Mozambique Country Summary Evaluation Report

Decentralized evaluation for evidence-based decision making

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WFP Contribution to Market Development and Food systems in Southern Africa: A thematic Evaluation [January 2018 to June 2021]

1. Introduction

1) Mozambique was one of the six country case studies for a thematic evaluation of the World Food Programme (WFP) market development activities (MDAs) and related food systems support activities in Southern Africa. The evaluation was commissioned by WFP Regional Bureau for Southern Africa (RBJ) and covers the period from 2018 to 2021. The evaluation was intended to answer the question: *"What is WFP's contribution to market development and food systems and how can such contribution be enhanced to contribute towards Zero hunger?"*. The primary user of the evaluation is WFP staff involved in designing and implementing MDAs especially Country Office (CO) and RB staff. Other users are HQ staff involved in development of guidelines, standards, and procedures for designing, implementing, monitoring and evaluating MDAs. Relevant partners involved in MDAs will also find the evaluation of use to them.

2. Context

2) Mozambique has a historically high rate of natural disasters, and that trend has continued into the present, as pests have affected staple crops in much of the country while the central part was severely hit by Cyclone Idai in 2020, and the northern provinces were hit by Cyclone Kenneth, provoking severe agricultural losses, the destruction of infrastructure assets, and livelihoods, as well as substantial internal population displacement.

3) According to UNHCR, Mozambique hosts 28,345 refugees and asylum-seekers- some 9,500 live in Maratane refugee settlement in Nampula Province, while the remaining 19,000 reside in urban areas throughout the country. More than 732,000 people were internally displaced in northern Mozambique as of April 2021 due to violence that erupted in 2017.

4) Nearly half the population of Mozambique remains below the poverty line. According to the Ministry of Economy and Finance, from 2015 to 2019, the number of Mozambicans living in extreme poverty have increased by 55 to 60 percent, which corresponds to 16.7 to 18.2 million people.[1]

3. Subject of the Evaluation

5) The subject of the evaluation are the MDAs implemented as part of Cash Based Transfers (CBTs) and related agriculture market interventions. CBTs in Mozambique were planned to be used under Country Strategic Plan (CSP) Activity 2 (*Provide technical assistance to the Government in making social protection programmes shock-responsive and hunger-sensitive*) and Activity 3 (*Provide cash and/or food transfers to vulnerable households affected by crisis),*[2] and have subsequently been implemented in Activity 4 (*Strengthen the capacity of the government bodies responsible for the national home-grown school feeding programme*).[3] Mozambique CO has implemented CBTs including restricted cash through retailers since 2017, and has provided MDAs in a structured way as guided by the WFP corporate guidance since 2020.

6) The evaluation had two mutually reinforcing objectives of accountability and learning, with greater emphasis given to learning as this is a relatively new and under-evaluated area of WFP work. In Mozambique, the evaluation assessed changes that happened to retailers working with WFP in ensuring food access to those receiving assistance. In addition, the evaluation generated lessons on the WFP relationship with retailers who participated on the MDAs.

[1] See Annex 4 in the main evaluation report for a more detailed context on Mozambique.

[2] 2017 WFP, Mozambique CSP (2017 – 2021).

[3] 2019 WFP Mozambique ACR

7) In terms of agriculture market interventions, these were implemented under Activity 5 (Provide capacity strengthening and technical assistance to government entities implementing the national strategy to combat stunting and micronutrient deficiencies) and Activity 6 (Enhance the aggregation, marketing, and decision-making capacities of smallholder farmers, with focus on women). The evaluation generated lessons on how WFP could enhance smallholder farmers' linkages to markets to enhance their incomes and contributions to the local economy in general.

4. Methodology and Limitations

8) The evaluation adopted a mixed methods approach that included an in-depth literature review of project documents sourced from WFP at the CO, Regional and HQ levels, as well as from implementing partners. These included Annual Country Reports (ACRs), the Mozambique CSP, Market Functionality Index (MFI), project reports and others. The Evaluation Team used the Qualitative Impact Assessment Protocol (QuIP)[4] to collect data from retailers, complemented and triangulated by key informant interviews with WFP staff, local government, farmer associations and wholesalers working together with WFP. The list of stakeholders consulted in Annex 12.

9) The evaluation followed the eleven evaluation questions posed by the terms of reference using the evaluation criteria of relevance, effectiveness, impact contribution and sustainability. Gender equality and empowerment of women was mainstreamed throughout the evaluation. Data collection took place from May 15th to June 12th, 2021. QuIP data consisted of 24 key informant interviews (KIIs) and three Focus Group Discussions (FGDs) in Cabo Delgado, Sofala, Gaza, Maputo, and Tete provinces. 10 non-QuIP interviews were conducted either in-person in Sofala or remotely.[5]

10) Blindfolded recruitment posed a challenge to data collection. Respondents were skeptical of researchers who could not produce credentials from the organization responsible for the study. Replacements for these respondents were not available because of the limited pool of retailers who were working together with WFP. The data collection period was extended by two weeks in order to obtain consent from blindfolded respondents, but ultimately the ET was forced to lift the blindfold for three interviews in Maputo and three interviews in Tete. In these interviews, WFP was more explicitly mentioned. FGDs presented a major challenge as well, since most retailers did not have the time to leave their shops and commute to participate in group discussions. This meant it was not feasible to conduct FGDs with WFP-retailers. Instead, the researchers conducted FGDs with retailers in the provincial capital that are not engaged with WFP.

11) In general, the methodological focus on causal mechanisms makes it difficult to capture the seasonality and dynamic nature of changes in assortment, availability and price. In addition, questions asked in both FGDs and KIIs were similar and may not have been grouped to elicit the most honest and open responses. Disaggregation of data was not possible, making it difficult to discern the differences between retailers and wholesalers. Furthermore, the framing of the tools and the structure of the data did not allow for the identification of specific organizations and supply chain actors in the analysis.

5. Key Findings

12) The evaluation findings and the evidence to substantiate them are presented below according to the evaluation criteria.

1. Relevance/Appropriateness

Question 1: To what extent are market development activities and related interventions informed by market inefficiencies identified during relevant WFP multi-sectoral market assessments and country contexts?

13) The Country Office (CO) implemented CBTs through lean season assistance and to crisis-affected populations.

14) *Lean season assistance*: As stated in the 2019 Annual Country Report (ACR), during the 2018/2019 lean season, WFP provided assistance in response to drought in Tete (112,000 people) and Gaza provinces (116,000 people).

[4] QuIP is a simple and cost-effective way to gather, analyse and present feedback from intended beneficiaries of social investments and development interventions about significant drivers of change in their lives

[5] For a more detailed of the list of respondents, see Annex 7 in the main Evaluation Report.

This response was coordinated through WFP's work on social protection under Activity 2, but transfers were provided through contributions received for Activity 3.[6] Following extensive crop losses and damage of agricultural livelihoods in the beginning of 2019 due to Cyclones Idai and Kenneth and considering forecasted drought in the southern part of the country, a large 2019/2020 lean season response was implemented by WFP in Mozambique. According to the 2020 ACR, WFP provided lifesaving and recovery assistance to over 1.2 million people from November 2019 to March 2020 in nine provinces. In March 2020, the last round of distributions of the lean season response had to be temporarily suspended in all locations following the outbreak of COVID-19 in Mozambique.[7]

15) *Crisis-affected populations*: In response to the deterioration of the humanitarian crisis in Cabo Delgado, WFP increased its food assistance to Cabo Delgado, Nampula and Niassa provinces from about 18,500 to almost 510,000 conflict affected beneficiaries through in-kind and cash transfer-based assistance. Food insecurity was expected to rise during the 2020-2021 lean season,[8] indicating that within the period October to December 2020, 2.7 million people faced acute food insecurity crisis levels (as per the IPC Phase-3 Category) in both rural and urban areas across the country. This number was expected to increase from January to March 2021 to 2.9 million people. As a result, besides providing assistance to approximately 500,000 IDPs in the north of the country, WFP is assisting about 480,000 people in 37 southern and central rural districts during the 2020-2021 lean season.[9]

1.1. Which MDAs and related interventions have been designed and implemented?

16) According to project staff, four MDA activities were identified in which the CO was engaged with: a Market Systems Analysis (MSA), conducted in Pemba in order to identify the causes and context behind price fluctuations in staple products; the retail-in-a-box (RIAB) pilot in Guara Guara, where the aim was to create a new market in the resettlement center of Masquil Alto; retailer training as part of the RIAB project, but for all retailers in Sofala; and mobile shops in Cabo Delgado and Gaza, serving as extensions of physical shops to sell goods in remote locations. WFP also supported beneficiaries which bred chickens with fast-growing eggs in Gaza, although this was not officially classified as a market development activity. The four market development activities are explained below in more detail.

17) (i) MSA - The market systems analysis was conducted to understand the price fluctuations in areas within Pemba where IDPs are located on specific products representing the main staples of households in Mozambique and identify what the bottlenecks in the supply chain were. It provided WFP with an assessment of retailer capacity. (ii) RIAB – The retail-in-a-box project was designed with the purpose of bringing the market to beneficiaries by creating pop-up shops in resettlement camps. If the market is relocated closer to beneficiaries, it will reduce their travel time and stimulate local economies that include farmers, retailers, and markets. A second RIAB is currently being piloted in Cabo Delgado. (iii) Retailer training - The objective of the retailer training in Sofala was to avoid overcrowding and improve the shopping experience in shops working with WFP, by implementing new warehouse management and product placement formats and improving the over-the-counter service. WFP partnered with a German institute (Metro Group) to develop four modules for the training. (iv) Mobile shops - These shops are mobile extensions of the physical shops, with refrigerators, freezers, and a limited assortment of products, which allow them to cater to all of beneficiaries' basic needs and remove beneficiaries' costs of transportation to get to the physical shop. Mobile shops were implemented in Pemba and Montepuez.[10]

1.2. Are objectives of the MDAs and related interventions in line with the market inefficiencies identified during relevant WFP multi-sectoral assessments?

18) The CO conducted a Market Functionality Index (MFI) assessment in 2020 to inform the CBT and other programme areas. Subsequently, the MSA was conducted in 2020 in order to identify the root causes of the constraints identified in the MFI and provide recommendations for future MDAs. In addition, supply

[6] 2019 WFP Mozambique ACR
[7] 2020 WFP Mozambique ACR
[8] 2021 IPC Acute Food Insecurity Analysis, October – September 2020
[9] 2020 WFP Mozambique ACR
[10] 2020, Mobile Shops Brief, August 2020

chain normally conducts retailing monitoring once a month through monitoring visits at the retailer store, using beneficiaries or customer feedback mechanism or through remote monitoring. The MFI assessment[11] identified prices of vegetable oil and rice as being extremely unstable. The MSA determined that price instability was due to imported goods being subject to exchange rate volatility. Higher prices for beneficiaries were also a consequence of retailers' use of supplier credit and their inability to cover the payment waiting period.[12]

19) With respect to the other interventions, project staff mentioned that they are in line with market inefficiencies. Beneficiaries often have to walk long distances or take expensive transport to reach markets. Both RIAB and mobile shops bring the market to beneficiaries, reducing travel time and transport costs as a result. There is not enough retail capacity in locations with newly arrived IDPs, and retailers are often not willing or able to cooperate with WFP.[13] The retailer training was designed to tackle inefficiencies identified by beneficiaries through the hotline prior to the programme. Beneficiaries stated that they were not able to choose the products they wanted because retailers would often sell them older products in order to empty out their stock. According to project staff and the local leaders, RIAB also addresses potential inefficiencies on the supply side. By supporting three retailers to join in the creation of a new market, competition is incentivized, which provides beneficiaries with more choices and better prices.

1.3. To what extent are the MDAs and related interventions relevant to the needs of the targeted beneficiaries?

20) The MSA is considered to be relevant to the needs of beneficiaries because the recommendations developed in the report are designed to stimulate competitiveness between traders, which would reduce the prices of goods and improve the service and customer experience for WFP beneficiaries.[14] Most respondents mentioned the devastating impact that Cyclones Idai, Kenneth, and Eloise have had on the lives of Mozambicans. Beyond the immediate crisis of loss of lives and food shortages, people's homes and livelihoods have been wiped out, and they will need to rebuild. Now that in the second half of 2021 the levels of acute food insecurity across most of the country decreased from 'crisis' phase to 'stressed' phase,[15] WFP operations moved from emergency to recovery phase.

21) The aim of the RIAB project is to create long-term wellbeing for people and prepare beneficiaries for future disasters such that they do not become dependent on external assistance. Establishing a market where there is demand for it attends to the beneficiaries' needs in a sustainable manner. Retailers are also able to respond to the emergent needs of a population in recovery. Retailers frequently noted adding construction material to their assortment in the period after the cyclones.

22) Despite a significant decrease in the number of people facing high levels of acute food insecurity, 1.7 million Mozambicans are still experiencing a food shortage crisis,[16] in particular people living in the conflict-affected province of Cabo Delgado.

23) Mobile shops were considered a short-term solution that addressed beneficiaries' immediate food needs in the urban areas of Pemba and Montepuez, conserving their money and eliminating the discomfort of having to walk up to 15 km to reach the market. Both project staff and retailers indicated the demand generated by the CBTs was so substantial that many retailers did not have the capacity to deal with the large number of people wanting to buy at the same time. The purpose of the retailer training was to improve the shopping experience and avoid overcrowding, an issue particularly relevant during the COVID-19 pandemic.

1.4.- Are the objectives of MDAs and related interventions in line with national policy frameworks for achieving zero hunger?

24) Project staff generally agreed that the Government is a supporting actor but not a driving force. Every CBT intervention is typically coordinated with the government and INGD, and the government is on board with WFP's objectives and implementation. The government has endorsed MDAs, and local and regional authorities have worked with WFP on all activities. The Government's

[11] 2020 MFI Assessment
[12] 2020 MSA Pilot, Pemba, Mozambique
[13] Mozambique WFP Global mVAM on Household Hunger and COVID-19 Snapshot 28 August 2020
[14] 2020 MSA Pilot, Pemba, Mozambique
[15] 2021 Acute Food Insecurity Analysis, October 2020 – September 2021
[16] Ibid

policy framework helped guide WFP on finding target locations for interventions. In Cabo Delgado, the Government expressed an interest in market analyses so that it can identify points where it can intervene. Furthermore, the mobile shops were developed as a solution to address local authorities' needs, which suggests that MDAs are in line with government priorities.

25) There are broader discussions with the Government about where and how cash can be distributed. The Government's position in the past had been that cash can be given as part of social policies and a safety net, but not as an emergency response. There is some hesitance on the Government's behalf about involving retailers in humanitarian assistance, because they would have to justify why they give some people cash but not others. This is the topic of debate in ongoing discussions within the external Cash Working Group (CWG), which has not yet been involved with market development activities.

1.5. How can WFP enhance relevant market development programming in the country context?

26) One of the main recommendations to enhance development programming in Mozambique highlighted by project staff was to finetune and expand the scope of WFP interventions. WFP should expand the target populations and settings of interventions in order to be able to respond to different challenges and needs across provinces in Mozambique. One project staff member noted that CBT programme activities are not designed with the market in mind. The focus is on addressing beneficiaries' needs, but the quality of the intervention should also be taken into account if the interventions are to be successful across different units within WFP and organizations in the external CWG.

27) Project staff believed that WFP should work more closely with the national government to align their priorities in the transition from vouchers to CBTs. The representative mentioned that cooperation and structured joint developments should be pursued with other sectors, such as Water, Sanitation, and Hygiene (WASH) and social protection, as well as working together with small/local microfinance organizations in order to get buy-in from multiple actors and create a large impact. Furthermore, WFP should assess the feasibility of tailoring CBTs to a humanitarian setting and consider how a transition from a voucher system to a CBT system is meant to work, particularly in the specific socioeconomic and security environment in Mozambique.

28) With respect to MDAs, project staff suggested that WFP should adopt a systematic approach and conduct more MSAs and MDAs where necessary, regularly assessing their performance and linking them to the work of other agencies and the government. Coordination between organizations working on markets and finance would reduce the overlap of trainings and a waste of resources. Improving the preferred supplier network could create a more competitive environment and provide opportunities for smaller local retailers to participate. Finally, WFP should establish a centralized hub which provides a platform to share ideas on MDAs, and work together with academia, external agencies and the general public to disseminate these activities.

29) Key stakeholders also offered some suggestions for improving development programming in their local context. The community leader in Guara Guara recommended expanding the coverage of beneficiary families in the Food for Work program, as he felt that many people are still excluded from the program.

30) The representative from the farmer association in Tete had similar impressions of the school feeding program, suggesting WFP to expand their coverage of beneficiary communities and schools to increase the positive impact on the well-being of students, employment, and food security. He followed up with a request for more farmer trainings on creating associations, and improving quality standards, food storage, and nutritional information. His experience with previous trainings was that they improved farmers' yields and using those to feed beneficiary schools would likely improve school attendance and reduce malnutrition.

31) The wholesaler in Nhamatanda was also very positive about the WFP trainings farmers had received on good production techniques and creating associations and suggested expanding these to different communities. Furthermore, they recommend that WFP coordinate with wholesalers to open a credit line for resettled people in order to allow them to start a small business as retailers

2. Effectiveness

Question 2: To what extent did the identified MDAs deliver expected outputs and contribute to the expected outcomes?

2.1. What is the extent to which MDAs delivered expected outputs?

32) Project staff concurred that the market systems analysis achieved its expected outputs. The problems with CBT activities were identified through the analysis, and recommendations provided concrete solutions, which allowed WFP to get past the bottlenecks observed, such as the delayed payments by WFP leading to inefficiencies in the provision of goods to beneficiaries.[17]

33) Since the retail-in-a-box project was a pilot, expectations were not as clearly defined as for other projects. The design was considered to be good, but operational challenges have led to delays with the implementation of the project. The aim was to have three operational shops in the resettlement camp in Masquil Alto at the end of 2020, but rainy season delayed construction of shops. The first shop opened within the six month period expected (February), the other two opened several months later. One respondent suggested that the delay may have been due to the strong focus of the intervention on beneficiaries' needs, which meant that initially the project did not adequately promote the benefits to retailers.

34) On the positive side, a market was created, the shops reduced travel time for beneficiaries, approximately 2,200 households' needs were met at market prices, the retailers targeted were local and made their own investments to open up the shops, and the cost to WFP was minimal.[18]

35) According to the retailers that participated, the training achieved its expected outputs. Participating retailers were unanimous in recommending the training to other retailers, and felt the objectives of improving price, service, assortment, and quality, had been achieved.[19] The results of the training were visible - retailers built bigger shops and implemented the recommended warehouse management approaches. Some retailers confirmed in the QuIP interviews that these changes were a result of WFP training.

36) Project staff mentioned that the success of the training was in part because WFP performed adequate scoping on retailers' knowledge and needs in anticipation of the training. They observed that shops lacked information technology (IT) systems and organizations and designed the training modules accordingly. Therefore, the training added a lot of value for all retailers in Sofala, and there are now plans to expand the scope of the training to integrate additional modules.

37) Finally, the mobile shops were not planned, but instead triggered by the needs of local authorities in Cabo Delgado. Mobile shops addressed the four pillars of food security in the short term, but not in the long term. The MDA is still being implemented because there is currently no sustainable alternative. As of August 2020, the initiative was providing 500-2000 households in Cabo Delgado with access to food.[20]

2.2. To what extent are the outputs contributing to or are likely to contribute to planned outcomes?

38) Market systems analyses help to prepare the platform on which to establish MDAs but are not enough on their own. Despite their success, project staff note that MSAs have not become a way of working in the CO, nor have they been implemented in other areas. This significantly curtails MSA abilities to contribute to planned outcomes over the long-term.

39) The retail-in-a-box project reportedly provided access to more choice and commodities, and created a better shopping experience for the beneficiary, and allowed beneficiaries to avoid malnutrition, which are all in line with planned outcomes. However, shops are not yet open all throughout the week and there is still space for them to improve service. The retailer training is one way to achieve this, since it allows retailers to meet WFP quality standards and improves the sustainability of businesses.

40) Since the goal of MDAs is to build markets around beneficiaries to facilitate a transition to cash-based transfers, project staff were all in agreement that the short-term nature of the mobile shops initiative in Cabo Delgado meant that it was not a good market

[17] 2020 MSA Pilot, Pemba, Mozambique

[18] 2020, Retail in a Box, Status and Strategy Brief

[19] 2020, RtR Mozambique training report

[20] 2020, Mobile Shops Brief, August 2020

development activity, despite being able to achieve its immediate outputs.

41) Looking at CBT interventions overall, MDAs only contribute to less than 50 percent of beneficiaries. In Pemba, for example, less than 5 percent of households are being reached. WFP should innovate on MDAs and build on current activities to expand their coverage. Last but not the least, costs are an issue. According to the UNICEF CWG member, CBT activities are still considered to be more expensive to implement than in-kind food delivery. The costs of CBT activities need to come down further before cash can become a feasible alternative.

2.3. What factors are affecting implementation of MDAs and achievement of outputs and their contribution to outcomes, negatively or positively?

42) Respondents reported a wide variety of internal and external factors that affect the implementation of MDAs and the achievement of outputs. An internal factor observed by the farmer association partnered was the criteria used by the WFP monitoring department for fixing the prices of products only being recorded once a year, and it did not account for seasonal variations in the prices. The unilateral fixing of the prices by WFP reduces farmers' capacity of producing quality goods because farmers are unable to cover all their fluctuating operating expenses throughout the year with fixed prices.

43) Funding is another critical factor that can affect project outcomes. WFP staff mentioned the need for having a dedicated human resource on the project, and more investment in better coordination between the different units. WFP funding cycles are seasonal, which creates an environment where designing a long-term MDA can be quite challenging. Funding is also an important issue for retailers. WFP payment delays have had a counterproductive result on retailers because the long waiting period for reimbursement affected their capacity to restock and build new infrastructure in order to meet the increased demand, and the additional costs are often passed onto the beneficiaries.

44) Coordination between WFP units or with government counterparts, partners and other stakeholders was frequently considered to have a positive contribution to MDA outcomes. Many respondents noted that a lack of coordination resulted in a lack of inclusivity and diversity of perspectives during implementation of MDAs.

45) External factors mentioned included climactic changes and accessibility to beneficiaries. Climate change and natural disasters affect agricultural activities, often reducing farmers' yields and local supply of fresh produce. The remoteness of some locations targeted by MDAs may limit accessibility to beneficiaries, especially in areas with bad road infrastructure or in areas at risk of flooding during the rainy season. Environmental factors can there severely impact the outcomes of MDAs.

3. Impact/contribution

Question 3: To what extent are WFP MDAs contributing to improving market efficiencies in different country contexts?

3.1. What are the changes that the WFP retail engagement and related MDAs contributed to?

46) The retailers were asked to describe the changes they had experienced in the past three years along the market development Key Performance Indicators (KPIs) of *assortment and quality, availability, price, resilience of the supply chain, infrastructure, service, competition, access and protection*. The direction and frequency of these changes are indicated in Table 1 below.

47) Out of the 27 retailers, 81 percent of respondents reported a positive change in the assortment and quality (22), and the same number reported a positive change as services rendered. 96 percent reported a positive change in the price of goods (26) over the past three years, 93 percent observed marketplace competition to have increased (25) in this period, and 85 percent felt very confident about the future (23).

Table 1: Direction and frequency of changes reported by retailers (n=27)

Question	-	+	0
Changes in the assortment and quality of products in the past 3 years	2	22	3
Changes in the availability of products in the past 3 years	6	15	6
Changes in their prices in the past 3 years	0	26	1
Changes in the ability to meet market demand in the past 3 years	5	13	9
Changes in the state of shops infrastructure in the past 3 years	1	16	10
Changes in the services provided by shops in the past 3 years	1	22	4
Changes in marketplace competition in the past 3 years	0	25	2
Changes in access and protection to their shop in the past 3 years	2	8	17
Changes in the way the community works together in the past 3 years	1	8	18
Changes in the wellbeing of the household in the past 3 years	8	15	4
Confidence about the future	0	23	4

+Positive change - Negative change 0 No change. In instances when the sum of responses is lower than n, there were qualitative responses that were impossible to categorize into -, +, or 0. *The different colours of purple have been used to differentiate the levels of change. Dark purple is the highest and white is the lowest.*

Source: Key informant interviews and FGDs with retailers

48) 56 percent of respondents were positive about changes in the availability of goods and the same number of respondents also observed an improvement in the wellbeing of their household (15). 59 percent of respondents mentioned their infrastructure improved (16), and 48 percent reportedly increased their ability to meet demand (13) over the past three years. 30 percent of respondents reported a decrease in most of these KPIs over in this period, with the most notable change being for household wellbeing (8). 30 percent of respondents also observed positive changes in access and protection (8), and the same number reported an improvement in the way the community worked together (8) over the past three years; Between 63 and 67 percent reported no change at all in these dimensions (17 and 18, respectively).

49) According to retailers, WFP support [E][21] received was mainly perceived as a causal factor of the changes experienced, whether negative or positive, with 45 out of 53 statements identifying it as such (Annex 1). Similarly, external assistance [E][22] was considered a causal factor, with 40 out of 46 statements reporting external assistance as a cause of change. Other causal factors are external phenomena, such as COVID-19, currency depreciation, natural disasters, and to a lesser degree, competition. The three indicators used to measure overall changes in business, business growth and performance, sales, and income, act both as causes and effects, as displayed by their high centrality rating (721, 167 and 71, respectively).[23] These factors are therefore not only a result of change, but also generate further change. Other notable factors with a high centrality rating include demand, payment and customer services, infrastructure, competition, retailer stock, and number of suppliers. The main factors that are identified as effects consist of quality and variety of goods, supplier stock, prices, the ability to meet demand, queues, security, and accessibility.

3.2. Perception on how the change for each attribute has occurred in the past three years

a) Causal links associated with assortment and quality

50) Demand was a key causal factor for both the quality and variety of goods, as illustrated in Annex 2. An increase in demand also led indirectly to an increase in the quality and variety of goods through an increase in marketplace competition and to a lesser extent through an increase in the number of suppliers. WFP guidelines shared with retailers were also mentioned by some respondents as

[21] E- Where WFP was mentioned explicitly.
[22] CBT intervention with beneficiaries coded separately from the support received by retailers

[23] Centrality rating represents to what extent a factor functions as a nexus of connections within the causal chain

having a positive effect on the variety and quality of goods.[24]

51) The reported increase in customers and WFP beneficiaries led retailers to expand their assortment of goods, because they sought to offer their clients a greater choice of products. The increase in demand has attracted more retailers to the market, and this competitive environment has pushed retailers to add new products to their assortment of goods in a bid to attract customers. The demand has also brought new suppliers to the market, providing retailers with access to new products. Box 1 below provides some quotes highlighting the causal factors described.

b) Causal links associated with availability

52) Storage infrastructure and demand were the main causal factors affecting availability of goods (Annex 3). An increase in storage infrastructure had a positive effect on retailer stock, as retailers expanded their shops or built warehouses to house

> **Box 1: Retailers' perceptions on causes of changes in assortment and quality**
>
> *"The market demand is the main reason, the number of customers has increased and this affects the assortment and quantity as we have customers of different social statuses, that is why we decided to invest more in the variety and quantity of products in our shop." – COGEF Montepuez*
>
> *"Of course, when we talk about quality, we are talking about good things not bad and there was a need to improve in quality and quantity because our customers are more demanding now than before. Due to these varieties, we were forced to expand the store in order accommodate the changes." – VIP Pemba*
>
> *"We have improved the quality of our products. We have a better quality of rice, better quality of flour since 2019. We improved the quality of our products because of the clients' demands." - Chongue Ltd.*
>
> *"The quality changed as result of customer and market demand, my customers know what the product with good quality is and this is also a reference from my partner WFP." - Judas Ubisse*

a larger quantity of products. Demand had both a positive and a negative effect, because some retailers were able to respond to the increase in customers by expanding their stocking capacity, but some retailers were not able and subsequently ran out of stock. One retailer mentioned a high seasonal demand for beans in the summer months as the reason for scarcity of the product.

c) Causal links associated with price of products

53) The causal map in Annex 4 illustrates the direct relationship between retailer prices and supplier prices. WFP-retailers in Mozambique typically sell products with a 1-5% markup over prices at which they buy them,[25] and therefore will reflect any changes in price experienced by suppliers. Supplier prices have multiple influencing factors, including COVID-19, the currency depreciation, imports, transport costs, and reduced supplier stock.

54) Retailers report that COVID-19 was one of the main reasons for the surge in prices in 2020, because the increased restrictions imposed during the pandemic led to a halt in production and importation of many goods. The second noteworthy factor mentioned was the depreciation of the Mozambican Metical last year compared with the US dollar and South African rand, the two main currencies used in the purchase of imports. Prices of products are highly sensitive to exchange rate volatility, given the heavy reliance on importation.[26] The third factor frequently perceived to increase prices was transport costs. Heavy regulations on imports and cross-border movement during the pandemic increased transportation fees and freight costs. In 2021, bad weather compounded the supply chain challenges, further driving up transportation costs.

55) The additional costs incurred by suppliers from the factors described above, together with the ensuing scarcity of products available, led to an increase in supplier prices. One retailer summed up the main reasons behind the price changes: "The main reason for this [price] change is the dollar appreciation against the metical. The coronavirus pandemic also influenced this because restrictions on importation and exportation caused a shortage of products in the market."

d) Causal links associated with resilience in the supply chain

56) The causal map in Annex 5 only shows a few direct relationships with the indicators for resilience. Retailer

[24] Not observed in annex 2 because the map is simplified to include only the top 20 links

[25] 2020 MSA Pilot, Pemba, Mozambique

[26] Ibid

stock is strongly linked with the ability to meet demand, in a causal chain that is traced back to changes in market demand (Annex 3). As one retailer explains: *"We always meet the market demand because we control our stock, when business is running well, we order products three days in advance. We always have products in our shops, we calculate our product by the number of clients in a day."*

57) Further evidence of how retailers react to the needs of the market is shown in the other link highlighted. As demand increases, so does the number of suppliers that retailers work with. Not shown in the simplified map is the link less frequently observed between the number of suppliers and the ability to meet demand, both directly and indirectly and through an increase in variety of goods. Retailers reported using different approaches to meet demand, including increasing the number of suppliers, buying from local suppliers, or exchanging products between retailers in the market. One retailer even mentioned working together with local producers to source food products: *"We have also signed MU with local companies that produce eggs. And the impact is positive because it is always good to work with local producers, products are fresh, we now don't import tomatoes and we do have enough eggs and tomatoes to supply the market."*

e) Causal links associated with infrastructure

58) The coding for infrastructure in Annex 6 is segmented into several components because retailers expand or improve on their infrastructure for different reasons. Cyclones Idai and Kenneth were one of the main contributing factors affecting general infrastructure, as the flooding wiped out roofs, doors, or other elements of retailers' shops. The direction of the effect is ambiguous because some retailers noted that the destruction experienced as a result of the cyclones was the reason that they rebuilt their infrastructure.

59) Another reason given by retailers for improving infrastructure aesthetically was because they wanted to enhance the customer experience. Retailers would frequently mention painting the walls to keep their shop interiors fresh and attractive for clients, or renovating the shelves in order to improve the product display. Some retailers were quite innovative with their ideas and even found ways to contribute to the community: one painted their walls to illustrate COVID-19 prevention methods, and another is in the process of building a bus stop in front of their shop. Finally, a less frequently cited infrastructure factor in the interviews was related to storage. An increase in demand is the main reason for increasing storage infrastructure, as retailers invest in warehouses or storage rooms in order to increase their stock capacity.

f) Causal links associated with services

60) Improving customer service not only led to an enhanced customer experience, it also increased retailers' ability to meet demand (Annex 7). The main factor that retailers observed to have improved customer service was the introduction of new electronic and mobile payment services, such as M-pesa, Conta Movel, Ponto24, Pay Izzy, and Mkesh. In addition, some retailers adopted the use of POS machines in order to facilitate debit/credit card payments, and a few others allowed payments by check or on credit from loyal customers. The shift towards new payment services was stimulated by strong consumer demand, an increasingly digitalized society, stringent health protocols required to combat the spread of COVID-19, and a desire to keep up with the competition.

61) Other contributing factors to customer service reported by retailers included offering delivery services or improving their infrastructure. Examples of infrastructure to improve service mentioned ranged from waiting rooms or additional cashiers to adhere to social distancing norms, to building a bakery separate from the shop, or building a milling machine in the shop so that customers could grind corn on the spot,

62) According to respondents, queues are usually caused for two reasons: an increase in customers or additional hygiene protocols to prevent COVID-19. When queues are due to higher demand, retailers tend to hire more staff as cashiers to reduce the waiting times in their shops. One retailer acknowledged that introducing the mobile banking service was a way of reducing waiting time when paying the bills, whilst adhering to COVID-19 hygiene protocols.

g) Causal links associated with competition

63) The findings from the retailer interviews (Annex 8) reflected a common adage in business: demand breeds competition. As populations grow, demand for quantity, quality, and variety of products increases. Shifting population dynamics may be organic (Moamba), or stem from displacement from areas suffering from natural

disasters (Buzi) or conflict (Cabo Delgado). In conjunction with high (youth) unemployment and low barriers of entry for opening a shop, a higher demand led to a hike in the number of retailers in the market competing to serve the needs of consumers.

64) Some displaced persons were also retailers before they were forced to move and have opened up shops in locations where they resettled, further driving up competition. A few shop owners also complained about an increase in foreign retailers and wholesalers doubling as retailers, in some cases unfairly influencing the market: *"The fact that wholesalers are acting as retailers in the food supply is very bad, because it affects the real price of a certain product in the market."*

65) Retailers in Guara Guara and Magude celebrated the construction of a new roads, claiming they have stimulated demand for more products, and subsequently increased the competition. One retailer encapsulated the situation in Guara Guara with the following statement: *"The competition is increasing since 2019 because as many social projects are being developed in Guara Guara since Idai, people consider Guara Guara as a safe area and migrate here. The migrants start new business as retailers because as they have no jobs, doing business a new beginning for them, as they want to provide better living conditions for their families. Also, as the road from Tica to Buzi is being built, a lot of workers are living in Guara Guara, and it increases the demand for more products. This increment on the demands also conducts to an increment on the number of shops."*

h) Causal links associated with access and protection

66) Not much change was reported by retailers regarding access and protection over the three-year time period, as can be observed by the relatively few links leading to accessibility and security factors in comparison with the other causal maps (Annex 9). Nevertheless, some contributing factors can be identified and are discussed in more detail below.

67) The paving of roads and the construction of the aforementioned roads in Guara Guara and Magude were reported to contribute to an increase in general accessibility to retailers' shops. Retailers also observed that improving their infrastructure, such as building a ramp or separate entrances for priority individuals (e.g., elders, pregnant women, and people with disabilities), or adding cashiers for priority individuals, had a positive effect on the accessibility of their shops.

68) Security is said to have declined directly as a result of the conflict in Cabo Delgado, as well as due to a perceived increase in crime perpetrated by migrant populations displaced by conflict in the north or natural disasters in the centre of Mozambique. Retailers responded by hiring security staff or improving the infrastructure of their shops in order to avoid being robbed. The introduction of electronic payment services also increased the safety of shop environments, because it meant that customers no longer have to carry around that much cash to make transactions, and shop owners are able to keep less money in stores, reducing the risk of loss in case of theft.

3.3. Perceptions of how the overall business has changed over the past three years

69) In Table 2, a robustness test was performed on the broader causal chains extracted from the retailer interviews in order to examine how their business had changed over the past three years and whether it was possible to trace the changes back to WFP efforts.

Table 2: Robustness test on causal link between WFP and changes in overall business

Overall business change factor	WFP support [E][27][28]	External assistance [E][29]
Growth in business and performance[30]	41	27
Sales	37	24
Income	33	25

70) A total of 41 statements would have to be removed before the causal chain between WFP support and growth in business and performance would be disproven, which suggests that the link is quite robust. The link between WFP support and sales or income is less robust, but still enough to state with some level of confidence that the support provided by WFP to retailers had a significant impact on their revenue and profits. The link between the CBT intervention itself and changes in retailers' business is relatively weaker, but still noteworthy.

71) The causal chains linking these factors together are illustrated in the causal map in Annex 10. Growth in business and performance increases with higher levels of competition, improved infrastructure, and more demand. As previously discussed, competition is intrinsically tied to demand. Retailers connect it to growth through innovation, research, creative marketing strategies, improvements in service, and an optimization of the supply chain. Sales, on the other hand, are negatively linked to competition because profits are likely to suffer when multiple retailers in the market are vying for the same customers.

72) According to retailers, WFP support is a contributing factor to demand because its interventions bring a large number of WFP beneficiaries to associated shops seeking to redeem their vouchers. The intervention-related demand has led to significant business growth as retailers expand their number of suppliers, stock capacities, assortment, and infrastructure in order to meet their new customers' needs (see Box 2 below for selected quotes describing retailers' experience with WFP).

Box 2: Retailers' perceptions on their business growth and its relation to WFP

"Our infrastructure is changing. We bought one big container in order to store a bigger quantity of products. This bigger container was a response to increment of sales we had from 2018 to 2019 when supplying food to WFP. We had to satisfy bigger demands, which required us a bigger warehouse." - Chicavane Comercial

"Products for feeding were increased because of the partnership of my shop with NGOs (WFP and World Vision), as they demanded large quantities of goods between 2018 and 2020." – Tinnas Comercial

"Before signing the contract with WFP, I had low number of customers. When WFP and other organizations signed a contract with me, in order to attend the beneficiary needs, my business improved because the number of customers increased. In the past I had difficulties in selling the same quantity of products I sell now." – Carlos Francisco Mahanjane

3.4. Stakeholder perceptions on the role of MDAs in improving price, quality, and service

73) Table 3 represents a robustness test conducted to examine the causal link between WFP support and target factors of MDAs over the past three years. The table shows a strongly robust link between WFP support and factors related to quality - variety and quality of goods, with 39 and 42 statements, respectively, to be removed before the causal link can be disproven. The link between WFP support and customer service is slightly weaker but still substantial (25 statements). The robustness also provides moderate evidence for the link between WFP support and the other target factors, including retailer (22) and supplier (25) prices, payment services (24), and queues (26).

[27] WFP factors were categorised as external assistance for the CBT interventions targeted at beneficiaries and WFP support for the financial support received by retailers engaged in WFP CBT activities

[28] [E] represents explicit references to WFP

[29] CBT interventions targeted at beneficiaries

[30] The main indicators used to measure changes in business were growth in business and performance, sales, and income

Table 3: Robustness test on causal link between WFP and changes in price, quality and service

Target Factors	WFP support [E]
Price (Retailers)	22
Price (Suppliers)	25
Quality (Variety)	39
Quality (Quality)	42
Services (Payment)	24
Services (Customer)	31
Services (Queues)	26

3.5. Stakeholder perceptions on positive/negative effects of WFP MDAs

74) For a more detailed causal map outlining the major and minor effects of WFP interventions and support, see Annex 11. The association to WFP meant retailers were required to step up their level in terms of the quantity and variety of their products and adhere to stringent WFP requirements with respect to quality of products and services. One wholesaler switched to become a retailer when they started working with WFP in order to address the spike in demand. Another retailer mentioned how his assortment increased as a result of the partnership: *"This increment in the variety is the result of our link to World Food Program since 2017, which allowed us to sell more products because of the demand, and also helped us to grow from small in 2018 to big in 2021."*

75) Some retailers took to heart lessons learned from trainings about product safety, hygiene, price and product displays, farming techniques, and inventory management. Others even built warehouses to create a hygienic environment and keep their products fresh for longer periods of time. Finally, retailers recognized the positive outcomes that WFP interventions such as 'Comida Pelo Trabalho' had on the overall wellbeing of their communities and food security for its members.

4. Sustainability

Question 4: Are the results of WFP contribution sustainable i.e., continuing, or likely to continue after the interventions of WFP?

4.1. What is the likelihood that the results of MDAs will be sustained after the end of external assistance?

76) Project staff mentioned that the sustainability of MDAs was highly dependent on the design of the activity itself. RIAB has the potential to offer a sustainable solution by developing a market for beneficiaries and creating business opportunities for retailers. From beneficiaries' perspective, the activity is sustainable because the market will still be there, even after WFP withdraws assistance. However, whether this activity can be implemented by retailers on their own over the long term remains to be seen.

77) To make this activity more sustainable, both project staff and key stakeholders suggested linking retailers with wholesalers in order to extend credit to retailers, focusing on small retailers who are more invested in the local community, or combining the activity with trainings that provide retailers with a business understanding. The retailer training that accompanied the RIAB pilot was considered to be sustainable since the initiatives being undertaken by retailers as a consequence of the training will benefit their businesses in the long run.

78) Mobile shops, on the other hand, were a short-term solution and were widely considered to be unsustainable. Mobile shops incurred higher costs for retailers and for WFP, created dependency on assistance, and neither beneficiaries nor retailers were encouraged to find new sustainable ways of making money and increasing their income. Therefore, the current business model for mobile shops will not function without outside intervention or without changing the financial incentives for retailers. Recommendations given for improving sustainability were for bigger retailers to run mobile shops.

79) Given that MSAs are essentially situation assessments, the sustainability component would be regarding the habitual use of MSAs rather than the assessments themselves. In order for MSAs to be sustainable, WFP has to work on integrating them more into its programme designs. Last but not least, WFP should establish a clear way of measuring sustainability in order to be able to systematically assess projects on this criterion.

4.2. What are the key factors that affect negatively or positively sustainability of MDAs, including political, economic and social factors?

80) The main external factors affecting the sustainability of MDAs can be broadly categorized into

political and socioeconomic factors. Political factors negatively affect the sustainability of MDAs in Mozambique because the conflict in Cabo Delgado is causing for substantial internal displacement of the population, leading to WFP redirecting funds that would otherwise go to long-term projects in other parts of the country to provide assistance to resettled people in the northern provinces. Massive internal displacement can also generate tensions between host and displaced populations, and the resulting decrease of social cohesion between these populations can negatively impact the outcomes of MDAs over the long-term. Another key political factor is the role of the government. If government strategy is preventative, it can create a very positive environment for MDAs. However, if the government approach is reactionary and only responds to emergencies, it will not be conducive to sustainable market development.

81) The COVID-19 pandemic has had a strong economic impact in Mozambique, reducing commercial activities, agricultural fairs and markets, and people's freedom of movement. The high rate of unemployment increased further during the pandemic, reducing consumer purchasing power and subsequently, demand for products. To compound Mozambique's economic challenges, the exchange rate of the metical against the dollar worsened considerably over the past year, leading to a marked increase in the price of imported goods and a decrease in their availability. The result is an environment where newly developed markets will struggle without assistance.

82) Internal factors are considered by some respondents to be even more important. WFP has to have a long-term plan in place which takes into account the local context of the region and beneficiaries' previous experience if it aims to make MDAs sustainable, with proper funding and government participation.

4.3. Are the factors different for different actors, men, women, rural, urban etc...?

83) Respondents generally felt that the socioeconomic and political factors previously discussed affected men and women equally, but one respondent did note that income differs depending on gender and suggests a focus on women practicing agriculture. The project staff consulted highlighted the cultural aspects as critical in design and implementation of MDAs. For example, in the southern, central, and northern parts of Mozambique, traditionally men are the ones who are always in the lead and doing business.

84) A more noteworthy distinction, according to respondents, is between people from urban and rural areas. In urban areas people have more access to education, job opportunities, and higher incomes than people in rural areas. Rural infrastructure in the country is also in bad condition, as many people still do not have a water supply, electricity or access to roads. The absence of those services makes it harder to develop all activities of the program in the rural area.

5. Lessons learned

85) Project staff recommended that there should be a clear future vision for the direction of MDAs, so that WFP can focus on the long-term planning and sustainability of activities. Furthermore, MDA activities provide a lot of information to contribute to program design, and this information should be better utilized. On the supply chain unit in particular, one respondent expressed the need to clearly differentiate between MDAs and traditional logistics activities such as emergency response, and to highlight the importance of MDAs as sustainable supply chain solutions in comparison with programming and general logistics activities. Furthermore, the framework involving the usage of MDAs should be standardized, i.e., where an MFI automatically triggers an MSA, and MSA reports suggest potential MDAs in the recommendations.

86) Staff often noted that further development and expansion in scope of MDAs requires a higher level of planning, engagement, and expertise and a shift towards cross-cutting activities. MDAs should not be seen only as a supply chain activity, but instead the CO should be involved in main activities in order for them to be more successful. Beneficiaries have expressed the need to buy a variety of products, and a multi-sectoral approach could identify other needs, such as construction material or hygiene products, that can be addressed with support from retailers involved in these MDAs. MDAs are also heavily focused on the beneficiaries' perspective, but other perspectives (e.g., financial, logistical, authorities, supply chain) need to be taken into account in the planning phase.

87) WFP should change its approach to retailers by not just contracting them as service providers but also as partners that WFP is training. Retailer organizations could be involved to increase coverage and potentially improve

the preferred supplier network through. Given the recent experiences with delayed payments, some respondents said that MDAs should account for the financial capacity of actors working with WFP. Small retailers without a steady cashflow require a different approach than wholesalers, who can buy in bulk and can afford to wait for extended payment periods.

88) Another factor considered to be crucial to the success of MDAs was including the local government in MDA activities in order to get buy-in. The authorities have to clearly understand the activity's objective and be kept in the loop during implementation. Where possible, the government should be encouraged to take the lead and to help set priorities. The Cash Working Group is very much oriented on NGOs and UN, but if WFP really wants to make cash work, key authorities should be involved. One respondent recommended WFP to establish a CWG at authority level and to ensure it maintains a multi-sectoral approach.

89) Finally, some respondents suggested gathering and using stories from other countries who have used different approaches. An MDA hub would be a useful platform to develop and share ideas and lead innovation. It is important to remember that in some contexts, WFP can do more than emergency response.

6. Conclusions & Recommendations

90) Based on the evidence presented in the QuIP analysis and in the key stakeholder interviews, WFP support has had a strong effect in improving retailers' businesses and providing them with financial security by increasing the demand for products and improving their capacity to meet that demand. Therefore, WFP should continue engaging with retailers in future MDAs activities, as it has proven to be a good model for supporting business development, improving services, and building resilience.

91) The effectiveness of MDAs is seen in a positive light. MSA recommendations provided concrete solutions, which allowed WFP to get past the bottlenecks observed that had led to inefficiencies in the provision of goods to beneficiaries. Despite their success, project staff noted that MSA have not become a way of working in the country office and this significantly curtails MSA's abilities to contribute to planned outcomes over the long-term. The retail-in-a-box had significant achievements, its design was good, but operational challenges led to delays with the implementation of the project, shops are not yet open throughout the week, and there is still space for them to improve service. The results of the training were visible as retailers built bigger shops and implemented the recommended warehouse management approaches. In the short term, mobile shops addressed some of the four pillars of food security in the short term but not in the long run.

92) WFP financial support in Mozambique created increased demand and competition, which led to increased growth and business amongst retailers. Most retailers report the link to be indirect, which suggests that MDAs are working as intended, through creation of demand and competition. While WFP supports retailers financially, this also generates a market with demand and competition which subsequently stimulates retailer growth. This is the intention of MDAs and makes the approach more sustainable. It means that once WFP exits, the markets will still be there, and retailers will continue to grow.

93) According to the findings, the design and implementation of MDAs is most constrained by macroeconomic challenges and policy uncertainties, political changes and demographic changes. The MDAs operate within a complex environment where economic factors interact with political, environment, and social factors. The MDAs need to be coordinated within this broader framework with WFP forging partnerships with government in the coordination and implementation of MDAs.

94) Despite the benefits brought by the MDAs, the project can still improve. The feedback given by several stakeholders suggests that WFP must expand the coverage of MDAs and improve reduce the waiting time for payments in order to make these activities more appealing to both beneficiaries and retailers. Moreover, MDAs should receive more funding and they should be utilized in a systematic manner in order for them to grow as an effective tool for market development. Finally, MDAs should be designed in a cross-cutting manner, with the local context and the long term in mind if they are to be sustainable without external assistance. Local retailers can respond to changes faster, and working with local suppliers has a more positive multiplier effect on the local economy. WFP should engage more actively with the government to ensure continuity of the activities once the organization's funding cycle ends, as well as discuss and

seek guidance from other COs and partners outside WFP on MDAs in order to increase their impact on stakeholders.

95) In several instances there is evidence to show that some of the benefits of MDAs are, or will be, sustainable beyond WFP assistance as in the case of Retail-in-a-Box and associated retailer trainings. The sustainability of MDAs depends on several contextual factors: geography, political, policy, macroeconomic challenges, climate change, size of retailers, and the level of multi-sectoral engagement. The importance of engagement with the government and making sure they are part of the MDA design and implementation was emphasized in all countries. Multi-year funding was deemed critical for sustainability of interventions.

96) In the context of Mozambique, conflict and natural disasters detract from a sustainable approach because they require an emergency response from WFP. The short-term nature of funding for emergency responses does not favour sustainability or long-term results. If possible, the organization must advocate with donors for longer multi-year funding, so that a more self-sustaining environment is developed.

97) WFP must also improve the pre-implementation stage with better mobilization of and engagement with retailers to build trust and guarantee their adherence to the project. During the mobilization retailers must be informed about the conditions for the project, such as duration, funding, benefits and responsibilities. In addition, to strengthen the monitoring and evaluation of MDAs and enhance the measurement of results, more assessments must be conducted on the progress of activities.

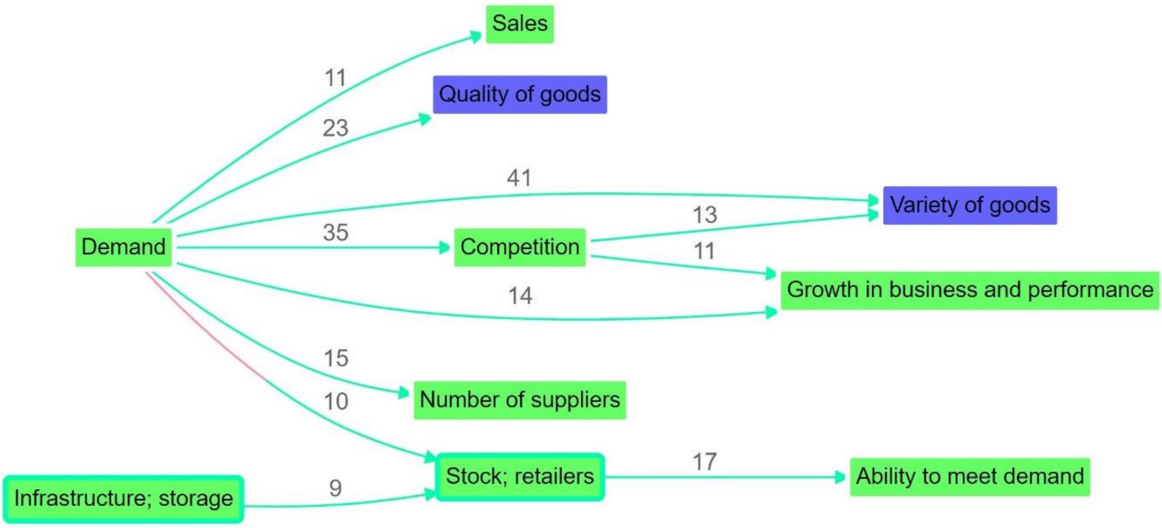
Annex 1: Table with factor frequencies and centrality ratings[31]

Factor (Top 40)	From	To	Total	Centrality
	232	81	313	696
Growth in business and performance	61	95	156	721
Prices; suppliers	34	117	151	54
Competition	93	54	147	46
Infrastructure	85	30	115	190
Variety of goods	19	93	112	61
Ability to meet demand	1	107	108	5
COVID-19	103	0	103	0
Imports	57	44	101	141
Stock; retailers	34	67	101	113
Payment services	45	50	95	115
COVID-19 restrictions	70	13	83	3
Quality of goods	11	71	82	60
Supply chain	31	51	82	34
Number of suppliers	47	31	78	121
Protocols	24	53	77	57
Road	51	25	76	55
Natural disasters; flooding	74	0	74	0
Income	21	50	71	71
Customer service	31	40	71	37
Household well-being	0	71	71	0
Customer experience	1	69	70	138
Sales	19	50	69	167
MZN depreciation	66	2	68	3
~Stock; retailers	17	49	66	65
Migration	39	22	61	7
External assistance	51	5	56	34
Transport costs	30	24	54	50
WFP support [E]	45	8	53	12
People empowered to access food	11	40	51	6
~Stock; suppliers	23	27	50	19
Infrastructure; storage	35	14	49	64
Community well-being	2	45	47	57
External assistance [E]	40	6	46	3
Product display	28	17	45	62
Local production	35	8	43	32
~Prices	11	32	43	14

[31] Numbers of links from and to each factor. Most frequent factors are listed first. ~ indicates a negative direction of change

Factor (Top 40)	From	To	Total	Centrality
Hygiene	5	38	43	11
Security	15	26	41	60
Staff	31	8	39	72.4

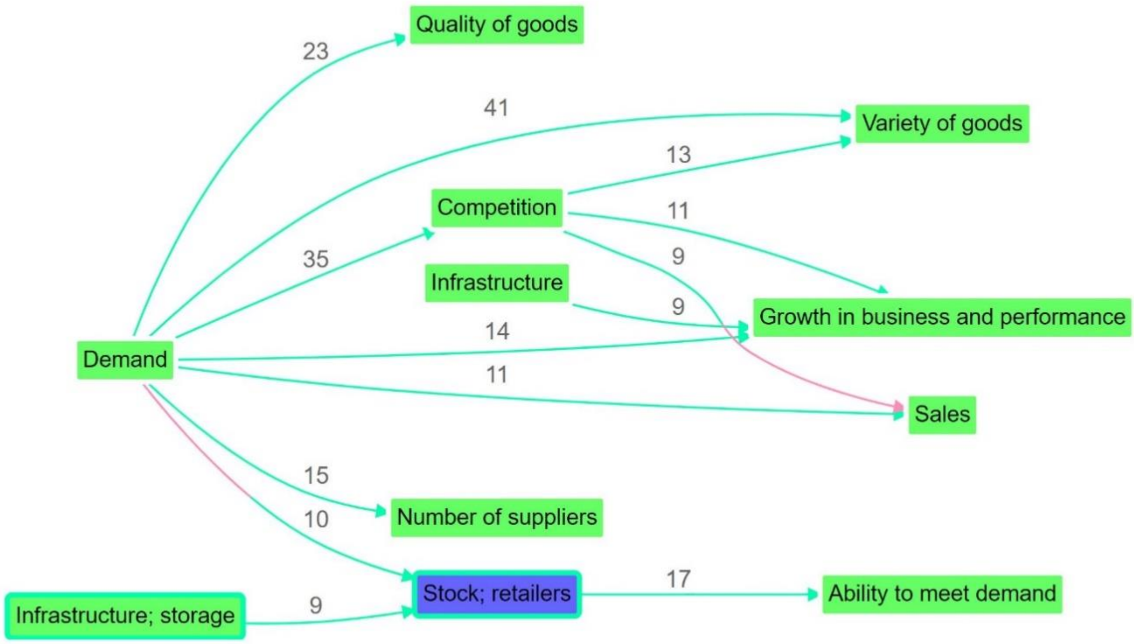
Annex 2: Causal links in connection with assortment and quality[32]



Source: Interviews and FGDs with retailers

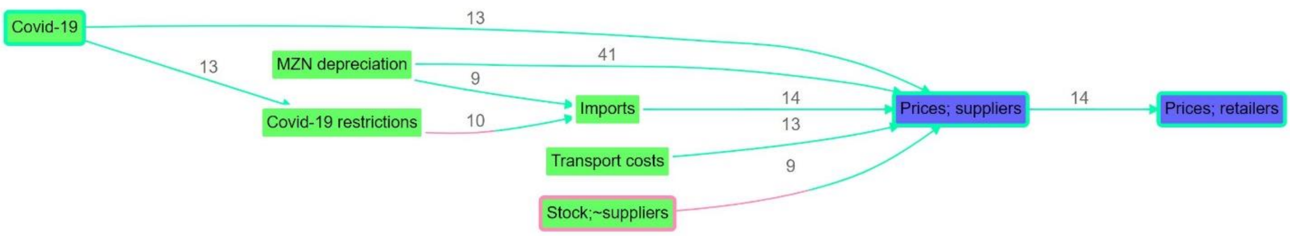
[32] WFP factors were categorised as external assistance for the CBT interventions targeted at beneficiaries and WFP support for the financial support received by retailers engaged in WFP CBT activities
[32] [E] represents explicit references to WFP
[32] CBT interventions targeted at beneficiaries
[32] The main indicators used to measure changes in business were growth in business and performance, sales, and income

Annex 3: Causal links in connection with availability



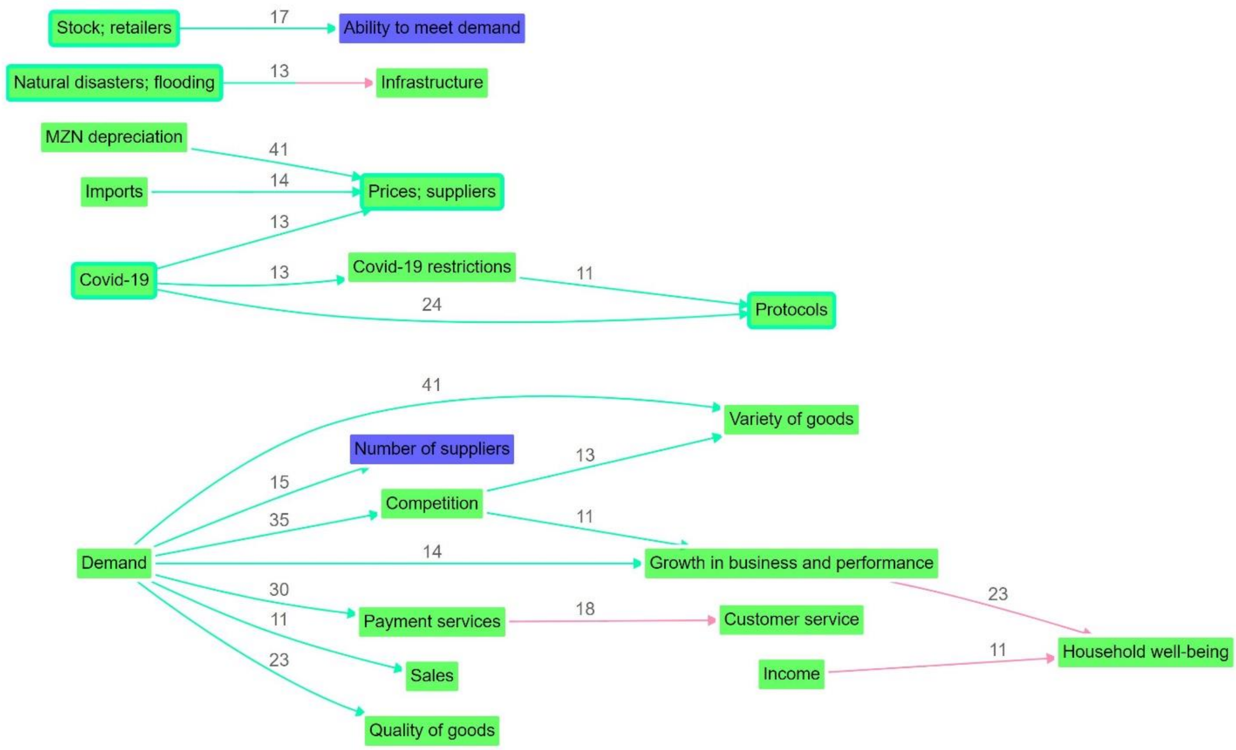
Source: Interviews and FGDs with Retailers

Annex 4: Causal links in connection with prices of products



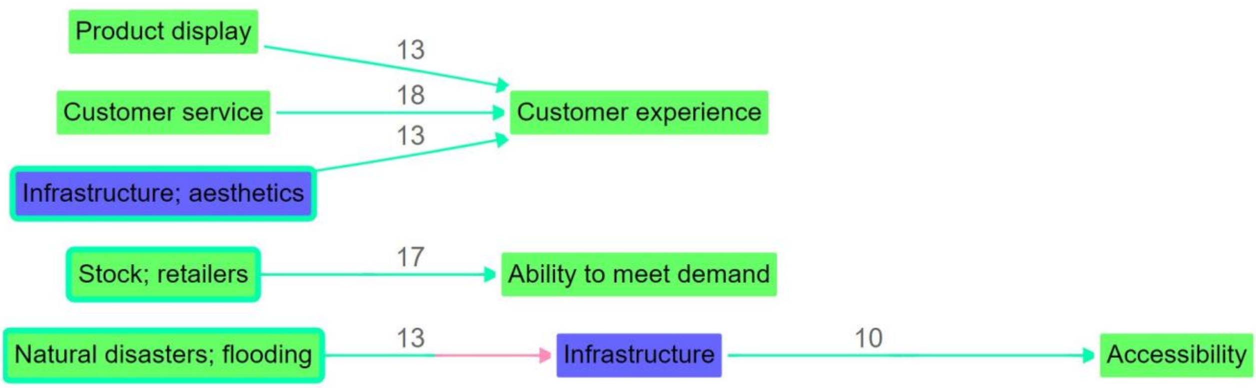
Source: Interviews and FGDs with Retailers

Annex 5: Causal links in connection with resilience in the supply chain



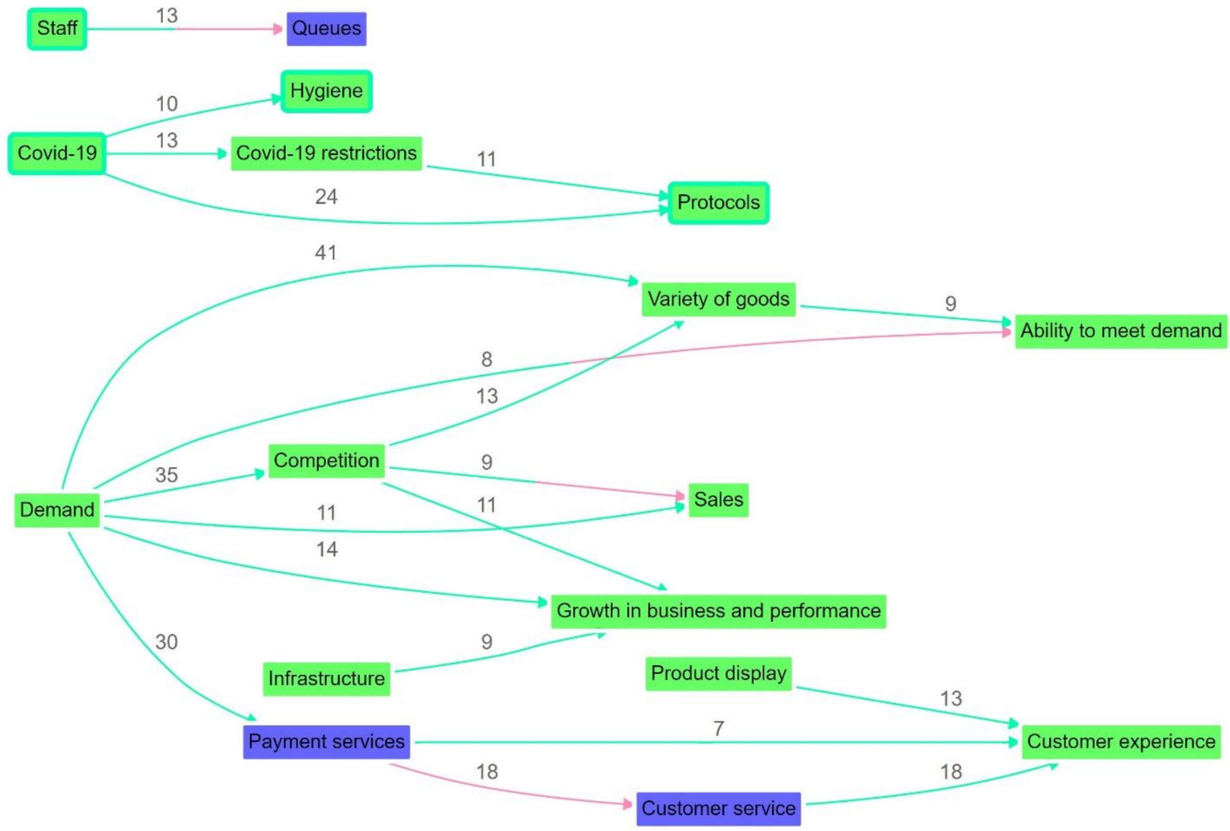
Source: Interviews and FGDs with Retailers

Annex 6: Causal links in connection with infrastructure



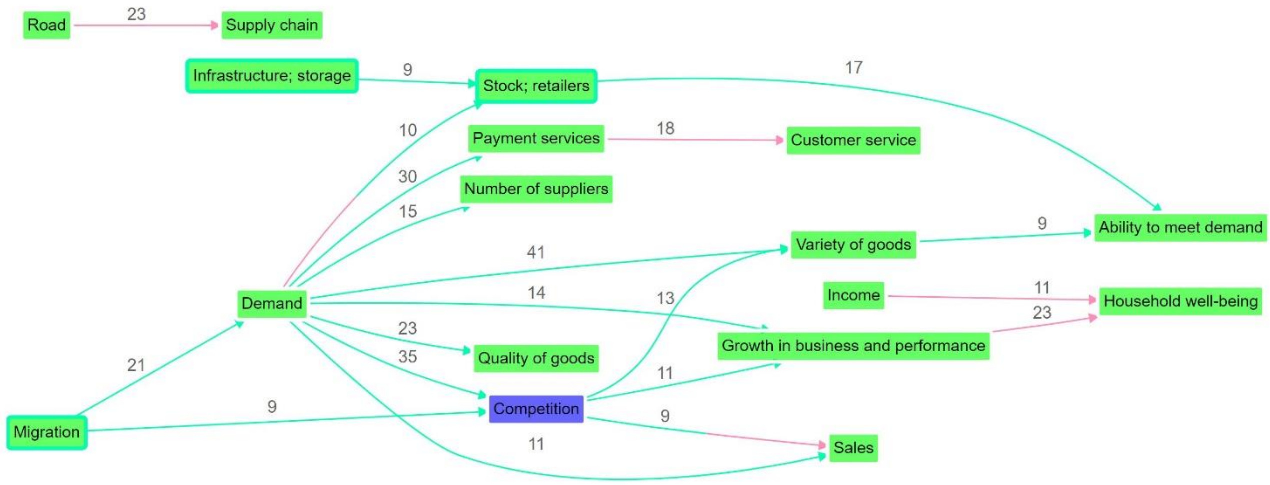
Source: Interviews and FGDs with Retailers

Annex 7: Causal links in connection with customer services



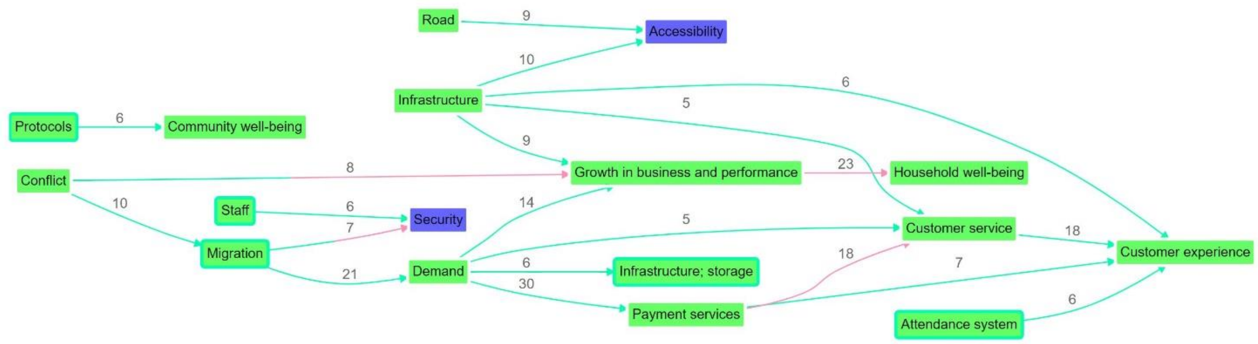
Source: Interviews and FGDs with Retailers

Annex 8: Causal links in connection with competition



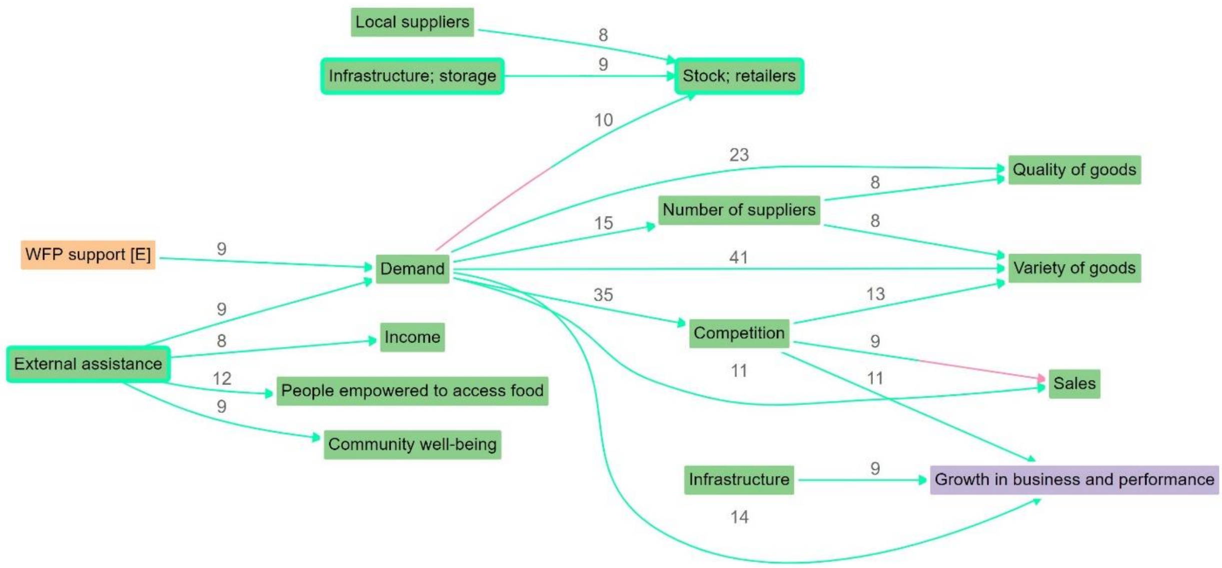
Source: Interviews and FGDs with Retailers

Annex 9: Causal links in connection with access and protection



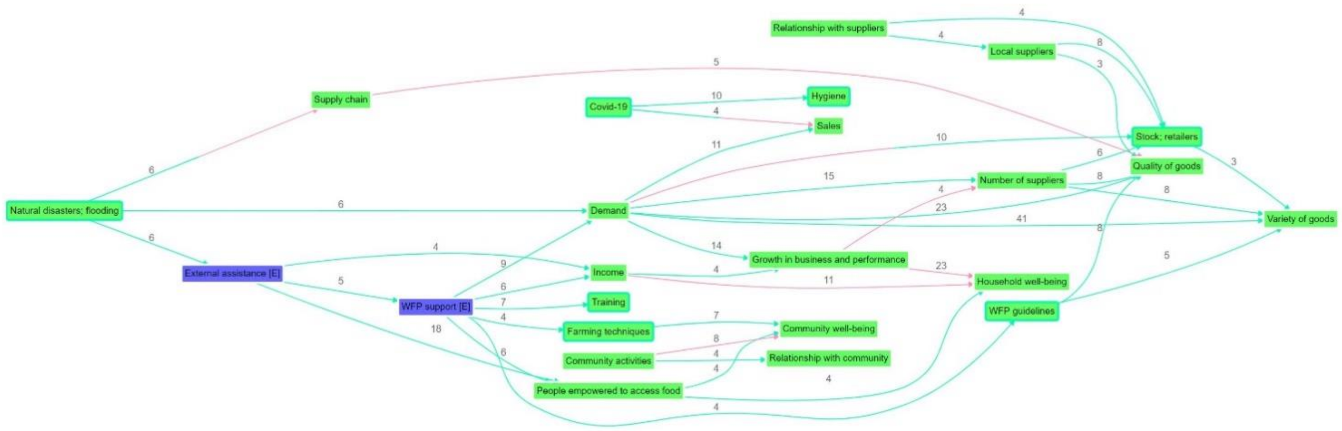
Source: Interviews and FGDs with Retailers

Annex 10: Causal links on perceptions of how WFP has impacted growth in business and performance over the last three years



Source: Interviews and FGDs with Retailers

Annex 11: Causal links on stakeholder's perceptions on positive/negative effects of WFP MDAs



Source: Interviews and FGDs with Retailers

Annex 12. List of Stakeholders Consulted

	Gender	Designation	Organisation	Location
Non_QuIP				
1.		Former CBT officer	WFP	Cabo Delgado
2.		Retail Logistics Office	WFP	Sofala
3.		Head of Supply Chain CBT	WFP	Marta Guivambo/Nelsa da Costa
4.		Head of Supply Chain Unit CBT – Mozambique	WFP	
5.		Contracted Market Development Consultant		Rome
6.	F	Farmer/ Wholesaler	AFMC- Associação Futuro Mulheres Carada	Changara, Posto Administrativo de Carada
7.		Wholesaler	Nhemachere	Nhamatanda
8.		Community Leader of Guara Guara	Guara Guara Community	Guara Guara

QuIP Key Informant interviews

District	Retailer		Gender	Location
Montepuez	9.	41 Retailer/Trader	M	Montepuez/ZAC Comercial
	10.	43 Retailer	M	Montepuez/VIP Supermarket
	11.	45 Retailer/Wholesaler	M	Montepuez-COGEF
Pemba	12.	31 Small Retailer	M	Pemba, Casa Azmaira
	13.	34 Retailer	M	Pemba/VIP Supermarket
	14.	38 Retailer/Wholesaler	M	Pemba-COGEF
	15.	Retailer	M	Pemba/Mini Mercado
	16.	FGD Retailers	5 M, 3 F	Pemba
Chibuto	17.	Retailer	M	Chibuto
	18.	Retailer	M	Chibuto

	19.	Retailer	M	Chibuto
	20.	FGD	All Male	Chibuto
Magude	21.	Retailer	M	Magude
	22.	Commercial Retailer	M	Magude
Namaacha	23.	Commercial Retailer	M	Namaach
	24.	Retailer	M	Namaacha
Panjane	25.	Retailer	M	Panjane/
Ressano Garcia	26.	Retailer	M	Kanimambo Mama
Loja Francisco	27.	Retailer	M	Loja Francisco
Buzi- Guara	28.	Retailer	M	Buzi- Guara Guara
	29.	Retailer	M	Buzi
	30.	Retailer	M	Buzi- Guara Guara
	31.	Retailer	M	Buzi- Guara Guara
	32.	FGD	All Male	Buzi- Guara Guara
Dondo	33.	Retailer	M	Dondo
Moatize	34.	Retailer	M	Moatize
Tete	35.	Retailer	M	Tete
	36.	Retailer	M	Tete
	37.	Retailer	M	Supermercado Tete

Annex 13: List of Acronyms

ACR	Annual Country Report
CBT	Cash Based Transfer
CO	Country Office
CSP	Country Strategic Plan
CWG	Cash Working Group
FGD	Focus Group Discussion
IT	Information technology
KII	Key Informant Interviews
MDA	Market Development Activities
MFI	Market Fuctionality Index
MSA	Market Systems Analysis
NGO	Non Governmental Organization
QuIP	Qualitative Impact Assessment Protocol
RBJ	Regional Bureau for Southern Africa
RIAB	Retail-in-a-Box
UNICEF	United Nations Children's Fund
UNHCR	United Nations High Commissioner for Refugees
WASH	Water, Sanitation, and Hygiene
WFP	World Food Programme