,4%	1	3,8%
OVERALL	64	35,75%	56	31,28%

Looking a bit more in detail at the sample, out of the 64 companies that reported to export in 2023: 13 started exporting in the period (i.e., reported not exporting in 2017 but exporting in 2023) and 51 continued exporting (i.e., reported exporting both in 2023 and 2017); with 5 companies that stopped exporting from 2017 to 2023.

With regards the goods or services exported, the diversity has been quite consistent between 2023 and 2017. The below list refers to the most relevant export products in 2023 (within brackets the number of firms that mentioned the product among its exports):

- Flowers (26)
- Grain, including flour (7)
- Vegetables (18)
- Fruits (14)
- Animal feeds (3)
- Milk (1)

Some of the responses reported more general type of products (e.g., flowers) while others reported a more specific product (e.g., roses). In order to summarise the information, a simplified response was produced to categorise the sample per broader type of products.

Q5f. Has your business engage in recent years in any activity towards complying with mandatory and / or voluntary requirements for marketing your products/services in your local market or abroad (even if a certification was not obtained)? (e.g., compliance with requirements in terms of food safety, phytosanitary measures, product quality standards, management systems standards, etc.)

168 companies (93,85% of the sample) responded Yes to this question.

What type of process did you carry out?

This was a multiple-choice answer, in which a company could mark several responses depending on it referring to voluntary or mandatory requirements, and the completion of certification or not. It is understood that a same company might have different status for different processes or products, explaining why they might have marked more than one option.

The summary is as follows:

	OVERALL COUNT	OVERALL %
I implemented measures so my process/product complies with mandatory requirements by the relevant authorities to trade my goods in the market obtaining a certification	145	51,97%
I implemented measures so my process/product advance in the compliance with mandatory requirements by the relevant authorities to trade my goods in the market but did not complete a certification	19	6,81%
I implemented measures so my process/product complies with voluntary standards that can be valued by the consumers obtaining a certification	80	28,67%
I implemented measures so my process/product advanced in the compliance with voluntary standards that can be valued by the consumers but did not complete a certification	21	7,53%
N/A*	12	4,30%
OTHER	2	0,72%

*One company that indicated to have engaged in these activities, reported N/A to this follow-up question. Within "OTHER" a company specified having obtained BRC, and the other one to comply with all procedures required in their producers' group.

Q5h. In case of voluntary standards, what type of certification have you obtained or are working in implementing? (Check all that apply)

39 companies replied N/A to this answer

Out of the 140 which provided responses:

- 66 were aiming to obtain both Product Certification and Process Certification
- 23 were aiming to obtain Product Certification
- 44 were aiming to obtain Process Certification
- 7 did not marked any of the options but provided further information

The question had an open field (Please specify) that allowed responses different than the close-ended ones. 17 firms provided further information in that field and mentioned specific certifications or requirements (including the seven that only provided that information). Among those, it was mentioned: SMETA, organic certification, YUM food safety, Spring standard for Avocado, Global GAP, Fair Trade, Halal, promoting kindness and human treatment of animals, quality control and fish handling, HACCP.

Q5.i. In case of mandatory technical requirements, what type of certification have you obtained or are working in implementing?

32 companies replied N/A to this answer

Out of the 147 which provided responses:

- 79 were aiming to obtain both Product Certification and Process Certification
- 48 were aiming to obtain Product Certification
- 19 were aiming to obtain Process Certification
- 1 did not marked any of the options but provided further information

In terms of the additional information provided, 27 firms mentioned specific certifications or requirements (including the one referred above). Among those, some requirements were mentioned multiple times such as: trading licence, medical certificate, health inspection, BRC certification and Global GAP.

Other issues mentioned include crop management certification, Rainforest alliance, HACCP, ISO 22000 and KS 1758 (mandatory in Kenya context).

Q5.j If you did not engage in any activity towards complying with mandatory and voluntary requirements during manufacturing/production or marketing of your products/services in your local market or abroad, why not? (Check all that apply)

142 respondents out of the sample reported N/A to this question. Out of the remaining 37 responses, only 8 are from respondents that have declared to have not been engaged in the process towards compliance with mandatory or voluntary requirements. In this way, this question can be understood to collect information on general challenges that firms have faced in their compliance efforts regardless of the final status of it.

	OVERALL RESPONSES COUNT	ONLY RESPONSES OF FIRMS THAT DID NOT ENGAGE IN ACTIVITIES
It takes too much time	16	1
It is too expensive	15	4
I am aware of the importance of standards but they are not relevant for my usual market or markets that I think I could enter	14	--
I do not have the necessary infrastructure or equipment to advance towards the relevant certification / proof of compliance	5	3
I was not aware of the relevance of complying with technical regulations and/or standards	4	2
If other, please specify	4	--
I do not have the necessary human resources or the necessary level of skills	3	1

Of those marking "other", one referred to having faced all those difficulties and another referred to the bureaucracy linked to the task.

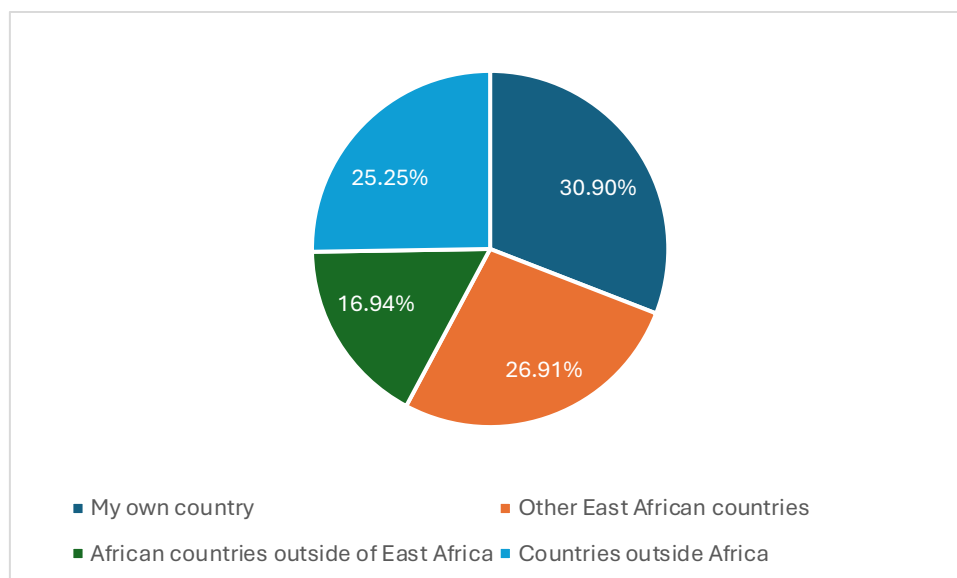
The two remaining provided details on their certification process, so they actually did engage in the effort.

Q6. 6. Which markets would you like to access? (customer categories that you are not currently serving, e.g., export market, supermarkets, hotels, etc.)

This was an open-ended question that allowed firms to indicate one or more target markets. Out of the 179 companies interviewed only 5 of them reported not having any new objective market.

MARKET FIRMS WANT TO ACCESS	RESPONSES COUNT	% over total responses
Export market	117	48,75%
Supermarkets	34	14,17%
Schools	22	9,17%
Local market*	20	8,33%
Hotels	11	4,58%
Regional market	9	3,75%
Retail Shops	7	2,92%
Public institutions	6	2,50%
International organisations	2	0,83%
Direct Consumers	2	0,83%
NGOs	2	0,83%
Restaurants	1	0,42%
Processing and industrial markets	1	0,42%
All	1	0,42%
N/A or None	5	2,08%

**It can be mentioned that several of these categories (e.g., schools, retail shops, restaurants, direct consumers, public institutions...) are local market as well. However, this category includes those that did not provide detailed information on the specificities beyond local market.*



Q7. I was aware that my products needed to be Certified or have other type of proof of quality before the assistance by TMA

	#firms	% over total responses
1. Strongly disagree	3	1,68%
2. Disagree	5	2,79%
3. Neither agree nor disagree	27	15,08%
4. Agree	50	27,93%
5. Strongly agree	89	49,72%
N/A	5	2,79%
Total	179	100,00%

Most of the sample, 139 firms or 77,65%, report to be aware of the need to be certified before the intervention.

The following table shows the distribution of responses per country:

Country	1.Strongly disagree	2.Disagree	3. Neither agree nor disagree	4. Agree	5. Strongly agree	N/A
Ethiopia			3	1	10	--
Kenya		3	8	18	1	--
Rwanda		1	10	10	5	--
Somaliland					3	--
Tanzania	2	1	5	6	9	4
Uganda	1		1	15	61	1

Q8. My customers require that the products they source from my business are certified or have other proof of compliance with a quality standard

	#firms	% over total responses
1. Strongly disagree	7	3,91%
2. Disagree	3	1,68%
3. Neither agree nor disagree	18	10,06%
4. Agree	54	30,17%
5. Strongly agree	97	54,19%
N/A	--	--
Total	179	100,00%

Most of the sample, 151 firms or 84,36%, report that their customers require the products sell to them are certified or have other proof of compliance.

The following table shows the distribution of responses per country:

Country	1.Strongly disagree	2.Disagree	3. Neither agree nor disagree	4. Agree	5. Strongly agree	N/A
Ethiopia	1		1	3	9	--
Kenya		1		21	8	--
Rwanda		1	11	10	4	--
Somaliland				2	1	--
Tanzania	4	1	4	9	9	--
Uganda	2		2	9	66	--

Q9. Which services provided by your country institutions that provide quality/standard or certification related services have you used in recent years? (multiple responses allowed)

Services	# Responses
Testing	139
Quality Standards	144
SPS standards	101
Certification of a Product	127
Certification of Management Systems	93
Other (please specify)	10

Among the "Other" responses it is indicated: inspection services, packaging and safe handling of products. One respondent did not know of any such service; another one generally mentioned UNBS, and four said not having used any service.

Q10. Have you received any direct support towards compliance of mandatory requirements or voluntary standards in recent years? If so, which services have your company received?

Service	Overall		Ethiopia		Kenya		Rwanda		Somaliland		Tanzania		Uganda	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Awareness / sensitisation about standards	130	32,26%	10	31,25%	25	34,25%	25	33,78%	2	33,33%	12	25,00%	55	33,13%

Training / Capacity Building	138	34,24%	14	43,75%	26	35,62%	25	33,78%	2	33,33%	19	42,31%	49	29,52%
Direct technical assistance	69	17,12%	7	21,88%	8	10,96%	19	25,68%	0	0,00%	6	11,54%	29	17,47%
Financial grant / assistance	15	3,72%	0	0,00%	2	2,74%	4	5,41%	1	16,67%	3	5,77%	5	3,01%
Infrastructure development / support	19	4,71%	1	3,13%	7	9,59%	0	0,00%	0	0,00%	2	3,85%	9	5,42%
I have not received direct support	24	5,96%	0	0,00%	2	2,74%	0	0,00%	1	16,67%	3	9,62%	16	9,64%
Other	8	1,99%	0	0,00%	3	4,11%	1	1,35%	0	0%	1	1,92%	3	1,81%

With regards the follow up question “From which institution or organisation have you received the support?”, responses are:

- Ethiopia:
 - o All respondents mentioned EHPEA (Ethiopian Horticulture Producers and Exporters Association) which is to be expected as they were the key source of the list of companies interviewed. In addition, it is mentioned Ethiopian Standards Agency (1), Ethiopian Environmental Protection Authority (1), and the NGO SNV (1).
- Kenya:
 - o 21 respondents mentioned KEPHIS (again to be expected as the information on attendants to the trainings they organised was one key source for the list of firms to interview).
 - o Non specified Government agencies (4), National Environment Management Authority (1).
 - o 11 firms mentioned the Horticultural Crops Directorate (HCD), with that name or previous denomination HCDA.
 - o Various respondents refer to support from private sector organisations, either mentioned in general (6) or specifically such as Fresh Produce Consortium (1), Kenya Flower Council (2)
 - o NGOs and Foundations were also mentioned: International Fertilizer Development Center (1), MasterCard Foundation (1), E4Impact (1), etc.
- Rwanda:
 - o 19 respondents refer to “Public institutions” without further specification. In addition, other public bodies are mentioned: RSB (5), RDB (1), MMCL (1).
 - o 10 respondents refer to TMA directly.
 - o International organisations such as USAID (1) and GIZ (1) are also mentioned.
- Somaliland:
 - o SLQCC is mentioned twice. The NGO Shuraako is also mentioned once.
- Tanzania:
 - o TAHA (14) is the organisation more mentioned (again, TAHA was one of the sources of information for the list of firms), together with SIDO (3) and EAGC (3)
 - o On the public side: TBS (2), TPHA (1), TFDA (1).
 - o International bodies / initiatives and NGOs were also mentioned: USAID (1), COLEAD (1), WFP (1), RIKOLTO (1), among other.
- Uganda:
 - o 54 respondents refer to the UNBS.
 - o On the private sector support side, the PSFU was mentioned 16 times, as well as the Federation of Small and Medium Size enterprises (4).
 - o Other support providers mentioned were, among others: POST BANK (3), RBS (4), TMA (2), Worldvision (1).
 - o 3 enterprises mentioned having counted with private technical support.

Q10.C LEVEL OF SATISFACTION WITH THE SUPPORT RECEIVED (I am satisfied with the quality of the services / support received).

	#firms	% over total responses
1. Strongly disagree	7	3,91%
2. Disagree	3	1,68%
3. Neither agree nor disagree	23	12,85%
4. Agree	56	31,28%
5. Strongly agree	71	39,66%
N/A	19	10,61%
Total	179	100,00%

Overall, the level of satisfaction with the services / support received is quite good, with 127 firms responding positively on their level of satisfaction.

Country	1.Strongly disagree	2.Disagree	3. Neither agree nor disagree	4. Agree	5. Strongly agree	N/A
Ethiopia				4	9	1
Kenya			13	12	3	2
Rwanda			1	16	9	
Somaliland					2	1
Tanzania	1	2	7	4	10	3
Uganda	6	1	2	20	38	12

Comments / Recommendations for improvement of the services include (summarised):

- It lacks continuity, sustainability and post evaluation assessments. (2)
- Specifically, irregularity on the trainings was mentioned various times (14)
- Make trainings / support accommodative of the dynamic of the industry. I.e., need regular training and information especially when there are changes to food safety requirements or a new pathogen which has to be considered (2)
- There should be more outreach programmes to sensitize. (5)
- Establish more laboratories for testing.
- Harmonisation of standards.
- Provide proper guidelines on the requirements (2)
- More staff and resources for inspection and meeting standards (2)
- Improve coordination of services
- Provide more specific support to the work a firm is conducting / plans (2)
- Train elder people practically to increase more knowledge and skills
- Stabilise costs during registration to be fair to enterprises, particularly for renewals
- Improve delays in the testing process

Q11a. As a result of my efforts to comply with quality standards, my firm has the potential to sell more products in my usual market.

	#firms	% over total responses
1. Strongly disagree	5	2,79%
2. Disagree	3	1,68%
3. Neither agree nor disagree	20	11,17%
4. Agree	70	39,11%
5. Strongly agree	81	45,25%
N/A	--	--
Total	179	100,00%

The respondents consider that their potential to sell in their usual market improved thank to their efforts on compliance (over 45% of respondents strongly agree with this, and almost 85% of them either agree or strongly agree).

Country	1.Strongly disagree	2.Disagree	3. Neither agree nor disagree	4. Agree	5. Strongly agree	N/A
Ethiopia		1	3	5	5	--
Kenya		1	1	20	8	--
Rwanda			3	19	4	--
Somaliland			1		2	--
Tanzania	3		8	4	12	--
Uganda	2	1	4	22	50	--

Q11b. As a result of my efforts to comply with quality standards, my firm has the potential to sell in new markets

	#firms	% over total responses
1. Strongly disagree	5	2,79%
2. Disagree	12	6,70%
3. Neither agree nor disagree	21	11,73%
4. Agree	56	31,28%
5. Strongly agree	85	47,49%
N/A	--	--
Total	179	100,00%

Respondents also think that the compliance process has increased their potential to sell in new markets (almost 78% of them agree or strongly agree with that statement).

Country	1.Strongly disagree	2.Disagree	3. Neither agree nor disagree	4. Agree	5. Strongly agree	N/A
Ethiopia	1	3	4	3	3	--
Kenya		2		13	15	--
Rwanda		1	5	16	4	--
Somaliland			1		2	--
Tanzania	3		8	4	12	--
Uganda	1	6	3	20	49	--

On the follow up question, regarding the new markets to which it has accessed (“If you agree or strongly agree, could you please indicate which new markets have you entered (if any)?”), we have:

Almost 50 companies refer to exporting markets, including Asia and/or China and/or South Korea, new European countries, African countries (Kenya, South Sudan, DRC, Ethiopia), or exporting in general. Over 50 companies refer to new markets in their usual countries, including: schools (16), supermarkets (11), hotels (11), retail shops (11), etc.

Could you provide an approximate value of your trade volume to these new markets?⁶⁰

A total of 110 firms provided response to this question reporting an increase on the value of trade to the new markets of their interest; with five companies reporting over a million USD in value and three over 5 million (in one specific case, the value reported in USD is extremely high leading to some doubts over the accuracy of the specific data input).

Without considering those three outliers, the average increase was 118.759,21USD.

The median increase considering all responses except the one posing doubts about its accuracy is 13.060USD.

Q12A. I think my firm competitiveness has improved as a consequence of my efforts to comply with technical requirements and/or voluntary standard

	#firms	% over total responses
1.Strongly disagree	6	3,35%
2. Disagree	1	0,56%
3. Neither agree nor disagree	14	7,82%
4. Agree	73	40,78%
5. Strongly agree	81	45,25%
N/A	4	2,23%
Total	179	100,00%

Interviewed firms consider that their competitiveness has improved as a consequence of their efforts towards compliance (over 80% agree).

Country	1.Strongly disagree	2.Disagree	3. Neither agree nor disagree	4. Agree	5. Strongly agree	N/A
Ethiopia			1	6	7	
Kenya	1		1	19	9	
Rwanda			1	20	5	
Somaliland				2	1	
Tanzania	3	1	7	4	9	3
Uganda	2		4	22	50	1

Q12b In case you now comply with voluntary standards of relevance for your business, can you indicate which voluntary standards you consider to have had significance for reaching new markets?

A variety of standards are pointed out as relevant in the responses. Below is a summary of the most repeated ones (within brackets the number of responses including them):

- Quality issues (quality of products, quality management systems, etc.) (40)
- Food safety issues (15)
- HACCP (10)
- Responses generally pointing out to hygiene and sanitation importance (14)
- SMETA (9)
- SPS issues (7)
- Organic certification (11)

⁶⁰ Information was provided both in USD, local currencies and, in some cases, in EUR. For those values provided in local currency or EUR, the Exchange rate with the USD in December 2023 as per the [InfoEURO platform](#) was used.

Q13.a As a result of your effort towards conformity assessment or certification, did your sales increase and by how much? (As reported in close-end question)

	#firms	% over total responses
0-9%	19	10,61%
10-19%	47	26,26%
20-29%	15	8,38%
30-39%	18	10,06%
40-49%	34	18,99%
50% and above	20	11,17%
No increase	26	14,53%
Total	179	100,00%

Country	0-9%	10-19%	20-29%	30-39%	40-49%	50% and above	No increase
Ethiopia		6		2	1	4	1
Kenya		2	10		15	1	2
Rwanda	5	6	4		9	2	
Somaliland		3					
Tanzania		3	1		4	7	12
Uganda	14	27		16	5	6	11

Q13b-c. Increase in sales (income) as per reported values

The general closed-end question was followed by two questions asking for the detail on the income in 2023 and 2017 (or closer available data point if, for any reason, 2017 was not available).

143 firms provided information for 2023, while 127 did for 2017.

Information was provided by the firms either in their local currency, USD or EUR. The relevant exchange rate (December 2023 or December 2017) as per the InfoEURO webpage (see note 1) was used to convert all amounts to USD for the analysis.

	Sales volume (Income) in 2023 in USD	Sales volume (income) in 2017 (or closer date with available info) in USD	Increase in % terms
Overall Avg.	16.622.224,4	20.721.901,47	-19,78%
Median	94.190,3	112.000,00	-15,90%
VALUES PER COUNTRY			
ETHIOPIA			
Avg.	4.345.741,4	2.790.231,67	55,75%
Median	3.295.500,0	2.365.400,00	39,32%
KENYA			
Avg.	70.478.548,3	78.664.166,17	-10,41%
Median	555.050,0	386.724,00	43,53%
RWANDA			
Avg.	1.367.811,9	1.202.110,57	13,78%
Median	800.000,0	598.000,00	33,78%
SOMALILAND			
Avg.	400.000,0	340.000,00	17,65%
Median	400.000,0	340.000,00	17,65%
TANZANIA			
Avg.	28.839.054,2	31.704.697,25	-9,04%

Median	119.520,0	57.825,00	106,69%
UGANDA			
Avg.	75.395,5	49.222,78	53,17%
Median	15.470,0	19.600,00	-21,07%

Q14. In recent years, I have experienced a shorter time to obtain certification or other proof of quality in manufacturing, farming or processing (HACCP, GLOBALGAP, ISO, etc.).

	#firms	% over total responses
1. Strongly disagree	20	11,17%
2. Disagree	10	5,59%
3. Neither agree nor disagree	26	14,53%
4. Agree	65	36,31%
5. Strongly agree	42	23,46%
N/A	16	8,94%
Total	179	100,00%

Almost 60% of respondents report to have experienced a shorter time to obtain certification.

Country	1.Strongly disagree	2.Disagree	3. Neither agree nor disagree	4. Agree	5. Strongly agree	N/A
Ethiopia	6	1	1	3	2	1
Kenya	1			22	6	1
Rwanda		2	15	8	1	
Somaliland			1	2		
Tanzania	1	2		6	6	12
Uganda	12	5	9	24	27	2

Q14b-c. Change in number of months as per reported values

	Estimation of how long (in months) has taken for you to obtain certification now (2023)	Estimation of how long (in months) was taking to obtain a certification by 2017 (or closer date with available Info)	Increase in % terms
Overall Avg.	3,937106918	7,015625	-43,88%
Median	2	5	-60,00%
VALUES PER COUNTRY			
ETHIOPIA			
Avg.	6,769230769	8,166666667	-17,11%
Median	6	7	-14,29%
KENYA			
Avg.	1,816666667	6,033333333	-69,89%
Median	1	6	-83,33%
RWANDA			
Avg.	11,60869565	15,08695652	-23,05%
Median	12	12	0,00%
SOMALILAND			
Avg.	7,5	3,5	114,29%

Median	7,5	3,5	114,29%
TANZANIA			
Avg.	2,357142857	3,3	-28,57%
Median	1	3	-66,67%
UGANDA			
Avg.	2,188311688	4,549019608	-51,89%
Median	2	4	-50,00%

Both the responses to the close-ended questions and the analysis of values reported speak to a reduction of the time experienced for obtaining certification.

It cannot be disregarded that some of the effect captured in this information is due to companies now undergoing just the renewal of the certification obtained in the past, what could lead to reported times for 2023 being a bit lower due to the usually simplified procedure for the renewal of the certification once it has been acquired a first time. However, based on the other responses in the survey, implying to companies working on obtaining new certifications as well, it is considered that these results in any case still hint to an improvement in the efficiency of the overall processes.

The only case where an improvement is not observed, in average or median is in Somaliland. In this case, the results could be explained by two main elements. 1 – the very reduced sample limits the validity of specific results; 2 – in events where firms go from not undergoing any certification procedure to start this process time and costs can be (and also be perceived) as longer and more costly.

Q15. In recent years, I have observed a reduction in the cost of obtaining certification or other proof of quality (in manufacturing / food producing or processing). This is referred to cost of the external verification process.

	#firms	% over total responses
1. Strongly disagree	42	23,46%
2. Disagree	5	2,79%
3. Neither agree nor disagree	37	20,67%
4. Agree	46	25,70%
5. Strongly agree	30	16,76%
N/A	19	10,61%
Total	179	100,00%

Country	1.Strongly disagree	2.Disagree	3. Neither agree nor disagree	4. Agree	5. Strongly agree	N/A
Ethiopia	11				1	2
Kenya	13	2	2	10	3	
Rwanda	1	2	5	18		
Somaliland			2	1		
Tanzania	2		4	3	4	14
Uganda	15	1	24	14	22	3

Q15b. Cost of obtaining the certification process, as per reported values:

When a range of values was provided as answer, the highest value in the range was taken for the analysis.

In 2023, 149 responses were provided while in 2017 (or year used as reference) only 109 gave information. In one of the cases, for both dates, the amount/currency of the data point was not clear, so it was not considered for the analysis.

It has to be considered, however, that the sample is not distributed equally among all countries. For example, in the case of Tanzania, only 11 and 6 firms responded to the question in 2023 and 2017, respectively.

Another relevant element to consider is that companies might be in different stages of the certification process what might vary the cost; for example, in Uganda a company reported that a new certification costs 3million Ugandan shillings (780USD) and renewal is 915,000shilling (237,90USD), however most companies only report the value of their actual situation, what might cause variation in the absolute numbers. Similarly, a company might have multiple products in their certification what would also increase the cost they report.

	Estimation of how much it has cost the businesses to obtain certification now	Estimation of how much it costed the businesses to obtain certification by 2017 (or closer date with available Info)	Increase in % terms
Overall Avg.	28915,91	36651,82	-21,11%
Median	520	1120,00	-53,57%
VALUES PER COUNTRY			
ETHIOPIA			
Avg.	8049,86	9553,62	-15,74%
Median	5492,50	5913,50	-7,12%
KENYA			
Avg.	123962,80	86248,19	43,73%
Median	2938,50	1731,60	69,70%
RWANDA			
Avg.	22301,81	62799,80	-64,49%
Median	18842,02	28000,00	-32,71%
SOMALILAND			
Avg.	9166,67	4000,00	129,17%
Median	4000,00	4000,00	0,00%
TANZANIA			
Avg.	1963,82	1729,58	13,54%
Median	2000,00	1337,50	49,53%
UGANDA			
Avg.	387,01	704,59	-45,07%
Median	247,00	308	-19,81%

Q16. In recent years, I have observed more availability or accessibility of testing, certification and conformity assessment services

	#firms	% over total responses
1. Strongly disagree	7	3,91%
2. Disagree	6	3,35%
3. Neither agree nor disagree	15	8,38%
4. Agree	64	35,75%
5. Strongly agree	77	43,02%
N/A	10	5,59%
Total	179	100,00%

Country	1.Strongly disagree	2.Disagree	3. Neither agree nor disagree	4. Agree	5. Strongly agree	N/A
Ethiopia	2	2	3	6	1	
Kenya			1	18	11	
Rwanda		1	4	19	2	
Somaliland				3		
Tanzania	1	3	2	5	8	8
Uganda	4		5	13	55	2

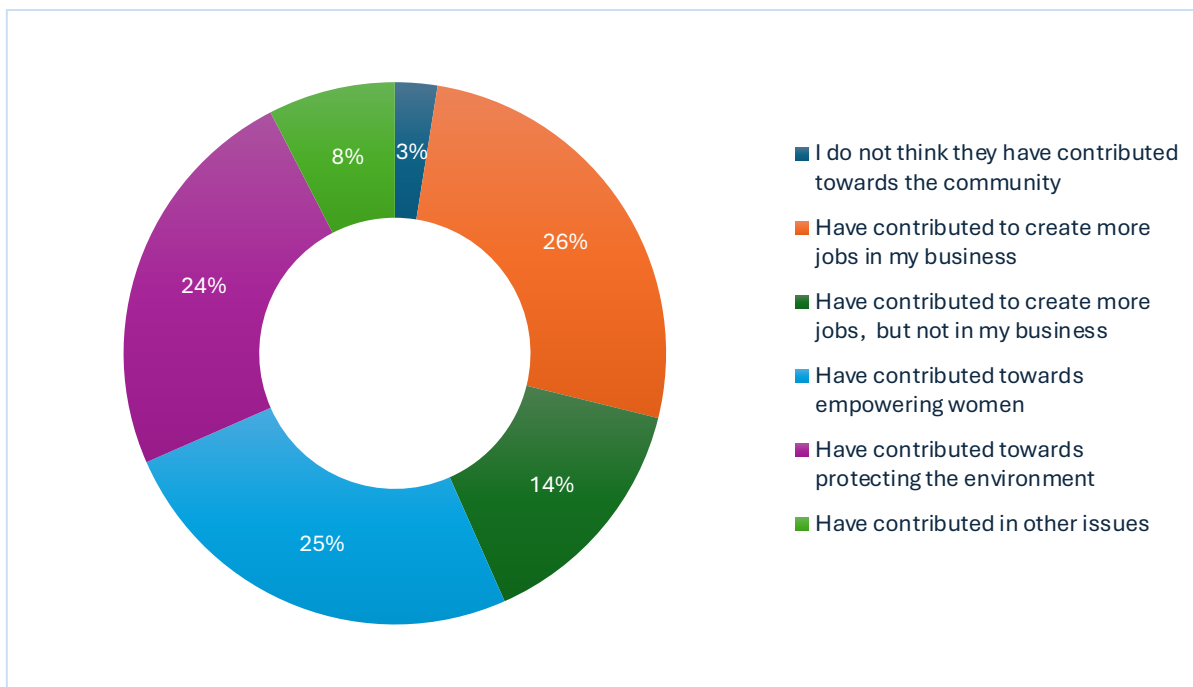
Q17. In recent years my customers are more aware of the benefits of buying products that are certified or have undergone conformity assessment

	#firms	% over total responses
1. Strongly disagree	5	2,79%
2. Disagree	2	1,12%
3. Neither agree nor disagree	13	7,26%
4. Agree	64	35,75%
5. Strongly agree	89	49,72%
N/A	6	3,35%
Total	179	100,00%

Country	1.Strongly disagree	2.Disagree	3. Neither agree nor disagree	4. Agree	5. Strongly agree	N/A
Ethiopia	1		3	5	5	
Kenya		1		22	7	
Rwanda			6	17	3	
Somaliland				3		
Tanzania	2		3	7	9	6
Uganda	2	1	1	10	65	

Q18. Do you think that your efforts towards compliance with mandatory and/or voluntary technical requirements have benefited the community? If yes, in which way?

The majority of firms interviewed agree that the work towards compliance with technical requirements have benefited the community, with only about 2,45% of the responses (12) claiming that it has not been the case. However, out of those 12, five of them also market some other benefits. It is unclear if that was a mistake, or if the respondents did not consider those benefits as contributing towards the community.



It is relevant to point out that several responses were possible to this question. Also, 66 respondents marked both “Have contributed to create more jobs in my business” and “Have contributed to create more jobs, but not in my business”; while this seems a contradiction, considering the potential responses in the questionnaire, it is understood that this combination of responses has been provided by firms that consider that jobs have been created both in their business and more in general.

With regards to other issues in which it has contributed (open-ended question), responses include issues such as:

- Better product safety, product quality and consumer safety/health
- Adherence to Corporate Social Responsibility
- Improvement of income levels

Q19. What recommendations would you propose to improve the services provided by the institutions working on testing, certification and conformity assessment of products and/or services in your country?

This was an open-ended question which allowed the respondents to provide their overall feedback. In spite of the diversity of the sample, by country and type of company, there are a few areas that were consistently mentioned in their recommendations:

- Sensitisation and awareness raising. This includes several aspects:
 - o Increasing sensitisation with regards to certifications needed, testing, processes, etc. Particularly important is the awareness raising in cases where new measures are developed, or new requirements might be imposed at the international stage, so producers are aware upfront and can work in adaptation and align accordingly their production systems.
 - o Increase awareness of the clients and consumers with regards certified products / services and its importance
 - o Working in providing awareness along the value chains and for providers (e.g., grain producers for millers; providers of fresh food, chemical suppliers, etc. for hotels and restaurants) which is relevant for the certification process of the companies in the later links of the value chain.
 - o Promote private sector engagement.
- Capacity building of the producers. Trainings are consistently mentioned as a key element to equip, especially small-scale farmers, with knowledge and ability to comply with different standards. Recommendations include:

- Improve the consistency in their provision as well as their frequency, with potential follow-up on trainees to see their understanding and practical application. This could be related to provision of coaching which is also mentioned several times. Include refresher courses when changes in the standards or requirements happen.
- Train of trainers to create a pool of qualified personnel to support the process.
- Trainings to include more transversal topics as well, such as post-harvest handling.
- Build the capacity of the institutions providing services:
 - Increase institutions' accreditation so they can provide more services (e.g., add new certifications) and obtain validity of their tests and results, reducing the need to depend on the expertise from nearby countries.
 - Develop capacities of the staff and increase the numbers for timely provision of services.
 - Be more visible, for example in the public awareness initiatives.
 - Improve customer orientation, and the establishment of a good rapport with the private firms seeking certification.
 - Increase availability of services, particularly laboratories, locally, and possibly increase the presence of the private sector providers to this end.
 - Engage in partnership with international bodies to share best practices.
- Improve coordination among national entities to avoid duplication of efforts and ensure compliance, counting with a national quality policy and institutional framework to this effect.
- Improve communication with private sector and producers, especially on banned products. In particular, and linked to what is mentioned in sensitisation, timely and adequate communication of changes in requirements and procedures is considered highly important.
- Ensure a level playing field in which mandatory requirements are applied consistently for all actors. Several firms in various countries point out to the presence of firms (in many cases informal) which do not comply with the technical requirements and thus are able to be cheaper and compete in the market. The need of more resources to verify this compliance is also stated.
- Streamline procedures and requirements. Several recommendations are linked to the lack of clear guidelines and procedures for certification and compliance and need to consolidate and sync the process, including steps, documentation to provide, etc.
- Follow-up renewals early enough (i.e., before expiration of the previous certificate).
- Reduce time of the process. In particular, this seems to be often referred to the turnaround of results after delivery of samples and the cases of renewal.
- Reduce costs of the process, particularly in the cases of renewal. In this sense, various responses also suggest the possibility of extending more the validity of certificates to avoid very frequent renewals, as well as the possibility to have reduced fees for SMEs or companies starting their activities, for which this cost is perceived as too high.
- Provide financial support either for obtaining the certificates, as mentioned above, training and capacity building, as well as for adaptation of the infrastructure, which might be needed for some cases.
- In addition, as more transversal recommendation, it is also mentioned the need to support firms in the process of new markets access / acquisition.

A METHODOLOGICAL NOTE

The survey targeted to have a representative sample of companies that were beneficiaries of the TMA S2 support. The target firms for the survey were identified with support from the stakeholders engaged during the KIIs.

However, this was not a simple task. The design of the projects under Strategy 2, where the support for the private sector was done indirectly, as already explained, meant that the resources/information directly available from TMA were more limited, and a strong follow-up with the main direct beneficiaries (public institutions, private sector support organisations) supported by TMA teams had to take place. During the preliminary meetings with stakeholders over the month of October, the effort to identify and request from them lists of firms to consider in the evaluation was started. However, the actual provision

of information was slow and extended until late November, being in some cases finally complemented by publicly available sources (e.g., private sector organisations' membership lists, etc.).

Due to this, the survey was implemented under a two-step approach (two cohorts) based on the timing in which the information was made available to the contractor. While this was not initially intended, it revealed unexpected benefits, as it allowed to extract some lessons from the work with the first cohort to improve the process under cohort 2. For example, among others, the evaluation team focused the specific enumerator training to ensure that key concepts and needs were clearer. This part of the work improved explanations on how to approach interviewees to maximise response rates and made some adjustments in the questionnaires to simplify data management (e.g., questions regarding values separated in different fields the amount and currency, posing limitations on the type of information that could be included, such as number vs text).

The countries that were part of the Cohort 1 were Somaliland, Ethiopia and Uganda; those of the Cohort 2 were Tanzania, Kenya and Rwanda.

The provision of the list of firms by well-known institutions in their respective countries assisted the field implementation, where the possibility of mentioning them as a source of the contact contributed to create a relation of trust. In spite of this, some level of resistance was found in some cases / countries, reason why the evaluation team requested the support of the relevant organisation, i.e. letting the relevant firms know about the exercise and cooperate with the evaluators when contacted.

For example, this was the case in Ethiopia where some companies required a more bureaucratic process where the introductory letter prepared with TMA for these purposes had to be sent to firms' management for approval of the engagement in the survey.

Each country had an enumerator's team and a country coordinator who liaised with our key expert team, with the exception of Somaliland where, given the small sample size, coordination was done directly by the Consultant's team member.

The platform Zoho survey was selected for the survey implementation. In order to incorporate the adjustments of the work with Cohort 2, a separate link per cohort was used. In addition to those two links, another survey link per cohort was prepared to be used as testing environment for the enumerators so they could familiarise both with the questionnaire and the platform before the actual field work.

In addition to those links, as proposed during the inception phase, an online version of the survey was also launched. Given the difficulties in obtaining lists of firms, it was only launched for Uganda where the list provided allowed for that. The Consultant prepared a draft invitation email, which was verified with TMA, and sent to over 800 firms; however, the results obtained were very limited (only 8 responses) which, by the way, varied in the degree of completion and detail of the information provided, reason why they were not included in the overall survey analysis but reviewed separately.

The general approach preferred for the implementation was to try to set up appointments via phone previous to the in person visit. While this could limit the rapport in some cases and make harder to get an actual time for the interview, considering the level of detail of information to be requested and the time to complete the survey (between 30 minutes to an hour as estimate) this was important for the adequate engagement. Surveys took place in person with just a few exceptions taking place remotely based on the security situation (i.e., in Ethiopia) or on very far locations.

A NOTE ON THE ONLINE SURVEY

The methodology of the evaluation initially foresaw to launch an online survey for the collection of the firm-level information. At the start of the project, and after a conversation with TMA, the approach of the

tool was adjusted to the collection via enumerators considering the expected low response rate that this kind of exercise might provide.

However, as the platform used for recording the responses collected by enumerators could also be used for the online version; it was decided to launch it in parallel.

Considering the difficulties to obtain the list of firms from stakeholders and the limited number of firms provided, the online survey was launched only for Uganda, where UNBS provided quite a comprehensive list of firms which had used their services.

An invitation email, linking to the survey (specific online link) was sent to 763 firms on 26th November 2024. Only 8 responses were received until the 28th December; one of them not completed.

As the level of detail of responses varied and considering the different type of data collection method used, it was decided to not combine these 7 responses in the overall sample. They have been kept separate and a brief analysis of the responses has been carried out and is presented below.

Sample characteristics:

Type of organisation		
	Cooperatives (number)	2
	Private enterprises (number)	5
Sector of activity		
	Agriculture and processing	7
Average size per total employees		
	In 2023	15
	In 2017	9
Median size per total employees		
	In 2023	8
	In 2017	4
Exporting status in 2023		
	Export	2 (one already exporting in 2017)
	Do not export	5

Most of the sample (6) engaged in activities towards compliance focusing particularly on mandatory requirements (only 2 mentioned voluntary standards), and product certification.

Main issues or challenges in the process that they report are the cost (mentioned 3 times), time (2), lack of awareness (1), and lack of infrastructure (1) or human resources (1).

In terms of markets of interest, supermarkets, hotels, public institutions and schools are mentioned as objective, together with export markets (for which intra-EAC, African level and outside of Africa trade is of interest).

Overall, the sample seems to be aware of the importance of certification (5 responded positively either agree or strongly agree) and that their customers require it.

Most firms think that their efforts to comply with the standards have helped them to sell more on their usual market or new markets (5 responses each, agreeing or strongly agreeing). Among the new markets of access, it is mentioned local ones but also international, i.e. Kenya and South Sudan, Tanzania, USA.

It is not possible to look into the detail of the amount, as some companies reported the trade volume in value, others in quantities and others did not specify; which is something that repeats in the other questions referred to specific values.

Overall, it seems the companies think that their compliance has helped them in their competitiveness levels (4 express different level of agreements, 2 did not agree nor disagree, and only 1 disagreed); and all of them report increases in sales above 20%.

In terms of their experience as users of certification services, only 3 agreed that they have experienced shorter times (2 disagree, 1 nor agree nor disagree, and another did not respond) but generally did not provide sufficient information to compare 2017 and 2023.

With regards to changes in the cost, 3 agree or strongly agree that they have observed a reduction of the cost, 2 are in disagreement, and 2 did not replied. In addition, 5 of them have observed more availability or accessibility of the services in recent years.

On the level of awareness of their customers, 3 strongly agree that in recent years they are more aware, 2 nor agree nor disagree, and the other 2 disagree.

With relation to Q18 – if they think that efforts towards compliance with mandatory and/or voluntary technical requirements have benefited the community; overall, the creation of more jobs in their business (and in some cases overall) are perceived as benefits, together with protection of environment and food and nutrition security.

Finally, on the recommendations to improve services by the QI institutions, reduction of cost and speed are mentioned. Another response points out that it should be compulsory for all companies to obtain certificates.

ANNEX 10. CASE STUDIES

A Case study of ProDev Rwanda

Context

ProDev Rwanda was started in 2006 under ProDev Group Holdings. Initially the company was only dealing with the postharvest handling of maize, by buying maize from farmers, drying, storing and selling it to milling companies. In 2016, it diversified its products and started milling for animal feeds (poultry and livestock) that sell by trade name 'Tunga Feeds'. The expansion owed to the demand of the products and the fact that not many companies had ventured in this area. Currently, the company's output for feed production ranges between 40,00-45000 Tonnes per month as of 2023 they are selling around 3000MT per month of animal feed as compared to initial 900MT. In the year 2024, the company has gone a notch higher to diversify its project portfolio from poultry and livestock feed to an additional production line of fish feed production. It was quite exciting on the day of the interview, the operation manager quoted that *'Today we've sold our first product of the fish feed'*.



Result

The company is excited about the support from TMA to get certification, which has brought many benefits which include fine-tuning processes such as safety and quality in their production processes which have enhanced product quality and competitiveness thus enhancing trust with their clients. They have been able to increase their exports to DRC up to 30% and opening of new markets.

Impact

- Through support by Rwanda Standards Board, PRODEV-Rwanda Ltd attained certified against RS ISO 22000: 2018 Food Safety Management Systems in 2022.
- The training provided by RSB has enhanced the organization's capacity which has helped overcome bottlenecks experienced before with regard to food safety and quality thus building trust with their clients and increasing demand for their products.
- The development of a new product line (fish feed) is a great milestone for the company which is associated with the certification.
- The company has been able to establish international partnerships such as NUTRECO
- The product has a well-established quality management system in place and has hired a food quality management manager and all staff are well trained and understand the quality management systems.
- The amount of animal feed exported to Burundi has increased to 15Tonnes per week
- The company's manpower has increased from 37-40 employees in 2016 to current number of 60 permanent employees and around 240-250 contractual employees.

Challenges

- Maize and rice bi-products are only imported, which increases the cost of production

- The cost of certification at the beginning was quite expensive costing approximately 6.5million Rwandan Franc, however, the cost of maintaining the certification is quite manageable since it's conducted only once a year with a cost of 100K Rwandan Franc
- Economic constraints due to currency depreciation against the dollar, they import large quantities which they are required to pay upfront
- Sometimes there's scarcity of raw material which poses limitations to production
- During the certification process, documentation was the actual drawback, but Millenium consultants came in handy to support in the process.

Who benefits

The community of farmers approximately 20,000 and 3,000 farmers in Rwanda and DRC respectively.

Case Study: Enhancing Standards and Conformity Assessment in Somaliland

Context

The Somaliland Quality Control Commission (SQCC) serves as the National Standards Body (NSB) for Somaliland. Established under the Quality Control Commission Act (Act No. 68/2014) and officially launched in 2015, the SQCC is tasked with developing, maintaining, and promoting standards while combating counterfeit products. Its mandate covers Standardization, Quality Assurance, Metrology, and Testing (SQMT), ensuring the development and implementation of national standards through conformity assurance activities. The SQCC also provides testing, calibration, and product inspection services to ensure quality and compliance with established standards.

Before the establishment of the food laboratory in Berbera, Somaliland faced significant challenges in quality control, including:

- Limited technical capacity for advanced laboratory testing.
- Inadequate laboratory equipment and reagents.

Intervention

Trade Mark Africa (TMA) partnered with SQCC in December 2019 on Project 5112. The project aimed to enhance sanitary and phytosanitary standards infrastructure and strengthen the technical capacity of SQCC staff to address the identified gaps. Specifically, it sought to support the application of quality standards, enable Somaliland to participate in international trade, and safeguard the health of citizens and the environment while boosting exports.

In December 2019, TMA facilitated the signing of a memorandum of understanding between the SQCC and several Ethiopian National Quality Infrastructure Institutions, including the Ethiopian Standards Agency, Ethiopian Conformity Assessment Enterprise, National Metrology Institute of Ethiopia, and Ethiopian National Accreditation Office. This collaboration focused on improving SQCC's capacity for conformity assessment through regulatory reforms and the use of quality testing equipment.

To achieve these objectives, activities undertaken encompassed a variety of areas:

1. **Procurement and Installation of Equipment** – TMA facilitated the procurement of food laboratory equipment valued at USD550,000, which was installed at the Berbera food laboratory.
2. **Capacity Building** – TMA organized training programs for 20 SQCC staff, including six laboratory technicians, four certification staff, and others from the standards division. Training modules included: Microbiology, Animal Feed Analysis, Good Laboratory Practice and Product Certification.
3. **Additional Support** - The laboratory was further equipped with testing instruments valued at USD 484,450, funded by the UK's Foreign, Commonwealth & Development Office (FCDO).

Results

The intervention significantly improved Somaliland's conformity assessment processes by enhancing local testing capabilities and reducing the time and costs associated with accessing local and regional markets.

Key achievements include the certification of:

1. Two water bottling plants: Tango and Maaxda.
2. One carbonated drinks processor: Dur Dur.

3. One canned tuna oil processor in Berbera: Somtuna

Impact

The enhanced laboratory facilities had a transformative impact on local businesses.

For instance, Somtuna previously relied on laboratories in Nairobi, Kenya, for testing. This process was both time-consuming and expensive. With the establishment of the Berbera laboratory, the company can now conduct tests locally, reducing costs and enabling efficient export of their products.

Somtuna reported that thanks to its certification status it has been able to enter two new markets, exporting its products (canned tuna and fish meal) to Ethiopia and Kenya, with an overall approximate value of these exports of USD200,000.

Challenges

The project faced logistical challenges, particularly delays in equipment delivery caused by global supply chain disruptions during the COVID-19 pandemic.

Conclusion

The establishment of the Berbera food laboratory and capacity-building initiatives has strengthened Somaliland's ability to ensure product quality and compliance with international standards. These advancements have not only enhanced consumer safety but also boosted Somaliland's participation in regional and international trade. Despite challenges, the project underscores the value of partnerships and targeted investments in building robust quality infrastructure.

Case study - UNBS Regional Laboratory in Guru

Context

The Uganda National Bureau of Standards (UNBS), under the Ministry of Trade Industry and Cooperatives, is a government institution with the mandate of:

- Formulation and promotion of the use of standards;
- Enforcing standards in protection of public health and safety and the environment against dangerous and sub-standard products;
- Ensuring fairness in trade and precision in industry through reliable measurement systems; and
- Strengthening the economy of Uganda by assuring the quality of locally manufactured products to enhance the competitiveness of exports in regional and international markets. Mandated to Develop, Promote and Enforce Standards.

UNBS has been offering its Testing Services from Kampala at their Central Laboratories located at Bweyogerere Industrial and Business Park in Wakiso District. This required enterprises from across different regions of the country bringing samples to Kampala, hence increasing the risk of compromising the integrity of the samples and also increasing cost of doing business due to high transport costs, and even accommodation and upkeep while waiting for test results in Kampala.

In this situation, UNBS was set to decentralise its laboratory testing services to reduce cost of doing business and support trade both in the country and with neighbouring countries.

Intervention

The UNBS Laboratory Equipment project implemented between 2019 and 2023 and with a total budget of USD4.45 million, helped to develop the testing capacity of the institution via the provision of equipment and capacity building.

The focus of the project was to assist the decentralization efforts of the Ugandan government to make testing services more accessible to traders via the provision of equipment in the three new regional laboratories in Gulu, Mbale and Mbarara.

TMA also supported UNBS in increasing awareness of quality standards among small and medium enterprises (SMEs), encouraging compliance to boost competitiveness, getting Product Certification to access regional markets.

Result

The intervention enabled the establishment of the regional laboratories which have supported trade in the Western, Northern Regions and with South Sudan.

The laboratory, together with the advances on regional harmonisation (harmonized testing and sampling protocols), was a key element to solve trade disputes between South Sudan and Uganda on maize quality which was leading to the rejection of Ugandan maize and halted export for over three months in 2023 (due to measures taken by South Sudan authorities to address food safety concerns – high levels of aflatoxin). The agreement reached between the countries determined that, before the grain cross into South Susan, the UNBS would certify that they passed the quality, with the presence of the Gulu Lab supporting the implementation of this decision.

Impact

Reduction of turnaround time and improvement of the efficiency in UNBS testing service delivery with an average reduction from 25 days to 10 days (as reported by the institution).

Proximity to testing laboratories has facilitated Market Surveillance and Product Certification activities and services to enterprises and industries involved in processing and value addition to ensure that their products meet the minimum quality standards before being put on the market.

This has also led to an improvement in the time firms face to obtain certification in the northern districts (from about 4 months in 2017 to 2 months in 2023, in median value according to the results of our survey) as well as a reduction on the reported costs of almost 50% (from USD476 in 2017 to USD251 in 2023).

Who benefits

Cost of production for micro small and medium enterprises, MSMEs and other manufacturers in the regions is reduced because of the close proximity to the laboratories, and the reduction in the need for repeat testing caused by wrong results arising from sample compromises caused by poor handling during the transportation of samples to central laboratories. This in turn makes MSMEs more competitive and boost business in the regions.

Case Study – Supporting Regional Standards and Quality Infrastructure (Project 2603)

Context

TMA implemented the Standards and Quality Infrastructure (SQI) program in the period 2018-2023, with the goal of building a regional Quality Infrastructure System in the East African Community (EAC) to support the implementation of the EAC Common Market. This would reduce technical barriers to trade within the Common Market by working with National Standards Bodies (NSBs) of state members, as well as with other regulatory agencies and with the private sector through business organizations.

Its purpose was to enhance quality infrastructure related to standardization, metrology and accreditation of conformity assessment systems; and to facilitate private sector compliance to technical regulations and standards for traded goods in the region.

Method

The regional SQI and SPS project involved national standards body (NSBs), national metrology institutes, legal metrology departments, calibration laboratories, national accreditation body and a private sector accreditation body. Service providers of quality promotion, inspection, testing, certification, calibration and verification in the respective EAC partner states were included in the project implementation and in the setting up of the quality infrastructure framework.

The Private sector enterprises were involved through the East African Business Council (EABC) in the process towards harmonization and other aspects of facilitation of cross border commerce. The EAC was supported to produce policy briefs and documents on the priority standards to be harmonized, to be submitted to the EAC.

Result

Some of the main achievements found during the Rapid Assessment on the project conducted in September 2022 are:

- 24 standards were harmonized and gazetted as East African Standards (EAS) with adoption rate of 96% by the EAC Partner States.
- Five Policy Briefs have been developed by the East African Business Council (EABC) to support firms views in the EAC.
- Technical Regulations Frameworks for Cosmetics and Packaged Foods were developed to facilitate trade.
- The EAC Standards and Conformity Assessment (SACA) Bill and the EAC Metrology Bill have been developed and were under consideration for passing into law by EALA, the East African Legislative Assembly (the EAC website does not show information on its passing yet, by January 2025).

Impact

The project contributed to the ultimate aim of sanitary and phytosanitary regulations which is to protect plant, animals and people from diseases that may be brought in by imported agriculture products. It responded to the needs of reducing instances of multiple conformity assessment checks for goods traded and, via the reduction of barriers to trade, improved business competitiveness and promoted increased trade.

It contributed also to EAC's vision 2050 of reaching fully harmonized standards for all goods in the region following WTO standards and also to EAC 6th Development Strategy 2021/2022-2025/2026 to streamline and harmonize trade procedures.

The project also had an impact on social issues such as improving the situation of women traders, since the project paid special attention to the needs of MSMEs and women-owned or managed MSMEs which make up the majority of actors involved in cross-border trade in the region.

The results of our evaluation found that the regional SQI efforts on regional harmonization enhanced the outcomes of other projects; for example, the Ugandan National Bureau of Standards (UNBS) pointed out at regional harmonization as a key element to solve the trade disputes between South Sudan and Uganda and make the most of the laboratory established in Gulu in 2022; and TAHA in Tanzania also referred to standards harmonization as a tool of trade facilitation.

In the survey carried out, it was found that almost 60% of SMEs supported by the S2 portfolio experienced shorter times to obtain certification or other proof of quality in manufacturing, farming or processing, including HACCP, Global GAP, ISO, etc. This is consequent with the project support to regulatory agencies such as NSBs and with the increased accessibility of conformity assessments. The firms reported that the number of months needed to obtain a certification in year 2023, as compared with year 2017, was shortened by 44%. When observing the costs, the survey shows an overall decrease of 21% on average throughout the portfolio.

Lesson Learnt

- The alignment of standards harmonization to the needs and priorities of the stakeholders promoted their use: it focused on the 20 most traded goods.
- Permanent reference to international standards were usual in promoting mutual recognition agreements, which are based in regulatory alignment.
- Political will is very important to achieve passing of public policies or legislation into law.
- Going from mutual respect to mutual building of trust between regulators is a slow process. Engaging regulators in peer assessments builds mutual trust of conformity assessment stakeholders to recognize reports or certificates by other regulatory authorities. It also helps to deal with regulatory differences within the region, towards mutual recognition.
- Use of automated ICT infrastructure for implementing assessment procedures reduces time and cost of business. The newer phenomenon of the use of Artificial Intelligence (AI) for different administrative procedures could also be explored.

Challenges

At a Regional Public and Private Sector Consultative Engagement on Standards held in Tanzania in September 2022⁶¹, the following challenges were identified:

- Language barriers as standards use English as a technical language.
- Lack of staff and testing facilities at the border agencies.
- Border delay challenges caused by non-conformity to mutual recognition and multiple test requirements by NSBs on both sides of the border.
- Inadequate information about the role and functions of NSBs and other regulatory bodies.
- High cost of certification and lengthy procedure for acquiring standards certification.
- Difference between local approved standards and international market standards. For instance, international packaging requirement for seeds oil is glass, not the plastic bottles used locally.
- Limited participation of manufacturers in the Standards Technical Committees and lack of information on the status of implementation of EAS i.e., the list of adopted and outstanding standards for adoption by NSBs.
- Inadequate awareness of the private sector standard needs, and inadequate standards training in the private sector.
- Arbitrary standard measures at the border (rejections and inspections in some instances lead to delays of up to 1 week thus costing business money).

⁶¹ Report of the Regional Public and Private Sector Consultative Engagement on Standards (Conformity Assessment and Mutual Recognition) held in Dar Es Salaam, Tanzania, September 2022, by TMA.

An End of Project Performance Report⁶² notes that there were financial risks due to budget fluctuations but that collaborative implementation remained consistent throughout the year and expected project and activity outcomes reduced costs of the movement of products due to the harmonization.

Who benefits

The rapid assessment performed in 2022 specifically on the Regional SQI project found that 83% of respondents interviewed indicated that the project had achieved the desired objectives. Beneficiaries were the Quality infrastructure institutions, the quality private services providers, the enterprises themselves, the consumers, the East African Business Council, and the EAC Secretariat.

⁶² Standards and Quality Infrastructure End of Project Performance Report, Financial Year Progress Report July 2022 - June 2023

ANNEX 11. BORDER REJECTION RATES IN MAJOR GLOBAL MARKETS

Ethiopia	Year													Grand T.
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	
Australia	0	2	1	1	3	0	1	4	0	0	1	1	2	16
China	0	2	1	0	0	0	0	0	0	3	0			6
European Union	1	2	0	5	4	7	12	15	11	17	10	4	8	96
Japan	14	7	0	5	7	7	7	1	0	7	0	0	1	41
United States	17	0	5	4	7	0	7	5	4	0	0	7	7	54
Grand Total	28	0	7	15	21	22	17	25	10	30	11	7	11	250

HS1-23:Food and feed

Kenya	Year													Grand T.
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	
Australia	0	0	1	1	0	4	7	0	0	0	0	1	1	10
China	0	0	0	1	1	1	1	1	0	0	0			0
European Union	4	7	4	24	20	10	0	0	1	2	0	1	22	100
Japan	0	0	0	0	0	0	0	1	1	2	0	0	1	5
United States	1	17	1	0	7	7	0	2	0	5	0	5	22	61
Grand Total	5	27	5	29	28	30	9	4	6	9	7	7	46	212

HS1-23:Food and feed

Rwanda	Year													Grand T.
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	
Australia	0	0	0	0	0	0	0	0	0	0	0	0	0	0
China	0	0	0	0	0	0	0	0	0	0	0			0
European Union	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Japan	0	0	0	0	0	0	0	0	0	0	0	0	0	0
United States	0	0	0	0	0	0	0	1	1	0	0	0	1	3
Grand Total	0	0	0	0	0	0	0	1	1	0	0	0	2	4

HS1-23:Food and feed

United Republic of Tanzania														
	Year													
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Grand T..
Australia	0	0	0	0	1	0	0	1	2	1	7	4	0	16
China	0	0	0	1	0	0	0	0	2	0	2			5
European Union	0	0	1	0	1	0	1	1	1	2	0	0	1	8
Japan	4	0	0	1	0	0	4	0	1	0	0	2	1	14
United States	8	0	2	0	0	0	0	3	0	4	4	8	3	41
Grand Total	17	0	3	2	2	0	5	5	6	7	13	14	5	104

HS1 :23:Food and feed

Uganda														
	Year													
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Grand T..
Australia	0	0	0	1	0	1	0	0	0	0	0	1	0	3
China	0	0	0	0	0	0	0	0	0	1	0			1
European Union	4	4	2	4	1	0	10	5	0	17	0	20	27	141
Japan	0	0	1	2	0	0	0	0	0	1	0	1	0	5
United States	1	0	0	0	0	1	0	0	0	0	0	1	1	4
Grand Total	5	4	3	7	1	2	10	5	14	29	10	31	28	158

HS1 :23:Food and feed

Unit Rejection Rate

The unit rejection rate is the number of rejections per USD 1 million of imports. This indicator accounts for changes in the volume of exports such that it provides a direct measure of the rate of non-compliance. A higher unit rejection rate shows a higher rate of non-compliance of an exporting country with food safety and quality standards.

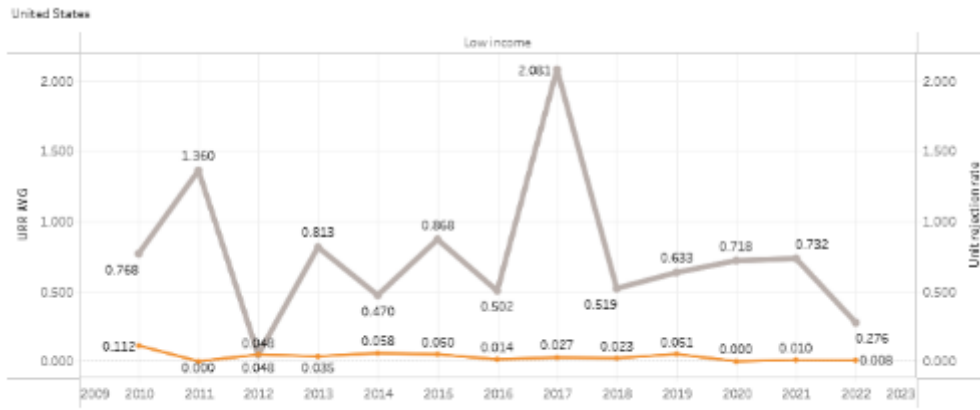
The dot-and-line charts represent the unit rejection rate for selected exporting countries over the years for a given market and product. The country's unit rejection rate (the dots) is compared with the average unit rejection rate for World Bank income group where the country belong (the line).

Reasons for rejection (pie charts)

The pie charts show the frequency of reasons for rejection of products exported from selected countries into a given market, by year and product. The frequency of reasons for rejection is the total counts of consignments rejected at the border of entry for a particular reason. Note that a single consignment can be rejected on multiple grounds.

ETHIOPIA





Australia



China



European Union



Japan



United States



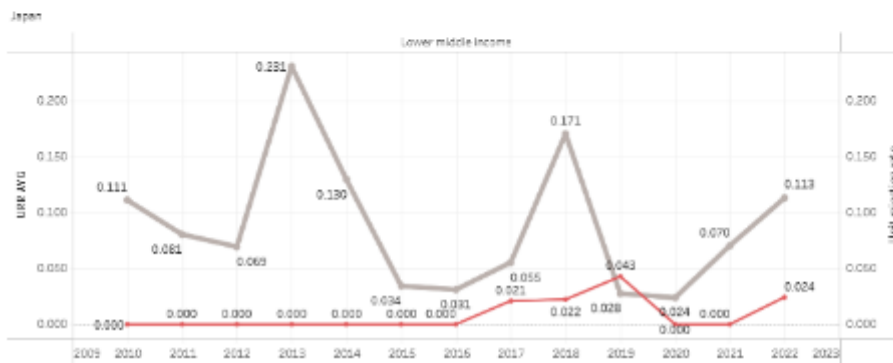
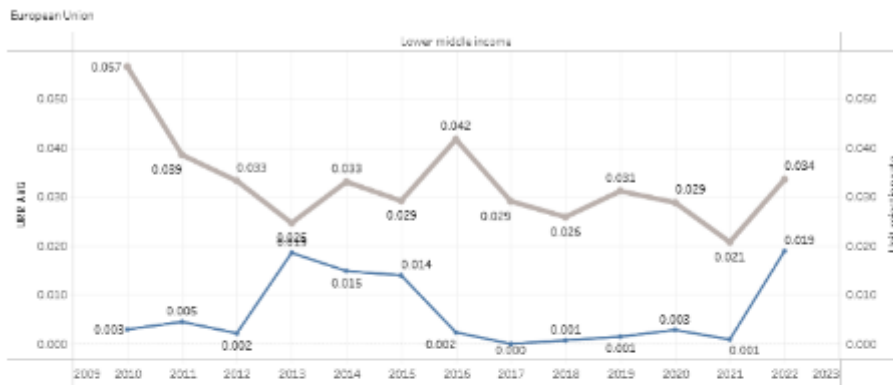
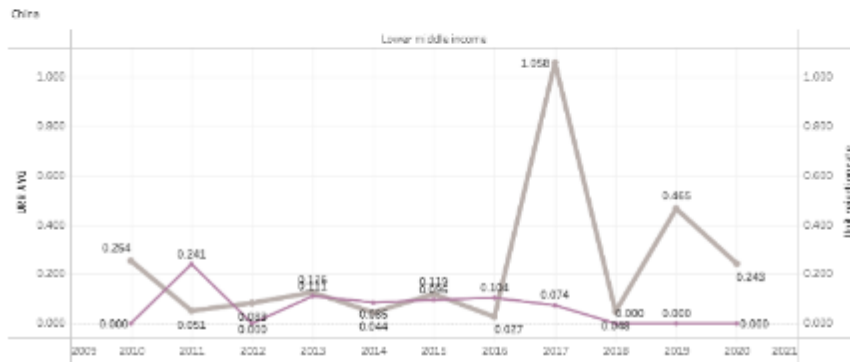
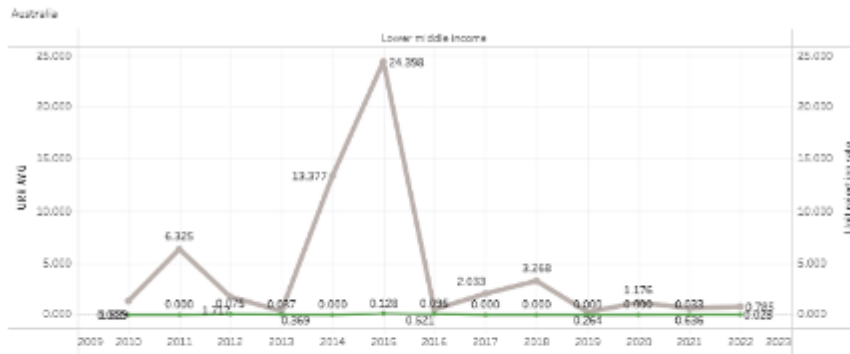
Reasons for Rejections

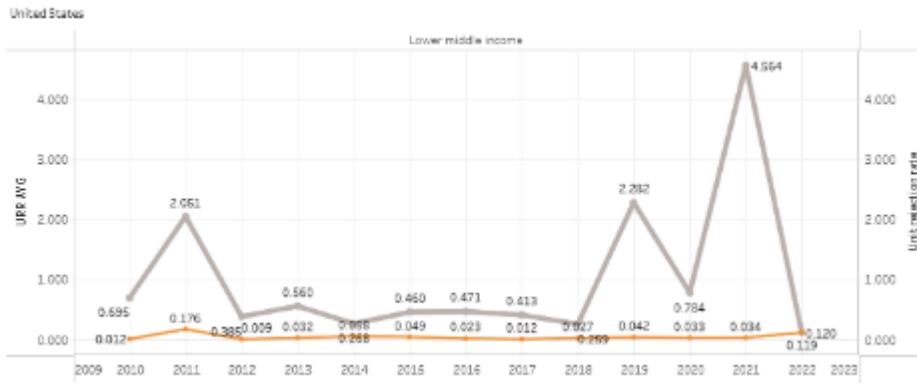
- Additive
- Adulteration/missing document
- Bacterial contamination
- Heavy metal
- Hygienic condition/control
- Labeling

- Mycotoxins
- Other contaminants
- Others
- Others microbiological contaminants
- Packaging
- Pesticide residues

- Veterinary drugs residues

KENYA





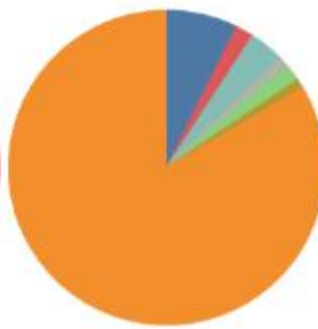
Australia



China



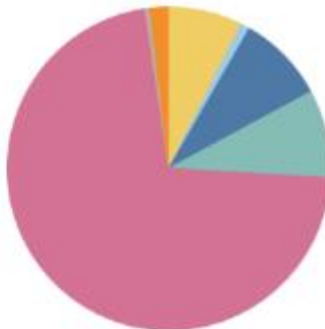
European Union



Japan



United States



Reasons for Rejections

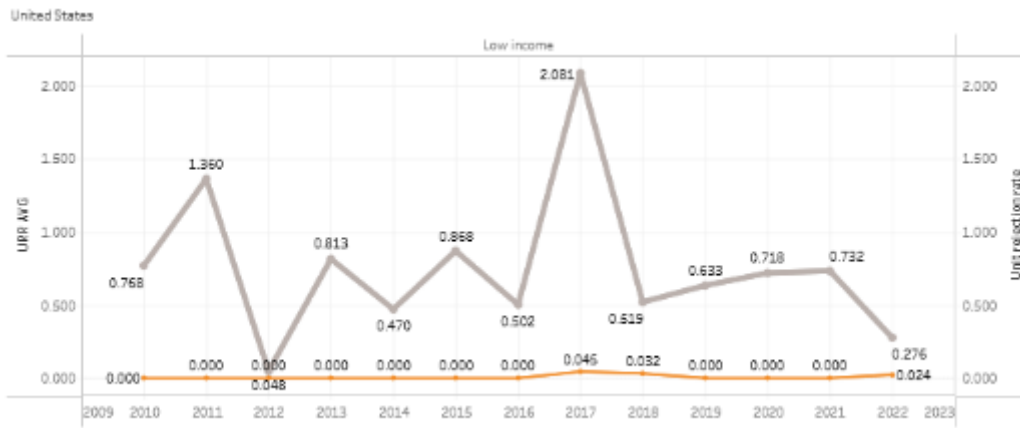
- Additive
- Adulteration/missing document
- Bacterial contamination
- Heavy metal
- Hygienic condition/control
- Labeling

- Mycotoxins
- Other contaminants
- Others
- Others microbiological contaminants
- Packaging
- Pesticide residues

- Veterinary drugs residues

RWANDA





Australia

China

European Union



Japan

United States



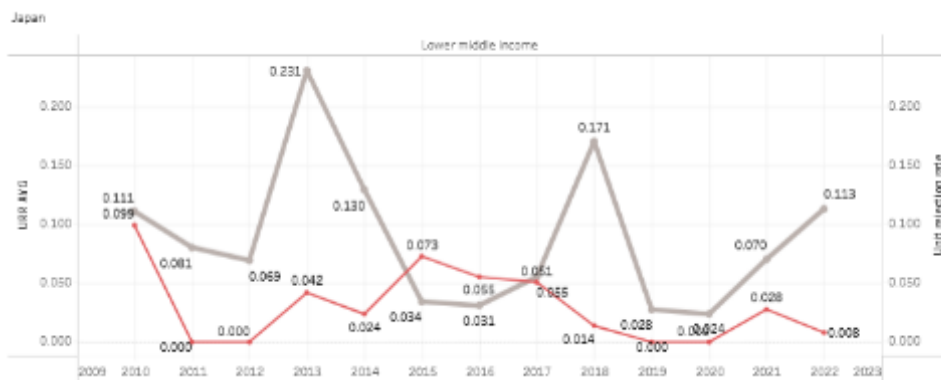
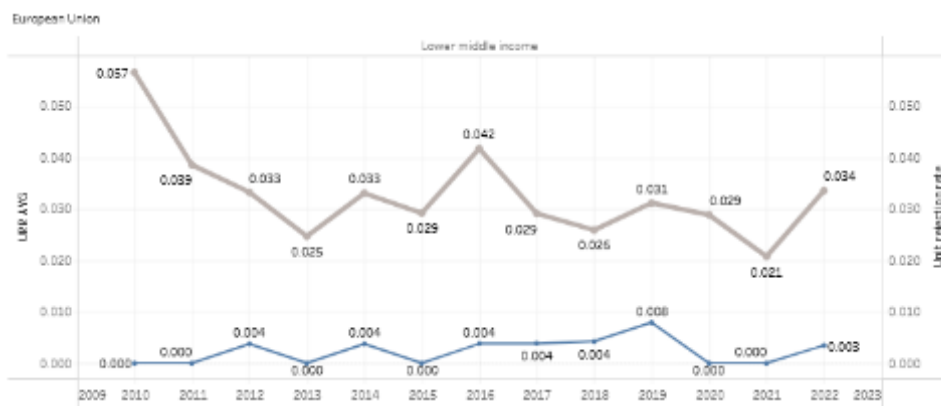
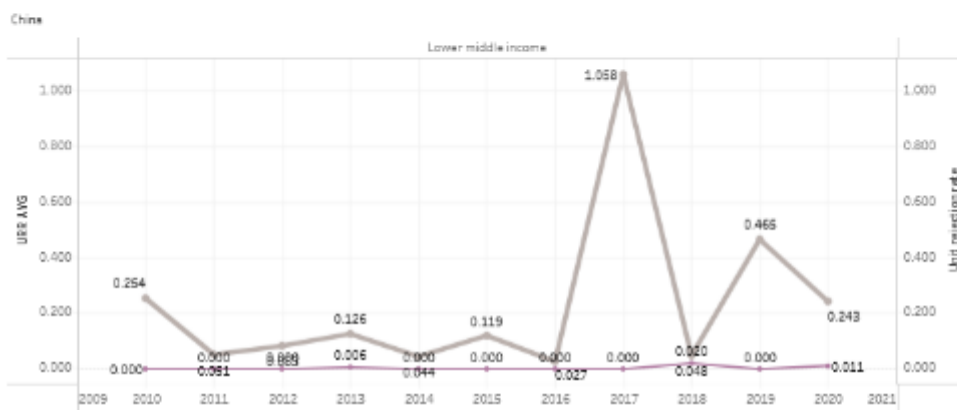
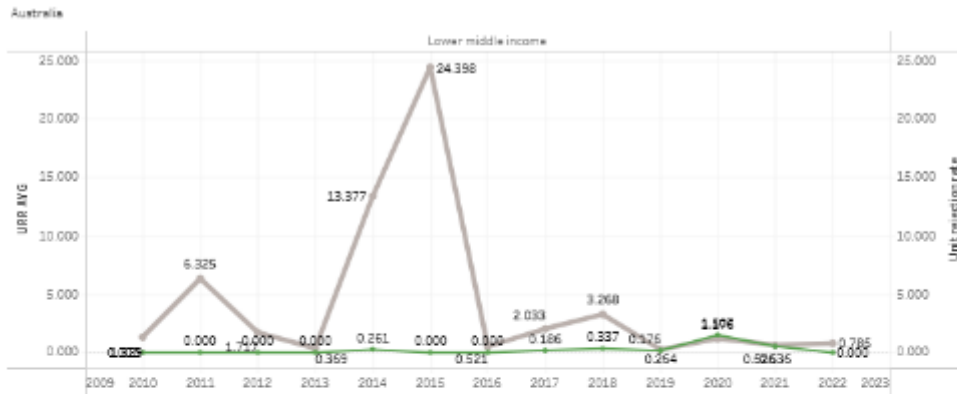
Reasons for Rejections

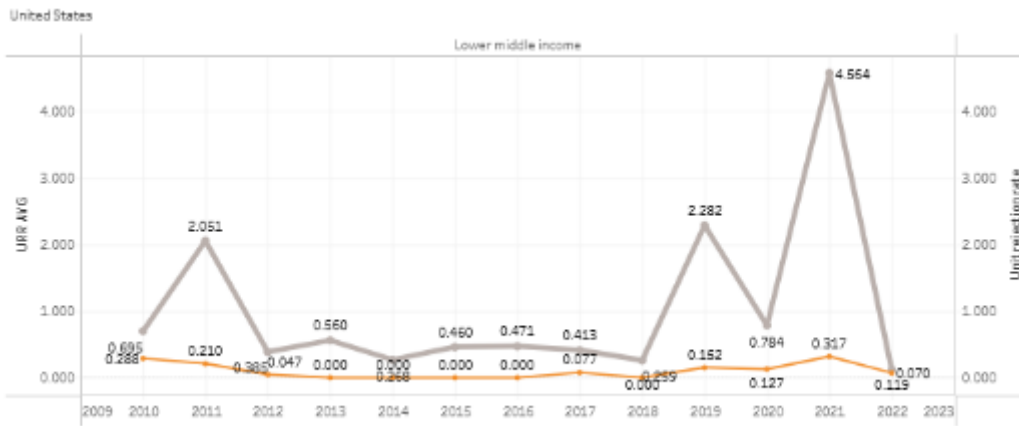
- Additive
- Adulteration/mixing document
- Bacterial contamination
- Heavy metal
- Hygienic condition/controls
- Labeling

- Mycotoxins
- Other contaminants
- Others
- Others microbiological contaminants
- Packaging
- Pesticide residues

- Veterinary drugs residues

TANZANIA





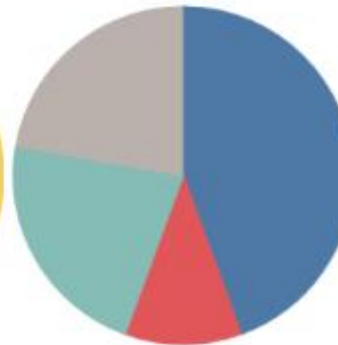
Australia



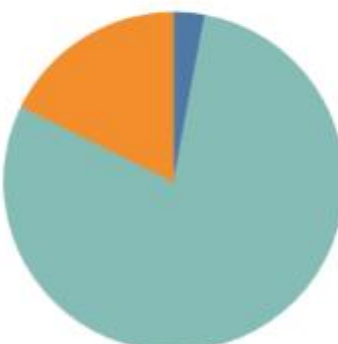
China



European Union



Japan



United States



Reasons for Rejections

- Additive
- Adulteration/missing document
- Bacterial contamination
- Heavy metal
- Hygienic condition/controls
- Labeling

- Mycotoxins
- Other contaminants
- Others
- Others microbiological contaminants
- Packaging
- Pesticide residues

- Veterinary drugs residues

UGANDA

