

Final Report

**MID-TERM REVIEW OF THE CAMBODIA EXPORT DIVERSIFICATION AND
EXPANSION PROGRAMME
(CEDEP II cassava component)**



Contents

CONTENTS	1
LIST OF ACRONYMS	3
EXECUTIVE SUMMARY	5
1. INTRODUCTION	11
1.1 BACKGROUND.....	11
1.2 THE REPORT	12
1.3 MTR FRAMEWORK/APPROACH AND ACTIVITIES UNDERTAKEN	13
1.3.1 DATA COLLECTION.....	15
1.3.2 CONSULTATIONS AND MEETINGS.....	15
2. FINDINGS	16
2.1 RELEVANCE TO COUNTRY STRATEGY / GOVERNMENT POLICY AND PROGRAM DESIGN QUALITY	16
2.1.1 CASSAVA COMPONENT DESIGN AND IMPLEMENTATION MODALITY	16
2.1.2 COMPONENT’S OBJECTIVE	17
2.1.3 RELEVANCE - PROBLEM AND INTERVENTION LOGIC	17
2.1.4 COHERENCE AND COMPLEMENTARITIES WITH ON-GOING INITIATIVES	20
2.1.5 CURRENT FINANCIAL SITUATION.....	21
2.1.6 ASSUMPTIONS AND RISKS	21
2.1.7 PROJECT MANAGEMENT ARRANGEMENTS	22
2.2 EFFECTIVENESS	23
2.2.1 OUTCOME 1: NEEDS OF THE CASSAVA EXPORT ARE BETTER UNDERSTOOD AND THE SECTOR IS STRUCTURED TO BETTER FOCUS THE POLICY DIALOGUE WITH THE GOVERNMENT AND IMPROVE THE ENABLING ENVIRONMENT LEVELS	23
2.2.2 OUTCOME 2 – A GROUP OF CASSAVA PROCESSORS HAS BEEN IDENTIFIED AND MADE EXPORT-READY AND HAS SUCCEEDED IN DEVELOPING COMPETITIVE EXPORTS TO NEW MARKETS	25
2.2.3 SECTOR DYNAMICS AND MARKET TRENDS EFFECTS ON THE IMPLEMENTATION	26
2.3 EFFICIENCY	27
2.3.1 MANAGEMENT OF THE PROJECT	27
2.3.2 PROJECT COSTS AND PROGRESS	27
2.3.3 M&E, PLANNING AND REPORTING	29
2.3.4 PARTNERSHIPS	29
2.4 POTENTIAL IMPACT	30
2.4.1 SOCIAL AND CULTURAL IMPACT	30
2.4.2 ECONOMIC AND FINANCIAL IMPACT	31
2.4.3 INSTITUTIONAL IMPACT	31
2.4.4 ENVIRONMENTAL IMPACT	32
2.5 ELEMENTS OF SUSTAINABILITY	32
2.5.1 SOCIAL AND CULTURAL SUSTAINABILITY	32
2.5.2 INSTITUTIONAL STRENGTHENING.....	33

2.5.3	ECONOMIC AND FINANCIAL SUSTAINABILITY	33
2.6	COMMUNICATION AND VISIBILITY.....	34
3	<u>CONCLUSIONS.....</u>	35
4	<u>RECOMMENDATIONS.....</u>	37
4.1	“INSTITUTIONAL SCENARIO”	37
4.2	“BUSINESS AS USUAL SCENARIO”	38
4.3	“DEMONSTRATION SCENARIO”	39
4.4	“FOCUS SCENARIO”	40
4.5	“INNOVATION SCENARIO”	41
4.6	WHICH SCENARIO TO SELECT?	42
4.7	CHANGE THE IMPLEMENTATION APPROACH	45
4.8	BETTER CLARIFY AN EXIT STRATEGY.....	46
5	<u>LESSONS LEARNED.....</u>	48
6	<u>LIST OF ANNEXES.....</u>	49
7	<u>LIST OF TABLES.....</u>	49
8	<u>LIST OF BOXES.....</u>	49
9	<u>LIST OF FIGURES.....</u>	49
10	<u>LIST OF ANNEXES.....</u>	49

List of Acronyms

ADB	Asian Development Fund
AfD	<i>Agence Française de Développement</i> / French Development Agency
ASEAN	Association of Southern Asian Nations
CARDI	Cambodian Agricultural Research and Development Institute
CAVAC	Cambodia Agricultural Value Chain
CDC/	Council for the Development of Cambodia
CDP	Commune Development Plan
CEO	Chief Executive Officer
CIRAD	<i>Centre de Coopération Internationale en Recherche Agronomique pour le Développement</i> /French Agricultural Research Centre for International Development
CSO	Civil Society Organisation
CTIS	Cambodia Trade Integration Strategy
DCC	Department of Climate Change
DICO	Department of International Cooperation
DIM	Direct Implementation Modality
Dpt.	Department
E10	Ethanol 10%
EBA	Everything But Arms
EIF	Enhanced Integrated Framework
EMS	Emerging Markets Asia
EU	European Union
EUD	European Union Delegation
FGD	Focus Group Discussion
HQ	Head Quarter
HR	Human Resources
IFC	International Finance Corporation
JICA	Japanese International Cooperation Agency
KII	Key Informant Interview
LDC	Least Developed Countries
LDCF	Least Development Countries Fund
LFA	Logical Framework Analysis
LoA	Letter of Agreement
MAFF	Ministry of Agriculture, Forestry, and Fisheries
M&E	Monitoring and Evaluation
MoE	Ministry of Environment
MEF	Ministry of Economy and Finance
MoPWT	Ministry of Public Works and Transport
MoU	Memorandum of Understanding
MoRD	Ministry of Rural Development
MTR	Mid-Term Review
NIU	National Implementation Unit
NSDP	National Strategic Development Plan
ODA	Official Development Assistance
PDA	Provincial Department of Agriculture
PDoE	Provincial Department of Environment
PPP	Public Private Partnership
PRA	Participatory Rural Appraisal
PSB	Program Support Board
RGC	Royal Government of Cambodia
SMART	Specific, Measurable, Achievable, Relevant, Time-bound
SNA	Sub-National Administration
TA	Technical Assistance
ToR	Terms of Reference

ToT	Training of Trainers
TRAC	Target for Resource Assignment from the Core
T.R.A.D.E.	Trade Related Assistance For Development & Equity
TTRI	Trade Training and Research Institute
UN	United Nations
UNDP	United Nations Development Program
UNOPS	United Nations Office for Project Services
WTO	World Trade Organisation

Executive Summary

INTRODUCTION AND REVIEW OF MANDATE

The project under review is part of a larger programme – CEDEP II - made of four components on cassava, fisheries, tourism and on institutional strengthening of Government in monitoring and evaluation of this programme. CEDEP II was formulated in the early 2010s following the drafting of the 2009 Cambodia Trade SWAp. Its objectives are to contribute directly to the Trade SWAp.

The cassava component under review has been implemented from April 2014 to April 2017 (36 months implementation period). As part of the CEDEP II mid-term review in early 2016, it was already evaluated and key recommendations included the acceleration of the implementation due to a slow delivery of activities partly linked or not to an unfavourable cassava sector environment on the international market, which resulted in the questioning of key activities of the project and resulted in further implementation delays.

In that context, it was deemed necessary to review the cassava component of CEDEP II to assess the relevance of the expected activities, their effectiveness in view of a newer cassava sector business environment that is less conducive to implement cassava-related trading and exporting on the international market and to recommend activities that might be more in line with the current situation of the sector.

With a no-cost extension in view, the objective of the assignment is to provide an independent overview of the project's situation, progress achieved, relevance of still-to-be achieved activities against initial results and objectives, and to provide recommendations on activities that might ensure project results' impact and sustainability and better respond to the current requirements of the cassava value chain's stakeholders.

The adopted methodology focussed on the need to identify implementation gaps by comparing the initial cassava sector situation in 2007 when the Trade SWAp was being formulated upon which the project was based in 2010 and the cassava sector situation in 2017 by project's end. This resulted in the scenarios for a no-cost extension as presented in the recommendations' chapter.

The evaluator conducted both individual and group interviews of institutional (mainly ministries) and value chain stakeholders (growers, traders, exporters, associations...) as well as donors involved in the cassava sector.

ASSESSMENT OF PROGRAM PROGRESS PER COMPONENT AND IMPLEMENTATION PERFORMANCE

Relevance and program design

The project was a direct response to the 2009 Trade SWAp policy by developing and strengthening the export capacity of priority crops that included cassava.

The cassava component of CEDEP II is funded by WTO under the EIF Tier 2 modality and implemented by UNDP under the Direct Implementation Modality in close collaboration with MoC.

The objective of the cassava component of CEDEP II was to develop products and export services through a better understanding of the cassava export sector and structuration of policy dialogue with the Government and to identify a group of cassava exporters, making them export-ready for new markets.

The 2016 MTR rated the project as highly relevant in relation to the Trade SWAp and until this day, the project remained well aligned to the Trade SWAp policy. However, the cassava sector business environment has deteriorated substantially during the project's implementation with lower selling prices on the international markets resulting in reduced competitiveness of most value chain stakeholders in relation to Thailand and Vietnam cassava value chain stakeholders and, in particular, the closure of a large number of starch plants and higher levels of indebtedness of cassava growers.

The review of the project's logical framework showed that several indicators are not SMART and one output no longer achievable, at least as initially contemplated. Within a recently depressed cassava sector, the strategy of the project is less clear with a large number of activities, still highly relevant as such – confirmed by numerous interviews –, but lacking coherence as to how they might contribute together to the initial objective. This is obvious for some activities that are now of less importance in relation to others as viewed by the value chain stakeholders themselves.

Several initiatives are complementary to this project on cassava (funded by CIRAD on sustainable cassava agriculture, DFAT on transformation of cassava productions, JICA on research and development). So these are opportunities to build linkages between the projects.

As of today, less than 50% of the budget had been spent; this is the result of putting on hold several activities pending a reassessment of their relevance (partly through this assignment) but also of a slow implementation with many delayed activities due to difficulties in consultant's recruitments for several TA activities.

The formulation team rightfully identified a series of risks. Their probability of occurrence was not clearly estimated at the time of the project design. It is striking to see that a majority of these issues actually took place during the course of the project, putting a severe strain on the project team. Another issue seems to have been the lack of Government support in the sector which remains largely informal and highly competitive, which was not specifically addressed at the project formulation stage.

The project's governance system was established through a steering committee, project manager, a 'core team' with staff from relevant ministries, which function has been to be an interface between the project unit and the Government for seeking support, coordination, and transmitting relevant information (e.g. studies, requests for support...).

Effectiveness

The level of implementation of the project activities has not been high and not up to the initial expectations. There are two reasons for this: (i) the price of the cassava on the international market (raw, dried or even as starch) has decreased substantially, evidencing serious competitiveness issues of the country in relation to neighbouring countries, resulting in some activities no longer being a priority for value chain stakeholders, and (ii) despite regular exchange of information, the project was jeopardized by a somewhat weak involvement of Government to follow-up the project's results.

The results are as follows:

On Outcome 1: 'understanding the needs of the cassava export and sector structuration for policy dialogue with Government': a 'working group' of value chain stakeholders and donors, through the support of Grow Asia, has been setup and is meeting on a regular basis to discuss issues affecting the value chain; however, its interaction with the Government remains limited. A comprehensive value chain study was carried out and transmitted to Government but has yet to result in the follow-up of actions. ICS standards review has been put on hold as it happened that it is no longer a top priority for value chain stakeholders. The production of an export manual remains also on hold, pending a reassessment of what kind of product should be supported by the project (raw / dried cassava, starch, others...). Cassava associations have been created to enhance the negotiating power of the value chain stakeholders (mainly farmers and silo owners); most of them are not well established and remain institutionally weak: the sector's stakeholders see them as Government's initiatives and they lack capacities and leadership. Despite regular meetings through the project, a formal 'working group under the G-PSF platform' has yet to be created through the framework of the TRADE-SWAp so the value chain working group above can merge into it as well. Interviews showed however that Government is willing to set up such a formal working group.

On Outcome 2: identification of a group of cassava processors, support to make them export-ready and in exporting to new markets': a group of processors and collectors was identified. While the SPS survey has been put on hold pending the review of its relevance, a survey of environmental risks and mitigation needs was carried out for the pilot group of processors.

With recent price decreases of cassava on the international market, the weaknesses of the sector have been exposed and show that Cambodia's competitiveness is systematically lower than its neighbouring competitors because of its geographical position and lack of infrastructures. This is most obvious when cassava price decreases just at profitability level while Thailand and Vietnam resist much better to price decreases because of better cassava sector structuring. The project team became aware of this issue very quickly but still, little action ensued from the steering committee but tacitly agree on holding back on activities that might need some minor/major adjustment until the end of the project.

Efficiency and partnerships

Around 40% of the budget has been spent while the project is at an end. This is normal as several activities are yet to be implemented, pending an assessment of their relevance. In addition, there are also some issues associated with already implemented activities: late delivery of studies combined with a lack of project resources to follow-up mainstreaming/key recommendations within Government or stakeholders, weak functionality of most cassava associations despite attempts to initiate activities and cooperation with some of them, functional cassava value chain stakeholders' working group but lacking domestic leadership.

M&E has been carried out by the project team, DICO and MoC. The project team rightfully identified the key implementation issues of the project and, in particular, the changing conditions of the cassava business environment. The periodic reports were comprehensive and included an assessment of the cassava sector.

The project team created a network of contacts including most development donors involved in cassava and cooperated to implement the same activities. This has had the potential to create synergies to increase the effectiveness of interventions in the sector. Meanwhile, the project's private sector partnerships resulted in attempts to launch contract farming but its success was limited due to price drops on the international market and the fact that there was no product differentiation.

Potential impact

To enhance the project's impact, there needs to be another project approach taking into account (i) the need to raise the sector's competitiveness, (ii) the need for a national policy on cassava to regulate the sector and accompany the value chain stakeholders, (iii) support production and decrease cassava dependency for a large part of the population, (iv) investigate more in detail cassava value addition through niche marketing and the domestic market to move away from being a premier supplier of raw materials for neighbouring countries.

At project level, the social and cultural impact can be seen through the signal given by the associations: the sector is remaining largely informal and getting together for a common purpose still received caution: although some associations are willing to engage with other value chain stakeholders, most seem to lack leadership and are *de facto* not-operational. It is too early to evidence an economic and financial impact of the project: some activities like trade fairs, exchange visits were conducted but others like an export manual have yet to be developed. What stakeholders seem to miss most is the creation of linkages between different value chains elements (e.g. volume consolidation for traders, starch plant). The project did not target directly the institutions but at a later stage the establishment of public-private sector dialogue: this is on-going with the strengthening of the cassava value chain stakeholders' 'working group' and periodic discussions that have yet to result in the establishment of a Government structure to develop a policy at a later stage.

The environmental impact of the project has yet to bear fruit with only the development of an environmental assessment/study. This seems to be no longer a top priority in the sector with the closure of some starch plants.

Elements of sustainability

The key to sustainability is the need to develop a national policy/framework for the cassava sector; this is included in the project but as an activity amongst others. With a degraded trade environment for cassava, it is important for Government to support the sector through the development of an enabling environment. Interviews showed that MoC is ready to take the lead in this process.

As for the project, the associations remain institutionally weak and dependent on external aid; they seem to lack HR leadership. The economic and financial sustainability of the sector is key to the project: so far, the activities have been able to identify the competitiveness issues of the sector. Some solutions have been proposed but they seem to be individual actions that have not been subsumed in a larger sectoral strategy that is responding to the current concerns of the value chain stakeholders.

CONCLUSIONS

The project has partly achieved its objectives for the following reasons:

- (i) The competitiveness of the sector has been gradually eroded with decreasing prices over the past three years and most stakeholders are now breaking even at best while neighbouring countries with a better-structured sector are resisting to price drops on the global market;
- (ii) The project has focused its attention on the commercialisation (trading and export) side of the sector with less attention on the production side. In this newer environment, the production side is requiring substantial support as it bears the brunt of the price drops;
- (iii) Several key activities resulted in a better understanding of the sector's strengths and weaknesses. However, few resources were allocated to follow up actions based on their findings by Government or value chain stakeholders. In a sense, the project was underfunded;
- (iv) The project's institutional setup has not been conducive enough to create yet a dynamics of Governmental support to further support the sector. This may be because there have been few incentives for Government participation under DIM but support UNDP in coordination.

RECOMMENDATIONS

As the project has already agreed on the principle of a no-cost extension, the evaluator strongly supports this option through narrowing down the scope of the project to ensure maximum impact given that (i) still few donors are involved in cassava, (ii) the project remains complementary to other interventions focussing on the production side, (iii) the sector is in need of structuration to better resist global price volatility, (iv) valuable information has been produced but has yet to be utilised to improve the competitiveness of the sector, (v) value chain stakeholders dialogue is on-going but still needs to be linked with Government and (vi) the sector's viability is dependent on raising competitiveness through more innovative strategies (new market opening, diversification).

Given the number of issues that the sector is experiencing, several options are proposed to limit the scope of a project's extension:

- (i) Support to the Government in policy making prior to supporting sector's stakeholders: this is part of the actual project (outcome 1) and UNDP is well placed to support Government in initiating a dialogue on a national policy for the cassava sector; it, however, requires full Government's endorsement and skips entirely outcome 2 of the current project
- (ii) Continue the activities as planned but with a reduced scope (e.g. one province covered instead of four): this requires little adaptation to the project and increases the remaining financial resources for the supported stakeholders; it also enables the project to focus on a limited number of (supposedly) proactive value chain stakeholders; the number of activities remains still high and some might no longer be in phase with the current situation of the sector; the timeframe of the extension (12-18 months might be too short for some activities (e.g. linking agro-processing and associations for volume consolidation)
- (iii) Support the entire value chain but for linked-only value chain's stakeholders from the association to the exporter around a finished product (e.g. starch): the project would turn into a small-scale demonstration intervention with little quantitative impact. This option is the one that keeps up with the original spirit of the project: demonstrating the feasibility of opening up new markets through value chain support. It is, however, unlikely that volume consolidation will be achieved within the timeframe of an extension. With low global prices, starch remains uncompetitive compared with Vietnam and Thailand despite recurrent attempts to reopen abandoned processing plants; this option is only feasible through innovative export markets (with a competitive advantage like HACCP/EBA for the European Union or the Indian market and its tax exemption mechanism)
- (iv) Target high impact activities focussing on the commercialisation process through added financial resources (hence removing other activities from the project): this will address the prime concerns of the value chain stakeholders but would lack a strategy of intervention (only supporting stakeholders on an

ad-hoc basis as per their perceived commercialisation issues, hence not adopting a holistic approach to solving the sector's issues)

- (v) Test out new initiatives by moving the centre of gravity of the project from traditional cassava value addition (dried cassava, starch production) to innovative and diversified products' commercialization: this is in accordance with the logic of the project (seek out new markets) and moves away from the main issues that the sector is experiencing with traditional products and depressed prices. It, however, requires a substantial review of the project with a large number of activities discarded and replaced by others; this option would be most relevant if additional support was planned after the no-cost extension (other donor intervention, Government commitment to pursue support, CEDEP III).

Selecting the right option will depend how the decision makers view the contribution of each scenario to the spirit of CEDEP – how it responds best to the Trade SWAp – and the likelihood of impact within the limited timeframe of the no-cost extension.

The opinion of the evaluator is to consider first the scenario supporting the formulation of a national policy on cassava: the sector is highly informal, a large part of the population is entirely dependent on cassava in the four provinces supported by the project, the low prices of dried/raw cassava and the lack of competitiveness of the agro-industry is jeopardising the entire value chain, there is limited Government support to alleviate the price shocks on the value chain stakeholders. It is, therefore, necessary for the Government to step in with a comprehensive national policy to protect/revitalise the sector through a better business environment. A national policy is the first step to achieving this goal.

Alternatively, a second option would be to limit the project to a demonstration effect by supporting well-established value chain stakeholders' linkage from a functional association to an exporter and supporting each player only as required. The no-cost extension should be as long as possible to facilitate a test-trial of volume consolidation (one full cassava growing season) and the formalisation of an agreement for the next season, should the experience be successful.

Finally, the option that responds best to the issues at stake under a depressed cassava market is a scenario for supporting innovation and diversification. It would, however, require extensive discussions with both MoC and EIF as there are project reformulation considerations.

The project has shown its limits with slow delivery of activities due to difficulties in consultants' identification and a somewhat lack of follow-up of Governmental counterparts through the Core Team. It is, therefore, necessary with a no-cost extension to adopt a different implementation strategy either through direct subcontracting of key activities to accelerate implementation or involve more relevant stakeholders in decision-making processes.

Finally, an exit strategy should be based on the following principles: build stakeholders' capacity, design at a minimum a roadmap for a cassava policy formulation process, and ensure knowledge transmission and remanence given the valuable information produced by the project, keep networking lead stakeholders.

LESSONS LEARNED

The review of the project showed that (i) value chain stakeholders should not be limited to the production and dissemination of studies but ensure that actual financial resources are available to ensure that recommendation are well taken through actions, (ii) the cassava component of CEDEP was underfunded (or too optimistic) given the range of planned activities and with limited funding, it would be preferable to limit the intervention to a demonstration effect/proof of concept, (iii) there is a lot of inertia from identifying major implementing issues (by the project team) which need timely strategic decision making and approval of new activities or budget reallocation; and (v) sector structuring is fundamental for cassava given its informality; however business associations might not be an effective way by this time as there are needs of intervention on production. The associations should add production services within their core functions. Also, the process of structuring the associations should start with awareness raising, broad-based participation, and supports on local champions. There should be funds allocated for

the association for organizational arrangement and capacity building after leaders are selected by a democratic process.

1. INTRODUCTION

1.1 Background

With Cambodia joining the WTO in 2004, it became eligible for access to the EIF that supports LDCs to use trade as a vehicle for economic growth and poverty reduction. A first generation programme “CEDEP I”¹ was elaborated in 2009 with a focus on silk and milled rice value chains as per priority areas of the Cambodia Trade SWAp and 2007 CTIS. A second programme “CEDEP II” (‘part II’) was formulated soon afterwards with a focus on several subsectors: cassava, marine fisheries products and skills export for tourism. It was however implemented later by early 2014 for 36 months.

An MTR was already conducted in early 2016 for the entire CEDEP II programme; amongst others, it evidenced the overall relevance of the actions, their potential impact and some issues regarding sustainability. However, there was also differentiated progress between sub-components in terms of project delivery, in particular for the cassava component that experience implementation delays in consultants’ contracting and an unfavourable trade situation of the entire cassava sector (fast growth production in the country, in particular in the Southeast region, increased competition from neighbouring Thailand and Vietnam combined with decreased world prices driven mainly by China’s policy on biofuel).

This situation resulted in some activities either been delayed or put on hold pending reassessment of their relevance and effectiveness in view of the original component’s objectives. These issues resulted as well in a very low spending trend while the programme is due to end by April 2017.

In that context, it was deemed important to revisit the cassava component of CEDEP II to reassess the relevance of the activities, their effectiveness in view of the initial objectives and expected results, and propose activities that are more in line with the difficulties that the sector is experiencing currently, should a no-cost extension be granted to tend to achieving the initial component’s objectives.

The overall objective of the midterm review was to provide an overview of the activities carried out at this stage of implementation and reassess the relevance of activities and results for a smooth implementation of the cassava component with a no-cost extension. The MTR emphasised its analysis on the following:

- Assess the project progress against the logical log frame, work-plan and budget, and its contribution to the achievement of the project’s impacts, outcomes, and outputs;
- Provide comprehensive analysis on the areas which the project needs to improve in order to achieve its expected results putting sustainability aspect in perspective;
- Assess the relevance and feasibility of the project document including scope, strategy, logical log frame, resource, risk, and project management arrangement against the current sector dynamic and market trend;
- Provide recommendation on how the project can effectively move to reach out its target output and result within the project timeframe to meet stakeholders’ needs and current situation of the cassava sector for the effective project implementation and achievement of the expected results
- Together with recommendations, provide suggestions on how the project can ensure the sustainability of its interventions, and recommendations on the framework and plan moving forward.

In view of the difficulties experienced during its implementation, the review of the component was also concentrated on the following:

- Review the project progress and assess the quality of the outputs produced by the project from 2014 to the first quarter of 2017;
- Analyse the extent to which the delivery of the project outputs has contributed to the achievement of the project’s expected results as stated in its logical framework;

¹ Cambodia Export Diversification and Expansion Program (CEDEP) Part I

- Assess whether the project has built synergy with other projects or stakeholders to address sectoral issues and strengthen cassava value chains as stated in Cambodia's Diagnostic Trade Integration Strategy and the Trade SWAp Roadmap-Outcome 13: Cassava;
- Review and analyse whether the project allocated the resources properly toward delivering the project development results;
- Assess whether the project allows being flexible in moving in the right direction to bring the expected results;
- Gather lessons learned from the three-year project implementation and identify areas for improvement
- Analyse the current sector dynamic and market trend, and how they affect the project implementation and the attainment of the project's expected results;
- Based on the analysis and lessons learned above, assess whether the project design document including the project's logical framework, scope, strategy, risk, and project management arrangement is still relevant and effective to achieve the expected results with the available resource;
- Provide proposed changes in the project design and ways forwards for the project implementation putting in perspective the sustainability dimension;
- Present and validate findings with UNDP management, Donors and Stakeholders and as directed by UNDP's project team update the project design document;
- Have practical recommendations such as project activities during a no-cost extension, project's exit strategies and sustainability.

1.2 The Report

This report has been prepared in accordance with the Terms of Reference **Error! Reference source not found.**(ANNEX 1) of this mid-term review.

It initially presents the *Executive Summary* of the evaluation, giving a brief background of the cassava component of the programme and its components, a summary of the main findings in terms of results, management, and important aspects such as sectoral analysis, identified gaps in implementation, potential impact and sustainability, and the main recommendations and lessons learned.

It is followed by an *Introduction* (**Chapter 1**) outlining the context and main elements of the cassava component and the evaluation, such as problems addressed by the program's components, overall progress, and the methodology adopted.

The *Findings and Evaluation Outcomes* section (**Chapter 2**), which is the core of the report, is then presented under subheadings related to the component and its results for the five evaluation criteria, against the current sector dynamic and market trend:

- *Relevance and design*: assess the feasibility of the project document including scope, strategy, logical log frame, resource, risk, and project management arrangement
- *Effectiveness*: project progress against the logical log frame and expected results, assess whether the project has built synergy with other projects or stakeholders to address sectoral issues and strengthen cassava value chains as stated in CTIS and Trade SWAp Roadmap-Outcome 13: Cassava; analyse the current sector dynamic and market trend, and how they affect the project implementation and the attainment of the project's expected results
- *Efficiency*: project progress against work-plan and budget and project management arrangements and project allocation of resources toward delivering the project development results;
- *Impact*: reach out its target output and result within the project timeframe to meet stakeholders' needs and current situation of the cassava sector for the effective project implementation and achievement of the expected result
- *Sustainability*: assess the potential sustainability of the project

The chapter on *Recommendations* (**Chapter 3**) focusses on a comprehensive analysis of the areas which the project needs to improve in order to achieve its expected results putting sustainability aspects in perspective, provide suggestions on how the project can ensure the sustainability of its interventions, and recommendations on the framework and plan moving forward and provide changes in the project design and ways forwards for the project implementation putting in perspective the sustainability dimension.

Finally, the chapter on *lessons learned* (**Chapter 4**) reviews the achievements over the 3-year implementation period, identify areas for improvement, improve the program's implementation level and reflect on future similar or complementary interventions.

1.3 MTR framework/approach and Activities Undertaken

The preparation phase was spent in laying down the MTR framework of the cassava component of CEDEP II with an emphasis on setting up an approach to identify the gaps between the programme design and the actual current situation of the cassava sector (see figure below).

The fieldwork in Cambodia focussed on analysis the achievements of the cassava component so far, the needs of the stakeholders and how could the programme component contribute better to achieving its original objectives?

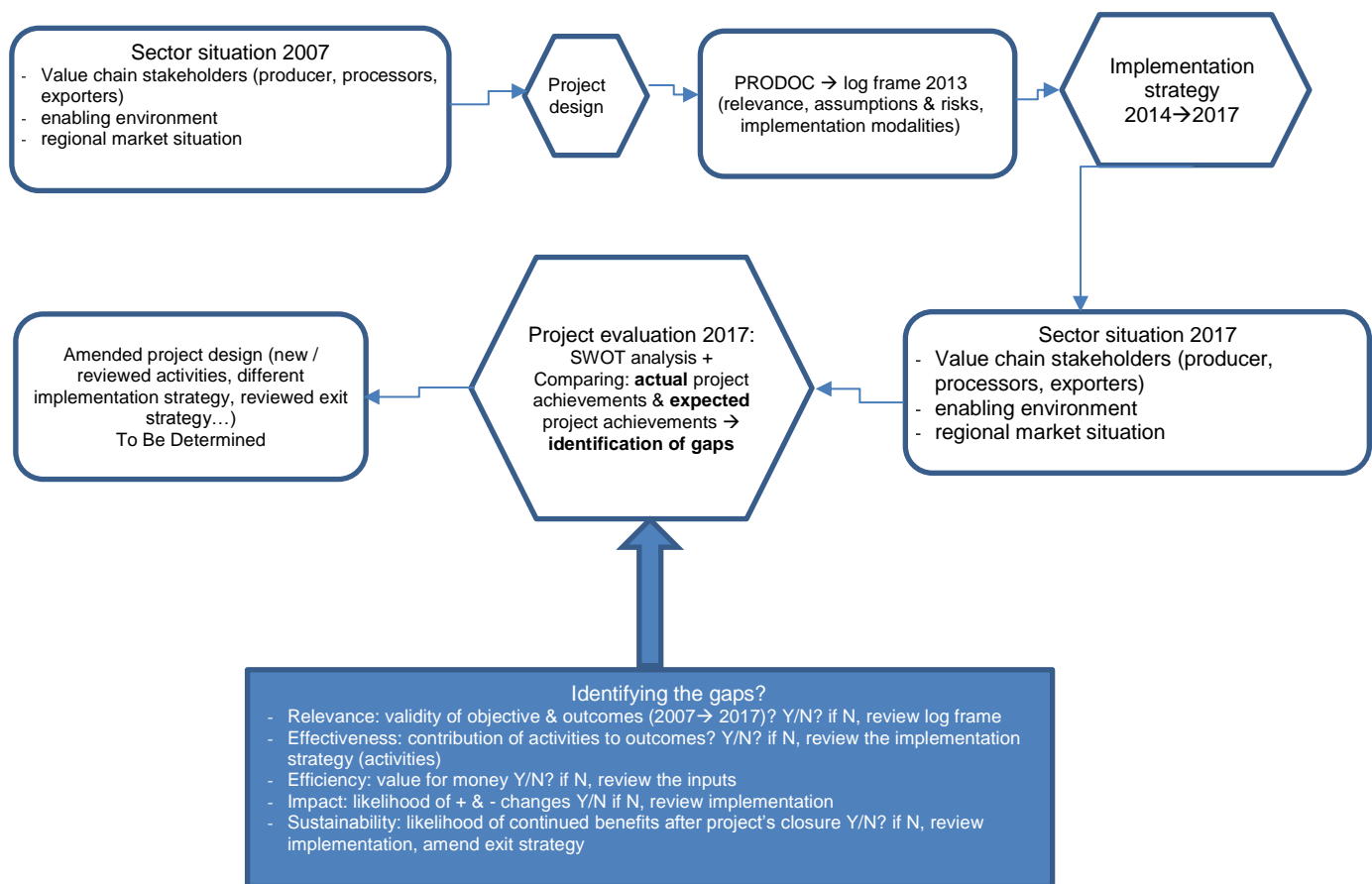


Figure 1: Mid-term review framework

A brief documentary review was undertaken by the consultant defining the critical elements of the program to be reviewed – in particular, the actual results of activities carried out so far -. The analysis showed the need to spell out more clearly the gaps between on the one hand the planned programme activities and expected results and on the other hand the actual difficulties experienced by the sector’s stakeholders. This resulted in a list of issues and questions to be analysed during the actual mission in Cambodia that were turned into a checklist of questions/topics for the main stakeholders and the anticipated cassava sector beneficiaries (see ANNEX 6).

The MTR was initiated with a briefing by the cassava component Programme Technical Team; consultations were then held with (i) selected line ministries and (ii) cassava value chain stakeholders both in Phnom Penh and in the provinces. Additional meetings were then held at the end of the field mission in Phnom Penh mainly with the Program Management Team to clarify information captured during the field trips.

The schedule of activities is shown in Table 1².

Schedule	Activity
01-20 January 2017	Desk review
08 February – 19 February 2017	Data Collection
20 February 2017	Debriefing of preliminary findings
25 February -15 March 2017	Draft review report
19 April 2017	Final review report

Table 1 - MTR schedule

² The detailed schedule is presented in ANNEX 2

1.3.1 Data collection

Initially, relevant documents were reviewed by the consultant including primary and secondary data as sources of information for the evaluation. The major sources of data (see annex 5) collected can be identified as follows:

- Data related to the general background of the cassava sector (national policies and strategies);
- Data useful to identify and assess the key issues in relation to the project component, as well as the actual and potential beneficiaries (PRODOC and periodic component reports);
- Information produced by the project itself as part of its package of activities and anticipated results (studies and report related to the cassava value chain)
- Data related to the implementation of the component including timing and delivery as per result, and the process of resource/budget allocation, and mobilisation (financial data and CDR).

The data collection focussed on the following issues:

- Describing the situation in terms of actual implementation against planned/anticipated implementation;
- Identifying the potential implementation gaps by project's end and in relation to the cassava recent price deterioration
- Reviewing the achievements and shortcomings with particular reference to the 5 evaluation criteria (Relevance, Efficiency, Effectiveness, Impact & Sustainability).
- Analysing the project situation, the viewpoints of each value chain stakeholder so as to propose a new chain of actions to better achieve the component's objectives.

1.3.2 Consultations and meetings

The consultant conducted individual and group visits (see ANNEX 2 – mission timetable) when interviewing staff from line ministries, value chain stakeholders (farmers, traders/brokers, silo owners, agro/industrial processors, and exporters) and supporting agencies (donors, NGOs) (list of people met in ANNEX 4).

The following major stakeholders involved in the program were consulted:

- The UNDP Management Team (UNDP);
- The line ministry (MoC);
- Other national ministries (MAFF, MoPWT);
- Value chain stakeholders (farmers, Sampovlun Cassava Association [farmers' assoc], Sala Krov Cassava Association [silo owner assoc], silo owners, TTY company, Kim Heng Starch, BAI starch processors, Bio-Energy [bio-ethanol producer], Advanced Export Logistics);
- Supporting agencies (Swisscontact, IRAM, CAVAC project, EMS);
- External stakeholders (Cambodian Rice Federation) and
- The donor (WTO & UNOPS)

The consultant used a mix of tools that enabled him to gather data for the project's overview, its potential impact and progress towards completion as per initial objective:

- Semi-structured interviews with RGC/institutional beneficiaries
- Focus group for gender-based final beneficiaries (farmers)
- Bilateral interviews with project's staff and local project staff
- On-site assessment of achievements (mainly creation of sector's associations)

2. FINDINGS

2.1 Relevance to Country Strategy / Government Policy and Program Design Quality

2.1.1 Cassava component design and Implementation modality

The project design responded to the objectives of the Trade SWAp (2014-2018), in particular, the development and strengthening of the export capacity of priority crops including cassava. The objectives of the cassava component *per se* were not sector-based but contributing to the overall purpose SWAp and some specific objectives of the strategy for this priority crop.

The cassava component funded by WTO under the EIF Tier2 modality focussed on the commercialisation aspects of cassava that were at the time of formulation, around 2011, highly relevant with high selling prices, a growing cassava production capacity, near-guaranteed raw material outlets in neighbouring Thailand and Vietnam and some financial leeway to sell semi-finished products (dry chips) to China directly by boat from Cambodia itself or through Thailand.

The intervention would be implemented in collaboration mainly with MoC and also other ministries and institutions whenever relevant (e.g. MAFF).

The chronology of the program with key milestones is indicated in Table 2.

Chronology	Activity
Late 2011	Initial stakeholders consultation
August 2012	Initial proposal submission to NIU
November 2012	Revised proposal submission
Early 2013	Due contract signature
April 2014	The project team on-board
October 2014	1 st board meeting
February 2015	2 nd board meeting
October 2015	3 rd board meeting
March 2016	CEDEP II mid-term review
November 2016	4 th board meeting
April 2017	<i>Planned cassava component completion</i>
Implementation timeframe	planned: 36 months

Table 2 – Program chronology

The project is being implemented by UNDP which is called MIE while MoC acts as an EIF's focal point with M&E roles. MoC/DICO is co-chair of the project steering committee and also gets updates of the project progress through quarterly meetings and the SSC.

A channel of communication was set-up between the relevant ministries including MoC and UNDP for technical matters through the establishment of a Core-Team consisting of representatives of relevant ministries³ that can act as intermediaries to exchange information, improve coordination, pass on technical information and mobilise HR whenever relevant.

Ownership was to be ensured by the setting-up of a cassava component Project Board⁴ and the involvement of MoC in the implementation of the project. Overall, there was a positive trend with the involvement of value chain

³ Core team includes MoC, TTRI, MAFF, MRD and MoE

⁴ Board is co-chaired by MoC and UNDP. Members include MAFF, Project Beneficiaries and Representative of the Sub-National Administration, like Provincial Departments of Commerce and Agriculture of the project's target areas

stakeholders (collectors, processors): in the early steering committees, there was no participation of value chain stakeholders; at a later stage, processors, traders were participating in Project Board meetings.

Unfortunately, this initial setup was at best suboptimal for overall ownership and empowerment of the project's results and efforts were to be put on transferring ownership from the above arrangement to (i) more engagement of the government (involvement of government's direct implementers in knowledge dissemination for scaling up and replication and (ii) increasing the Government's capacity to fulfil its organic role through developing an adequate project's exit strategy.

2.1.2 Component's objective

The objective of the cassava component has been to contribute to the Trade SWAp's objectives of developing products and export services through (i) a better understanding of the cassava export sector and structuring of policy dialogue with the Government ('outcome 1') and (ii) identifying a group of cassava exporters and making them export-ready for new markets ('outcome 2').

To achieve that objective, the project focussed on the following:

- Value chain studies
- The establishment of a working group of processors and collectors
- The reviewing of cassava standards
- A manual on export procedures
- Formal dialogue mechanisms in place with the Government
- Processors and collectors supported to be export-ready
- Sanitary and phytosanitary study and subsequent plan implemented
- Survey of environmental risks of processors carried out and low-cost solution brought forward
- Ensuring that three new potential markets identified by export-ready processors

The initial idea was to support most of the value chain but somewhat sidelining the small holders from the project⁵, hence focussing nearly exclusively on agro-processing, transformation and export/commercialization supporting the successful business cases at the time of project formulation: export of raw and dried cassava directly from Cambodia or through Thailand / Vietnam's ports.

This 'upstream approach' had the advantage of identifying each bottleneck from the collector/processor to the exporter (given that there was an unlimited supply of raw material by the farming sector). While Cambodia was still less competitive compared with neighbouring countries, this was not a critical issue because of high cassava price on the international market.

This approach showed its limits when the business environment changed with decreasing prices, with most of the commercialisation process becoming barely profitable and requiring the project and possibly other less involved stakeholders (e.g. Ministry of Agriculture) to focus on key profitability issues (sustainable production of cassava by the farming sector, reducing costs of agro-processing facilities, seeking new markets and/or innovative cassava products).

2.1.3 Relevance - problem and intervention logic

While the 2016 CEDEP II MTR rated the cassava component as highly relevant in view of the policies and strategies in place, in particular in relation to the Trade SWAp and CTIS of 2007, the project's objective has remained just as well aligned to these policies by the end of the project (1 year later).

⁵ at least not focussing on the agronomical aspects of the value chain that remain within the realm of the Ministry of Agriculture's overall responsibilities

The change for the past 2-3 years has been that the deterioration of the cassava sector business environment has accelerated making these kinds of interventions even more critical as cassava has become one of the major cash crops of Cambodia in recent years and is sustaining an ever-larger part of the population in the cassava growing provinces.

Indeed, the less conducive business environment for cassava due in a large part to falling international prices but also a lack of reaction of the sector itself to innovate and diversify has led to the closure of a substantial number of starch processing facilities that are no longer competitive with neighbouring companies in Thailand and Vietnam.

Now, the business case for cassava has changed and brought up three main challenges now evidenced because of the substantial price drop:

- (i) Export cost (transportation, logistics cost, lack of working capital, warehouses, agro-commodity port, and far distance to ports in the country): these issues cannot be addressed directly by policy dialogue. So, it becomes imperative to support the development of a national policy under which the government is committed to addressing these issues through a long-term plan
- (ii) Market change: the overflowing and Cambodian and other neighbouring countries' cassava and China's corn on the international market has caused a price drop. Chip is no longer a reliable business model but starch might still be a good model if the industry can adapt to the price drop through increased competitiveness (most of the starch facilities did not adapt and closed recently despite a still increasing demand trend for starch⁶).
- (iii) Production is less sustainable due to poor agronomic practices (after an uncontrolled rush of farmers into cassava monoculture with little technical support from relevant ministries), the emergence of pest disease (little or no research on cassava until very recently) and climate change (e.g. recurrent droughts in the Western part of the country). In that context, farm profit decreases with the combination of increasing use of input to sustain production and thwart price drops: farmers are penalised twice. Farmers are either locked in a downward spiral of debt and poverty⁷ or going into crop diversification for those who can afford it (e.g. mango, rubber, cashew for larger scale farmers).

It remains to be seen whether the price drop is permanent or part of a cycle (as it is for many commodities traded on the international market) and how it might impact on a long-term basis the cassava producing provinces. In any case, there is little if any knowledge on this issue.

In any case, this is resulting in less wealth created within the country with more of the transformation process occurring in neighbouring countries with a more competitive cassava value chain.

These issues are becoming significant and should be somehow addressed by the Government.

In that context, the activities under the project might still be relevant but would require more focus to clearly identify the major constraints through adopting a 'downstream approach' in order to identify the value chain bottlenecks (focus on exporter issues, then the processors, collectors and if necessary the farmers through association creation) with views on value creation and diversification.

The interviews showed that the difficulty in the cassava value chain is that there are key priority issues such as high price of energy, production consolidation, lack of diverse products, transport costs⁸) that need attention first before moving towards market access issues. If bypassing these issues, the export strength of Cambodian stakeholders will not improve to be competitive with neighbouring countries. Unfortunately, most of these issues (electricity price,

⁶ International market Analysis Research & Consulting (IMARC), 2017, Cassava Starch Market: Global Industry Trends, Share, Size, and Growth, Opportunity and Forecast 2017-2022

⁷ This is particularly the case for small-farmers that engaged into the sector at the start of the cassava rush (5-10 years ago) and are now facing low yields because of depleted soils.

⁸ Issue prioritisation is key to increasing competitiveness : e.g. for a starch processor, production consolidation (increasing storage and farmers' cooperation to spread out harvesting) is key issue nr 1 before even considering transport costs or energy price reduction ('secondary issues'); for a trader/exporter, key issue nr 1 is to reduce the multitude of farmers upon which he builds up volume to respond to large orders (hence the usefulness of associations) ; transport and border issues are secondary issues for him

fuel costs) are outside the scope of the project and not addressed specifically by the Government for this sector.

Logical framework analysis:

The Log frame of the cassava project is relatively simple; most if not all the outputs are straightforward:

Two outcomes were formulated but their contribution to the objective is inconsistent: outcome 1, in particular, is vague and its logic unclear: a collection of diverse outputs (from studies to organising stakeholders together) has been defined but they lack a purpose (actually, “understanding the needs of the sector” is not an outcome but a means to achieve something greater) and the relationship between these outcomes is not visible. This might be a reason why activities have been let down temporarily and are not impacting the project as they were considered weakly contributing to the project’s objective.

Impact indicators, an outcome and several outputs should not be considered SMART⁹ as they are no longer attuned to the current situation of the sector (see Table 3):

- The outputs on SPS while highly relevant are unlikely to be achievable even with an extended timeframe (unless additional support is provided after the closure of the project); compliance can realistically be achieved in 2 seasons at a minimum (e.g. HACCP or other); partial compliance might be achieved through possibly for processing / not for raw material supply,
- The impact indicator #1 is highly doubtful as the price at farm gate will reflect the world price variations with intermediaries maintaining a relatively fixed margin; this is even more so for cassava as most of the trade is informal : there is no national policy to regulate production and price and the bargaining power of farmers is extremely limited; this impact indicator that is actually at the centre of the theory of change (increase of exports will benefit the poor) of the component would only have effects if there is a Government strategy to regulate and support the sector, which was not initially contemplated under CEDEP II as a direct result, a more reliable impact indicator might have been the tonnage of cassava processed with value addition (hence with a price differential benefitting the farmers)
- The output on association is still relevant but its approach should be changed: interviews showed that the setting-up of associations can be counterproductive with stakeholders not interested in getting together under the auspices/advice of a public institution (MoC); all indications are that approaching the stakeholders into collaborating for a common purpose is more effective through companionship (securing support from a large stakeholder – a champion with a dynamic approach to enhance his activities - that can attract smaller stakeholders through a copy effect¹⁰) before proposing associativism.
- While the indicator for output 6 (outcome 2) is SMART, it definitely lacks ambition; another indicator might have been the number of contracts signed / tonnage traded resulting from these trade missions
- As there is a need of the national cassava sector policy, UNDP has done a good job to prepare the ground for its development, i.e. the facilitation of inter-ministerial dialogue (e.g. establishment of an inter-ministerial committee on cassava sector policy and strategy development),

There is also a lack of rigour in the indicators related to studies. The indicators are about the achievement and dissemination but not about the actual expected results of the studies: e.g. activities initiated due to the dissemination of the report, new activities initiated by value chain stakeholders or Ministries as a direct result of the report. Hence, it is not possible to know whether the studies are useful or utilised.

Overall, most activities of the project that were put on hold might still be relevant but the logic of the project (exporter → processor → farmer) no longer looks coherent with several activities no longer responding to the priority issues of the value chain stakeholders. In that context, redefining a rationale becomes a necessity in view of the project’s objective, preferably through a value chain approach as mentioned above.

⁹ Specific Measurable Achievable Relevant Time-bound

¹⁰ Aggregation of small stakeholders around a key player (e.g. small farmers around a large production farmer, small silo owners around a major silo company...)

Description	Description of Indicator	Specific	Measurable	Achievable	Relevant	Time-bound
<i>Objective:</i> strengthen and diversify export supply capacity of cassava						
<i>Impact #1:</i> positive development of the sector supports Cambodia’s efforts to meet its MDG s through improved income of farmers	Average price of Mt of fresh and dried cassava at farm gate	Y	Y	N	N	N
<i>Impact #2:</i> the competitiveness of the Cambodian cassava increases resulting in opening of new markets (geographical and products) and improved pricing of its exports	Average price of exported cassava (chips, starch, ethanol) compared to world prices	Y	Y	N	Y	Y
	Composition of formal exports (by product and destination)	Y	Y	Y	Y	Y
<i>Outcome 1:</i> need of the cassava export are better understood and the sector is structured to better focus the policy dialogue with the Government and improve the enabling environment	Sustainable mechanisms for Government – Cassava Sector dialogue established	Y	Y	Y	Y	Y
	Cassava sector policy developed (in best case scenario) and endorsed by Government	Y	Y	N	Y	Y
	A cassava task team including Government, DP and private sector is set up to develop recommendations for a cassava sector policy	Y	Y	Y	Y	Y
<i>Output 1:</i> working group of cassava processors and processors organised, agenda set-up and key issues identified	Working group created and meeting	Y	Y	Y	Y	Y
<i>Output 2:</i> up-to-date cassava value chain study carried out and SPS requirements for exports identified	Value chain study disseminated	Y	Y	Y	Y	Y
<i>Output 3:</i> ICS standards review and updated	Number of standards updated or developed	Y	Y	Y	Y	Y
<i>Output 4:</i> manual on export procedures prepared	Manual on cassava trade facilitation disseminated	Y	Y	Y	Y	Y
<i>Output 5:</i> cassava associations created	Cassava task team set-up to discuss recommendations on cassava policy	Y	Y	Y	N	Y
<i>Output 6:</i> formal dialogue mechanism in place between cassava sector and Government	Government cassava sector dialogue mechanism created	Y	Y	Y	Y	Y
<i>Outcome 2:</i> a group of cassava processors has been identified and made export-ready and has succeeded in developing competitive exports to new markets	Three markets identified and two visited; export contract signed in two of them and executed by several Cambodian processors	Y	Y	Y	Y	Y
<i>Output 1:</i> one group of processors and collectors identified for strengthened readiness	Criteria for identification and selection of target group	Y	Y	Y	Y	Y
<i>Output 2:</i> up-to-date cassava value chain study carried out and SPS requirements for exports identified	SPS needs survey completed and plan implemented	Y	Y	N	Y	Y
<i>Output 3:</i> ICS standards review and updated	SPS compliant number of processors	Y	Y	N	Y	Y
<i>Output 4:</i> Environmental risks and mitigation needs survey developed for pilot group of processors	Survey of environmental remediation completed and implementation plan formulated	Y	Y	Y	Y	Y
<i>Output 5:</i> project’s support in the development of a number of remedial solutions to address some of the negatively environmental impacts of cassava cultivation amongst a group of processors	Number of processors supported	Y	Y	Y	Y	Y
<i>Output 6:</i> Three new potential markets have been identified by a group of export-ready processors (through direct visits or participation in international buyer-seller market trade fairs)	Number of participants and trade missions	Y	Y	Y	Y	Y

Table 3 – SMART analysis of the logical framework

2.1.4 Coherence and complementarities with on-going initiatives

Previous relevant interventions included MoUs between China and Cambodia on SPS for cassava as a substantial part of the cassava production was exported (until price crashes in 2015-6) to China. UNDP has also cooperated in the past on a South-South agreement between Cambodia and China on cassava, (training in China of extension officers).

More recently, CIRAD is supporting CARDI on sustainable land management and conservation agriculture including through better cassava land management practices in the same provinces as for the cassava component. JICA is supporting the Government on cassava research in pest management in the Battambang University (“Project for Development and Dissemination of Sustainable Production System Based on Invasive Pest Management of

Cassava in Vietnam, Cambodia, and Thailand”) and CAVAC is having a cassava component supporting MAFF through the elaboration of a cassava production policy but not for the whole sector. IFAD provided a loan to MoC to implement the AIMS project with some support to cassava value chains.

Aside from CAVAC and JICA, support in the cassava sector remains quite limited despite the challenges that the whole value chain is experiencing.

2.1.5 Current financial situation

The level of funds utilisation by early 2017 is very low with more than 50% of donor budget still to allocate (see Table 4 below).

Year	Annual plan (US\$)	Actually committed (US\$)	% committed
2014	71.000	34.000	48
2015	420.000	160.000	38
2016	394.000	207.000	53
2017	133.000	-	-
Total	1.000.000	411.000	42

*Table 4 – Donors’ financial commitment and level of utilisation
(Source: annual reports)*

This is a sign of implementation issues (see efficiency); there is no other option at this stage than requesting a program extension. However, whatever the options of activities, a no-cost extension of 12 – 18 months will require a new approach in project implementation (‘do things differently’ through direct subcontracting of whole packages of activities or closer approximation with MoC to get more support in facilitation for activity delivery); it is unlikely that a new set of activities will by itself unlock the implementation issues and a new relationship with (institutional and final) stakeholders is necessary to ensure their collaboration.

2.1.6 Assumptions and risks

The PRODOC has identified potential risks and assumptions: (1) Government-private sector dialogue in cassava difficult to establish, (2) association cannot be established, (3) apex association difficult to sustain, (4) limited attention of the sector by other donors, (5) production of cassava affected by major natural disaster, (6) production negatively affected by environmentally unsustainable practices, (7) processors having difficulties to meet SPS standards, (8) processors having difficulties in meeting international price demand, (9) Cambodia losing tariff preferences in key markets affecting producers’ competitiveness.

While the assessment of the risks was correct, their likelihood was not evaluated. It is most unfortunate as this allows for the elaboration of staged mitigation strategies.

It is most striking under this project to see that in one way or another, these risks were very high and the identified issues actually took place with varying severity during implementation:

- (1) *Government-private sector dialogue in cassava is difficult to establish*: the establishment of a cassava value chain working group is the first step before engaging into the Government’s existing policy dialogue platform (G-PSF). Even so, it needs to define clear agenda¹¹ and select lead stakeholders (from the private sector); at this stage, this working group itself is not yet self-sustained and only driven by a supporting

¹¹ Source : interviews of participants of **working group**

institution (Swisscontact); however, a (UNDP, MoC, CAVAC) cost-shared workshop was held in late March 2017 to set a clearer agenda and organize the cassava value chain stakeholders working group

- (2) *Association cannot be established*: the associations have been (in)formally established successfully but the move was not root-based and perceived (negatively in some cases) as a Government intervention; this is evidence of the lack of proper dialogue¹² to show the added value of combining means/market intelligence in a highly competitive environment; most of these associations are basically non-functional although some do have an interesting (albeit maybe too ambitious) agenda to develop further activities (mainly bypassing traders/brokers and engaging directly in export or with agro-processors): there is at least a case of one association providing basic service to its members such as dissemination of agronomic practice and organising farmers into groups to raise awareness on product quality and facilitating sales' arrangement
- (3) *Apex association difficult to sustain*: it was not established given the issues under (2)
- (4) *Limited attention of the sector by other donors*: this lack of attention was confirmed through interviews although cassava is the second crop of Cambodia (CAVAC project and JICA support to Battambang University on research are only recent donor-sponsored support in the sector with little if any other support but CEDEP before them); one can only assume that donors are less interested because it is a cash crop and the sector growth has continued unabated until only very recently;
- (5) *Production of cassava affected by major natural disaster*: the recent droughts that are more marked in the West of the country are resulting in some varieties no longer being adapted and farmers rushing to other varieties from the East that are not disease-free
- (6) *Production negatively affected by environmentally unsustainable practices*: this is becoming a major issue with the use of un-sustained land practices since the cassava boom started; the results are a decreasing productivity because of reduced soil fertility somewhat compensated with larger quantities of input and inadequate planting material (lack of Government support in research and extension services until very recently with JICA's support to Battambang University) and the consequence, the sector's inability to propose quality standards and secured/formal production volumes
- (7) *Processors having difficulties to meet SPS standards*: (this is not an issue as there is no binding standard so far but selection based mainly on visual quality)
- (8) *Processors having difficulties in meeting international price demand*: this is one of the major issues in a decreasing cassava price environment and is evidencing the lack of competitiveness of the sector with higher transport and energy costs than its natural competitors (Thailand and Vietnam)
- (9) *Cambodia losing tariff preferences in key markets affecting producers' competitiveness*: with recent overproduction and overall price decreases, Thailand has progressively put in place trade barriers for direct export of raw materials through its ports; however, project's studies did identify a lot of trade expansion potential to new markets (EU, Indonesia, Bangladesh, India), mainly for starch.

A critical point seems to have been the lack of a national sector policy while the cassava sector is still largely informal, out of Government's control and support and risky (due to price fluctuations). These issues are however not directly in the project scope and require combined efforts of all relevant stakeholders to be addressed.

2.1.7 Project management arrangements

Due to its previous experience in trade interventions, UNDP was selected to be MIE for the cassava component. The governance mechanism of the intervention is as follows:

- Steering Committee: UNDP, Government and private sector stakeholders meeting twice a year
- Project Manager: UNDP-recruited staff with periodic reporting duties
- Core team: Seven Government officials were assigned to be the core team of the project and a liaison officer between UNDP and their ministries.

¹² Possibly the lack of participatory approach ?

The component is externally monitored by MoC (EIF focal point) and the M&E unit of NIU located in DICO. Their role is to report periodically about the status of the cassava component and its contribution as part of CEDEP II to the Trade SWAp objectives' governing structure and related committees.

2.2 Effectiveness

The overall effectiveness of the cassava component has been relatively weak: some activities have not been implemented.

There seems to be an issue of governance (from project design) that is resulting in weak implication of Governmental institutions: with no ministry taking the lead in the project (as per EIF lack of minimum requirement) – and little direct fund allocation to implement activities -, UNDP alone is implementing the project: this is resulting in limited collaboration with key Governmental institutions: e.g. facilitate meetings at central level and in the provinces, share information to stakeholders through the core team, disseminate relevant reports through the core team... ; all of which is not encouraging Government institutions to take the lead in carrying out project activities in close collaboration with UNDP (with/without project funds) as they are only project recipients and not active participants in implementation.

The core team concept is also resulting in a dilution effect of responsibilities with each member potentially being interested only in his own area (trade, agriculture...) and with little incentive to collaborate with other ministries or to enhance project activities within his own ministry as they have no allocated project resources.

This leads to little project results ownership and empowerment to enhance project results.

2.2.1 Outcome 1: needs of the cassava export are better understood and the sector is structured to better focus the policy dialogue with the Government and improve the enabling environment levels

Output 1.1: working group of cassava processors and collectors organised with agenda of issues identified

Achievement: The cassava value chain stakeholders working group was set up, its role and responsibilities defined, various discussion workshops taking place and a stocktaking workshop was carried out this year. Grow Asia, then, Swisscontact is following-up the working group. Its main characteristic is that it is made primarily of stakeholders linked to processing and commercialisation and key donors involved in the sector; the farmers are not well represented (although some associations of output 1.5 are included); there is also little involvement/participation of the Government.

Interviews have shown that while there are lively discussions about the issues of the sector, little follow-up ensues because there is little stakeholders' leadership, possibly because it is a mix of stakeholders with different agendas (as different as a trader or a starch processor).

Output 1.2: up-to-date cassava value chain study carried out and SPS requirements for exports identified

Achievement: the study was carried out but after months of delays due to the difficulty in identifying a consultant; eventually, results were disseminated through workshops and a 'problem clustering' exercise¹³ (e.g. transport, access to finance, trade facilitation...) was carried out.

¹³ Reviewing the report's main findings and conclusions and defining sets of issues of the sector

Interviews have shown that despite the exhaustive/comprehensive study, there is little evidence of follow-up by relevant stakeholders (typically Government); the cause might be the lack of proactivity of Ministries to follow-up action/recommendations because they lack project resources (they are no implementers) and there is no overarching Government agency taking the lead in this project.

The Value Chain study was used to refine the project strategies and to be inputs of the project design of other interested development partners.

Output 1.3: ICS standards for cassava reviewed and updated

Achievement: the output was suggested to change from the standards to a product quality control manual

With the current structuring of the sector – in particular, its informal nature -, there is apparently no need for detailed standards of quality; until now, cassava (fresh and dried) is visually assessed (freshness and contaminant level) with no control on pesticide residues despite some production used for animal feed or transformed as starch.

Interviews have shown that the processors/ final customers have few quality requirements as most of the production is exported to China for biofuel production.

This situation might change if the sector wants to penetrate new markets with specific quality requirements or tax exemption mechanisms (e.g. halal for Indonesia, HACCP for Europe, Indian market and tax exemption), which is a result of this intervention.

Output 1.4: manual on export procedures and trade facilitation for cassava-based products

Achievement: a training workshop on export procedure of cassava based products from Cambodia was organised in the Battambang province in 2016 with numerous stakeholders from the sector and Government (at subnational level); the ToRs for an export manual has been already prepared.

The considered approach seems to be a two-part manual: (i) Inbound procedure: within Cambodia, e.g. from warehouse to the port or on-ship / on-truck and (ii) Outbound procedure: from Cambodia to markets.

This activity remains highly relevant, especially in an ever more competitive environment on the international market. However, it will have to be implemented in a scenario of no-cost extension with a clear vision of what should be done to support stakeholders in new market penetration (support past business models [raw/dried cassava] or new products/markets [starch, innovative products, exploring the domestic market...]).

Output 1.5: cassava associations created and engaged in working group output 1.1

Achievement: eight local cassava associations were established; these associations have in common an overall similar objective: increase their bargaining power. The separate associations are made of growers, silo-owners, traders; in operational terms, they have, in theory, different objectives (consolidate production, seek intelligence on price, look for new customers, etc.). Their establishment was typically driven by MoC (at least as viewed by the associations). A capacity-building plan was commissioned; indications are that it will be operationalised by MoC, possibly through a new project (AIMS).

Interviews from associations and MoC subnational level have shown that the associations are not functional despite some individual attempts to link with other stakeholders; in some cases, the objective of the association has remained unclear for its member base to such a point that they do not see any benefit of getting together in an association. In another case, the association leaders were no longer available. There are also cases of associations willing to engage

with stakeholders to develop their own agenda (e.g. more trade) but they lack support from project/Government and/or lack internal institutional leadership.

The review of the sector has shown very conflicting viewpoints: in such an informal sector as for cassava, stakeholders view the individual action as more effective/value for money than common action that will inevitably erode their individual competitive position. While this is shared by nearly all stakeholders for commercialisation/exporting of products, they also share the view that the sector should be more organised so that they have access to better information (both upstream and downstream) and to consolidated volumes (downstream).

The difficulties to operationalise these associations are multiple: top-down approach not root-based with few confidence building measures, too little support for institutional capacity building, too little support to link value chain stakeholders through order requests, project's timeframe too short to establish new commercial relationships between value chain stakeholders.

As part of this activity, the project developed a capacity-building plan that should be operationalised through a new intervention (AIMS).

The whole approach on cassava association was drawn from the successful associations' networking building in the rice sector. However, the rice and cassava sector are very different in nature: food crop for rice vs cash crop for cassava, strategic crop for rice vs speculative cassava, Government full support for rice vs little Government attention for cassava, strict SPS conditions for rice vs no strict SPS requirement for cassava products such as dry chip, formal sector for rice vs mainly informal cassava sector...). It remains to be seen whether this approach through associations will be successful for the cassava sector.

Output 1.6: formal dialogue mechanism in place between cassava sector and Government

Achievement: there have been several types of meetings with Government (e.g. between key ministries and stakeholders on the sector, on the need for a cassava policy, on a cassava policy roadmap...).

All these meetings can be considered preparatory work before the Government establishes a group for the design of a sectoral policy on cassava; interviews have shown that the project achieved to get a consensus from key stakeholders (MoC, MAFF, Donors, private sector, farmers, universities, research institutes, and experts) on the need for a national cassava policy. That has yet to happen.

Together with the establishment of a cassava value chain stakeholder's working group, this should be a key priority.

2.2.2 Outcome 2 – a group of cassava processors has been identified and made export-ready and has succeeded in developing competitive exports to new markets

Output 2.1: one group of processors and collectors identified for strengthened readiness

Achievement: the processors and collectors were identified.

All the major players in the sector have been identified and some of them included within the cassava value chain working group or even as steering committee members.

The Export Readiness approach includes (i) Access to market information, (ii) Building business networks (e.g. Thai Tapioca associations, Cassava Conference in Thailand, World Starch Dubai...), (iii) Knowledge of export procedure, (iv) Market identification, (v) Market analysis, (vi) Support on policy dialogue, (vii) Environment awareness.

Some of these activities are underway or were planned to be delivered (now pending an extension for additional activities like access to finance, reliable supply chain [contract farming], and trade missions).

Output 2.2 and 2.3: SPS needs survey carried out, SPS requirements for exports identified and SPS plan implemented

Achievement: TORs for the SPS needs survey are being drafted; actually, this activity has been put on hold since early 2016.

Output 2.4: survey of environmental risks and mitigation needs to be developed for the pilot group of processors

Achievement: the survey was completed in late 2016; its results were disseminated at the national level. The subnational level has yet to be covered.

The main idea was to assess the environmental issues of the sector, including those linked to starch production. Since many (but not all) starch plants have shut down activities in recent years, this activity no longer seems to be relevant. The lessons learned from current starch processing should be used for new starch plant projects which environmental management should be a priority in terms of safeguarding community welfare and a way of creating more values from cassava wastes (waste valorisation through energy production for starch plants themselves or fertiliser production for the farming sector).

Output 2.5: a number of low-cost, economically sustainable remedial solutions are put in place to support a pilot group of processors

Achievement: no longer relevant

With the environmental survey completed, it appeared that there are no critical issues which the project should focus on.

2.2.3 Sector dynamics and market trends effects on the implementation

The business environment of the sector was substantially changed during project implementation. For the past 2-3 years, the cassava world price decrease (whether as chips, starch or bioethanol) has reduced the competitiveness of Cambodia in the sector. Its situation is now less than ideal compared with neighbouring countries that still take advantage of the sector through transformation. This is less and less the case in Cambodia due to value chain inefficiencies related to informal fees associated with export, transport and energy costs for transformation (all of which are beyond the scope of the project) and a disorganised sector unable to provide standardised products or commit large volumes with a specified quality.

The sector profitability has plummeted in recent years for most if not all raw and (semi)processed products, with profit erosion due to a higher proportion of cost inefficiencies in the stakeholders' business model¹⁴. The most visible result of this has been the (on/off) closure of starch/ethanol processing facilities; this, in turn, has led to the questioning of the relevance of several activities by the project team but there was little action from the steering committee but agree tacitly to hold back activities until the end of the project. It is unlikely that support to stakeholders to become export-ready in an environment with higher transport and energy costs, uncertain markets and a downward pressure on price will be successful. Another approach might be essential, based on new markets and product diversification.

In that context, there is a need to refocus the project on the essential (the 'outcomes'), increasing its effectiveness by: (i) supporting the Government in designing a comprehensive policy to start regulating the sector, (ii) reducing the scope and number of supported stakeholders for effectively demonstrating the benefit of value chain support for export-driven economy and (iii) possibly exploring alternative ways for sector growth (through diversification and/or the national market).

¹⁴ The cassava price drop has uncovered the value chain inefficiencies that were somewhat overshadowed by the high price of cassava

2.3 Efficiency

Efficiency measures the outputs in relation to the inputs. In particular, were the activities cost-efficient, were the objectives achieved on time or was the intervention implemented in the most efficient way compared to other alternatives?

2.3.1 Management of the project

Structure of the project:

The project is being implemented by UNDP.

As mentioned under 2.1.7, the overall governance and implementing structure of the program consists of:

- A cassava component Steering Committee: UNDP, MAFF, MoC, DICO and selected sector stakeholders Meetings are taking place as planned with relevant agendas on issues, planning, narrative and financial reporting; the review of the minutes while acknowledging the implementation issues does not evidence project improvement's suggestions from Steering Committee members other than the implementing partner (UNDP).
- The component implementation unit within UNDP: project manager, assistant project manager administrative staff (as part of UNDP), a program analyst (as part of UNDP staff), key consultants for studies, capacity building activities...

While maintaining close contacts with key the government's ministries, interviews showed for example that the involvement of Governmental institutions is limited to facilitation/coordination with either little or no financial resources made available to implement parts of the project (a substantial part of resources is allocated for studies) or no provision for Government financial contribution made available at formulation stage.

With few resources for directly enhancing the capacity of Government or value chain stakeholders (e.g. no action was taken based on reports' recommendations on association's capacity building, value chain study...), this might explain the lack of involvement of national institutions in the project.

- A Core Team in charge of coordination with national stakeholders: MoE, MoC (various departments), MoC/TTRI, MAFF, MoRD. There has been little clarity in the PRODOC as to what are the functions of the Core Team unit in relation to the actual outputs except for coordination (e.g. inform the subnational level when UNDP starts implementing new provincial activities) and transmission of information (e.g. dissemination of technical reports). Therefore, information might be flowing from/to relevant Ministries but little internal follow-up ensues.

Incidentally, several Core Team members apparently are little involved in the project (e.g. MoRD, MoE, TTRI) although their support to this project could be viewed as critical if they were able to be actually involved in project activities (e.g. MoRD and communities development, MoE and pollution control, TTRI and delivery of training modules on institutional capacity building of associations, workshops on export readiness).

2.3.2 Project costs and progress

Project costs:

The cassava component was initiated in 04/2014 and should be concluded by 04/2017 (3 years).
The project budget and expenditure are as follows (01/2017):

Activity	Approved Budget (ProDoc)		Cumulative Expenditure		BALANCE		DELIVERY	
	EIF	TRAC	(Apr 2014 - 31 Jan 2017)		(US\$)		(%)	
			EIF	TRAC	EIF	TRAC	EIF	TRAC
Activity 1.1: A working group of cassava	9,630	-	6,433	-	3,197	-	67%	
Activity 1.2: An up-to-date Cassava Value Chain study	66,126	-	55,378	110	10,748	(110)	84%	
Activity 1.3: The quality control manual	11,770	-	-	-	11,770	-	0%	
Activity 1.4: A manual on export procedures/trade facilitation	44,726	-	-	-	44,726	-	0%	
Activity 1.5: Association(s) engaged in G-PSF discussions.	39,590	-	7,668	14,440	31,922	(14,440)	19%	
Activity 1.6: Formal dialogue mechanism(s) are identified	12,198	-	3,076	-	9,121	-	25%	
Activity 2.1: One (several) groups of processors and collectors are identified	2,247	-	4,341	-	(2,094)	-	193%	
Activity 2.2: A survey of SPS	40,018	-	40,82	-	39,977	-	0%	
Activity 2.3: SPS plan is implemented	52,965	-	-	-	52,965	-	0%	
Activity 2.4: A survey of environmental risk	40,018	-	28,020	-	11,998	-	70%	
Activity 2.5: Sustainable remedial solutions are implemented	52,965	-	-	-	52,965	-	0%	
Activity 2.6: Three new potential markets have been identified	208,971	-	33,075	-	175,895	-	16%	
Project Management	415,802	10,854	248,249	70,314	167,552	(59,460)	60%	648%
Total	997,026	10,854	386,283	84,865	610,743	(74,011)	39%	782%

Table 5 – Cassava component financial delivery

The budget consumption falls very short of any objective with less than 40% actually spent. From initial delays in recruitment of consultants to carry out studies to activities lockdown in 2016, pending a review of their relevance, the project will achieve few results by its final stage.

This opens the way for a major no-cost extension period (whose principle was already approved during the last Steering Committee meeting of 2016) (see recommendations).

Project delivery:

While key activities have not been carried out yet, the allocation of resources for achieving results is at best adequate for studies support to final beneficiaries with the main issue being the follow-up by relevant stakeholders:

- Studies (e.g. value chain, environmental study, capacity assessment of associations...): limited financial resources for these assignments resulted in delayed identification of relevant consultants; eventually, the delivery of the studies is good (highly relevant, comprehensive, well-documented) but there are no resources to support either institutions or final beneficiaries to implement key recommendations
- The establishment of cassava associations is Government-oriented, not initiated by the beneficiaries, resulting in a clear lack of ownership despite attempts by some executive members; this is somewhat counterproductive within a sector that is nearly exclusively informal. Other approaches could have been attempted (see recommendations)
- The cassava value chain working group still do not have a clear leadership and working structure. Even so, there is a commitment for key stakeholders such as Swisscontact and private companies with assistance from the project to build it to be a functional mechanism. This is a priority for the sector given its informal nature.

This points out towards too ambitious objectives and expected results in relation to (i) the available budget that is too little, (ii) the timeframe to operate sectoral changes which is too short.

Hence, any continuation of the intervention will inevitably result in the adoption of more straightforward implementation methods (e.g. subcontracting, closer collaboration with Government, direct contract) and a reduction of its scope (focus on fewer beneficiaries and intermediaries).

2.3.3 M&E, Planning and reporting

The reporting and planning processes are similar in nature to the CEDEP I procedure. They include mainly the following:

- Narrative and financial six months (JAN-JUN) and annual reports (JAN-DEC) prepared by the UNDP project team and sent to the Steering Committee for review and approval
- MoC (DICO) is monitoring through the Steering Committee the status of the project and is reporting progress to the Trade SWAp governance structure.
- MoC is organising mid-term and final evaluations

The review of the narrative reports shows that they are comprehensive detailing amongst others, the status of the sector, the effects of the cassava situation on the project, the activities carried out, and follow-up of previous recommendations from EIF and Executive Secretariat and implementation issues. They present a trustworthy picture of the project.

The M&E function is ensured through linkages between UNDP, MoC and the Core Team members. Interviews with UNDP and MoC showed that communications on the project consist of daily communication through email and phone call between the project, DICO and core team, Steering Committee meetings and formal feedback from UNDP to the Core Team members regarding issues and support/coordination requests for implementing new activities.

While the core team concept remains relevant as a linking mechanism between UNDP and the involved ministries, its actual operationalisation was not optimum: few if any decision makers/individuals were part of the core team and the actual members had little authority to enforce follow-up within ministries.

Indeed, interviews confirmed that while the activities target mostly final beneficiaries, these received little support afterwards from institutional stakeholders (e.g. MoC, MAFF at the subnational level, no inter-ministerial structure yet to discuss cassava issues or the lack of a national policy...).

There are some notable exceptions like the reduction of informal cost at the border (cost of CAMControl) and ban of transshipment through Thailand. Most importantly, the consensus amongst value chain stakeholders is to have a policy, which is a direct result of the project.

2.3.4 Partnerships

UNDP has successfully created a network of contacts with various institutional stakeholders that are contributing through workshops and discussions to a better understanding of the sector. These include CAVAC, IFC, EMS and others.

Some collaborations were initiated like AfD and contract farming, bulk purchasing of farmer's production through the "Cassava Cambodia Company" but with limited success due to a still highly competitive and fragmented sector and the recent price drop.

These contacts, however, have not resulted in decisive synergies despite some stakeholders involved (more recently) in the cassava sector (JICA on cassava research in Battambang University, CAVAC on a MAFF cassava policy, CIRAD on sustainable land conservation research [including for cassava cultivation]). This might reflect, to some degree, a lack of drive of donors to get involved in a (still-considered) dynamic sector despite the recent economic downturn and an overall lack of leadership of Government (MoC, MAFF) to prioritise this sector for support.

This points out towards the need for UNDP to enhance further its role as the lead-donor to coordinate support to the cassava sector as this project is planning to support Government in initiating a process to develop a national cassava policy.

2.4 Potential impact

The potential impact of the project is very high with prospects of opening up new markets. However, with recent price fluctuations and restrictions for direct export through Thailand and Vietnam, some adaptation to the project's strategy needs to be pursued.

So far, the strategy was to support farmers into associations so as to increase their capacity to consolidate volume and increase their bargaining power with intermediaries, raise quality through SPS requirements and quality standards, increase the competitiveness of agro-processors by lowering their costs and reduce their environmental impact, support exporters in finding out new markets.

This strategy was based on a cassava value chain as in early 2010 with high export prospects in a growing market (demand outgrowing offer). The situation has changed drastically with lower cassava world prices resulting in a higher weight of Cambodian competitive disadvantages (energy and transport costs) with resulting closure of some agro-processing (starch) facilities and a handful of biofuel (ethanol) companies still barely operational. In that context, the project should review its approach to support the cassava industry in order to leverage its impact.

While most if not all cassava project activities remain relevant, their combination as per project proposal might not have the expected impact: e.g. SPS requirements are of less importance for raw materials/chips for biofuel but might become critical should the intervention focus on niche markets like EU starch; Cambodian starch production is ill-equipped to compete with neighbouring countries and might focus on specific markets like *halal* certification for Muslim countries; cassava-derived products to be supported by the project are fairly conventional and in direct competition with similar products in Vietnam and Thailand (raw/dried cassava, starch); there may be opportunities for the national market (plastic bags, snacks, E10 fuel), although the right business environment is not yet there, not to mention the absence of inter-sector dialogue (commerce, energy, agriculture). These are worth business opportunities to be explored in the next development phase.

In that context, it is necessary to narrow the scope of the project, should any extension be granted, concentrate financial resources on key issues that will likely achieve the main project objectives by paying attention to the following either directly through the project activities or indirectly through awareness raising of key stakeholders (Government, the donor community and the private sector):

- (i) the competitiveness of the sector needs to rise to adapt to the high variability of price through lowering the transport costs and energy price for agro-processing,
- (ii) Government must support the sector through a national cassava (agricultural?) policy and balance cash/food crops through regulation including diversification to reduce cassava farmers' exposure to price shocks,
- (iii) support to production has to be enhanced to integrate better cassava into sustainable farming systems and move away from monoculture practices that degrade the country's 'land' capital
- (iv) Cambodia has to gradually move away from being a premier supplier of raw material (raw cassava or dry chips) to neighbouring countries that will still have an edge in terms of agro-processing capability over Cambodian industry through 1. 'Niche product' diversification and branding, and 2. Investigating the national market for cassava products

2.4.1 Social and cultural impact

The social/cultural impact of the project can be viewed mainly from the growers' perspective: linking similar stakeholders (growers but also silo owners, traders) into plain associations has been viewed widely by beneficiaries themselves as an artificial process; although this might be the only option in order to overcome recent market downturns, final beneficiaries are viewing this process as inefficient. This is mostly due to a lack of Government

information and support in linking similar stakeholders for enhanced bargaining power in an ever-increasing competitive market.

Interviews suggested that stakeholders' partnerships or professional associations of stakeholders having a common purpose (consolidate production, seek intelligence on price, look for new customers, etc.) around initial key players (large grower, trader, major silo owner...) might be a better model to deal with as the value chain remain largely informal and very competitive (with individualistic decision-making processes). The traditional association model remains poorly understood (in terms of value addition) and brings caution from value chain stakeholders.

The involvement of Government into the value chain to better communicate on opportunities, support individual initiatives should somewhat be seen as a prerequisite for any project in the sector to be successful (hence incorporated into interventions).

In that context, a national policy becomes again a necessity to better circumscribe any intervention to enhance Cambodian competitiveness and a means to ensure beneficiaries' adherence to a cassava development policy.

2.4.2 Economic and financial impact

By project's official closure (April 2017), the economic and financial impact of the project will be somewhat limited: while support was provided to exporters through international visits (trade fairs, exchange visits) or to growers and silo owners through associations, interviews showed that what exporters and traders need mostly is production consolidation to reduce transaction costs and new market penetration. A project's extension becomes a necessity to actually impact the sector.

The economic impact might still be achieved (or at least initiated) with a project extension that would focus on a limited number of stakeholders and for some very specific cassava products (e.g. starch for export¹⁵, innovative products on the domestic market¹⁶ or increasing competitiveness through energy costs reduction for agro-processing, niche market exploration).

2.4.3 Institutional impact

The project did not target directly Government institutions: however, to initiate a dialogue between the sector and Government, the adopted strategy was to organise the stakeholders into a cassava value chain 'working group' consisting of a mix of private sector stakeholders and donors. This process of supporting structuring within the cassava sector through resource and information exchange, analysis of shortcomings and value chain weaknesses/bottlenecks is on-going; however, the process is kept alive by the project's contracted organisation and there has yet to emerge national leadership amongst the working group members to further strengthen and expand the interests of the sector as the project will come at an end. It should be viewed as a key activity that should be pursued until the private sector is able to enter into negotiations with the Government on key actions in terms of sector policy.

Unfortunately, there has been little project support to Government to initiate inter-ministerial dialogue on this crop although both MoC and MAFF are closely associated with some components of the project (Government strategic support). This has yet to occur and interviews showed that Government is willing to initiate such a process.

Government's understanding of the key issues of the sector through interactions with the cassava value chain stakeholders ('working group') are the primary steps to engage value chain stakeholders and relevant Government institutions into designing a national policy on cassava.

¹⁵ Starch remains an alternative for the sector despite plant's closure with positive prospects for exports to South Asia or Europe (e.g. organic starch), should the starch companies lower their energy costs and improve their marketing strategies (ethanol production cannot with giant suppliers like USA, Brazil while crude oil is at \$45 per barrel)

¹⁶ This might not be within the project's focus but prospects do exist

This policy formulation is planned through the project's new work-plan but would require (i) an effective formal working group under the G-PSF with an official agenda to be presented to Government, (ii) the initiation of an integrated policy dialogue between relevant ministries (energy, agriculture, commerce, transport...) to discuss value chain stakeholders agenda and assess how it can be met and (iii) the establishment of an inter-ministerial technical group in charge of a national cassava policy formulation.

2.4.4 Environmental impact

The acceleration of cassava production for the past 10 years has resulted in the adoption of unsustainable farming practices (monoculture, excessive use of pesticides and fertiliser, cassava cultivation on marginal lands...). **But, this** aspects was not in the project's scope.

The project conducted a study on impacts of cassava processing on environment and communities. It identified some problems for future intervention but they are still under control of the Sub-National Administration.

2.5 Elements of Sustainability

The necessary albeit not sufficient condition to sustainability of any result of the project is the need for a comprehensive national policy on cassava; the policy has to be inclusive enough to incorporate all economic sectors under which cassava is/could become a key player: from the Government, this includes at least MAFF (production side), MoC (commercialisation), MoE (natural resource management and deforestation, water pollution), MIME (use of biofuel), MoRD (water resources protection and access to farm), MEF (access to finance). On the other side, the value chain stakeholders need to be incorporated, a process directly supported by the project through the establishment of a cassava value chain working group. Finally, the donor community can facilitate this process.

The structuring of the sector through value chain stakeholders representativeness is also a prerequisite; this process has been initiated but remains fragile and far from certain after project's completion.

Finally, the activities leading to the results should present a good economic case to stimulate ownership and lead to stakeholders' empowerment to maintain and develop results under the project.

In a volatile business environment such as for cassava, this can be difficult to achieve and activities should be carefully selected to respond to acute value chain issues that should be under identification through the formal 'working group' sessions and somewhat already identified with the initial value chain study.

Value chain stakeholders' interviews identified such issues like production consolidation (to reduce transaction costs from the trader/exporter's viewpoint), the need for cheaper energy costs (for agro-processors to regain some competitiveness), diversification to reduce dependence on plain cassava world prices (to expand Cambodia's market base geographically and/or through the development of new products).

2.5.1 Social and cultural sustainability

The sustainability of most activities will depend whether the value chain stakeholders are 'buying-in' or not: at this stage, there are two contexts in which some associations cannot function while few associations set a vision and start activities with their own survival strategies. Meanwhile, the cassava value chain working group is still in a development process and its sustainability cannot be assessed by this time.

The commissioning of studies, while highly relevant and extremely useful for the sector and decision making bodies is not resonating well within Government institutions due to their peripheral role within the project and the fact that Core Team members are located outside the project and therefore acting only as information relays.

This points out towards the need to review the project approach to ensure better ownership of activity results and to stimulate empowerment with the initiation of new activities arising from the project's results.

This could be the case for the establishment of a strong formal ‘working group’ that becomes a key player in cassava national policy formulation or the creation of an inter-ministerial commission in charge for reviewing in a holistic manner the sector’s issues before pushing an agenda for policy formulation.

On the positive side, interviews have shown that all value chain stakeholders (from [large] growers to the exporter) have an irrepressible spirit of entrepreneurship, meaning they are willing to invest and possibly take risks if there is a good economic and financial case for innovative business opportunities. This is the case for at least one growers’ association, several traders and a starch company. Hence, there is still potential within the timeframe of an extended project to achieve a demonstrative effect through combined value chain stakeholders’ support but scaled down to a limited number of participating value chain stakeholders.

2.5.2 Institutional strengthening

The program has not focussed on strengthening Governmental institutions active in the cassava sector. The sustainability of cassava associations is not ensured at all for most of them (clear lack of leadership within the associations). There are, however, notable exceptions with at least one association organised enough to engage dialogue with MoC at subnational level on contract farming, willing to exchange information with Thai associations. Interviews showed that in another case, members of an association wanted to disband entirely the association altogether as they did not see any added value for it. Furthermore, the setting up of associations has created grand expectations from other associations that feel let down without further (project or Government) support since their creation two years ago despite identified issues like price instability or production issues like disease and fertility, poor seed quality, quality issues for production consolidation (variable humidity for dry chips)..., and despite a plan for capacity building that has yet to come in force.

Since they are not (yet) linked with other value chain stakeholders (buying/selling on a regular basis), their durability is not ensured.

The project has created a lot of knowledge on the cassava sector (as did previous interventions on cassava); however, there is no permanent structure within the Government itself where this knowledge might be stored; on the contrary, studies are disseminated to relevant ministries and there is isolated dedicated staff on the cassava sector in various ministries and academic institutions; given the strategic value of cassava to the agricultural sector, this is an issue for future support with recurrent interventions not based on lessons learned from previous interventions.

2.5.3 Economic and financial sustainability

At this stage, project activities are not resulting in sustained economic or financial benefit on a long-term basis for the sector: due to price uncertainties, project’s attempts to link value chain stakeholders to enhance their competitiveness (through contract farming, export readiness activities) have not borne fruit so far.

Since 2015/6, there was still a downward spiralling of the sector with starch companies closing down due to inefficient transformation processes, or farmers converting or wishing to convert to other crops. Despite this, cassava growing remains strong because demand remains high from neighbouring countries that have a competitive edge over Cambodia.

Attempts to enhance the sector will necessarily have to focus on improving the competitiveness of agro-processing and seek new markets where Cambodia might have a competitive advantage: e.g. Cambodia benefitting from EBA arrangements for the EU market or 15% tax deduction for the India market (while direct competitors like Vietnam or Thailand do not).

2.6 Communication and Visibility

Visibility and communications activities play a vital role in the field of development cooperation for encouraging ownership and empowerment by relevant stakeholders.

Overall, there has been a significant number communication and visibility activities under the project like awareness raising on the MoC and Trade SWAp, DICO websites, cooperation with TTRI, and systematic divulgation of studies' findings through workshops and seminars.

The networking capacity of UNDP has resulted in widespread knowledge of CEDEP and the cassava component amongst the donor community and Government in general.

3 CONCLUSIONS

Within the agreed timeframe (3 years), the project has only partly achieved its objective; there are several reasons for this:

- The cassava sector has considerably changed since project formulation in the early 2010's at a time of extended sector growth and prices hikes on the international market, coinciding with high oil prices. The approach was to accompany an already well underway expansion process through the exploration of new markets, somewhat bypassing neighbouring countries value addition (drying and starch production) and therefore retaining wealth creation within Cambodia itself. These times are now over: low oil price have reduced substantially the attractiveness of cassava biofuel and China is currently massively releasing its obsolete corn reserves on the market for biofuel production; this has resulted in price decreases that have remained relatively stable and low for the past 2 years; it has affected all cassava producing countries in the region.

Furthermore, Cambodia has always had a competitiveness issue in relation to Vietnam and Thailand; these have more organised cassava value chains and benefit from various domestic advantages (better-organised grower's network, cassava research, large ports for direct export, low energy prices for agro-processing, reduced transport costs).

On the other hand in Cambodia, the price of electricity is almost double than for neighbouring countries, transport costs are systematically higher due to the longer distance to ports and cross-border fees. In addition, Thailand has put restrictions on direct export to China, possibly to protect its own industry (especially dry chips).

The lowering of cassava price on the international market has revealed these value chain weaknesses to a point where Cambodian value chain stakeholders operate at break-even point while neighbouring countries can still enjoy some (lower) margin of profit; in Cambodia, this resulted in the closure of agro-processing companies unable to adapt (most of them) and the need for growers to compensate low prices with increased productivity (through added input and resulting net indebtedness) or face conversion to other crops.

- The activities under the initial project were focussing on resolving a mix of outstanding sectoral issues related to commercialization and value addition but without much focus on the production side (understanding the value chain, resolving environmental agro-processing issues, beefing up standards...); indeed, there was little concern with the growers when demand was meeting offer.

Furthermore, at a time when competitiveness was not really an issue as there was a satisfactory profit margin for most value chain stakeholders, sector structuring (policy-making, working group, associations) was not a top priority but a part of the intervention as for other activities: demand meeting offer was deemed a natural process in an informal sector with a wide variety of intermediaries (traders, brokers, exporters...).

When world prices started to lower, the value chain stakeholders that became exposed to competitiveness issues were those that were mostly adding value: the growers, silo owners and the agro-processors; in the meantime, intermediaries tried to keep up with their profit margins.

To its advantage, Cambodia has kept up with cassava area growth, relatively high productivity with little or no input and disease-free cassava production (until recently); however, these advantages are now also being eroded.

Furthermore, interviews have shown that the project is now addressing different issues in an unrelated way (stakeholders' priorities have changed since the price drop) and is likely to little impact the sector; there is a need to review the project strategy and adapt it by selecting activities that are linked between individual stakeholders as increasing the competitiveness of one value chain stakeholder will not resolve the issues of the others. In addition, one stakeholder of the value chain might have a set of priority issues to address: dealing with non-priority issues might not improve the overall competitiveness of that stakeholder anyway. Hence, there is a need to prioritise¹⁷. This is most difficult to resolve as these priorities are a mix of activities related to the production side (not addressed through this project), processing, knowledge/intelligence gathering for commercialisation and new markets access.

- A lot of project activities are punctual events (create an association, draft a study, make presentation workshops...); they fundamentally lack resources to further support any achievement downstream to make

¹⁷ Example : a starch processor is not interested in a drop of electricity price or improving environmental issues if first his plant's capacity is not fully utilised throughout most of the year

sure that results are owned and stakeholders are empowered to further develop, enhance and improve initial project results; in a sense, the project has been too ambitious or underfunded. This is most obvious with the recent cassava economic downturn as interviews showed that stakeholders feel helpless on how to address their competitiveness issues.

- The project institutional setup has not been conducive enough to create yet a dynamics of Governmental support through increasing its involvement in the sector – first by the establishment of commissions to analyse and review value chain/environmental/standard/SPS issues as per project activities, second prioritising cassava issues/bottlenecks for support through donors and third by considering the creation of an inter-ministerial commission for the formulation of a comprehensive cassava policy (that during the course of the project and in view of cassava price instability should have broadened its mandate to an overall assessment of the agricultural policy with a view on diversification and reducing farmers exposure to cassava production risks). Indeed with the entire responsibility of the project results resting on UNDP and few financial resources being allocated to government institutions, there has been little incentive from Government to get involved and little follow-up of key sectoral recommendations produced through technical studies.

In conclusion, these internal and external factors have affected dramatically the project implementation conditions and any further support would require an extensive review of both the project approach and actual issues to address within the cassava value chain, with an emphasis on linking value chain stakeholders and on an imperative need to support Government in designing a comprehensive/all sector inclusive policy on cassava as a way to better structure the sector.

4 RECOMMENDATIONS

The project is officially closing in early April 2017 with over 55% of the budget unused. The last Steering Committee of late 2016 already had agreed in principle to a project no-cost extension.

This is most welcome because a large part of the population in the four project provinces are relying on cassava for their livelihood and their economic situation is somewhat deteriorating with the economic downturn in the cassava sector.

Despite little progress in achieving the original project results, the justification of such an extension is as follows:

- (i) there is little if any donor support of the sector in commercialisation,
- (ii) the project is complementary to others interventions focussing on the production side (CAVAC on value chain with MAFF and Battambang University/JICA on cassava agronomical research, CIRAD on sustainable farming systems),
- (iii) the sector is in need of structuration and regulation to better resist worldwide price volatility,
- (iv) the project has produced valuable and reliable information that can be used by Government to better understand the sector issues,
- (v) initial (albeit insufficient) steps have been taken to initiate a dialogue between the private sector and Government through the concept of ‘working group’ - however, (iv) and (v) are not sustainable and risk collapse should the project come to an early close –
- (vi) in a depressed price environment, cassava sector viability is dependent on increasing its competitiveness and bring it on par with neighbouring countries through other strategies (preferential/new markets, product diversification).

As for the length of the no-cost extension, it all depends on the activities considered: (i) are there cassava cycles involved? (ii) Are activities depending on the results of others? (iii) Will the implementation approach be amended for swifter execution of activities (Governmental implementation, NGO/institutions’ subcontracting?) or continue in the same way as for the first three years?

The consultant’s opinion is that it should not be less than 12 months (at least one cassava cycle) and additional financial resources (EIF/UNDP Core funding) should preferably be made available to avoid further dilution effect of fixed costs from a 36 months to possibly 48 months (1 year extension) or more project duration (the project’s budget is very small in relation to the set of activities that was originally considered). On the positive side, over 40% of management costs are yet to be spent. Therefore, there is still quite a lot of leeway to agree to an extension.

A series of options are available to further support the sector through the project:

- (i) Support the Government in policy making prior to supporting the sector stakeholders (*‘Institutional scenario’*): as a cash crop and the number two crop of the country, cassava has become of strategic importance for the country, requiring Government attention given that the livelihoods of a large part of the population are depending on it and its trade volatility has been having negative effects for the past few years
- (ii) Continue the activities as planned but with a reduced scope (fewer project beneficiaries) (*‘Business as usual scenario’*)
- (iii) Support the entire value chain but only linked value chain stakeholders (*‘Demonstration scenario’*)
- (iv) Target high impact activities focussing on the commercialisation process (*‘Focus scenario’*) by increasing their financial resources to ensure that there is ownership and beneficiaries are empowered
- (v) Test out new initiatives through shifting the project’s focus on innovation and diversification (*‘innovation scenario’*)

This range of scenario is evidencing the need for much further support beyond the scope, available resources and timeframe of this particular intervention; therefore, difficult choices will have to be made to ensure high impact, minimum implementation risks and avoid administrative issues linked project redesign/amendments.

4.1 “Institutional scenario”

For the remaining 12 months or so, the project efforts should focus on accelerating the establishment of a value chain/cassava private sector representative body, moving it from a lack-lustre working group and requiring external

support to a leading structure able to dialogue by itself with the Government and present key issues for further Government support and/or regulation.

In parallel, the project would support Government – in particular, MoC – (i) to start working on a sectoral policy for export and product diversification on both the domestic and international markets and (ii) to establish an inter-ministerial committee/formal working group through the Trade-SWAp framework to discuss cassava potential in all sectors (energy, food processing, environment, trade & exports...) which if successful could become a working group for the formulation of a comprehensive national cassava policy and later the formal working group under the G-PSF.

This would incur activities on wide-spread divulgation of project studies, initiating cassava sector workshops and working groups at both national and subnational levels that, in turn, would feed in a national policy formulation exercise.

The logic of this scenario is that Government’s understanding of the sector is a necessary condition prior to sectoral planning and providing guidance and support in the sector, regulating the production to limit stakeholders¹⁸ exposure to risks and securing tax income through sector formalisation.

Advantages: this is the most straightforward option for supporting the sector; while an actual endorsement is unlikely within 12 months, a tight schedule could bring value chain stakeholders and Government together to at least, formulate a formal draft policy for parliamentary review; the activity is already part of the actual intervention; UNDP as an international organisation has the capacity to mobilise Government stakeholders.

Disadvantages: its effects on the value chain stakeholders would not be visible by project’s end; this scenario would skip entirely outcome 2 and focus only on outcome 1. Government’s support is, of course, paramount for this scenario to be successful.

Activity	Approved Budget (ProDoc)		BALANCE	
	EIF	TRAC	(US\$)	
			EIF	TRAC
Activity 1.1: A working group of cassava	9,630	-	3,197	-
Activity 1.2: An up-to-date Cassava Value Chain study	66,126	-	10,748	(110)
Activity 1.3: The quality control manual	11,770	-	11,770	-
Activity 1.4: A manual on export procedures/trade facilitation	44,726	-	44,726	-
Activity 1.5: Association(s) engaged in G-PSF discussions.	39,590	-	31,922	(14,440)
Activity 1.6: Formal dialogue mechanism(s) are identified	12,198	-	9,121	-
Activity 2.1: One (several) groups of processors and collectors are identified	2,247	-	(2,094)	-
Activity 2.2: A survey of SPS	40,018	-	39,977	-
Activity 2.3: SPS plan is implemented	52,965	-	52,965	-
Activity 2.4: A survey of environmental risk	40,018	-	11,998	-
Activity 2.5: Sustainable remedial solutions are implemented	52,965	-	52,965	-
Activity 2.6: Three new potential markets have been identified	208,971	-	175,895	-
Project Management	415,802	10,854	167,552	(59,460)
Total	997,026	10,854	610,743	(74,011)

Table 6 – Resource redistribution for ‘institutional scenario’

4.2 “Business as usual scenario”

The results of the interviews have shown that each and every project activity is highly relevant as it is: there is a need for all of them to somewhat address different stakeholders’ issues. However, the scattering of the project over 4 provinces (Pailin, Battambang, Kampong Cham and Tbong Khmum), the number of potential beneficiaries and over 8 associations are actually making it difficult for the project team to effectively achieve all planned activities; the project’s remaining budget is just too tight. Another approach would be to reduce the geographical coverage of the project, focussing for example on one province only but also making available more financial resources to follow-up initial activities’ results to ensure empowerment and results’ ownership. This is most relevant as there is already

¹⁸ Including the farming sector

a very limited number of agro-processors remaining on the market (biofuel/starch plants) and few associations are actually operational. However, they might not be located in the same province/areas.

Advantages: there is very little adaptation necessary to the existing project but downscale it geographically (no change of activities and outcomes, only reduce the scope); this would enable the project team to slightly increase the available financial resources per project beneficiary and better focus project support to key production/transformation areas of the country.

Disadvantages: despite the reduction of scope, the number of activities is still high in relation to the available financial resources and a dilution effect remains. In any case, the follow-up of some activities would remain outside the scope of the project for full-scale implementation (e.g. resolve wastewater issues or lower energy costs of agro-processing plants require important financial resources); still, testing the feasibility of these techniques might be considered and financed on a small scale; also, activities might take more than 12 months to effectively bear fruit (like 2 cassava cycles to induce changes for establishing linkages and create confidence building measures between growers' associations and stakeholders seeking production consolidation (exporter, starch plant, silo owner); this scenario does not radically resolve the new issues (consolidating volume, exploring innovative new markets/products) that stakeholders are experiencing in the recent cassava business environment.

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Activity 1.5: Association(s) engaged in G-PSE discussions.	9,590	-	31,922	(14,440)
Activity 1.6: Formal dialogue mechanism(s) are identified	12,198	-	9,121	-
Activity 2.1: One (several) groups of processors and collectors are identified	2,247	-	(2,094)	-
Activity 2.2: A survey of SPS	40,018	-	39,977	-
Activity 2.3: SPS plan is implemented	52,965	-	52,965	-
Activity 2.4: A survey of environmental risk	40,018	-	11,998	-
Activity 2.5: Sustainable remedial solutions are implemented	52,965	-	52,965	-
Activity 2.6: Three new potential markets have been identified	208,971	-	175,895	-
Project Management	415,802	10,854	167,552	(59,460)
Total	997,026	10,854	610,743	(74,011)

Table 7 – Resource redistribution for 'business as usual scenario'

4.3 "Demonstration scenario"

Under this scenario, the project would focus on the main if not all activities revolving around starch production from production to export:

one exporter → one agro-processors (e.g. starch) → 1 silo owner &/or growers' association → growers

The project would turn from a high impact intervention to a demonstration project with little quantitative impact.

The strategy would be to review, for a finished product (starch), each value chain stakeholder and address each issue/bottleneck:

- Starch exporter's readiness (*halal* / Indonesia – Bangladesh, HACCP – European Union and India through tax exemption) with additional activities focussing on quality and image
- Increase one starch plant competitiveness through reducing the energy bill with biogas production for both water heating and electricity production
- Reduce the environmental impact of starch production by processing wastewater residues
- Enhance volume consolidation by linking starch plant with silo owner (association)
- Enhance volume consolidation by linking silo owner (association) with growers' association

Advantages: this scenario is the only one that keeps up with the initial project’s spirit: eventually demonstrating the actual feasibility of opening up new markets through value chain support; there is little change in project design but downscale it to a single set of value chain stakeholders

Disadvantages: it is highly unlikely that activities on volume consolidation will be achievable within one cassava growing season: the associations are barely operational and a starch plant/silo owner is unwilling to get committed beyond good faith¹⁹ with growers’ associations; indeed there are precedents of volume consolidation failures (e.g. contract farming²⁰) because of price fluctuations; still interviews showed that a regular supply of cassava of an extended period through either delayed planting or late harvesting is key to maintain competitiveness as do neighbouring countries starch plants. Any project extension under this scenario should consider the maximum timeframe allowed (even under exceptional circumstances – e.g. 18 months).

This scenario is actually feasible on the condition of identifying pre-existing relationships between stakeholders and providing support to strengthen them.

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			EIF	TRAC
Activity 1.1: A working group of cassava	9,630	-	3,197	-
Activity 1.2: An up-to-date Cassava Value Chain study	66,126	-	10,748	(110)
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Project Management	415,802	10,854	167,552	(59,460)
Total	997,026	10,854	610,743	(74,011)

Table 8 – Resource redistribution for ‘demonstration scenario’

4.4 “Focus scenario”

The project team would select key issues to be resolved and inject enough financial resources (hence abandoning some activities like associations, waste water treatment... as required) to target high impact activities directly benefitting key stakeholders and to ensure follow-up of activities; interviews evidenced the stakeholders’ following issues:

- Exporters/traders need to deal with as few as possible suppliers: often, large orders require exporters/traders to contact a multitude of small intermediaries, growers, silo owners in the provinces; this decreases their competitiveness through additional (transport) costs and requires added logistical means; the value chain does not have mechanisms yet for consolidating raw/semi-finished products into large volumes; it is viewed as a key priority for exporters. Volume consolidation is a priority for exporters/large traders.
- Exporters/traders/starch companies face quality issues when trying to consolidate volumes: farmers dry by themselves cassava on dirt land, moisture content is too high; these issues should be addressed as it decreases product quality and final selling price

¹⁹ Interviews showed that linking growers and silo owners/starch plants should be a long-term process from good faith and confidence building measures to full scale input support and contract farming. It is however highly unlikely that formal agreements can be achieved within one or two growing seasons

²⁰ Contract farming has been so far unsuccessful for the following reasons : (i) there has been no product differentiation justifying an above-market price offer from a customer (intermediary/agroprocessor...) through contract farming, (ii) the sector is unregulated / informal, meaning farmers have difficulties in getting linked to a customer if plenty of others propose a higher price ; contract farming inevitably has to be integrated into a national policy that also formalises the cassava market

- Starch companies need to increase their competitiveness: the first priority is to spread out the cassava supply to the processing plants from 3-4 months to at least 6-8 months through delayed farming, late harvesting (with the adapted cassava varieties) and significant larger storage facilities. This will increase the plant usage rate. This requires agreements with growers and Government's support as a facilitator and possibly some infrastructures (dried cassava warehouses) investments. The second priority is to increase competitiveness through reducing the electricity bill by substituting it with biogas production from wastewater residues; biogas use is already under way for some of the few remaining starch plants for heat production but has yet to be tested for generating power. A third priority is for starch companies to be certified to so as to be in agreement with new potential customers (as a strategy to open up new markets).
- Silo owners (and starch companies) need standardised products for further processing; still, there is no procedure for product selection other than visual aspect assessment; as for dried cassava, the humidity rate varies widely; controls are difficult to formalise and upstream quality review (by growers) absent.

Advantages: this scenario is addressing the prime concerns of the value chain stakeholders. It would require discarding some activities and reallocate financial resources to strengthen prime activities' follow-up.

Disadvantages: volume consolidation through the newly formed associations is unlikely to be achieved but for some of them at best; a change of approach is necessary but would go way beyond the project remaining timeframe: 1. cooperate with a large grower/trader (leader of its kind) through informal agreements, 2. Support this grower/trader in aggregating smaller colleagues to increase volume consolidation, 3. Propose additional support (infrastructure, advice) through formalisation of his group (as an open federation, cooperative...); this kind of support can only be considered if Government is following-up after project's end, which is unlikely as it is not leading the project. Furthermore, this support is not specifically targeting high-value products but only helping traders in further exporting through usual channels (raw and dried cassava); targeting finished products exports only (biofuel, starch, innovative products) would truly bring an added value to the sector.

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Project Management	415,802	10,854	167,552	(59,460)
Total	997,026	10,854	610,743	(74,011)

Table 9 – Resource redistribution for 'focus scenario'

4.5 "Innovation scenario"

Most of the above mentioned no-cost extension scenarios focus on supporting traditional raw/semi-finished products; yet, the cassava business environment shows that Cambodia is unlikely to catch up with neighbouring countries in terms of competitiveness for such products unless ground-breaking policies are in place (special trade deals with neighbouring countries, new policy on energy & biofuel, policy on transport costs, policy on subsidies, guaranteed price at farm gate...).

In that context, the project's current strategy to support value chain stakeholders around starch production and volume consolidation is daring but still trying to reverse a trend of decline in domestic starch production.

A more positive approach would be to explore (i) new cassava products on the international market (organic cassava, plastic bags, snacks...), possibly targeting as a first step niche products and (ii) the potential for the domestic market (E10 fuel, agro-food products, alcohol/beer...).

Indeed, to generate and retain value addition in Cambodia would require breaking away from being a supplier of cassava products to neighbouring countries and combining innovative products with new (domestic and international) markets. The private sector is in full expansion with foreign investors topping over 10% of GDP and local entrepreneurs lacking investment resources.

Advantages: this scenario is in full accordance with the logic of the project: explore and develop new market products; this approach would steer away from traditional cassava products to (supposedly) high-value products/markets. This would redistribute all the benefits within Cambodia, albeit the impact might be small in the initial stages.

Disadvantages: it would require substantial project changes with most activities no longer relevant and replaced by others (see Table 10): extensive discussions with MoC and the donor might protract and reduce the implementation period as far as few activities could be covered by extended project's end. This scenario could only be considered if a new intervention to further develop the approach is agreed by all parties.

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			EIF	TRAC
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Activity 1.2: An up-to-date Cassava Value Chain study	66,126	-	10,748	(110)
Activity 1.3: The quality control manual	11,770	-	11,770	-
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Activity 2.4: A survey of environmental risk	40,018	-	11,998	-
Activity 2.5: Sustainable remedial solutions are implemented	52,965	-	52,965	-
Activity 2.6: Three new potential markets have been identified	208,971	-	175,895	-
Activity 2.7: assess potential/demand for new cassava products on the domestic market				
Activity 2.8: assess feasibility of new products manufacturing in Cambodia for export and domestic market				
Activity 2.9: call for proposals to test out new products manufacturing (grant)...				
Project Management	415,802	10,854	167,552	(59,460)
Total	997,026	10,854	610,743	(74,011)

Table 10 – Resource redistribution for 'innovation scenario'

4.6 Which scenario to select?

The choice (or combination) of scenario will likely depend how Government, the donor and UNPD view (i) the contribution of each scenario to the spirit of CEDEP and in particular how they respond to the Trade SWAp, (ii) the likelihood of achievement/impact given the remaining timeframe (12 or 18 months). A timeline/feasibility analysis is proposed under Annex 7 for a 6 months, 12 months and 18 months scenario.

For the sake of simplicity and the absolute need for a national policy on cassava, the ‘institutional scenario’ would be the prime choice for an extended implementation of the cassava component. Nonetheless, it would require agreement on its lack of impact on final beneficiaries and an overall radical change of how it would be implemented: most activities would focus on the preparation of a policy and outcome 2 should be discarded altogether. It would also imply the establishment of strong linkages between UNDP and the Ministries. Unless the actual process is lead at the highest level (MoC Minister/Secretary, Prime Minister Cabinet), it will be very difficult to mobilise civil servants to establish an inter/intra-ministerial dialogue to discuss a future policy. The interviews nonetheless showed a lot of interest within MoC to start such a process within the Ministry itself or in collaboration with MAFF. Furthermore, CAVAC is also supporting MAFF in the establishment of a policy on cassava (production and transformation sides). See Box 1 for an indication of an updated log frame.

<p><u>Result A: private sector able to voice value chain potential and weaknesses</u></p> <p><i>Activities:</i></p> <ul style="list-style-type: none"> (i) supporting working group in identifying cassava weaknesses and potential (in all relevant sectors), (ii) beefing up of ‘working group’ through leadership establishment and subsequent founding of sectoral lobbying group, (iii) strengthening lobbying group’s capacity to interact with Government and the donor community (workshops, presentation of grievances, priority issues/topics to integrate into a policy/development intervention, (iv) national communication campaign to promote the cassava sector (TV, radio on cassava benefits) <p><u>Result B: relevant ministries aware of cassava potential value addition</u></p> <p><i>Activities:</i></p> <ul style="list-style-type: none"> (i) subnational and national workshops at ministerial level (at least MAFF [through CAVAC], MoC) to raise awareness on cassava value chain potential and weaknesses (in collaboration with ‘working group representatives’), (ii) establishment of inter-ministerial ‘working group’ to discuss cassava sector-wide potential and shortcomings (E10, domestic food industry, export, competitiveness issues) and presentation at the highest level of a roadmap to develop an inclusive cassava policy, <p><u>Result C: draft national policy ready for Parliament’s review</u></p> <ul style="list-style-type: none"> (i) support in the formulation of a national policy for cassava (inter-ministerial workgroups, consolidation and draft elaboration [ready for Parliament review]))

Box 1– List of results and activities - ‘institutional scenario’

Alternatively, the “*demonstration scenario*” should be considered as it keeps most activities as they are but reduce the project’s scope and likely impact. The main issue is whether UNDP will have the capacity to implement still a large number of activities within a 12 months’ timeframe, albeit on a small scale. Looking back how the cassava component was implemented, this might be a difficult task and a different implementation approach should be considered (such as straight subcontracting or direct contract with external partners [firms/NGOs]). An indication of the log frame is under Box 2.

Result A: road map produced for initiating inter-ministerial dialogue on a national cassava sector policy

Activities:

- (i) accelerate strengthening of ‘working group’ and turn it into a cassava lobby group,
- (ii) initiate wide-level discussions with MAFF and MoC to formally establish a working group on cassava,
- (iii) Government’ and private sector’s working group have regular meetings resulting in the establishment of a roadmap leading to the drafting of a comprehensive national policy on cassava

Result B: sustainable trading relationship between agro-processor (typically, a starch plant company) and downstream stakeholders through volume consolidation (at least 1 cassava growing season)

Activities:

- (i) establishment of confidence building measures (support to enhance downstream capability to aggregate cassava production) between agro-processor and related downstream stakeholders (silo owner/best functional association/large trader or broker) seeking informal agreement on volume supply (e.g. subsidy test, support on transport capability...),
- (ii) support to agro-processor and downstream stakeholders on increasing quality (if relevant),
- (iii) support the establishment of a formal agreement on volume supply and quality standard resulting in a first standardised delivery (for the next growing season by project’s closure)

Result C: agro-processor’s competitiveness increased in a way to offer premium price to upstream stakeholders

Activities:

- (i) select an agro-processor with (mild) competitiveness issues,
- (ii) identify internal competitiveness issues and prioritize,
- (iii) test for priority no. 1 internal technical solutions on a small case / for single (or limited) orders¹ (e.g. mini biogas, increased storage capacity for dried cassava...),
- (iv) support agro-processor in attracting larger-scale investments to finance most relevant technical solutions

Result D: traders and related stakeholders have opened up a new market for cassava-related products

Activities:

- (i) support to exporters to be export-ready through export manual production and dissemination,
- (ii) exporters invited to trade missions and fairs,
- (iii) potential buyers invited in Cambodia to assess offer potential,
- (iv) communication campaign to promote the sector at domestic and international levels to increase its attractiveness

Box 2– List of results and activities - ‘demonstration scenario’

Finally, the ‘innovation scenario’ might be the boldest one but it is also possibly the most relevant one for responding to a cassava sector in crisis. It would require extensive discussions between all stakeholders and could be considered an entire project reformulation process, hence possibly unacceptable to EIF unless a follow-up is being considered. Box 3 shows an indicative log frame under this scenario.

<p><u>Result A: road map produced for initiating inter-ministerial dialogue on a national cassava sector policy</u></p> <p><i>Activities:</i></p> <ul style="list-style-type: none"> (i) accelerate strengthening of ‘working group’ and turn it into a cassava lobby group, (ii) initiate wide-level discussions with MAFF and MoC to formally establish a working group on cassava, (iii) Government’ and private sector’s working group have regular meetings resulting in the establishment of a roadmap leading to the drafting of a comprehensive national policy on cassava <p><u>Result B: private sector aware of innovative cassava products and investment potential</u></p> <p><i>Activities:</i></p> <ul style="list-style-type: none"> (i) market study on domestic and export of innovative/high value/‘niche’ cassava products, (ii) dissemination to Government and ‘working group’ members (both at national and subnational levels) <p><u>Result C: testing of cassava innovative product development, transformation, commercialisation, exporting</u></p> <p><i>Activities:</i></p> <ul style="list-style-type: none"> (i) call for proposals (small grants) for innovative cassava related activity (new product development, new market penetration) benefiting PPP, University and processing plant... (ii) support in seeking private sector investments if successful, (iii) dissemination of grants’ results and of lessons learned to Government and the donor community.

Box 3– List of results and activities - ‘innovation scenario’

4.7 Change the implementation approach

Results delivery has been very slow and incomplete for this project: on one side, the changing conditions of the cassava sector rightfully resulted in the questioning of many project activities and in particular how to achieve the results and reach the initial objective. Many activities have been put on hold because of this.

UNDP has to review its implementation approach for faster and more efficient project delivery considering:

- (i) subcontracting through a couple of contracts with specialised entities (firms, NGOs) to fast-track activities’ delivery and/or
- (ii) revisit its relationship with MoC (possibly MAFF as well) through more inclusivity in (operational) decision making processes (e.g. project team located in MoC, MoC no-objection procedure for implementation) to generate project ownership and subsequent empowerment through the establishment of MoC or MAFF-led cassava groups to discuss value chain issues.

This might be the best option as additional Government support will be necessary, in any case, to pursue the original project objectives including policy design.

4.8 Better clarify an exit strategy

Whichever scenario is selected, the project should ensure that its exit strategy is based on the following principles:

- Build stakeholders' capacity to ensure beneficiaries' support,
- Design at a minimum a roadmap for a cassava policy formulation through the formal working group and by involving Government institutions,
- Ensure knowledge transmission and remanence for relevant (institutional and final) beneficiaries
- Keep networking lead stakeholders (government, donors and project beneficiaries) to ensure continued cooperation

As for the *institutional scenario*, the exit strategy would be to support (i) the cassava value chain stakeholders 'working group' until it becomes a lobby for cassava promotion and (ii) Government until an formal working group is set to discuss sector issues and formulate a comprehensive draft national policy on cassava.

An exit strategy for the *demonstration scenario* version is to ensure that value chain stakeholders become autonomous to:

- (i) build and nurture a mutually positive relationship between the selected agro-processor and downstream stakeholders (silo owner or growers' association...) through volume consolidation – preferably on an official basis -,
- (ii) seek investments to implement on a larger scale technical solutions tested under the project and
- (iii) export directly at least demonstration products to identified new markets' customers. A Government's formal working group is operational to further discuss the roadmap in order to formulate a national cassava policy.

Finally, under the *innovation scenario*, the project team should ensure that, at least, selected innovative products have been tested by relevant stakeholders for feasibility, (domestic or export) marketing capacity and competitiveness in relation to more traditional cassava products.

Whichever scenario is selected will result in the production of knowledge on the cassava sector (as was done in the past for other cassava interventions) ; however, there is no permanent structure within the country where this knowledge can be stored: this is most evident when looking back at the actual impact of the previous projects and programmes on cassava: information is spread out between ministries, universities and donors and it is very difficult for specialised expertise in the country to take advantage of the numerous lessons learned from previous interventions since the information is not centralised; in that context, the project should initiate a process to aggregate knowledge on cassava through supporting the establishment of a think-tank on cassava (e.g. to be included in the national cassava policy), hence convening key experts in this structure. On a more long-term basis, Government could support the establishment of a formal working group for cassava under the G-PSF, then a centre of expertise, then a research institute on cassava.

Initially, it could be a merger of the cassava value chain stakeholders working group currently supported by the project with several key technical experts from universities and Government although additional donor support might be a requirement for its existence. The objective would be to (i) analyse the cassava sector (price/production trends, market information), (ii) advise donors and Government on the most relevant interventions in the sector, (iii) sensitise both (?) the Government and general public on cassava production (farmers)/processing (entrepreneurs) opportunities, (iv) identify and support the testing of technical solutions (e.g. for agro-processing).

5 Lessons learned

The review of the cassava component of CEDEP – including stakeholders’ feedback - has shown the following:

- Value chain sector support should not be limited to the production of studies and organisations of workshops: this is a first step that has to be followed-up with additional financial resources to make sure that key recommendations are actually being implemented.
- The private sector for cassava is very independent and less prone to cooperate with Government when investments are at stake; they lack intelligence in terms of marketing strategies and markets opportunities but once commercial openings are evidenced to them, they will be swift to react; while the domestic market was not on top of this project’s agenda, it would be worth exploring in the future (beverages in particular) given the ongoing dynamics of investments and business creation in Cambodia for the moment.
- With the above view in mind and the actual activities planned at formulation stage, the cassava component of CEDEP II has been very much underfunded; the assumption was that effective Core Team members relaying relevant information to committed Government staff would somehow follow-up project results.
- There is a lot of inertia to demand accelerated project review when external conditions make the implementation more difficult up to the point when activities’ relevance is questioned²¹. This is most troublesome when several annual reports have been clearly identifying these issues (see as well 2.1.6). Despite strong signals sent by the project team that rightfully identified key shortcomings of the project to the Steering Committee, the actual process to question the relevance of activities, review the project’s strategy and eventually take a decision was very slow, culminating in this evaluation (by official project’s closure date). An improved governance system should be sought – at least - by involving more Government in the daily implementation of activities and/or through another system of emergency meetings at steering committee level called upon by the project team.
- In technical terms, the project strategy to include all stakeholders has been highly relevant although financial resources could not follow up with all the issues at stake (which is why a pilot project – demonstrating proof of concept – might have also been a relevant project strategy given the limited funds available [< 1 million \$]).
- As a sector characterised by its informality, sector structuring through the establishment of formal associations through a Ministry might not be the best approach; growers, in particular, lack entrepreneurial spirit and interviews have shown the lack of understanding of such organisation, its purpose and added value. As such, more careful analysis how the sector is operating (its ‘culture’) is necessary to ensure that the right institutional mechanism is in place and accepted by the sector beneficiaries (see 2.4.1 and ‘logical framework analysis’): an alternative strategy to achieving sectoral structuring through associations could be to support champions first, then aggregated partners and finally turning these loose groups into formal associations through conditional support.

²¹ (i) Steering Committee of late 2015 requiring an updated workplan due to price drops on the global market (China corn release), (ii) mid-2016 agreement on a revision of the project strategy, (iii) most activities on hold until this evaluation in early 2017

6 List of Annexes

ANNEX 1: TERMS OF REFERENCE	51
ANNEX 2: TIMETABLE OF THE MISSION AND SITES VISITED	58
ANNEX 3: DEBRIEFING PPT PRESENTATION	60
ANNEX 4: LIST OF PEOPLE MET	72
ANNEX 5: LIST OF DOCUMENTS CONSULTED	74
ANNEX 6: CHECKLIST OF ISSUES TO INVESTIGATE.....	75
ANNEX 7: FEASIBILITY / TIMELINE IN CASE OF PROJECT EXTENSION.....	77
ANNEX 8: BRIEF DESCRIPTION OF CONSULTANT’S EXPERTISE.....	83

7 List of tables

<i>Table 1 - MTR schedule</i>	<i>14</i>
<i>Table 2 – Program chronology.....</i>	<i>16</i>
<i>Table 3 – SMART analysis of the logical framework</i>	<i>20</i>
<i>Table 4 – Donors’ financial commitment and level of utilisation</i>	<i>21</i>
<i>Table 5 – Cassava component financial delivery.....</i>	<i>28</i>
<i>Table 6 – Resource redistribution for ‘institutional scenario’</i>	<i>38</i>
<i>Table 7 – Resource redistribution for ‘business as usual scenario’</i>	<i>39</i>
<i>Table 8 – Resource redistribution for ‘demonstration scenario’</i>	<i>40</i>
<i>Table 9 – Resource redistribution for ‘focus scenario’</i>	<i>41</i>
<i>Table 10 – Resource redistribution for ‘innovation scenario’</i>	<i>42</i>

8 List of boxes

<i>Box 1– List of results and activities - ‘institutional scenario’</i>	<i>43</i>
<i>Box 2– List of results and activities - ‘demonstration scenario’</i>	<i>44</i>
<i>Box 3– List of results and activities - ‘innovation scenario’</i>	<i>45</i>

9 List of figures

<i>Figure 1: Mid-term review framework</i>	<i>14</i>
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10 List of annexes

ANNEX 1: TERMS OF REFERENCE	51
ANNEX 2: TIMETABLE OF THE MISSION AND SITES VISITED	58
ANNEX 3: DEBRIEFING PPT PRESENTATION	60
ANNEX 4: LIST OF PEOPLE MET	72
ANNEX 5: LIST OF DOCUMENTS CONSULTED	74

ANNEX 6: CHECKLIST OF ISSUES TO INVESTIGATE..... 75
ANNEX 7: FEASIBILITY / TIMELINE IN CASE OF PROJECT EXTENSION..... 77
ANNEX 8: BRIEF DESCRIPTION OF CONSULTANT’S EXPERTISE..... 83

ANNEX 1: TERMS OF REFERENCE

TERMS OF REFERENCE Individual Contractor

1. Assignment Information

Assignment Title:	Midterm Evaluation Consultant
UNDP Practice Area:	Poverty
Cluster/Project:	Poverty Reduction/ Cambodia Export Development and Expansion Programme II (CEDEP II) – Cassava Component
Post Level:	Senior Specialist
Contract Type:	Individual Contractor (IC)
Duty Station:	Home/Phnom Penh
Expected Place of Travel:	Four provinces of Cambodia
Contract Duration:	22 days, 10 days in Cambodia

2. Project Description

Poverty reduction and growth are the highest priorities of the Government. The Rectangular Strategy Phase III reaffirms government's commitment to prioritise policies and investment in support of agriculture; infrastructure; private sector development and employment; and human resources development. The global economic crisis and the rise in food and fuel prices have led the RGC to adopt a dual approach. This aims to increase national competitiveness and diversify the economy and to expand the social protection and safety nets¹

The government has identified agriculture as the top priority for Cambodia's socio-economic development, focusing on increasing productivity and diversifying within this sector. This is clearly reflected in the Rectangular Strategy III and the NSDP IV both covering the period 2014-2018. Similarly, the Cambodia Trade Integration Strategy 2014-2018 (CTIS 2014-2018) stresses the need for Cambodia to strengthen and accelerate the diversification of its export base above and beyond its original, two core export sectors – garments and tourism. To support this major strategic orientation, CTIS identifies: (1) 10 product and service export potentials for export development focus (including cassava) (2) “cross-cutting” reforms and institutional developments required to unleash growth in those potential exports; and, (3) capacity developments in areas of trade policy and Aid for Trade management. The strategy was endorsed by the Sub-Steering Committee on Trade and Trade-Related Investment in December 2013 (the Committee serves as National Steering Committee for all Aid for Trade in Cambodia) and launched officially by H.E. Prime Minister Hun Sen in February 2014

This is also in line with the results of the country's Trade Policy Review undertaken in 2011 in partnership with the World Trade Organization (WTO) that calls for Cambodia to move away from its dependency on garment and rice and urges to diversify and expand the country's export basis.

Cassava is the second largest agricultural crop in Cambodia and growing rapidly. Statistics from the Ministry of Agriculture, Forestry and Fisheries (MAFF) indicates production of nearly 4.250 million MT in 2010, up from 3.5 million MT in 2009. MAFF sources estimate that 2013 production reached almost 8 million MT. The fast-growing importance of the sector for export diversification and export revenues cannot be underestimated. Additionally, the sector might have been generating anywhere between \$300 to \$400 million worth of “informal” export revenues in 2013. Even though Cassava has become the second largest agricultural crop in term or income,

employment, hectares cultivated, and exports (more on this in the next section), there is very little technical assistance support provided to the sector.

The Ministry of Commerce and UNDP Cambodia have partnered since 2008 to tackle the above challenges and provide know-how and best practices to Cambodia's cassava sector. One key instrument developed under this cooperation was a Value Chain Analysis of the cassava sector carried out in 2009. Five years later, increased investment in the sector coupled with interests from new buyers (in particular from China) for raw and processed cassava products meant that Cambodia's cassava value chain is changing deeply. As a result, UNDP wishes to update the existing Value Chain study as a tool to assess where support provided through the CEDEP II project could be best used.

UNDP, in its CPAP, has vowed to support the above goals of economic diversification and poverty reduction and in particular the human capital development and competitiveness issues. Similarly, at the request of the Government, UNDP has decided to re-engage deeply in the trade sector, trade being an engine for economic growth, through the creation of a dedicated project within UNDP

The Cassava component will contribute directly to:

- UNDAF outcome on “promotion of equitable, green, diversified economic growth”
- CPAP Outcome #1 on Poverty Reduction: strengthening national and sub-national capacities to develop a more diversified, sustainable and equitable economy.
- CPAP Output #1.1: supporting human capital development and institutional capacity for selected sectors of importance for the diversification of the economy.
- CPAP Outcome #2: enabling national and local authorities, communities and the private.

CEDEP II has been implemented since 2014 and by its timeframe will end by April 2017. For two years, the project completed some of its main outputs such as the identification of project beneficiaries, the study on cassava value chain, and the creation of local business associations at key cassava production areas and export routes along the borders within target provinces. The project supported the creation of a cassava working group which is initiated by development partners and private sector, cassava associations to address cross-border issues and the linkage between a starch processor and farmers. The project is currently conducting a survey on environmental impacts causing from cassava production and processing and will support exporters/processors to implement low-cost solutions if the negative impacts need to be addressed.

Moving forward, the project is going to conduct a market assessment study to identify potential markets for Cambodia's cassava-based products. Based on the market assessment, the project will build the capacity of the exporters and processors on various aspects such as SPS, quality control management, export procedure etc. and make their export ready. The project will also organise trade missions to at least three target markets to build a relationship or do business matching between Cambodian exporters/processors and buyers. Through the technical working group and cassava associations, the project will support to address issues faced by them in implementing sale contracts or exporting their products to markets.

Currently, the project is challenged by the growth of cassava production in the South-east Asian region and the market force which is driven by a single buyer. All these dynamics creates a new landscape of cassava production in Cambodia. Its planting areas have expanded not only along the border areas but also inner parts of the country where lands are available through economic land concession and deforestation. Unfortunately, the growth of cassava production does not lead to the streamlining of processing industries and the domestic use of cassava. Indeed, the increase of the cassava production is to supply world markets indirectly through the neighbouring countries since their production could not increase due to their limited planting areas.

Various factors have affected the project's export promotion goals. The price drop to USD 50-55 per tonne of fresh root took away profit margin of all players within value chains. More seriously, some farmers lost profit and did not get a break even because of the rising production cost and low yield causing from climate change. Some of them shifted to grow other cash crops which are expected to provide more profit so the sector could scale down to some extent. While the price has dropped, the costs relating to export remains the same, the direct export provides small profit margins which are not satisfied by all players. The export-related costs in Cambodia are higher than its neighbouring countries so the effort to promote the direct export of cassava from certain areas in this circumstance may not be possible and result in value loss as much value taken by transportation cost.

Based on the price outlook, expected downside of the cassava sector, and uncertain market trend, the project needs to consider and reflect the relevance of its design and the effectiveness of its approaches to achieve the expected results with the available time and resources.

3. Scope of Work

The Mid-Term Review aims to assess review and assess the project progress against its log frame and indicators, and explore root causes impeding the project implementation. As the sector growth through the production increase, the influence of the neighbouring countries' trade system, and the dynamic of global markets, it also needs to review the project design and interventions to ensure that it is on the right track to achieve its expected results.

More specifically, the objectives of the Mid-Term are to:

- Assess the project progress against the logical log frame, work-plan and budget, and its contribution to the achievement of the project's impacts, outcomes, and outputs;
- Provide comprehensive analysis on the areas which the project needs to improve in order to achieve its expected results putting sustainability aspect in perspective;
- Assess the relevance and feasibility of the project document including scope, strategy, logical log frame, resource, risk, and project management arrangement against the current sector dynamic and market trend;
- Provide recommendation on how the project can effectively move to reach out its target output and result within the project timeframe to meet stakeholders' needs and current situation of the cassava sector for the effective project implementation and achievement of the expected results
- Together with the recommendation, provide the suggestion on how the project can ensure the sustainability of its interventions, and provide recommendation on the framework and plan moving forward.

In line with the above objectives, the scope of the assignment will cover:

- 1) Review the project progress and assess the quality of the outputs produced by the project from 2014 to 2016;
- 2) Analyse the extent to which the delivery of the project outputs has contributed to the achievement of the project's expected results as stated in its logical framework;

- 3) Assess whether the project has built synergy with other projects or stakeholders to address sectoral issues and strengthen cassava value chains as stated in Cambodia's Diagnostic Trade Integration Strategy and the Trade SWAp Roadmap-Outcome 13: Cassava;
- 4) Review and assess whether the project uses proper strategic approaches that will enhance national ownership, hence contributes to capacity building to the national counterparts and the private sector.
- 5) Review and analyse whether the project allocated the resources properly toward delivering the project development results;
- 6) Assess whether the project allows being flexible in moving in the right direction to bring the expected results;
- 7) Gather lessons learned from the two-year project implementation and identify areas for improvement
- 8) Analyse the current sector dynamic and market trend, and how they affect the project implementation and the attainment of the project's expected results;
- 9) Based on the analysis and lessons learned above, assess whether the project design document including the project's logical framework, scope, strategy, risk, and project management arrangement is still relevant and effective to achieve the expected results with the available resource;
- 10) Provide proposed changes in the project design and ways forwards for the project implementation putting in perspective the sustainability dimension;
- 11) Present and validate findings with UNDP management, Donors and Stakeholders and as directed by UNDP's project team update the project design document;
- 12) Produce a precise justification note to inform the project's donor and stakeholders about the proposed changes and update of the project design document.

4. Expected Outputs and Deliverables

N	Deliverables/Outputs	Estimated Duration to Complete	Target Due Dates	Review and Approvals Required
1	Assignment proposal with the details of rational, objectives, methodologies, key informants, work-plan and data collection tools is approved by UNDP.	3 days	2 nd week of December 2016	Reviewed by Programme management specialist/Programme analyst/approved by ACD/Team leader
2	The draft Mid-Term Review Report is completed and satisfied by UNDP.	14 days	2 nd week of January 2017	
3	The final Mid-Term Review Report is validated with stakeholders and the comments are fully addressed which is satisfied by UNDP.	5 days	4 th week of January 2017	
Total # of Days:		22 days		

While the number of days allocated for each output is fixed, the tentative schedule of the each of the outputs above can be slightly adjusted once the consultant is on board based on the consultation with UNDP project team.

5. Institutional Arrangement

Under the overall direct supervision of the ACD/Programme Team Leader, oversight of Programme analyst and direct guidance from National Project Management specialist, the consultant will be responsible for delivering the outputs stated above with the level of quality expected.

Role of the consultant

- The consultant is responsible to provide his/her technical expertise to produce the expected outputs;
- The consultant shall cover all the related cost for his mission to Cambodia. The field work to the province will be covered by the project;
- The consultant shall work under the assigned focal person from UNDP project team, National Project Management Specialist;
- The consultant needs to maintain daily communication with the UNDP project focal person as and when problems emerge during the consultancy period, especially if they affect the scope of the job.

Role of UNDP focal person/team

- The UNDP programme unit will provide overall quality assurance for this consultancy;
- The UNDP programme unit will review deliverables for payment release;
- UNDP focal person, National Project Management Specialist, will act as the focal person to interact with the consultant to facilitate the assignment, to facilitate the review of each outputs and ensure the timely generation of the comment from stakeholder on each output.

6. Payment Milestones

The consultant will be paid on a lump sum basis under the following instalments.

N	Outputs/Deliveries	Payment Schedule	Payment Amount
1	Upon satisfactory completion of the assignment proposal including rational, objectives, methodologies, key informants, work-plan and data collection tools.	2nd week of December 2016	20%
2	Upon satisfactory completion of the draft Mid-Term Review Report.	2 nd week of Jan 2017	40%
3	Upon satisfactory completion of the final Mid-Term Review Report which is validated with stakeholders and the comments are fully addressed.	1 st week of Feb 2017	40%

7. Duration of the Work

The consultant will work for 20 working days from December 2016 to February 2017. The consultant is expected to be on board in the 2nd week of December 2016 and complete the assignment no later than the 2nd week of Feb 2017.

8. Duty Station

This assignment is home-based and required the consultant to travel to Cambodia two times. The initial proposed mission schedule is as the following:

- 1st mission: around 2nd week of December 2016. To have a first round of stakeholder meeting to kick start the assignment. Benefitting from this first mission, the province might be as well needed. The expect duration in the country is 7 working days;

- 2nd mission: around 2nd week of January, to present the preliminary draft of report to stakeholder.
Expect to be in the country (Phnom Penh city) for 3 working days.

The above mission plan (number of mission and timeframe) could be further discussed and could be adjusted as based on the discussion between the consultant and the project focal person, National Project Management Specialist, to be validated by the programme Analyst and/or head of programme

The consultant should submit financial proposal covering the profession fee, cost incurred when she/he is in Cambodia. The cost related to field visit (4 provinces – Kampong Cham, Battambang, Pailin, Tbong Khmom) will be fully covered by the project.

9. Minimum Qualifications of the Individual Contractor

Education:	<ul style="list-style-type: none"> ▪ At least Master Degree in International Business, Business Administration and Trade, or other related field
Experience:	<ul style="list-style-type: none"> ▪ At least 7 years of substantial knowledge and experience in conducting development projects midterm review; ▪ Proven work experience in conducting the analysis the complexity of the relationship between trade and supply chain in Asia is a strong asset; ▪ Proven specific experience in evaluating similar project related to export of agro commodity trade in Asia region, particularly Cambodia; ▪ Proven working experience with international agencies and programs, preferable with UN agencies in the areas of project management, project design and M & E.
Other Competency	<ul style="list-style-type: none"> ▪ Time management (in managing deliverables) ▪ Team management ▪ Professionalism, courtesy, patience ▪ Outstanding inter-cultural communication, networking and coordination skills
Language Requirement:	<ul style="list-style-type: none"> ▪ Excellent written and oral English; knowledge of Khmer is an asset
Other Requirements (if any):	

10. Criteria for Evaluation of Level of Technical Compliance of Individual Contractor

Technical Evaluation Criteria	Obtainable Score
At least 7 years of substantial knowledge and experience in conducting development projects midterm review	35
Proven work experience in conducting the analysis the complexity of the relationship between trade and supply chain in Asia is a strong asset	20
Proven specific experience in evaluating similar project related to export of agro commodity trade in Asia region, particularly Cambodia	35
Proven working experience with international agencies and programs, preferable with UN agencies in the areas of project management, project design and M & E	10
Total Obtainable Score:	100

ANNEX 2: TIMETABLE OF THE MISSION AND SITES VISITED

Date	Time	Stakeholder	Organisation	Place	Name
WE 08/2	AM	UNDP Team	UNDP	Phnom Penh	Mr. Reathmana Leang, Programme Manager
	PM	UNDP Team	UNDP	Phnom Penh	Mr. Reathmana Leang, Programme Manager
TH 09/2	14:00	Dpt of International Trade (MoC) EIF Focal Point	MoC	Phnom Penh	Mr. Long Kemvichet Mr. Thou Pagna Mr. Bun Vuthy
FR 10/2	07:30 – 08:30	Swisscontact – cassava Working Group	Swisscontact	Phnom Penh	Mr. Rajiv Pradhan, Country Director
	09:00 – 10:00	Dpt of Trade Policies	MoC	Phnom Penh	Mr. Kith Pheara, Director
	10:30 – 13:00	Advanced Glory Logistic Co Ltd (cooperation with a Chinese export firm)	UNDP	Phnom Penh	Mr. Siek Hun
	15:00 – 16:00	Plant Protection & Phytosanitary Dpt (MAFF)	MAFF	Phnom Penh	Mr. Iv Phirun, Director
	17:00 – 18:00	CAVAC project	CAVAC	Phnom Penh	Mr. Pieter Ypma, Director
SU 12/2	06:30 – 13:00	Travel to Battambang			
	13:00-15:00	Sampovlun Cassava Association director (Sampovlun) and members/farmers		Battambang	Mr. Ni Kan, Director Ms. Un Yeng, Finance Officer Mr. Khlot Chhengy, Secretary Ms. Mek Sophy, Member Mr. Muy Chantha, Member
MO 13/2	08:00-09:30	Provincial Department of Agriculture		Pailin	Mr. Phat, Director
	10:30-12:00	Provincial Department of Commerce		Pailin/Town	Mr. Sok Sathim, Director Mr. Van Hour, Deputy Director Mr. Chhoeun Chhin, Deputy Director Mr. Chheng Intra Chhay, Official
	13:00 -14:30	Sala Krov Cassava Association		Pailin	Mr. Lor Sunchheang, President
	15:00-16:30	Silo Je Thorn		Pailin	Mrs. Je Thorn, Head
TU 14/2	06:30 – 13:00	Travel from Battambang to Phnom Penh			
	14:00 – 15:00	Department of Private Sector Development	MoC	Phnom Penh	H.E Mao Thora Mr. Komare
	15:30 – 17:00	Trade Training and Research Institute (MoC)	TTRI	Phnom Penh	Mr. Suon Vichea, Director
WE 15/2	10:00 - 11:00	IFC	IFC	Phnom Penh	Mr. Brozemuller
	10:30 - 11:30	Battambang Agro Industry (Starch)		BAI office, PHN	Mr. David Prak 012 696 000
	8:30 - 09:30	Cambodia Cassava Company	(lunch)	In Phnom Penh	Mr. Yoni Issahari
	15:00 - 18:00	Travel from Phnom Penh to Kampong Cham Province			
TH 16/2	7:00 - 09:30	Travel from Kampong Cham to Memot			
	10:00 - 11:30	TTY Co Ltd (starch)		Memot	
	10:30-11:30	Kim Heng Starch		In Phnom Penh	Mr. Kim Heng
	13:00 - 15:00	♀ Cassava farmer		Nearby Kampong Cham	
	16:00 - 19:00	Travel back to Phnom Penh			

FR 17/2	07:45 - 08:30	Contract farming expert	(café)	Phnom Penh	Mr. Jean Marie Brunckh, Project Management Advisor - IRAM
	09:00 – 10:30	National Logistics Council	MoPWT	Phnom Penh	Mr. Pich Chhieng, Director General
	11:00 – 13:00	Bioethanol company	Bio-Energy plant	Near Phnom Penh	Mr. Son Gook Hee, General Manager – Bio-Energy
	14:00 – 15:00	Ne ang Pov Export Co Ltd	UNDP	Phnom Penh	Mr. Chan Tona, Manager
	15:30 – 16:30	UNDP programme officer	UNDP	Phnom Penh	Mr. Reathmana Leang, Programme Manager
	17:00 – 18:00	Emerging Markets Asia	EMS	Phnom Penh	Mr. David Totter, Manager Mr. Matt van Roosmalen, Manager
SA 18/2	09:00 – 10:30	Cambodian Rice Federation	(café)	In Phnom Penh	Mr. Lun Yeng, Secretariat General
SU 19/2	AM/PM	Debriefing preparation			
MO 20/2	9:00 – 10:30	Agro-industry Dpt	MAFF	Phnom Penh	Mr. Yi Bunhak, Director
	11:00 – 13:00	Debriefing	UNDP	Phnom Penh	Mr. Reathmana Leang, Programme Manager
WE 08/3		Enhanced Integrated Framework		Bangkok	
TH 11/5	14:00 – 17:00	Validation workshop	Phnom Penh Hotel	Phnom Penh	Mr. Khit Oddom Sidara, Office Deputy Chief, MoC Mr. Men Sarom, Vice Rector, Royal University of Agriculture Mrs. Norng Ratana, Programme Analyst, UNDP Mr. Chheum Sopheap, Office Chief, MoC/PSD Mr. Bun Vuthy, M&E Consultant CEDEP II, DICO/MoC Mr. Sieng Komira, Office Deputy Chief, PQD/MoC Mr. Buth Vitou, Executive Assistant, TTY Company Mr. Heng Sarath, Deputy General Manager, TTY Company Mr. Sok Moniroth, Consultant Mr. Ek Sunsokha, CO, Long & Sokha Company Mr. Toeng Chanty, Officer, TTRI Mr. Suon Vichea, Director, TTRI Mr. Chheng Ou, Component Leader, Swisscontact Mr. Yi Bunhak, Deputy Director, Dpt. of Agroindustry, MAFF Mr. Prak Cheatho, DDG, GDA/MAFF Mr. Thou Panha, MNPM/DICO, DICO/MoC Mr. Sin Kang, NPC, UNIDO Mr. Leang Reathmana, National Management Specialist, UNDP Mr. Sun Seng, Project Assistant, UNDP

ANNEX 3: DEBRIEFING PPT PRESENTATION

Mid-Term Review of the "CEDEP II – cassava component" programme

19/02/2017

Debriefing

Introduction

► MTR objectives:

- Review programme achievements against initial objectives
 - Assess performance of main stakeholders & implementation gaps
 - On-the-ground verification of project's results
 - Recommendations for further support & lessons learned
- Evaluation criteria (relevance, efficiency, effectiveness, impact, sustainability)

15/12/2016

Methodological approach

- **Data / info collection / documentary review**
 - Background info & organizational structure
 - Project timing & delivery, budget allocation
 - CDR / project finance
- **Consultations & meetings**
 - UNDP team
 - MoC/MAFF
 - Selected Ministries
 - Range of cassava stakeholders
 - On-site final/potential beneficiaries
- **In-situ review of achievements / assets**
- **Analysis of findings → recommendations**

Preliminary findings Initial design

- **Design & formulation:**

Follow-up of CEDEP I

Duration 3 Y from 2013 – 2015

+++ SMART indicators + detailed/comprehensive risks log

Risks: Gov/private sector dialogue difficult, (Apex) associations not established, negative natural/unsustainable effects, SPS standards, losing tariff preferences

Assumption: continued boom of cassava sector with favourable export prospects (price)

→ many risks occurring, assumption not met

-- no involvement of MAFF (Dpt of Agro-Industry)

Implementation by UNDP with steering committee/core team

M&E unit in DICO

National ownership through core team, steering committee

Preliminary findings Project relevance

- In line with Gov policy & strategy: Trade-SWAP (2014-18)
- --- Lack of national strategy on cassava !
- --- Little ownership though UN agency
- +++ Focus on private sector

Rating: Relevant

Preliminary findings Project finance / efficiency

- Planned implementation: 2013 2014 215
- Actual implementation: early 2014 → early 2017 (36 months)
- → +/- 15 months late
- Delivery by 01/2017:
 - Total: approx. (<45%) in 33 months
 - >55% to commit in 3 months → major implementation issues
 - Not possible to deliver with current implementation pace (even with a 12 months extension)
- Management structure:
 - UNDP isolated / little interaction with MoC / MAFF for implementation due to the multisectoral nature of TRADE-SWAp
 - Ineffective core team relay for ownership/empowerment of results → lack of MoC leadership in cassava component

Total budget: 1M\$
2014: 34.000 / 71.000 (48%)
2015: 160.000 / 420.000 (38%)
2016: 207.000 / 394.000 (53%)
2017: ? / 133.000 (?)

06/03/2017

Preliminary findings Project effectiveness

OUTCOME 1 – cassava export needs understood / better policy dialogue

OP1.1: cassava processors / collectors organised

- Several meetings of working group completed
- Activity initiated very late (effectively by mid-2016)
- No Gov supervision / support to relay concerns

OP1.2: value chain analysis prepared

- Completed
- Little impact : divulgation workshop but no follow-up

OP1.3: ICS standards updated / quality manual

- Not yet implemented; in balance with other activities

OP1.4: manual on export procedures

Not yet implemented; review of actual contents in view of potential new activities

06/03/2017

Preliminary findings Project effectiveness

OUTCOME 1 – cassava export needs understood/better policy dialogue

OP1.5: cassava associations established

- Associations established but not functional
- → inappropriate approach (top → bottom)
- Need to review: based on leadership and subsequent copy/paste effect for membership

OP1.6: dialogue mechanism Gov/private sector in place

- No evidence as output 1.1 not effective

06/03/2017

Preliminary findings Project effectiveness

OUTCOME 2 – cassava processors export-ready

OP2.1: processors / collectors identified

- Done but issue of relevance

OP2.2: SPS needs survey of above done

- No evidence

OP2.3: SPS plan implemented

- Not done

OP2.4: Envir risks & mitigation needs developed for above

- Study done / report not accepted

06/03/2017

Preliminary findings Project effectiveness

OUTCOME 2 – cassava processors export-ready

OP2.5: low-costs solution to address negative envir. issues

- Not yet done

OP2.6: 3 potential markets identified by export-ready stakeholders

- Not yet done // possibly 1 sector: starch

06/03/2017

Preliminary findings

Potential impact

11

Project overcome by un-favourable cassava export prospects
Little impact as initially contemplated if no support to address other sector issues

Competitiveness issues in a depressed sector (// Vietnam / Cambodia):

- transport costs
- energy costs
- low world-wide price → cassava sector no longer competitive

Ex: starch/ethanol companies (nearly) closing/ closed since project start-up / not competitive with Vietnam / Thailand

Ex: producer sector in debt (poor Gov support [declining yields, un-adapted varieties, disease])

Ex: uncompetitive exporters despite demand (disorganised sector < organised sector in Thailand / Vietnam)

06/08/2017

Preliminary findings

Potential sustainability

12

Support to traditional cassava product value chains unlikely to be sustainable (& create wealth for stakeholders) in a depressing price environment

→ Agricultural diversification needed to reduce overproduction

Current project neither supporting competitiveness nor need for comprehensive support of the sector

06/03/2017

Recommendations

13

How to address the sector weaknesses

Principle: need for a holistic approach (production, transformation, commercialisation / export) in sector support: organised sector to withstand pricing shocks

1. Need for a comprehensive national Gov policy on cassava
 - MAFF: production & agro-processing
 - MoC: export/trading/SMEs
 - MoEnergy: electricity costs : E5 ethanol/gasoline
 - MoE: address pollution issues of transformation (biogas)
 - MoPWT: transport costs
 - Issues of border controls / corruption (lack of enabling environment Min Interior/Dpt corruption?)
2. Diversification / specialisation in innovative products
3. Take advantage of Cambodia's comparative advantages: export trade preferences, low cost production (for sustainable production)

06/03/2017

Recommendations

14

Accelerating implementation:

- New mechanism MoC / UNDP: Improved coordination
- Subcontract activities (NGO, Ministries)
- Need for 1. activities delivering, 2. activities follow-up by stakeholders, MoC, UNDP (for additional support/increasing impact & enhancing sustainability) → plan of action involving <> stakeholders

→ What to do during a 12 months extension

- Scenario 1: finalise planned activities
- Scenario 2: increase competitiveness of the sector
- Scenario 3: support/focus on 1 potential value chain from production to export
- Scenario 4: look for cassava diversification (domestic & export market)
- Scenario 5 : support Gov in developing a national cassava policy framework

06/03/2017

Recommendations

25

- **Scenario 1: finalise planned activities**
 - Advantages: addressing sector gaps (need to refocus as per stakeholders' key issues); easiest to implement if relying on subcontracting
 - Disadvantages: fundamentally not addressing competitiveness weaknesses of the sector, disorganised sector / overproduction; little added value addition; limited impact in a depressed price enviro / if downward pricing continuing
- **Scenario 2: increase competitiveness of the sector** (energy, transport, production)
 - Advantages: absolute necessity for export
 - Disadvantages: unlikely to be finalised in 1 year; lack of linkages with required key involved ministries; lack of Gov policy; majority of measures outside the scope of the project (ex. need for Min Energy, MAFF support)

06/03/2017

Recommendations

26

- **Scenario 3: support/focus on 1 potential value chain from production to export** (starch)

Focus on: new approach to associations, 1-2 export market (e.g. EU), accompany exporters to be ready

Upstream approach from exporter to producer

 1. readiness for buyers (ex. HACCP, Halal) (**priority 3**)
 2. address energy issue (biogas) (financing) (**priority 2**)
 3. address plant low productivity through production consolidation (linking farmer/silo owner to agro-processing → harvesting spreading-out (**priority 1**), MAFF support on productivity (**priority 4**); contract farming ("national Coordination Committee for contract farming")
 - Advantage: simple / straightforward approach
 - Disadvantage: need to involve MAFF for (3); not finalised in 1 year (project already closed when harvesting is delayed; biogas multi-annual invest.); impact not visible; risky approach as starch industry as highly competitive as chips/fresh roots (// Thailand & Vietnam)

→ need for further Gov support by project's end (at least follow-up); need for study on starch plant cost structure

06/03/2017

Recommendations

17

- **Scenario 4: look for cassava diversification** (domestic & export market)
SME innovation support for niche products / branding (plastic bag, snacks, beer...)
Niche product: high quality cassava → supply secured through premium price
Ex. business competition → idea → business plan → pilot financing
 - Advantage: simple / straightforward approach; no more risky than support to starch production; small-scale support
 - Disadvantage: not finalised in 1 year (ok from competition to business plan ; pilot financing requires 1-2 additional years for actual demonstration); risk: lack of response from entrepreneurs (→ need to enhance the private sector on cassava value addition / diversification potential); if need for high quality product → need for quality standard & securing supply
- **Scenario 5 : support Gov in developing a national cassava policy framework**
 - Advantage: UNDP can facilitate the process ; is a prerequisite for improving the sector's competitiveness
 - Disadvantage: somewhat outside the scope of the project; unlikely to have an endorsed policy in 12 months (draft policy possible → need for Gov follow-up)

06/03/2017

Recommendations

18

What to do?

- Within the scope of the project:
 - Scenario 1 (business as usual), 3 (value chain approach), 5 (partially policy)
- Most impacting support if more time allocated (e.g. other donor support CDM, GEF...)
 - Scenario 5 (policy), 4 (diversification)

In 12 months:

1. support national policy;
 2. pilot value chain (either starch/ethanol [E5 → CDM/Carbon credit] or **innovative** product)
- + contract farming-based

06/03/2017

Recommendations

28

In operational terms:

- For exporters: (1) reinforce trade promotion Dpt (MoC) e.g. info desk; (2) accompany exporters to trade promotion / market research
- Encourage innovation: workshop / conferences on cassava products
- Review associations: focus on leadership & subsequent members aggregation
- Starch plant competitiveness: reinforce but very risky & beyond project timeframe
- Need to look for additional support
- Initiate dialogue on national cassava policy

06/03/2017

Recommendations

29

Proposal for remaining 12 months:

1. Engage into policy dialogue: design a road map for national cassava policy with a view for acceptance by the National Economic Council → setting-up of a taskforce / steering committee to pilot the design of a national policy
2. Select 2 pilot (small scale) value chains focussing on (i) innovative cassava product value addition, (ii) starch for high grade (ex: human food production)
 - (i) support in info technology conferences, selection of technology (new product [ex. beer] or waste recovery/envir issues) & < scale demo plant/processing support
 - (ii) production side: establish trust mechanism with key producer/silo owner leader (max 2 assoc.) for quality supply & quality control manual → supply chain management; export readiness (EU HACCP and [Halal?]) with manual, traceability,...

06/03/2017

Recommendations

23

Proposal for remaining 12 months:

3. Support to exporting: trade mission & fairs, invite cassava buyers, sector promotion in-country/overseas + support to MoC info desk / Trade Promotion Dpt

Exit strategy: (i) have draft policy on cassava sector ready for discussion & stakeholders' clear roles defined and understood; (ii) capacity building of stakeholders of the value chain enough to sustain operations after 12 months

Next step? Explore access to finance through:

- (i) Carbon credit (ex: CDM) & GEF support [biogas for starch]
- (ii) loans for developing innovative products

06/09/2017

28

Thank you

15/01/2017

ANNEX 4: LIST OF PEOPLE MET

UNDP

Mr. Reathmana Leang, Programme Manager

Ministry of Commerce (MoC)

Mr. Long Kemvichet, Dpt of International Trade

Mr. Thou Pagna, Dpt of International Trade

Mr. Bun Vuthy, Dpt of International Trade

Mr. Kith Pheara, Director Dpt of Trade Policies

Mr. Sok Sathim, Director, Pailin Provincial Department of Commerce

Mr. Van Hour, Deputy Director, Pailin Provincial Department of Commerce

Mr. Chhoeun Chhin, Deputy Director, Pailin Provincial Department of Commerce

Mr. Chheng Intra Chhay, Official, Pailin Provincial Department of Commerce

H.E Mao Thora, Department of Private Sector Development

Mr. Komare, Department of Private Sector Development

Mr. Suon Vichea, Director, TTRI

Ministry of Agriculture, Fisheries, and Forestry (MAFF)

Mr. Iv Phirun, Director, Plant Protection & Phytosanitary Dpt

Mr. Phat, Director, Pailin Provincial Department of Agriculture

Mr. Yi Bunhak, Director, Agro-industry Dpt

Ministry of Transport & Public Works

Mr. Pich Chhieng, Director General, National Logistics Council

Private Sector stakeholders

Mr. Siek Hun, Advanced Glory Logistic Co Ltd

Mr. Ni Kan, Director, Sampovlun Cassava Association

Ms. Un Yeng, Finance Officer, Sampovlun Cassava Association

Mr. Khlout Chhengy, Secretary, Sampovlun Cassava Association

Ms. Mek Sophy, Member, Sampovlun Cassava Association

Mr. Mui Chantha, Member, Sampovlun Cassava Association

Mr. Lor Sunchheang, President, Sala Krov Cassava Association

Mrs. Je Thorn, Head, Silo Je Thorn – Pailin

Mr. David Prak, Battambang Agro Industry

Mr. Yoni Issahari, Cambodia Cassava Company

Mr. Kim Heng, Kim Heng Starch

Mr. Son Gook Hee, General Manager – Bio-Energy

Mr. Chan Tona, Manager, Ne ang Pov Export Co Ltd

External stakeholders/donors

Mr. Rajiv Pradhan, Country Director

Mr. Pieter Ypma, Director, CAVAC project

Mr. Brozemuller, IFC

Mr. Jean-Marie Brunkh, Project Management Advisor – IRAM

Mr. David Totter, Manager, EMS

Mr. Matt van Roosmalen, Manager, EMS

Mr. Lun Yeng, Secretariat General, Cambodian Rice Federation

ANNEX 5: LIST OF DOCUMENTS CONSULTED

- Tin Maung Aye, Need Assessment Survey Report "Current Situation of the Cultivation and Processing of Cambodian Cassava and Identify Gaps to China Market", UNDP, 2014
- RGC, Cambodia Industrial Development Policy 2015 – 2025, 2015/03
- Combined Delivery Report 2014
- Combined Delivery Report 2015
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- UNDP CEDEP II annual report, 2014
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- National Strategic Development Plan 2014-2018
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- Cambodia Trade Integration Strategy 2014-2018, 2014/01
- Cambodian Agriculture in Transition - Opportunities and Risks, 2015/05
- CEDEP II Mid-term Evaluation Report (Final), 2016/03
- Commodity, A Study of the Value Chains for Cassava in Cambodia, 2016/05
- UNDP Country Programme Action Plan 2016-2018
- Frank Caussin, Capacity Development Plan for Cassava Associations in Cambodia, 2016/10
- FAO Outlook 2016
- Sango Mahanty and Sarah Milne, Anatomy of a boom: Cassava as a ‘gateway’ crop in Cambodia’s northeastern borderland, Asia Pacific Viewpoint, 2016 n°2
- UNDP ROAR 2014
- UNDP ROAR 2015
- Prof. Jin Shu-ren, Future Prospects for Tapioca Production and Trade in East Asia
- Minute - The Fourth Project Board Meeting, Cambodia Export Diversification and Expansion Programme (CEDEP) II – Cassava Component, 2016/11
- Minute – The Third Project Board Meeting, Cambodia Export Diversification and Expansion Programme (CEDEP) II – Cassava Component, 2015/10
- Minute - The Second Project Board Meeting, Cambodia Export Diversification and Expansion Programme (CEDEP) II – Cassava Component, 2015/02
- Minute – The First Project Board Meeting, Cambodia Export Diversification and Expansion Programme (CEDEP) II – Cassava Component, 2014/10
- CEDEP-II, Deliverable #2, Strategic Approach – MNE
- Jonathan Newby, Sustainable cassava value chain for smallholder farmers in the ASEAN region: is there opportunities for economic growth? CIAT50

ANNEX 6: CHECKLIST OF ISSUES TO INVESTIGATE

Interview of beneficiaries

date		Village			
	Benef 1	Benef 2	Benef 3	Benef 4	Benef 5
PRODUCTION					
HHH gender					
Total number of HH members					
Qty of land owned					
2015/2016 cassava land					
2014/2015 cassava land + % new varieties					
Type & area of variety					
Advantage / disadvantage					
Use of variety (proc/seed multip/selling stem/ consumption Qty harvested					
Advantage / disadvantage variety 1					
Use of variety Qty harvested					
Advantage / disadvantage variety 2					
Use of variety Qty harvested					
PROCESSING					
What can be processed from cassava (flour/chips/starch)					
Experience in processing Y/N					
Where are the markets / whom to sell (middle man/factory/local market for starch, flour, chips					
Knowledge of price?					
What did you process/sell starch-flour-chips (qty / what / variety / price/kg)					
Cassava training received?					
Inputs received					
List 3 main priorities so as to get more benefits from cassava					
3 main priorities for the village					

1. **Relevance**

- 1.1. What issue is the project supposed to resolve for your household/family / community/village?
- 1.2. Objective of the association

2. **Effectiveness**

- 2.1. What support did you receive from the project?

- Kinds of materials/livestock, input...
- MoA number of visits (frequency or interval last 2 visits, purpose of the last visit, issue resolved? Y/N)
- Nr. and kind of training (explain usefulness/added value)
- Others

2.2. What would / do you do by yourself to maximise the benefits of your production / supported activity through project support?

(Buy fertiliser, pesticides, improved varieties, keep growing local varieties, crop rotation, other inputs, use clean/ecological products, increase area, buy machines, etc.)

For crop/livestock related support, do you prefer using local adapted varieties/species or improved / exotic / recommended ones? If yes, explain why.

3. Efficiency

- 3.1. Has the support been received as agreed? (timing, quality, quantity)
- 3.2. When was the last visit of Extension/project staff; how often do they come?
- 3.3. Explain the last visit (how long, what?)

4. Impact/ sustainability

- 4.1. What do you expect to / can you do better now in relation to before MAFF/UNDP support? (quality, quantity, diversification...)

5. Members' (potential) utilisation of products:

- 5.1. Does the farmer's activity supported by the project generate more costs than before (buy inputs, need for labour, etc.)? Y/N

If yes, quantify in Real for each cost/item: _____

- 5.2. Do you think this new/improved activity will increase your income? Qualify/quantify if possible
- 5.3. What would be the destination of added income from the activity? (Ex. Education, improving housing, clothes, cash security for marriage/funerals, reinvestment into productive activities, common community activities, buy food, etc.)
- 5.4. What kind of new support/activity would be most relevant in order to add value to / improve your current activity?
- 5.5. What would be the contribution of this activity to the community
- 5.6. Have you heard of people replicating your activity? (In your village or other villages close-by)? Y/N
If yes, was it the result of visits of sharing information?
- 5.7. List the challenges you are facing with the activity supported by the project
- 5.8. What are your plans for the future in relation to the project?
- 5.9. What do you recommend to resolve your challenges?

Thank you.

ANNEX 7: FEASIBILITY / TIMELINE IN CASE OF PROJECT EXTENSION

Scenario & extension period	Scenario 1 : institutional scenario		
	6 months extension ²²	12 months extension ²³	18 months extension ²⁴
Activities			
Precondition	Need for Gov commitment through staff availability for a policy working group (at least technical MoC and MAFF staff to be enlarged further with staff from other ministries); this may take a few months just to (in-)formally set up		
<u>Result: private sector able to voice value chain potential and weaknesses</u>	ACHIEVABLE		
Activity: supporting working group in identifying cassava weaknesses and potential (in all relevant sectors)	Need to finalise what has been underway during the project	Regular meetings as during the project; need to involve other potential sectors that could benefit / be interested from cassava by-products	
Activity: beefing up of the private sector's 'working group' through leadership establishment and subsequent founding of sectoral lobbying group	Unlikely to be achieved	Can be achieved pending interest of a lead stakeholder (hence eventually making available from its own resources time and HR) to represent the interests of the sector by heading a lobbying group	
Activity: strengthening lobbying group's capacity to interact with Government and the donor community (workshops, presentation of grievances, priority issues/topics to integrate into a policy/development intervention	Unlikely to be achieved	As above	
Activity: national communication campaign to promote the cassava sector (TV, radio on cassava benefits)	Cannot be achieved	May be carried out by the end of the project's extension; however, it might be difficult to see the benefits as the project will be closed	To be achieved in a comprehensive manner
<u>Result: relevant ministries aware of cassava potential value addition</u>	NOT ACHIEVABLE	ACHIEVABLE	

²² From April 2017 to September 2017 : effective 4 months from June onwards

²³ From April 2017 to March 2018 : effective 10 months from June onwards

²⁴ From April 2017 to September 2018 : effective 16 months from June onwards

Activity: subnational and national workshops at ministerial level (at least MAFF [through CAVAC], MoC) to raise awareness on cassava value chain potential and weaknesses (in collaboration with ‘working group representatives’)	This activity can only be initiated within the timeframe at national level and followed-up afterwards by the Government itself	It is necessary to swiftly make an agenda of workshops - especially at subnational level – so that they occur early enough to be integrated into a draft proposal / feeding-in the national dialogue	A full set of activities to prepare Gov stakeholders for discussions on a potential national policy is feasible
Activity: establishment of inter-ministerial ‘working group’ to discuss cassava sector-wide potential and shortcomings (E10, domestic food industry, export, competitiveness issues) and presentation at the highest level of a roadmap to develop an inclusive cassava policy	Highly unlikely to set-up	A full roadmap can be drafted and presented – involving MoC and MAFF - ; it is however not entirely inclusive	Can be achieved but in an inclusive manner with the contribution of other key ministries (energy, transport)
<u>Result: draft national policy ready for Parliament’s review</u>	NOT ACHIEVABLE	LIKELY ACHIEVABLE	ACHIEVABLE
Activity: support in the formulation of a national policy for cassava (inter-ministerial workgroups, consolidation and draft elaboration [ready for Parliament review]))	Not relevant (not enough time)	A very tight schedule has to be established (meaning, flexibility of involved stakeholders); a draft policy can be presented at a final workshop for further review / assessment at the highest level (Ministers)	To be achieved with the production of a draft ready for parliamentary review

Scenario & extension period	Scenario 3: demonstration scenario		
	6 months extension ²⁵	12 months extension ²⁶	18 months extension ²⁷
Activities			
Precondition	Need to select 1 product line (set of producers under 1 association, 1 silo owner, 1 starch company, 1 trader & 1 exporter)		
<u>Result: road map produced for initiating inter-ministerial dialogue on a national cassava sector policy</u>	ACHIEVABLE		

²⁵ From April 2017 to September 2017 : effective 4 months from June onwards

²⁶ From April 2017 to March 2018 : effective 10 months from June onwards

²⁷ From April 2017 to September 2018 : effective 16 months from June onwards

Activity: accelerate strengthening of 'working group' and turn it into a cassava lobby group	Need to work very swiftly on an agenda (action, responsibilities...); short spaced meetings Too little time to turn it into a lobbying group	Regular meetings as during the project; enough time to turn it into a lobbying group	
Activity: initiate wide-level discussions with MAFF and MoC to formally establish a Government working group on cassava	Can be done even informally between both ministries as soon as Gov can make available a team	Should be expanded by the inclusion of other ministries (e.g. transport, energy...) and above all formalised if there is political will to reach an agreement on the sector	
Activity: Government' and private sector's working group have regular meetings resulting in the establishment of a roadmap leading to the drafting of a comprehensive national policy on cassava	Achievable; would be very short-spaced meetings for a 6 months' extension (issue of availability of stakeholders)		
<u>Result: sustainable trading relationship between agro-processor (typically, a starch plant company) and downstream stakeholders through volume consolidation (at least 1 cassava growing season)</u>	NOT ACHIEVABLE	LIKELY NOT ACHIEVABLE	PROBABLY ACHIEVABLE
Activity: establishment of confidence building measures (support to enhance downstream capability to aggregate cassava production) between agro-processor and related downstream stakeholders (silo owner/best functional association/large trader or broker) seeking informal agreement on volume supply (e.g. subsidy test, support on transport capability...)	Too short	Some short term measures might be tested (e.g. subsidy scheme)	Likely to be able to propose a range of measures but little time to actually analyse the effects (1 cassava cycle is actually short)
Activity: support to agro-processor and downstream stakeholders on increasing quality (if relevant)	Can be done only on a theoretical basis (manual)	In addition to quality, support can be provided to accompany actual implementation / control of quality measures	
Activity: support the establishment of a formal agreement on volume supply and quality standard resulting in a first standardised delivery (for the next growing season by project's closure)	Too short; impossible	Agreement/deal might be struck but actual effects will not be visible by project's end; hence, not recommended	Can be achieved and checked by project's end
<u>Result: agro-processor's competitiveness increased in a way to offer premium price to upstream stakeholders</u>	LIKELY NOT ACHIEVABLE	LIKELY ACHIEVABLE	ACHIEVABLE

Activity: select an agro-processor with (mild) competitiveness issues	What to do with an agro-processor within 4 months??? Alternatively, a trader could be selected for a specific issue	Many contacts already made; most straightforward is selecting a starch processor ; need for an official agreement with the selected company
Activity: identify internal competitiveness issues and prioritize	Can be done both for a trader and agro-processor	For agro-processors (even traders), there are priority issues re. competitiveness: 1 st is volume consolidation and supply extended over as much as the year, 2 nd is storage (traders & agro-processor) and more efficient process (agro-processor), 3 rd transport; hence, emphasis should be put on the easiest : storage or more efficient agro-processing process
Activity: test for priority no. 1 internal technical solutions on a small case / for single (or limited) orders (e.g. mini biogas, increased storage capacity for dried cassava...)	No time to implement anything	Increased storage capacity could be considered if there is some agreement for volume consolidation (successful confidence building measures); as for bio-gas, only a small-scale demo can only be tested within the time period
Activity: support agro-processor in attracting larger-scale investments to finance most relevant technical solutions	Information can be provided to the agro-processor/ trader to establish contacts with potential investors	At best, contacts can be facilitated and some investment proposal be made after a successful demo (e.g. 1 full year for biogas); actual investment is beyond the scope of the project

Scenario & extension period Activities	Scenario 5: innovation scenario		
	6 months extension ²⁸	12 months extension ²⁹	18 months extension ³⁰
Precondition	Not relevant; too little time	Scenario too be considered if there is potential funding by the end of the project (e.g. treat the project as a preparatory phase to assess the potential for cassava diversification through another intervention); MoC, UNDP and EIF/ITC are willing to review extensively the project results/outputs 1-2 months should be devoted to redesigning the project, modifying the activities and having the amended project approved	
<u>Result: road map produced for initiating inter-ministerial dialogue on a national cassava sector policy</u>	ACHIEVABLE		

²⁸ From April 2017 to September 2017 : effective 4 months from June onwards

²⁹ From April 2017 to March 2018 : effective 10 months from June onwards

³⁰ From April 2017 to September 2018 : effective 16 months from June onwards

Activity: accelerate strengthening of 'working group' and turn it into a cassava lobby group	Need to work very swiftly on an agenda (action, responsibilities...); short spaced meetings Too little time to turn it into a lobbying group	Regular meetings as during the project; enough time to turn it into a lobbying group	
Activity: initiate wide-level discussions with MAFF and MoC to formally establish a working group on cassava	Can be done even informally between both ministries as soon as Gov can make available a team	Should be expanded by the inclusion of other ministries (e.g. transport, energy...) and above all formalised if there is political will to reach an agreement on the sector	
Activity: Government' and private sector's working group have regular meetings resulting in the establishment of a roadmap leading to the drafting of a comprehensive national policy on cassava	Achievable; would be very short-spaced meetings for a 6 months' extension (issue of availability of stakeholders)		
<u>Result: private sector aware of innovative cassava products and investment potential</u>	NOT ACHIEVABLE	LIKELY ACHIEVABLE	ACHIEVABLE
Activity: market study on domestic and export of innovative/high value/'niche' cassava products	Too little time	To be carried out by an external consultant	Preferably to be carried out by a team of international / national consultant (or better company/NGO subcontracting)
Activity: dissemination to Government and 'working group' members (both at national and subnational levels)	Not relevant due to the above	Due to the short time remaining, the dissemination would result in a classical divulgation of results through a workshop with little follow-up by Gov if the project terminates; stakeholders of the value chain working group might show interest especially if finding can be linked with a grant	Consultants should (i) present their findings and (ii) support Government in using these findings to design new interventions and activities and/or mainstream them into relevant Ministries' work plans ; stakeholders of the value chain working group might show interest especially if finding can be linked with a grant
<u>Result C: testing of cassava innovative product development, transformation, commercialisation, exporting</u>	NOT ACHIEVABLE	LIKELY NOT ACHIEVABLE	PROBABLY ACHIEVABLE
Activity: call for proposals (small grants) for innovative cassava related activity (new product development, new market penetration) benefiting PPP, University and processing plant...	Too little time	1-2 grants should be devoted to testing new products/agro-processing system, preferably under an accelerated mechanism (shortlisted institutions like already collaborating	Idem but more time is allowed to fuller develop grants and implement them

		stakeholders, research institutions and universities); there is a high risk though that no institution would be interested due to the short time frame to formulate a grant and to actually implement it	
Activity: support in seeking private sector investments if successful	Not relevant due to the above	Can be considered achievable if there is private sector follow-up (strong-based/committed stakeholder) after the end of the project (not within the projects' timeframe)	Seeking private investment can be done but the actual scaling-up is beyond the scope of the project; a linkage with a new intervention is more relevant
Activity: dissemination of grants' results and of lessons learned to Government and the donor community	Not relevant due to the above	Unlikely to be done during the project's extension; need for Gov to take over or additional funding	Can be done during the project even if scaling up is not implemented during the project

ANNEX 8: BRIEF DESCRIPTION OF CONSULTANT'S EXPERTISE

Mr. Vincent Lefebvre (lefebvrevinc@gmail.com):

- Program management & co-ordination / project formulation & implementation, M&E - knowledge of PCM, logical framework & ZOPP methodologies / equipment specifications.
- MA in tropical agriculture and post-graduation in business administration.
- Program & project evaluation / technical audit / institutional appraisal: analysis of relevance / effectiveness / efficiency / social, institutional & economic impact / political, social & cultural, technological, institutional & financial sustainability / cross cutting issues (gender, AIDS, environment & institutional capacity building); questionnaires design & interviews of beneficiaries.
- Knowledge of 9th, 10th & 11th EDF administrative & financial procedures.
- Data acquisition methods for evaluations: questionnaires drafting & interviews of beneficiaries; SWOT analysis; (semi-) structured interviews, focus groups.
- Knowledge of monitoring & evaluation methodologies (incl. Management Effectiveness Tracking Tool).
- Food security / Agronomy / agro-forestry & REDD+ / agro-industry / agro-climate and climate mitigation - adaptation / horticulture.
- Cartography / remote sensing / mapping / GIS (Arcinfo, Mapinfo, Ilwis) / Database management systems (MECOSIG, COONGO).
- Land & water resources evaluation / crop potential analysis / participatory rural appraisals / natural resources management / mountain agro-ecosystems.
- Soil survey / soil conservation / soil fertility.
- Statistics including programming in SAS & Delphi.
- Renewable energies (wind, bio-diesel, rape seed oil).