



**WFP EVALUATION**



# **EVALUATION OF WFP'S CONTRIBUTION TO MARKET SYSTEMS IN SOUTH SUDAN AND BANGLADESH**

**2018 TO 2022**

Decentralized Evaluation Report

DE/OSC/2022/029

WFP Supply Chain CBT, Markets and Retail Unit (SCOLR)

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# Acronyms

ACR	Annual Country Report
ACROSS	Interdenominational Christian organization based in South Sudan
ALNAP	Active Learning Network for Accountability and Performance in Humanitarian Action
BDT	Bangladesh Taka (currency)
BEAM	Specialist platform for knowledge exchange and learning about using market systems approaches to reduce poverty
BRAC	Building Resources Across Communities
CBA	Cost-Benefit Analysis
CBT	Cash-Based Transfer
CEDAW	Convention on the Elimination of All Forms of Discrimination Against Women
CO	Country Office
COVID	Coronavirus Disease 2019
CP	Country Programme
CRF	Corporate Results Framework
CRS	Catholic Relief Services
CSP	Country Strategic Plan
CXB	Cox's Bazar (a district in Bangladesh)
DAC	Development Assistance Committee
DC	Directly contracted retailers
DEQAS	Decentralized Evaluation Quality Assurance System
DRR	Disaster Risk Reduction
EC	Evaluation Committee
EQ	Evaluation Question

ERG	Evaluation Reference Group
ET	Evaluation Team
FAO	Food and Agriculture Organization
FGD	Focus Group Discussion
FFC	Fresh Food Corner
FGD	Focus Group Discussion
FLA	Field-level Agreements
FO	Field Office
GBV	Gender- Based Violence
GEEW	Gender Equality and Empowerment of Women
GEWE	Gender Equality and Women's Empowerment
GFA	General Food Assistance
HCI	Human Capital Index
HQ	Headquarters
ICSP	Interim Country Strategic Plan
IDP	Internally Displaced Person
IFPRI	International Food Policy Research Institute
IOM	International Organization for Migration
IPC	Integrated Food Security Phase Classification
IRC	International Rescue Committee
IRRM	Integrated Rapid Response Mechanism
JAM	Joint Aid Mechanism
KI	Key Informant
KII	Key Informant Interview
KPI	Key Performance Indicator
LEWIE	Local Economy-wide Impact Evaluation



MDA	Market Development Activities
MFI	Market Functionality Index
MHRP	Multi-Hazard Response Plan
MMR	Maternal Mortality Ratio
MS	Microsoft
MSA	Market Systems Analysis
MT	Metric Ton
NGO	Non- Governmental Organization
NRC	Norwegian Refugee Council
NSPPF	National Social Protection Policy Framework
OCHA	Office for the Coordination of Humanitarian Affairs
OECD	Organisation for Economic Co-operation and Development
OEV	Office of Evaluation
POS	Point of Sale
QuIP	Qualitative Impact Assessment Protocol
RAM	Research Assessment and Monitoring
RB	Regional Bureau
REA	Retail Engagement Activities
REVA	Refugee Influx Emergency Vulnerability Assessment
RIAB	Retail in a Box
RIC	Resource Integration Centre
ROC	Retailer Onboarding and Contracting
RPME	Retailer Performance Monitoring Tool
RRC	Relief and Rehabilitation Commission
SCOLR	Supply Chain CBT, Markets and Retail
SCOPE	WFP's beneficiary information and transfers management platform

SDG	Sustainable Development Goal
TDY	Temporary Duty
TOC	Theory of Change
UN	United Nations
UNEG	United Nations Evaluation Group
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations Children's Fund
UNOPS	United Nations Office for Project Services
UNSDCF	United Nations Sustainable Development Cooperation Framework
USD	U.S. dollar (currency)
VAM	Vulnerability Analysis and Mapping
WFP	World Food Programme

# Executive Summary

## PURPOSE AND OBJECTIVE

1. This thematic evaluation, commissioned by the Headquarters (HQ) Supply Chain CBT, Markets and Retail (SCOLR) team, examines WFP's Contribution to Market Systems in South Sudan and Bangladesh. The SCOLR unit works to optimize supply chains for reaching remote fragmented markets affected by natural disasters or conflict. Market development activities (MDAs), including Retail engagement (REA), which encompass supply chain and market solutions are implemented for improving market functionality. MDAs implemented in Cox's Bazar in Bangladesh and 4 markets (Juba, Mingkaman M, Mingkaman Kalthok, Bor) in South Sudan were the subject of this thematic evaluation. These countries were among the first countries to formally implement MDAs. The evaluation was carried out from April to November 2023 and covered the period from January 2018 to December 2022.
2. Accountability and learning were the two mutually reinforcing objectives for the evaluation which assessed results of the supply chain activities per the Cash-based Transfer (CBT) business model and revised Theory of Change, and their contribution to market development in the two countries. It simultaneously aimed to understand high-level outcomes and extract lessons and good practices to inform operational planning and decision-making processes.
3. The scope of the evaluation included an assessment of MDAs implemented during the stated period including beneficiaries' market interactions (purchasing power, choice and access to markets). The evaluation focused on the process for and extent to which MDAs were designed to sustainably contribute to enhanced assortment, availability, prices, and quality of food products and thus the market interaction experience for the intended beneficiaries at the local level. There was no comparison between two countries given the differences in monitoring tools and data availability. Each country's unique context was considered, and lessons drawn recorded in brief country-level summary reports.
4. The evaluation used the relevance, effectiveness, efficiency, impact, and sustainability criteria. Gender equality and wider inclusion were mainstreamed into the objectives, with a specific focus on assessing differential impacts on women and people with disabilities, to the extent possible.

## INTENDED USERS OF THE EVALUATION

5. The primary users of the evaluation are the SCOLR unit and WFP relevant CO staff, who should use the results to improve planning, implementation, and monitoring of MDAs. External users, including government representatives and other external partners, may also find it useful for their wider economic development goals.
6. The need for this evaluation is exigent given WFP's significantly increased use of CBT including in urban areas as well as focus on supporting national social protection systems in the context of the COVID-19 pandemic and the Ukraine crisis that deepened food insecurity in most countries. As such, there was interest in mapping and understanding the results of MDA in the design and revision of country strategic plans (CSPs) as well as for other programme designs and delivery processes.

## CONTEXT

7. Since 2017, 884,000 Rohingya refugees have fled over the border from Myanmar into the coastal district of Cox's Bazar in Bangladesh. Cox's Bazar, with a population of approximately 2,290,000, is recognized as one of the country's poorest and most vulnerable districts, with around 33% of its residents living below the poverty line and 17% experiencing extreme poverty.<sup>1</sup> A significant proportion of residents

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<sup>1</sup> Poverty Alleviation Coalition. (2019, December 9). Poverty Alleviation Coalition. Poverty Alleviation Coalition. Available from: <https://alleviate-poverty.org/bangladesh>

(35%) are food insecure (IPC level 3 and 4)<sup>2</sup> and an estimated 96% of Rohingya refugees in Bangladesh are unable to meet basic needs without assistance.<sup>3</sup> The overall vulnerability of both refugee and host communities in Cox's Bazar remain alarmingly high, with both communities having faced multiple shocks over the past few years.<sup>4</sup>

8. In South Sudan, 67.3% of the population lives below the international poverty line and 62% of the population experience food insecurity, which has been exacerbated by the ongoing conflict and climate-change.<sup>5</sup> The prevalence of stunting among children under 5 remains high at 31.3%. Patriarchy and limited gender rights also lead to gender-based violence and higher instances of food insecurity among women and girls. The country has a largely agrarian economy, with oil being its main export. However, fluctuations in global oil prices have significantly affected the economy, causing inflation and unemployment to rise. Additionally, the country continues to be affected by both internal and regional conflict and lacks the infrastructure, including roads, ports, and power generation, necessary to support economic growth.

## METHODOLOGY

9. The evaluation used a theory-based, utilization-focused approach with the Qualitative Impact Assessment Protocol (QuIP) to collect primary data for the evaluation. It used a collaborative approach to maximize learning and uptake of lessons from the current intervention. An updated TOC was used to gather and organize evidence on the extent to which MDAs contributed to achieving the intended outputs and outcomes. The evaluation primarily assessed outcomes at the market system level, but it also expanded the analysis of results to those at the intermediate level (i.e., WFP corporate indicators). QuIP was used to assess impact contributions to the well-being of the direct beneficiaries. The data collection process was sensitive to inclusion issues such as gender, disability, age, and other pertinent factors. The evaluation used causal maps to illustrate perceived contribution of MDAs to observed and reported changes. In addition, financial data was analyzed to assess the efficiency of the interventions. A cost breakdown matrix was used to evaluate the interventions' costs in both countries. Cost-benefit analysis was then applied to assess the marginal costs and benefits from the interventions. The evaluation team met key stakeholders, the Evaluation Committee (EC) in particular, on a regular basis, and all methodological decisions in this evaluation were made with full consensus of the EC. Though the evaluation team had to overcome some limitations such as data gaps and inherent challenges in using qualitative tools, overall, the methodology outlined above enabled a comprehensive, triangulated and reliable assessment of the impact of MDAs.

## FINDINGS

### Relevance

10. The evaluation found that MDAs, including retail engagement interventions, are largely informed by country contexts and market inefficiencies identified during relevant multi-sector assessments, demonstrating a commitment to addressing specific needs. The effective use of supply chain expertise and corporate market assessment tools indicated a thoughtful approach to identifying and responding to market inefficiencies. However, the evaluation noticed a gap in how analysis of consultation with women and marginalized people was used to design gender responsive programming and training materials and

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<sup>2</sup> Integrated Food Security Phase Classification. (2022). Bangladesh IPC Chronic Food Insecurity Report (June 2022)— Bangladesh. Available from: <https://reliefweb.int/report/bangladesh/bangladesh-ipc-chronic-food-insecurity-report-june-2022>

<sup>3</sup> Inter Sector Coordination Group. (2021). 2021 Joint Response Plan: Rohingya Humanitarian Crisis (January - December 2021) - Bangladesh. Available from: <https://reliefweb.int/report/bangladesh/2021-joint-response-plan-rohingya-humanitarian-crisis-january-december-2021>

<sup>4</sup> World Food Programme. Bangladesh. (2023). Refugee Influx Emergency Vulnerability Assessment (REVA-6) Report. WFP. Available from: <https://docs.wfp.org/api/documents/WFP-0000150690/download/>

<sup>5</sup> World Bank. (2023). Poverty and Equity Briefs. Available from: <https://www.worldbank.org/en/topic/poverty/publication/poverty-and-equity-briefs>

there is need for better reporting on how MDAs may have impacted these groups differently. Furthermore, while MDAs were recognized as highly relevant for government strategies in the target countries, their integration into the corporate strategy and the absence of mechanisms for measuring their impact limited their visibility and effectiveness both within the organization and to external stakeholders.

### **Effectiveness**

11. The evaluation found that the MDAs made progress towards achieving their objectives for men and women in the target groups and their wider local communities. MDAs, especially activities focused on improving retailer business practices, negotiating prices and developing market linkages, enabled the availability of nutritious food at fair prices, enhanced affordability and enriched the shopping experience for beneficiaries in both Bangladesh and South Sudan. Training provided to retailers and farmers has also led to increased food product quality. Additionally, MDAs positively contributed to women's economic empowerment by promoting their participation in various activities, such as volunteering and retailer training. However, the evaluation also detected challenges to achieving these objectives, such as reduced transfer values affecting affordability and negatively impacting beneficiaries purchasing behaviors and, subsequently, reported declines in the quantity and quality of food consumed (i.e. increased use of coping mechanisms). Other challenges affecting MDA outcomes include inflation, price gouging by retailers due to cartel formations, and currency volatility.

12. Support from WFP headquarters in the form of corporate tools and guidance played a crucial role in the successful implementation of MDAs. The tools, such as the Market Systems Analysis (MSA), help country offices adapt interventions to local circumstances. This adaptability enhances the effectiveness of MDAs and informs decision-making. Moreover, the capacity-building efforts provided by the CO team for market actors, particularly retailers, through training on operational compliance, product quality, customer service, and business management have been highly effective. These initiatives improved relationships between market actors and contributed to a better understanding of market dynamics.

13. The successful implementation of MDAs was, however, highly influenced by various external and internal factors. In Bangladesh, seasonal weather patterns and natural disasters like flash floods disrupt crop production and supply chains, leading to uncertainties in the market. Additionally, the limited availability of agricultural land hinders the ability to meet the food demands of local populations. In South Sudan, currency fluctuations, delayed payments, high taxes, and disrupted supply chains due to flooding, conflict and poor infrastructure pose significant challenges for MDAs. Collusion among retailers, leading to price gouging, negatively affects beneficiary purchasing power.

### **Efficiency**

14. Once established, MDAs proved to be a comparatively efficient option, with establishment costs recovered in less than two years and lower recurrent costs, providing nutritional and social benefits to vulnerable populations. In Bangladesh and South Sudan, the monetized social benefits from the MDAs—encompassing income generation, community advancement, and time-saving impacts—reach USD 1,456,502 and USD 1,935,315, respectively. These are set against total investments of USD 8,814,632 (including the construction of 13 shops) in Bangladesh and USD 2,832,775 in South Sudan, demonstrating the profound and tangible impacts of the MDAs in both countries. Bangladesh's strategy, marked by higher upfront costs and an extended recovery duration, reflects a commitment to providing a long-term positive retail experience for a large refugee population base. In contrast, South Sudan's approach, characterized by lower initial costs and quicker recovery, indicates a strategy for immediate impact in resource-constrained environments.

### **Impact**

15. WFP made notable contributions to improving resilience by enabling retailers to expand their businesses through improvements in the supply chain and retailer best-practice training and creating lasting market linkages and strengthened relationships with their customers. Positive effects of these initiatives include economic empowerment among paid volunteers in Cox's Bazar, where refugees gained employment opportunities that might not have been available otherwise. The farmer linkages programme also extended its impact to the wider community, providing training and market access opportunities for local producers. In South Sudan, the creation of markets from scratch led to job opportunities, and retailer training improved services and quality beyond shops outside WFP engagement. Additionally, a key positive

effect had been the recognition of the importance of providing quality products and services by market actors in both contexts. These efforts underline WFP's role in enhancing retailer resilience and expanding businesses of suppliers and retailers.

16. However, negative emerging effects impacted the results of MDAs, such as the inability to buy enough nutritious foods after ration cuts in Bangladesh (not an effect of the MDAs themselves, but this event had a negative effect on the ability of MDAs to reach their full impact). Issues like price gouging/collusion among retailers to push the prices up, unequal power dynamics between B2B and directly contracted retailers and exclusion of non-contracted retailers in South Sudan also pose challenges. Interviews revealed perceptible differences between the two countries when it comes to non-monetized benefits. In Bangladesh, most beneficiaries believe their overall wellbeing had gotten worse<sup>6</sup> in the past two years, which was mainly attributed to limited access to income and food. While most respondents in South Sudan had a favorable view of the changes brought about by the MDAs, particularly noting improvements in availability, affordability and quality of the food consumed, given markets did not substantially exist prior to MDA interventions. Overall, the supply-side activities facilitated by MDAs was crucial in making CBT possible in both locations, emphasizing the symbiotic relationship between these interventions.

### **Sustainability**

17. The results of WFP contributions through MDAs are currently facing sustainability challenges, with a notable lack of exit strategies or contingency plans in place in both countries. Respondents expressed concerns over abrupt termination of MDAs leading to market disruptions and uncertainties surrounding asset ownership, which indicated a need for improved planning for the post-intervention phase. Key factors affecting sustainability include strategic prioritization by WFP and government counterparts for implementing long-term MDAs, the availability of funding and resources for continued support, and the dependency on food assistance and e-vouchers, which can hinder market development. Additionally, economic and political uncertainties, climate change, access to markets, social discontent, and reliance on traditional agriculture practices all influence the sustainability of MDAs. However, there was a high likelihood of market actors continuing to adopt the practices learned through training and maintaining relationships developed during MDAs, even after the interventions conclude, which suggested a positive potential for sustainable impacts at the community level.

## **CONCLUSIONS AND KEY LESSONS**

18. MDAs/REAS expanded availability and affordability of nutritious foods in both Bangladesh and South Sudan. Support for market linkages with local producers boosted competition and consumption of diverse, quality items. Capacity building enhanced operations, product handling and service provision amongst retailers. Although pricing faced volatility due to external shocks, monitoring and supplier negotiations kept staples accessible.

19. These supply-side improvements combined with demand enabled by CBT led to revived dignity for beneficiaries through more regular consumer interactions. Choosing preferred foods aligned with household needs and budgets enabled beneficiary satisfaction. Multi-directional spill-over effects were also observed – from farmers profiting through direct market access to job creation within ever-expanding markets (e.g. porters, bodaboda drivers, small shops) initiated by MDA programming.

20. Once established, MDAs proved comparatively efficient versus in-kind aid, with lower delivery costs and 1-3 years establishment cost recovery periods. However, gains in access to nutritious diets proved highly sensitive to changes in transfer modalities and values. Ration reductions disrupted progress on poverty alleviation and gender equality. The shift to unrestricted cash in South Sudan also initially slowed supplies and affected retailer and beneficiary satisfaction, highlighting a need for ongoing and clear communication and capacity-strengthening during modality transitions and down-scaling. Uncertainty around sustainment beyond external interventions poses risks, especially given lack of exit strategy and clear communication. Enabling graduated self-reliance through policy reforms, infrastructure development and livelihood support is key for lasting resilience.

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<sup>6</sup> QuIP interviews in Bangladesh, 17 out of 29 respondents.

21. Key lessons drawn from the evaluation include:
- a. Regular monthly monitoring in Bangladesh helped to ensure retailers complied with the high WFP standards but also provided a regular feedback mechanism for identifying and resolving issues as they come up. This approach could be adopted in all countries where MDAs are implemented.
  - b. Long-term successful implementation of MDAs is boosted by maintaining positive relations with the host community which can be achieved through community outreach and also livelihood enhancement programmes to promote peace and local economic development.
  - c. Adaptive modalities responsive to market monitoring are essential to optimize efficiency, prevent elite capture and mitigate unintended gender consequences.
  - d. Infrastructure development, local supply chain support and livelihood programming should be emphasized in MDAs to bolster self-reliance and gradual transition planning.
  - e. Sustained, long-term engagement and nurturing of market systems is vital. This requires dedicated specialist capacity, not just temporary troubleshooting around emergencies.
  - f. A need for risk management plans was readily apparent, particularly in view of escalating socio-economic, climate-induced and geographic conflicts such as the COVID-19 pandemic and Ukraine war that affected global supply chains with major implications for the beneficiaries and markets in both the countries.

## RECOMMENDATIONS:

Recommendation	Priority: High/ medium
<b>Recommendation 1:</b> Hold discussions at global strategic level to establish exactly how to more explicitly integrate market development into existing or new corporate policies and manuals, especially in relation to the different in-kind, cash, voucher and capacity strengthening transfer modalities.	<b>High</b>
<b>Recommendation 2:</b> Establish corporate indicators within the Corporate Results Framework (CRF) to measure MDA outcomes, ensuring that some indicators measure the gender-related outcomes of MDAs. In addition, ensure adequate disaggregation of existing corporate indicators, by sex and geography, to allow for improved analysis on the results of market development activities in target markets. As part of this process, integrate clear measurement strategies into the Corporate Indicator Compendium, and pilot indicators through the corporate monitoring system (RAM) in a sample of COs. COs to provide feedback on indicators and available measurement guidance to improve learning and support finalization.	<b>High</b>
<b>Recommendation 3:</b> Enhance the use of corporate tools, particularly RPME, to allow for standardization and comparability across countries, especially if used as a tool for measuring newly developed corporate indicators (per recommendation 2), while still supporting customization per country. Ideally, the RPME should be mandatory and implemented at least quarterly.	<b>Medium</b>
<b>Recommendation 4:</b> In future cost-benefit analyses, it is critical to define at both corporate and country levels the specific expenses to include in the cost analysis (such as whether to	<b>Medium</b>

<p>limit to last-mile delivery or not) and, importantly, which benefits to consider.<sup>7</sup> It is paramount to establish a detailed CBA plan prior to the initiation of the MDA. This plan should outline the monitoring tools to be employed and specify the type of information that needs to be collected. To achieve this, existing WFP tools like market assessments and corporate monitoring tools should be utilized, potentially supplemented with surveys to collect missing information aligned with the considered benefits. It is crucial that these tools cover all territories, are updated at least annually, and include the required breakdown by gender, age, and disability.</p>	
<p><b>Recommendation 5:</b> WFP should invest in the sustainability of market development activities to mitigate the effects of humanitarian funding constraints and ration cuts. MDAs' intentional focus on household and market resilience will contribute to mitigating shocks and operational constraints. Actions should be tailored to each country context.</p>	<p><b>High</b></p>
<p><b>Recommendation 6:</b> Be more intentional and clearer on the means for mainstreaming gender and inclusion considerations and results of related consultations.</p>	<p><b>High</b></p>

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<sup>7</sup> The WFP should establish benefits at a global level, while allowing each country to incorporate specific benefits unique to their local context and objectives. As evidenced in the comparative table in Annex 12. Comparing the CBA conducted during the evaluation with others CBA studies in South Sudan, demonstrates how the definition of intended benefits (ranging from changes in retailers'/communities' perspectives, to nutritional, product variability, economic, or social aspects such as women's empowerment) critically shapes the outcomes of the CBA.



# 1. Introduction

1. The United Nations World Food Programme (WFP) is the largest humanitarian organization focused on hunger and food security, providing access to critical support for people impacted by shocks and stressors related to inequality, climate change and now, the COVID-19 pandemic. WFP provides life-saving solutions in 120 countries and builds long-term paths to stability and prosperity. The organization expertly delivers food assistance across the world by optimizing supply chains, strengthening local markets and food systems, and distributing food and Cash-Based Transfers (CBT) in order to work towards achieving the ultimate goal to end world hunger. WFP Supply Chain CBT, Markets & Retail (SCOLR) unit works towards achieving this goal by helping to create sustainable markets by addressing market inefficiencies to improve Price, Availability, Quality and Service.

2. **Market development activities (MDA) and retail engagement activities (REA) are any interventions intended to address/improve market functionality** (the extent to which a market is functional) along any of the following nine dimensions: availability, price, assortment (trader stock capacity), supply chain resilience, competition, quality, in-store infrastructure, service and access/protection. MDA and REA can be **categorized into three main concepts: 1) Supply chain and market solutions, 2) Capacity strengthening of key supply chain actors, and 3) Partnering/engaging with external organizations and local authorities.** These MDA/REA, which are led by the WFP Supply Chain teams in the country offices (COs) and implemented with other units including Programme teams with support of Regional Bureau (RB) and HQ, where applicable, were the subject of this evaluation.

3. South Sudan and Bangladesh were selected to be the focus of this evaluation, as the two countries were one of the first to initiate the implementation of MDA and REA. Moreover, the HQ Supply Chain CBT, Markets and Retail SCOLR) team was highly involved in the different stages of activity design and implementation.

## 1.1. EVALUATION FEATURES

4. This **thematic evaluation** of WFP's Contribution to Market Systems in South Sudan and Bangladesh, was commissioned by the SCOLR unit, and was carried out from April to October 2023. The **evaluation scope** covered all MDAs, including REAs, in Bangladesh and South Sudan from **January 2018 to December 2022** in Cox's Bazar in **Bangladesh** and Juba, Mingkaman M, Mingkaman Kalthok and Bor field offices in **South Sudan**.

5. At the country-level, WFP's work is anchored within a 4 or 5-year country strategic plan (CSP); as such, WFP designs food assistance interventions to address the food insecurity situation within each country context. Some of the interventions use in-kind food assistance (or commodity vouchers), while others use Cash-Based Transfers (CBT), including unrestricted cash and value vouchers. The MDAs implemented as part of CBT interventions were the subject of this evaluation.

6. The need for this evaluation was apparent given WFP's significantly increased use of CBT as well as focus on supporting national social protection systems in the context of the COVID-19 pandemic and the Ukraine crisis that deepened food insecurity in most countries. The strategic role of supply chain in this regard cannot be overestimated. However, in the past, WFP programmes have not included specific objectives, indicators and targets related to MDAs (except general capacity development and technical support outputs), and past evaluations concluded that the WFP Corporate Results Framework indicators were insufficient to identify WFP contributions to market development in each country<sup>8</sup> and did not cover in depth the effectiveness of MDAs/REAs in their different forms and stages<sup>9</sup> nor their cost-efficiency. This leaves an evidence gap as to how WFP contributes to sustainable market development, what lessons WFP is

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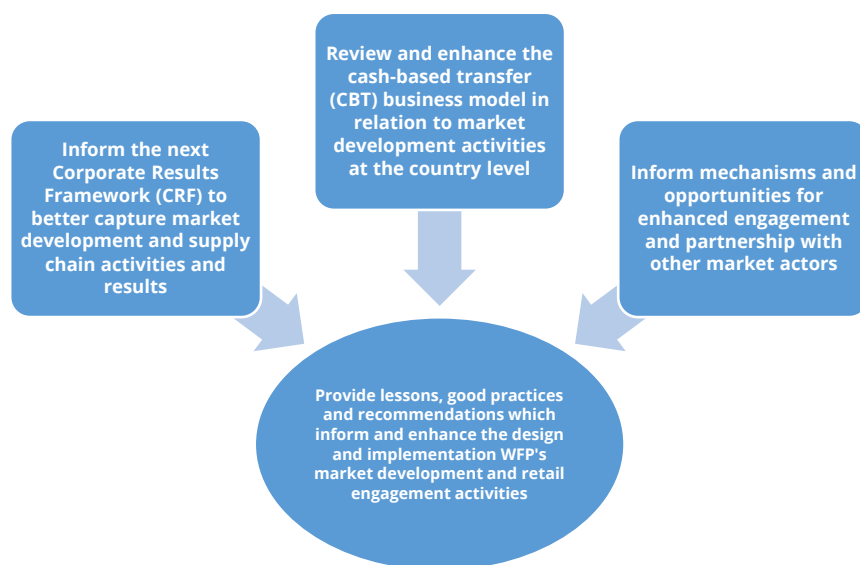
<sup>8</sup> World Food Programme (2021). WFP Contribution to Market Development and Food Systems in Southern Africa: A Thematic Evaluation 2018 to 2021. Available from: [https://docs.wfp.org/api/documents/WFP-0000136285/download/?\\_ga=2.223445727.590117783.1705680611-287098669.1699988849](https://docs.wfp.org/api/documents/WFP-0000136285/download/?_ga=2.223445727.590117783.1705680611-287098669.1699988849)

<sup>9</sup> WFP Regional Bureau Nairobi. (2021). Thematic Evaluation of Supply Chain Outcomes in the Food System in Eastern Africa from 2016 to 2021—Decentralized Evaluation. Available from: [https://docs.wfp.org/api/documents/WFP-0000143985/download/?\\_ga=2.80445271.1199175360.1704318142-287098669.1699988849](https://docs.wfp.org/api/documents/WFP-0000143985/download/?_ga=2.80445271.1199175360.1704318142-287098669.1699988849)

learning, and most importantly, how these lessons can be applied to enhance such contributions in the context of anticipated gaps between resource requirements and funding levels.<sup>10</sup> As such, there was interest in mapping and understanding the results of MDA to inform the design and revision of CSPs as well as for other programme designs and delivery processes.

7. The **scope of the evaluation** therefore included an assessment of all types of MDAs implemented during the stated period including beneficiaries' market interactions (purchasing power, choice and access to markets). It did not cover highest-level results, such as food consumption and nutrition status, as is typical in most WFP evaluations; instead, the evaluation focused on the process for and extent to which MDAs responded to situational analyses and multi-sector assessments and sustainably contributed to **enhanced assortment, availability, prices, and quality of food products and thus the beneficiaries market interaction experience** at the local level. There was no comparison between the two countries given the differences in monitoring tools and data availability. Each country's unique context was considered, and lessons drawn were recorded in brief country-level summary reports. In addition, the ET and EC collaboratively engaged in the evaluability assessment (Annex 3), which provided the joint agreement on the feasibility of this evaluation. This main report focuses on lessons and recommendations primarily for regional bureaus and HQ, though is also intended to be useful for evidence-based decision-making processes at the CO level when planning for upcoming MDAs. See Figure 1 for an overview of the **specific objectives** and **expected use** of the evaluation.

**Figure 1. Specific objectives and uses of the evaluation**



8. This **evaluation had two mutually reinforcing objectives of accountability and learning**, with a greater focus on the latter. Regarding **accountability**, the evaluation assessed the effectiveness of the HQ support to MDAs, the results of supply chain activities per the CBT business model, and contribution of these activities to market development in the two countries. It analyzed whether targeted beneficiaries received support in accordance with the planned outcomes as highlighted in the revised Theory of Change within their country context. As such, the evaluation is responsive to targeted stakeholders, including direct and indirect beneficiaries of MDAs. The evaluation also emphasized **learning**, determining why MDAs led to certain results (or not) in order to identify good practices and lessons to inform operational planning and strategic decision-making processes, especially considering how to include and equitably benefit diverse groups and consider country-level specificities **in line with 'leave no one behind' principles**. The SCOLR unit, in collaboration with COs, plans to socialize and actively disseminate the results and lessons.

9. The report's **main users will be WFP staff across the organization and partners who are involved in CBT and associated MDAs, including primarily Supply Chain and Programme/CBT staff as well as OEV**, which will use the evaluation conclusions and recommendations for future programming and strategies related to planning, technical support, monitoring and evaluation and partnership decisions,

<sup>10</sup> World Food Programme. (2023). Executive Board: WFP management plan (2024–2026). World Food Programme.

amongst others. **External users** include government ministries, UN agencies, as well as engaged male and female retailers.

10. The evaluation used the **relevance, effectiveness, efficiency, impact, and sustainability** criteria to assess the MDAs being implemented. It also examined how **gender equality and women's empowerment (GEWE) and wider inclusion objectives** and mainstreaming principles aimed at increasing impact for women, men, and people with disabilities.

## 1.2. CONTEXT

### *Population dynamics, poverty and inequality*

11. **Bangladesh** is one of the most densely populated countries, with a population of 166 million. While Bangladesh has experienced significant economic growth in the past decade, the country still faces challenges with nearly one third of the population facing food insecurity and 14.3% of the population estimated to live below the international poverty line of \$1.9 per person per day, with 21.4% experiencing multi-dimensional poverty.<sup>11</sup> The COVID-19 pandemic has exacerbated existing vulnerabilities and created a group of “*new poor*” living in urban areas, with people working in the informal sector and households headed by women particularly vulnerable.<sup>12</sup> Due to social norms and gender roles in the Rohingya and host communities, women and girls are more vulnerable. The crowded living conditions, limited mobility, restricted mobile network access, and lack of income opportunities create a serious predicament for women and girls from the Rohingya refugee population in the camps.<sup>13</sup>

12. Nationally, there have been positive trends in children's health and nutrition with stunting in children under 5 declining from 51% in 2004 to 28% in 2019, while wasting declined from 15% to 9.8% in the same period.<sup>14</sup> On education, **Bangladesh** has a high youth literacy rate (15-24 years) of 95%, but its Human Capital Index (HCI) is 0.46, which is lower than the average for the region.<sup>15</sup> In other words, a child born in Bangladesh today will be 46% as productive when she grows up as she could be if she enjoyed complete education and full health.

13. As a result of the protracted crisis in Myanmar, Cox's Bazar hosted more than 952,000 Rohingya refugees in 2022 (3.5% increase over 2021), with many residing in the world's most populous refugee settlements in Ukhiya and Teknaf Upazilas.<sup>16</sup> Cox's Bazar, with a population of approximately 2,290,000, is recognized as one of the country's poorest and most vulnerable districts, with around 33% of its residents living below the poverty line and 17% experiencing extreme poverty.<sup>17</sup> Multi-dimensional poverty is even higher. In the host community in Ukhiya Upazila and Teknaf Upazila, the percentage of households experiencing multi-dimensional poverty has steadily increased from 23% in 2019 to 43% in 2021.<sup>18</sup> The

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<sup>11</sup> World Bank. (2023). Poverty and Equity Brief. Available from: [https://databankfiles.worldbank.org/public/ddpext\\_download/poverty/987B9C90-CB9F-4D93-AE8C-750588BF00QA/current/Global\\_POVEQ\\_BGD.pdf](https://databankfiles.worldbank.org/public/ddpext_download/poverty/987B9C90-CB9F-4D93-AE8C-750588BF00QA/current/Global_POVEQ_BGD.pdf).

<sup>12</sup> Hossain Zillur Rahman et al., “PPRC-BIGD COVID-19 Livelihoods & Recovery Panel Survey,” *BRAC Institute of Governance and Development* (blog). Available from: <https://bigd.bracu.ac.bd/study/rapid-survey-on-immediate-economic-vulnerabilities-created-by-covid-19-and-the-coping-mechanisms-of-poor-and-marginal-people/>.

<sup>13</sup> Khatun, M., & Mia, P. (2020). Updates from UN Women Cox's Bazar. Available from: <https://asiapacific.unwomen.org/sites/default/files/Field%20Office%20ESEAAsia/Docs/Publications/2020/05/UN%20Women%20CXB%20Brief%20JanuaryMarch%202020%20KAA%20V5.pdf>

<sup>14</sup> Government of the People's Republic of Bangladesh, Bangladesh Bureau of Statistics, & United Nations Children's Fund. (2019). Progotir Pathay Bangladesh—Multiple Indicator Cluster Survey 2019. Survey Findings Report. Available from: [https://www.unicef.org/bangladesh/media/3281/file/Bangladesh%202019%20MICS%20Report\\_English.pdf](https://www.unicef.org/bangladesh/media/3281/file/Bangladesh%202019%20MICS%20Report_English.pdf)

<sup>15</sup> World Bank. (2020). Human Capital Index 2020 (Human Capital Index 2020 Bangladesh) [dataset]. Available from: [https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fdatafiles.worldbank.org%2Fpublic%2Fddpext\\_download%2Fhci%2FHCI\\_Data\\_September\\_2020\\_BGD.xlsx%3Fcid%3DGGH\\_e\\_hcpexternal\\_en\\_ext&wdOrigin=BROWSELINK](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fdatafiles.worldbank.org%2Fpublic%2Fddpext_download%2Fhci%2FHCI_Data_September_2020_BGD.xlsx%3Fcid%3DGGH_e_hcpexternal_en_ext&wdOrigin=BROWSELINK)

<sup>16</sup> WFP Bangladesh. (2023). Refugee Influx Emergency Vulnerability Assessment (REVA-6) Report. WFP. Available from: <https://docs.wfp.org/api/documents/WFP-0000150690/download/>

<sup>17</sup> Poverty Alleviation Coalition. (2019). Poverty Alleviation Coalition. Poverty Alleviation Coalition. Available from: <https://alleviate-poverty.org/bangladesh>

<sup>18</sup> Ibid.

comparable rate for Rohingya refugee households was 47% in 2019, 60% in 2020 and back to 47% in 2021.<sup>19</sup> A significant proportion of residents (35%) are food insecure (IPC level 3 and 4)<sup>20</sup> and an estimated 96% of Rohingya refugees in Bangladesh are unable to meet basic needs without assistance.<sup>21</sup> The needs of refugees have compounded existing socioeconomic challenges, straining public services and infrastructure. Moreover, the Ukraine crisis has adversely affected the food, energy, and fiscal situation in Bangladesh, including in the host communities.<sup>22</sup> The overall vulnerability of both refugee and host communities remains alarmingly high, with both communities confronting multiple shocks over the past few years.<sup>23</sup>

14. **South Sudan** is one of the poorest countries in the world, ranked last in SDG achievement (163/163),<sup>24</sup> with an unemployment rate of 13.9%, 67.3% estimated to live below the international poverty line, and 71% households experiencing moderate hunger<sup>25</sup>. Further, those living on less than \$3.65 make up 86.4% of the population<sup>26</sup> and the prevalence of stunting remains high at 31.3%, disproportionately affecting populations in rural areas<sup>27</sup> where access to basic services such as healthcare, education, and clean water is limited. Ongoing conflict and displacement also exacerbate poverty in many areas, as people have been forced to flee their homes and lose their livelihoods. More than one quarter of all South Sudanese have become internally displaced (1.9 million) or are among the 2.4 million refugees in neighboring countries. South Sudan is home to approximately 330,000 refugees and asylum-seekers, primarily from the Democratic Republic of Congo and Sudan. As of April 2021, there were approximately 1.6 million IDPs in the country, one of the largest populations of IDPs in the world, many of whom have been forced to flee their homes due to conflict and violence or flooding.<sup>28</sup> The humanitarian response to the IDP crisis in South Sudan is challenging, as insecurity, poor infrastructure, and limited funding have all hindered the delivery of assistance to those in need.

15. Conflict, insecurity, and the consequences of climate change also hinders South Sudan's economic stability. South Sudan is ranked the world's most vulnerable country to climate change and is highly vulnerable to floods as it ranks 7<sup>th</sup> in the world for share of total population highly vulnerable to river floods<sup>29</sup>. Owing to climate change, this risk is likely to amplify leaving the country's agricultural sector exposed to the devastating impacts of flooding. The country has a largely agrarian economy, with oil being

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<sup>19</sup> The multidimensional deprivation index (MDDI) is a measure of poverty that can be constructed at the household or individual level. It is designed to complement monetary poverty measures by weighing deprivation levels related to factors deemed essential to human development. For REVA-5, the key dimensions of multidimensional deprivation were identified as income, food access, health, education and living standards. (World Food Programme. (2022). Refugee Influx Emergency Vulnerability Assessment (REVA-5). World Food Programme. Available from: [https://docs.wfp.org/api/documents/WFP-0000140849/download/?\\_ga=2.23952572.747707236.1700707418-1520977825.1700707418](https://docs.wfp.org/api/documents/WFP-0000140849/download/?_ga=2.23952572.747707236.1700707418-1520977825.1700707418))

<sup>20</sup> Integrated Food Security Phase Classification. (2022). Bangladesh IPC Chronic Food Insecurity Report (June 2022)—Bangladesh. Available from: <https://reliefweb.int/report/bangladesh/bangladesh-ipc-chronic-food-insecurity-report-june-2022>

<sup>21</sup> Inter Sector Coordination Group. (2021). 2021 Joint Response Plan: Rohingya Humanitarian Crisis (January - December 2021) - Bangladesh. Available from: <https://reliefweb.int/report/bangladesh/2021-joint-response-plan-rohingya-humanitarian-crisis-january-december-2021>

<sup>22</sup> Ibid.

<sup>23</sup> WFP Bangladesh. (2023). Refugee Influx Emergency Vulnerability Assessment (REVA-6) Report. WFP. Available from: <https://docs.wfp.org/api/documents/WFP-0000150690/download/>

<sup>24</sup> Jeffrey Sachs et al. (2022). *Sustainable Development Report 2022* (1st ed.). Cambridge University Press. Available from: <https://doi.org/10.1017/9781009210058>

<sup>25</sup> World Bank. (2023). Poverty and Equity Briefs. Available from: <https://www.worldbank.org/en/topic/poverty/publication/poverty-and-equity-briefs>

<sup>26</sup> Ibid.

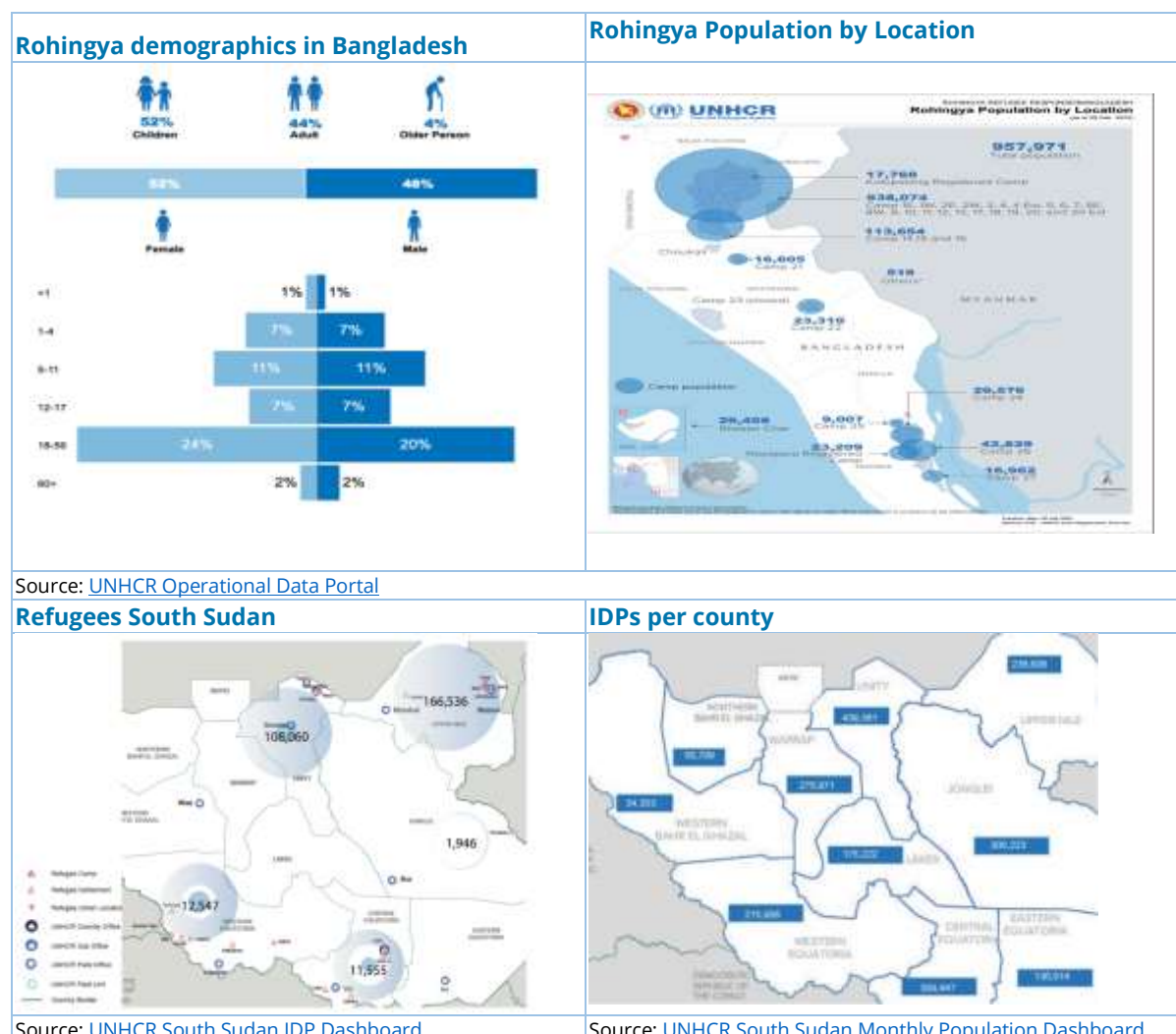
<sup>27</sup> Wogderes, B., Shibre, G., & Zegeye, B. (2022). Inequalities in childhood stunting: Evidence from Sudan multiple indicator cluster surveys (2010–2014). *BMC Public Health*, 22(1), 728. <https://doi.org/10.1186/s12889-022-13145-5>

<sup>28</sup> United Nations High Commissioner for Refugees. (2021). UNHCR calls for renewed commitment to South Sudan's peace, development, and future. UNHCR US. Available from: <https://www.unhcr.org/us/news/briefing-notes/unhcr-calls-renewed-commitment-south-sudans-peace-development-and-future>

<sup>29</sup> World Bank. (2023). Rising from the Depths: Water Security and Fragility in South Sudan. Available from: <https://openknowledge.worldbank.org/entities/publication/91048a50-eacb-5a24-9fa4-30cf8a9a9c9b>

its main export. However, fluctuations in global oil prices have had a significant impact on the country's economy, causing inflation and unemployment to rise. Additionally, the country lacks the infrastructure necessary to support economic growth, including roads, ports, and power generation. Consequently, South Sudan is reliant on Sudan for transporting its oil exports to other markets; the conflict in Sudan poses threats to South Sudan's macroeconomic stability<sup>30</sup>.

**Figure 2. Refugees and IDPs in Bangladesh and South Sudan**



**Food and nutrition security**

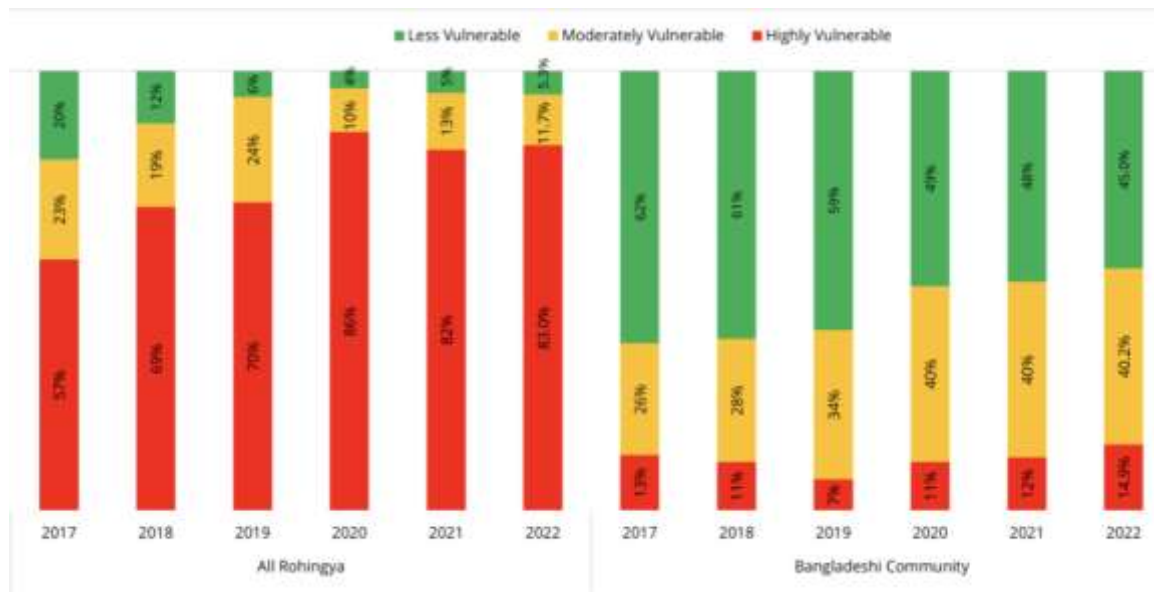
In Cox's Bazar, Bangladesh, over 431,000 Rohingya refugees were reported to be facing crisis or worse levels of acute food insecurity (IPC Phase 3 or above). Within these, approximately 383,000 individuals were experiencing severe levels of acute food insecurity, classified in Crisis (IPC Phase 3) and roughly 47,800 people were identified as experiencing even more extreme levels of acute food insecurity, categorized as Emergency (IPC Phase 4).<sup>31</sup> Over 622,000 refugees, making up over 65% of the Rohingya refugee population in Bangladesh, are projected to face crisis or worse levels of acute food insecurity between May and

<sup>30</sup> World Bank. (2023). Overview: The World Bank in South Sudan [Text/HTML]. World Bank. Available from: <https://www.worldbank.org/en/country/southsudan/overview>

<sup>31</sup> IPC Acute Food Insecurity Analysis. (2023). Bangladesh March – September 2023. IPC Acute Food Insecurity Analysis. Available from: [https://www.ipcinfo.org/fileadmin/user\\_upload/ipcinfo/docs/IPC\\_Bangladesh\\_Acute\\_Food\\_Insecurity\\_Mar\\_Sep2023\\_Report.pdf](https://www.ipcinfo.org/fileadmin/user_upload/ipcinfo/docs/IPC_Bangladesh_Acute_Food_Insecurity_Mar_Sep2023_Report.pdf)

September 2023.<sup>32</sup> Additionally, in the Rohingya refugee population in Cox’s Bazar and Bhasan Char, a greater percentage of women-headed households experienced food insecurity (49%) compared to male-headed households (41%).<sup>33</sup> Figure 3 demonstrates the vulnerability disparity between Rohingya refugees and the host community in Cox’s Bazar.

**Figure 3 Overall vulnerability between refugees and host community members in Cox’s Bazar**



Source: WFP REVA-6, Bangladesh

16. In March 2023, WFP was forced to lower the value of their food vouchers from \$12 (estimated to provide 2100 kcal per person per day) to \$10 per person per month in Bangladesh due to funding challenges. Three months later, WFP had to further reduce the voucher value for a second time from \$10 to \$8 beginning on June 1st.<sup>34</sup> Food insecurity in the refugee camps was reportedly extremely severe.<sup>35</sup> Prior to the reduction, a significant percentage of children were already suffering from acute (12%) or chronic (41%) malnutrition. These additional cuts to the rations were expected to further increase malnutrition.<sup>36</sup>

17. In **South Sudan**, the number of people requiring humanitarian assistance doubled in the last decade (4.6 million in 2013 to 8.9 million in 2022).<sup>37</sup> Reported acute food insecurity in South Sudan has also increased over time. In January 2018, about 5.3 million people (48% of its population) were experiencing high levels of acute food insecurity, categorized as Crisis (IPC Phase 3) or worse. About 6.6 million people (54% of its population) were experiencing high levels of acute food insecurity, classified in Crisis (IPC Phase 3) or worse between October and November 2022. Of those, 2.2 million people were experiencing worse conditions in Emergency (IPC Phase 4) acute food insecurity and an estimated 61,000 people in Catastrophe

<sup>32</sup> WFP Bangladesh. (2023). Refugee Influx Emergency Vulnerability Assessment (REVA-6) Report. WFP. Available from: <https://docs.wfp.org/api/documents/WFP-0000150690/download/>

<sup>33</sup> Ibid.

<sup>34</sup> Catherine Mones et al. (2023). Cox’s Bazar: WFP Bangladesh Ration Cuts Alert, May 2023 Update. World Food Programme. Available from: <https://www.wfp.org/publications/coxs-bazar-wfp-bangladesh-ration-cuts-alert-may-2023-update>

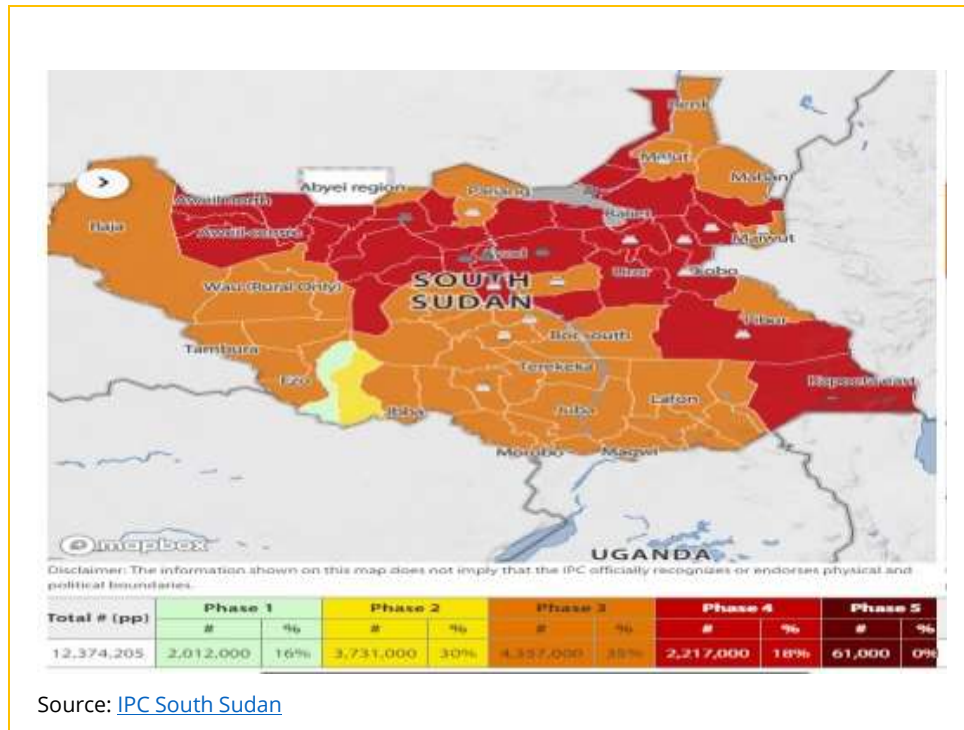
<sup>35</sup> Note that 15% is considered a threshold for an emergency.

<sup>36</sup> Catherine Mones et al. (2023).

<sup>37</sup> World Food Programme. South Sudan. (2022). South Sudan Annual Country Report 2022—Country Strategic Plan 2018—2022. Available from: [https://docs.wfp.org/api/documents/WFP-0000147995/download/?\\_ga=2.66777710.1999002266.1686053730-635537986.1684413759](https://docs.wfp.org/api/documents/WFP-0000147995/download/?_ga=2.66777710.1999002266.1686053730-635537986.1684413759)

(IPC Phase 5) acute food insecurity.<sup>38</sup> WFP prioritizes resources for the most vulnerable due to persistent funding gaps, and since May 2022, WFP only provides general food assistance (GFA) to people facing emergency and catastrophic food insecurity. The targeted population was reduced by 1.7 million people.<sup>39</sup> As shown in Figure 4, by the end of the evaluation period, the locations of the markets targeted for the evaluation (Bor, Awerial, Juba) were all classified as being in phase 3 (crisis) of the IPC therefore WFP would only be targeting those deemed most vulnerable and not providing GFA for the whole population.

**Figure 4. Food security situation South Sudan (Oct-Nov,2022).**



### Climate change and natural disasters

18. **Bangladesh** ranks seventh globally for the impact of extreme weather in the past two decades.<sup>40</sup> Depending on the rise of sea level, between 15 to 30 million people may be displaced from coastal regions.<sup>41</sup> In addition, 90 million Bangladeshis (56% of the population) live in high climate exposure areas, with 53 million facing very high exposure (33% of the population).<sup>42</sup> Cox's Bazar is highly vulnerable to climate change-induced disasters and extreme events, such as cyclones, floods, landslides, due to its geographic location. These events pose a threat to human lives and infrastructure; further exacerbating the challenges faced by people living in the camps. To address these challenges, Bangladesh utilizes its established disaster response capabilities and adheres to the Multi-Hazard Response Plan (MHRP) for

<sup>38</sup> IPC - South Sudan: Acute Food Insecurity Situation October—November 2022 and Projections for December 2022—March 2023 and April—July 2023 | IPC - Integrated Food Security Phase Classification. (n.d.). Available from: <https://www.ipcinfo.org/ipc-country-analysis/details-map/en/c/1155997/>

<sup>39</sup> World Food Programme. South Sudan. (2022). South Sudan Annual Country Report 2022

<sup>40</sup> David Eckstein et al. (2021) Global Climate Risk Index 2021. Germanwatch. Available from: [https://www.germanwatch.org/sites/default/files/Global%20Climate%20Risk%20Index%202021\\_2.pdf](https://www.germanwatch.org/sites/default/files/Global%20Climate%20Risk%20Index%202021_2.pdf)

<sup>41</sup> Saleemul Huq et al. (2022). Climate change impacts, adaptation, and vulnerability of Bangladesh: IPCC assessment in the previous reports and situation on the ground. ICCCAD International Centre for Climate Change and Development. Available from: <https://www.icccd.net/the-business-standard/climate-change-impacts-adaptation-and-vulnerability-of-bangladesh-ipcc-assessment-in-the-previous-reports-and-situation-on-the-ground> bangladesh-ranks-as-the-7th-most-vulnerable-country-to-climate-c/

<sup>42</sup> Ashley Moran et al. (2018). Fragility and climate risks in Bangladesh. United States Agency International Development. Available from: [https://pdf.usaid.gov/pdf\\_docs/PA00TBFJ.pdf](https://pdf.usaid.gov/pdf_docs/PA00TBFJ.pdf)

Rohingya Refugees in Cox's Bazar district and Bhasan Char.<sup>43</sup> The Multi-Hazard Response Plan (MHRP), established in 2022, outlines a detailed strategy and guidelines for addressing potential natural disasters affecting Rohingya refugee camps and the neighboring host communities.<sup>44</sup>

19. **South Sudan** is simultaneously drowning and drying, as a result of climate change, with large swathes of the country swallowed by an unprecedented flooding crisis and other parts are grappling with devastating drought. Two-thirds of the population – over 7.7 million people – face crisis or worse levels of hunger; surpassing that seen even at the height of the country's civil war. In 2022, South Sudan experienced its fourth consecutive year of heavy flooding, affecting over 900,000 people<sup>45</sup>. Four consecutive years of record flooding have led to widespread displacement, the destruction of livelihoods, and the loss of arable land. The effects of these concurrent climate shocks are compounded by rising food and fuel prices and ongoing conflict.<sup>46</sup>

### **Social protection systems**

20. While **Bangladesh** is making significant investment in disaster risk reduction (DRR) projects,<sup>47</sup> access to social protection systems for Rohingya refugees is limited. The primary focus of government is on repatriation of the Rohingya refugee population with limited guidance for humanitarian actors to address their development and social protection needs despite the protracted nature of the crisis. Their focus on repatriation was reflected in a pilot repatriation project, aimed at potentially sending back 1,140 Rohingya refugees to Myanmar, announced in 2023 by the Government of Bangladesh.<sup>48</sup>

21. Social protection in **South Sudan** is guided by the National Social Protection Policy Framework (NSPPF), which aims to establish a comprehensive social protection system to assist the most vulnerable individuals and households. This framework emphasizes the coordination and implementation of various social protection programmes and requires a thorough understanding of existing policies, programmes, and administrative arrangements. The strategic plan of WFP South Sudan for the period 2023-2025 highlights that the country's social protection systems are inadequate and that its coverage remains low<sup>49</sup>. Additionally, it notes that over 99.7% of the annual expenditure on social protection is funded by donors, indicating a heavy reliance on external support<sup>50</sup>. This dependency is attributed to various factors, including an unfavorable policy environment, challenges in managing the financial sector, and limited capacity for analysis and implementation. These factors impede the government's ability to effectively plan and deliver social protection services to the population.

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<sup>43</sup> Ibid.

<sup>44</sup> Multi-Hazard Response Plan for Rohingya Refugees in Cox's Bazar District 2022: Anticipatory Action & Response - Bangladesh | ReliefWeb. (2022). Available from: <https://reliefweb.int/report/bangladesh/multi-hazard-response-plan-rohingya-refugees-coxs-bazar-district-2022-anticipatory-action-response>.

<sup>45</sup> UNHCR. (2022). Devastation in South Sudan Following Fourth Year of Historic Floods. Available from: <https://www.unhcr.org/news/briefing-notes/devastation-south-sudan-following-fourth-year-historic-floods#:~:text=Over%20900%2C000%20people%20have%20been,and%20risking%20outbreaks%20of%20diseases.>

<sup>46</sup> Ibid.

<sup>47</sup> Duncan Knox et al. (2021). Supporting longer term development in crises at the nexus—Lessons from Bangladesh. Development initiatives and Norwegian Refugee Council. Available from: [https://www.nrc.no/globalassets/pdf/reports/development-actors-and-the-nexus/supporting\\_longer\\_term\\_development\\_in\\_crisis\\_at\\_the\\_nexus\\_lessons\\_from\\_bangladesh.pdf](https://www.nrc.no/globalassets/pdf/reports/development-actors-and-the-nexus/supporting_longer_term_development_in_crisis_at_the_nexus_lessons_from_bangladesh.pdf)

<sup>48</sup> Andrews, T. (2023). Bangladesh must suspend plans to return Rohingya refugees to Myanmar: Rights expert | UN News. United Nations. Available from: <https://news.un.org/en/story/2023/06/1137457>

<sup>49</sup> World Food Programme. South Sudan. (2022). Executive Board: South Sudan country strategic plan (2023–2025). WFP. Available from: [https://executiveboard.wfp.org/document\\_download/WFP-0000142938?\\_ga=2.248162563.508957254.1701120590-1520977825.1700707418](https://executiveboard.wfp.org/document_download/WFP-0000142938?_ga=2.248162563.508957254.1701120590-1520977825.1700707418)

<sup>50</sup> Ibid.



## Gender equality and women's empowerment

22. While **Bangladesh** has progressed in gender equality, it is ranked 65th in the Global Gender Gap Index<sup>51</sup> and is among the top ten countries in rates of early marriage.<sup>52</sup> As a result of social norms and gender roles in the Rohingya and host communities, women and girls are more vulnerable to issues such as crowded living conditions, limited mobility, restricted mobile network access, and lack of income opportunities.<sup>53</sup> Women and children continue to be at risk of all forms of GBV, including intimate partner violence, forced/child marriage, and exploitation as 98% of GBV incidents in 2021 were reported by women and adolescent girls<sup>54</sup>. Data collected by the International Rescue Committee (IRC) showcases a rise in instances of GBV committed by intimate partners. In 2020, 94% of GBV incidents attributed to intimate partners compared to 81% in 2019<sup>55</sup>. Conservative gender norms also place restrictions on women's and girls' movement and access to information, creating barriers to their education. Despite the provision of devices and digital platforms, the opportunity for education remains distant for many Rohingya youth. Only 13% of boys and 2% of girls aged 15-18 are in school.<sup>56</sup> In terms of commitments to GEEW, Bangladesh has made commitments to international agreements such as the Beijing Declaration and Platform for Action, CEDAW, and the SDGs. The government has also developed a National Plan of Action for Women's Advancement (2013-2020) outlining strategies to promote gender equality and empower women across key sectors, including education, health, employment, and political participation.<sup>57</sup>

23. The protracted and violent nature of conflict and crisis in **South Sudan** has contributed to a normalization of conflict-related sexual violence and gender-based violence (GBV), as over 40% women report to have experienced some forms of violence.<sup>58</sup> Patriarchal practices and incidents of GBV such as early and forced marriages, child abductions and teenage pregnancies subordinate women and girls and constrain their own development and opportunities for women and girls to contribute to the country's development. Maternal mortality rates are stark and amongst the highest in the world at 1150 per 100,000 live births. The youth literacy rate (15-24 years) is 48%, and when disaggregated by sex, the literacy rate for males is 48% compared to 47% for females. Additionally, 58% of primary-aged boys and 68% of primary-aged girls are out of school.<sup>59</sup> The Transitional Constitution and Bill of Rights (2011) recognizes the historic inequalities between men and women and provides guarantees for enhanced equality between the sexes.<sup>60</sup> Moreover, in 2023, South Sudan ratified the Maputo Protocol (Protocol to the African Charter on

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<sup>51</sup> World Economic Forum. (2021). Global Gender Gap Report 2021. World Economic Forum. Available from: <https://www.weforum.org/publications/global-gender-gap-report-2021/>

<sup>52</sup> United Nations Bangladesh. (2021). United Nations Sustainable Development Cooperation Framework (UNSDCF) for Bangladesh 2022-2026. Available from: [https://unsdg.un.org/sites/default/files/2021-07/Bangladesh\\_Cooperation\\_Framework\\_2022-2026.pdf](https://unsdg.un.org/sites/default/files/2021-07/Bangladesh_Cooperation_Framework_2022-2026.pdf)

<sup>53</sup> Khatun, M., & Mia, P. (2020). Updates from UN Women Cox's Bazar. UN Women. Available from: <https://asiapacific.unwomen.org/sites/default/files/Field%20Office%20ESEAAsia/Docs/Publications/2020/05/UN%20Women%20CXB%20Brief%20JanuaryMarch%202020%20KAA%20V5.pdf>

<sup>54</sup> Silvia Guglielmi et al. (2022) Gender-based violence. What is working in prevention, response and mitigation across Rohingya refugee camps, Cox's Bazar, Bangladesh. Report. London: Gender and Adolescence: Global Evidence. Available from: <https://www.gage.odi.org/wp-content/uploads/2022/12/GBV-Report.pdf>

<sup>55</sup> Gerhardt, L. (2021). GBV Trends Among Rohingya Refugees in Cox's Bazar. International Rescue Committee. Available from: <https://www.rescue.org/sites/default/files/document/5553/gbvtrendsamongrohingyarefugeesincoxsbazar-covid-19update.pdf>

<sup>56</sup> Save the Children. (2023). The Rohingya Crisis: Explained. Available from: <https://www.savethechildren.org/us/what-we-do/emergency-response/rohingya-crisis>

<sup>57</sup> UN Women Country Office. (2022). Gender Equality Brief: Bangladesh | October 2022. UN Women. Available from: <https://asiapacific.unwomen.org/en/digital-library/publications/2022/10/gender-equality-brief-from-bangladesh>

<sup>58</sup> UN Women – Africa. (n.d.). South Sudan. Available from: <https://africa.unwomen.org/en/where-we-are/eastern-and-southern-africa/south-sudan>

<sup>59</sup> World Bank. (n.d.). World Bank Open Data: South Sudan. Available from: <https://data.worldbank.org/country/south-sudan>

<sup>60</sup> Care. (n.d.). Gender in Brief South Sudan. Available from: <https://www.care.org/wp-content/uploads/2020/05/Gender20in20Brief20South20Sudan20.pdf>

Human and Peoples' Rights on the Rights of Women in Africa)<sup>61</sup>. Even though South Sudan is increasingly passing statutory laws to safeguard and empower women, it still extensively relies on customary laws which are often embedded in patriarchal norms and limit women's ability to inherit land, start a business, lead in public affairs, and seek protection from abusive households etc.<sup>62</sup> The prevailing political and public perception of gender issues, the inadequate attention given to these concerns, and the persistent institutional and organizational deficiencies in governance institutions remain a significant challenge.<sup>63</sup>

### *WFP's work in Bangladesh and South Sudan*

24. WFP's work in **Bangladesh** encompasses various initiatives including unconditional resource transfers, school-based programs, malnutrition treatment programmes, malnutrition prevention programmes, asset creation and livelihood programmes, as well as actions taken to protect against climate shocks. In 2022, WFP served a total of 1,755,968 (53% female) beneficiaries in Bangladesh.<sup>64</sup> Using Cash-Based Transfer (CBT) (mainly e-vouchers), WFP implements market-based approaches for food distribution in refugee camps. This allows households to choose the food they need, while also strengthening local markets and food chains through partnerships with retailers and wholesalers. In Cox's Bazar, WFP has established e-voucher outlets and Fresh Food Corners, covering different catchment areas and working with national retailers. It also supports local markets and small-scale farmers by providing training and creating direct linkages with them (through aggregation centres) to supply markets and camp retailers.

25. In **South Sudan**, WFP provides food assistance for both refugees and IDPs, as well as vulnerable members of the host community during lean seasons. In 2022, WFP assisted 5,640,342 people (42% male and 58% female) in South Sudan with 190,000 metric tons (MT) of food and USD 39.6 millions of CBT.<sup>65</sup> WFP employs a mix of food distribution modalities, including in-kind food assistance and CBT, depending on the local market situation and analysis. The market development activities in South Sudan involve the use of different models such as directly contracted retailers (WFP negotiates prices with retailers and beneficiaries redeem their vouchers with those retailers), Business-to-Business (B2B) and Retail-in-a-Box (RIAB). The B2B model involves contracting with a supplier who then hires retailers, while the RIAB approach establishes mobile shops or market structures, and then applies the B2B model to set up contracted retailers.

### *SDGs, international assistance and national priorities*

26. Under the aegis of UN Sustainable Development Cooperation Framework (UNSDCF), the UN in **Bangladesh** is focused on supporting the government in implementing the 2030 Sustainable Development Goals (SDGs) Agenda with a particular focus on inclusivity, gender equality, and human rights-based approaches to development. It aims to leave no one behind and promote sustainable development across various sectors, including education, health, environmental conservation, social protection, and women's empowerment.<sup>66</sup> Prior to the (2020-2025) plan, Bangladesh participated in the first Voluntary National Reviews in 2017, where the country presented a five-year plan (2016-2020) that was aligned with SDGs.<sup>67</sup> Whilst the 2020-2025 plan defines Bangladesh's future strategy for implementing SDGs, Bangladesh has

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<sup>61</sup> Nakiranda, Patience. (2023, July 25). Why Is the Maputo Protocol Important to Women of South Sudan? - Women's International Peace Centre. Available from: <https://wipc.org/why-is-the-maputo-protocol-important-to-women-of-south-sudan/>

<sup>62</sup> International Organization for Migration (IOM). (2021). Customary law, norms, practices and related factors that enables and constrain women's access to housing, land and property in South Sudan: A desk review. IOM, Juba. Available from: <https://publications.iom.int/system/files/pdf/Customary-Law-%20Norms-Practices-HLP-South-Sudan.pdf>

<sup>63</sup> Care. (n.d.). Gender in Brief South Sudan. Available from: <https://www.care.org/wp-content/uploads/2020/05/Gender20in20Brief20South20Sudan20.pdf>

<sup>64</sup> World Food Programme. (2022). Bangladesh Annual Country Report 2022—Country Strategic Plan 2022—2026. Available from: [https://docs.wfp.org/api/documents/WFP-0000147929/download/?\\_ga=2.100383198.1999002266.1686053730-635537986.1684413759](https://docs.wfp.org/api/documents/WFP-0000147929/download/?_ga=2.100383198.1999002266.1686053730-635537986.1684413759)

<sup>65</sup> World Food Programme. (2022). South Sudan Annual Country Report 2022.

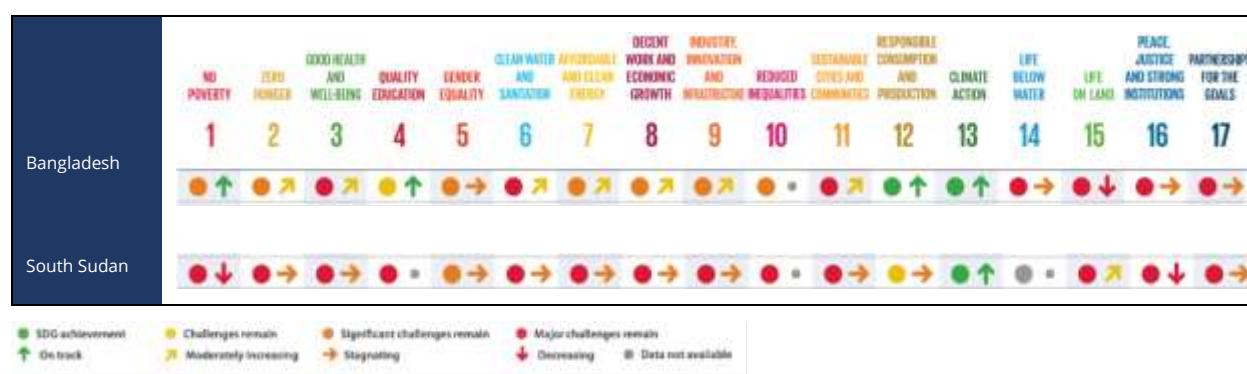
<sup>66</sup> WFP Bangladesh. (2023). Refugee Influx Emergency Vulnerability Assessment (REVA-6) Report. WFP. Available from: <https://docs.wfp.org/api/documents/WFP-0000150690/download/>

<sup>67</sup> Government of the People's Republic of Bangladesh. (2020). Voluntary National Reviews (VNRs) 2020 Bangladesh—Accelerated action and transformative pathways: Realizing the decade of action and delivery for sustainable development. Available from: [https://sdgs.un.org/sites/default/files/documents/26302VNR\\_2020\\_Bangladesh\\_Report.pdf](https://sdgs.un.org/sites/default/files/documents/26302VNR_2020_Bangladesh_Report.pdf)

shown considerable progress in achieving SDGs prior to the plan. The Ministry of Health and Family Welfare has played an important role in implementing indicators under SDG 3 (good health and well-being) and nutrition-related indicators under SDG 2<sup>68</sup>. Moreover, Bangladesh also achieved a notable decline in the Maternal Morality Ratio (MMR) from 181 per 100,000 live births to 165 and a considerable reduction in under-five mortality rate from 36 per 1,000 live births to 28 between 2015 to 2019<sup>69</sup>. In Bangladesh, various international organizations such as the International Organization for Migration (IOM) and the UN High Commissioner for Refugees (UNHCR), have played an instrumental role in providing assistance to address the needs of Rohingya refugees and their host communities in Bangladesh. The 2022 Joint Response Plan defines the strategy for the provision of relief and assistance to Rohingya refugees and their host communities by UN agencies such as IOM and UNHCR in collaboration with the Government of Bangladesh, supported by NGO partners<sup>70</sup>.

27. **South Sudan** receives a wide range of international assistance in order to tackle the current acute humanitarian crisis the country is facing on multiple fronts resulting from climate change, continued conflicts both internally and abroad (leading to large populations of both IDPs and refugees) and macro-economic shocks. International organizations provide food assistance as well as support education, health care provision, and peace building efforts across the country. Since South Sudan's accession to the United Nations in 2011, the country has received support from the UN to shift from a state of conflict towards recovery and development. The UNSDCF plays a pivotal role in this transformation, with a clear focus on four priority areas: consolidating peace and fostering transparent, accountable, and inclusive governance; promoting sustainable economic growth and diversification; advancing social development while ensuring the protection of the most vulnerable populations; and empowering women and youth to contribute to sustainable development.<sup>71</sup> Figure 5 shows current SDG progress of the two countries. The current National Development Strategy for South Sudan (2021-2024) contains 5 similar core objectives focused on strengthened and transparent institutions, macroeconomic stability, building critical infrastructure, support for the social sector for human development and protecting the vulnerable population, gender mainstreaming and empowerment.<sup>72</sup> The country has made progress in expanding access to education and healthcare, and it has taken steps to improve governance, including the creation of a new constitution and the establishment of anti-corruption measures. Additionally, there have been efforts to promote peace and reconciliation, although progress has been slow.

**Figure 5. SDG Progress (Bangladesh and South Sudan)**



<sup>68</sup> Bangladesh Planning Commission. (2020). 8<sup>th</sup> Five Year Plan (July 2020 – June 2025) Promoting Prosperity and Forging Inclusiveness. General Economics Division (GED). Available from: <https://www.prb.org/wp-content/uploads/2022/03/8th-Five-Year-Plan-compressed.pdf>

<sup>69</sup> Ibid.

<sup>70</sup> United Nations. (2022). Response Plan Launched to Support 1.4 Million Rohingya and Bangladeshis. UN News. Available from: <https://news.un.org/en/story/2022/03/1115012>

<sup>71</sup> United Nations South Sudan. (n.d.). About the UN in South Sudan. Available from: <https://southsudan.un.org/en/about/about-the-un>.

<sup>72</sup> Republic of South Sudan. (2021). Revised National Development Strategy Consolidate Peace and Stabilize the Economy 2021-2024. Available from: <https://www.undp.org/south-sudan/publications/revised-national-development-strategy-south-sudan-2021-2024>

### 1.3. SUBJECT BEING EVALUATED

28. At the country-level, WFP's work is anchored within a 4- or 5-year country strategic plan (CSP), as such, WFP designs food assistance interventions to address the food insecurity situation within each country context. Some of the interventions use in-kind food assistance (or commodity vouchers), while others using CBT. The REA and MDAs that have been implemented as part of the CBT interventions are the subject of this evaluation.<sup>73</sup> Table 1 provides an overview of the CBT portfolio in the evaluation target countries.<sup>74</sup>

**Table 1. Overview of CBT in target countries<sup>75</sup>**

Year	Bangladesh		South Sudan	
	Number of Beneficiaries	Executed Amount USD	Number of Beneficiaries	Executed Amount USD
2018	687,322	19,538,981.47	295046	1,792,503.40
2019	713,737	41,267,128.33	1566353	15,451,075.89
2020	863,041	97,505,881.17	1019527	18,566,950.49
2021	901,243	130,057,292.44	1327018	15,469,448.28
2022	921,300	145,561,716.79	1085804	10,321,840.17
Total	4,086,643	371,563,544.49	5,293,748	<b>61,601,818.24</b>

29. According to the data collected during the Data collection phase of the evaluation, from 2018 to 2022, the CBT programme in Cox's Bazar, Bangladesh, served a total of 4,086,643 beneficiaries and disbursed 125,005,730.35 dollars. The annual beneficiary count and financial disbursements steadily increased, beginning with 687,322 individuals and about 19.54 million dollars in 2018, culminating in 921,300 individuals and approximately 145.561 million dollars in 2022.<sup>76</sup>

30. From 2018 to 2022, CBT programme in South Sudan distributed a grand total of 61,601,818 units of cash assistance and supported 5,293,748 beneficiaries across four locations. The breakdown by location includes Bor with 5,948,848 in cash and 936,058 beneficiaries, Gorom with 20,629,443 in cash and 1,922,485 beneficiaries, Kalthok with a total of 49,981 in cash and 19,167 beneficiaries, and Mingkaman with 542,160 in cash and 36,497 beneficiaries.<sup>77</sup> These figures encapsulate the comprehensive reach of the programme over a five-year span.

**Table 2. Beneficiaries and CBT provided in target countries<sup>78</sup>**

	South Sudan	Bangladesh
<b>CSP period and date approved</b>	CSP (2018-2022) 30 October 2017 Revised with one year extension	CSP 1 (2017 -2022) Revised with one year extension

<sup>73</sup> As retail engagement is a part of market development activities, **the term MDA will be used to encapsulate both REA and MDAs throughout this report** unless the context demands specific mention of retailer engagement.

<sup>74</sup> World Food Programme. (2023). Evaluation of WFP contribution to market systems in South Sudan and Bangladesh from 2018 to 2022 – Decentralized Evaluation Terms of Reference. Available from: [https://docs.wfp.org/api/documents/WFP-0000147716/download/?\\_ga=2.173197414.412190491.1701136256-458925788.1701136256](https://docs.wfp.org/api/documents/WFP-0000147716/download/?_ga=2.173197414.412190491.1701136256-458925788.1701136256)

<sup>75</sup> Ibid.

<sup>76</sup> Bangladesh: number of beneficiaries from SCOPE data. Annual values from SCOPE and Building Block data (provided by CO). South Sudan: values from SCOPE (provided by CO).

<sup>77</sup> Ibid.

<sup>78</sup> SCOPE and Building Block

<b>Original Budget</b>	\$ 3,885,285,798	CSP1: \$969,120,577
<b>Original Beneficiaries</b>	4,909,688 Girls 40% Boys 33% Women 17%	CSP1: 3,853,158 Girls/Women 55%
<b>Original % of CBT</b>	7.5% (\$293,130,531)	37% (\$357,912,233)
<b>Revised Budget</b>	\$5,043,601,494	CSP1: \$ 1,367,706,520
<b>Revised Beneficiaries</b>	6,438,927 Girls 40% Boys 33% Women 17%	CSP 1: 5,407,600 Girls/Women 55%
<b>Revised % of CBT</b>	8% (\$395,361,128)	CSP1: 42% (576,442, 671)

### MDA in Bangladesh

31. WFP implemented various interventions to provide food assistance to Rohingya refugees in Cox's Bazar from 2018 to 2022. Table 3 provides a breakdown of electronic voucher (e-voucher) outlets and shops per catchment area in Cox's Bazar:

**Table 3. Breakdown of E-voucher outlets and shops in Cox's Bazar<sup>79</sup>**

Catchment Area	# E-Voucher Outlets locations	# Shops	# FFC
<b>A</b>	6	12	5
<b>B</b>	5	12	6
<b>C</b>	4	8	4
<b>D</b>	6	12	5
<b>Total</b>	21	44	20

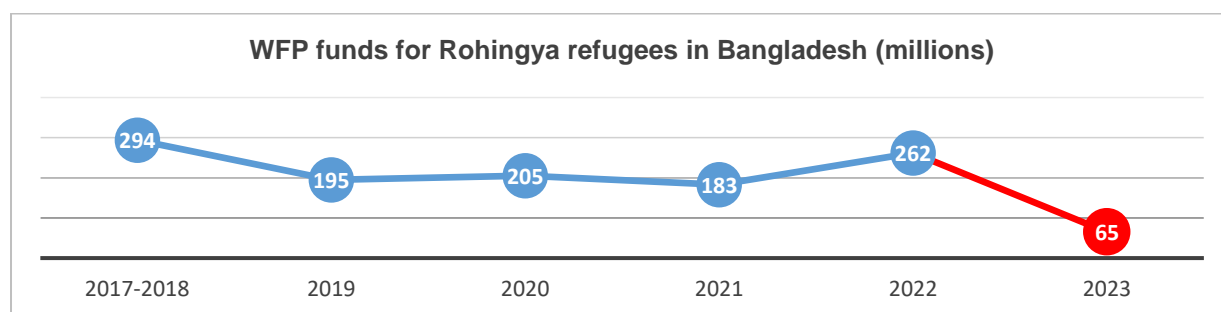
32. Over the evaluation period, WFP worked with 12 Bangladeshi retailers who manage e-voucher outlets in the camps. Each outlet serves 5,000 to 15,000 households, with 400 to 700 households visiting daily. The number of assorted food items was reduced from 50 to 40 in 2023 due to planned reductions in transfer values. WFP conducts monthly price negotiations with retailers, along with additional weekly negotiations for Fresh Food Corner (FFC) items, which can be more volatile given fresh produce seasonality and associated changes in production. Simultaneously, WFP monitors retailer performance, collects retail and wholesale price information, offering lower prices than the outside market, and payments are reconciled and made to retailers every two weeks.<sup>80</sup>

33. WFP began transitioning from in-kind food assistance to e-vouchers in 2018. By 2019, more than 50% of refugees received assistance through e-vouchers, and by April 2021 all distributions were administered through e-vouchers with the goal of providing refugees greater agency surrounding household purchasing decisions. This market-based approach also allowed WFP to expand host-community activities, including scaling up livelihood activities and emergency cash assistance for populations affected by fires, floods, and other disasters. Initially, transfer values for beneficiaries were \$12 per person, reduced to \$10 per person in March 2023, and then to \$8 per person in June 2023, with an additional \$3 provided to vulnerable groups.

<sup>79</sup> The outlet in 8W (Catchment B) ceased operations in July 2021, followed by the closure of the facility in Shamlapur, Camp 23 (Catchment D) in December 2021. Data regarding the number of shops in Shamlapur, Camp 23 (Catchment D) was not available in 2022; however, in 2021, there were two operational shops.

<sup>80</sup> CBT Retail and Supply Chain Meeting – Inception Mission - Cox's Bazar (01/05/2023)

**Figure 6. WFP funds for Rohingya refugees in Bangladesh (millions)**



Source: Own elaboration based on WFP data <https://datawrapper.dwcdn.net/Gj7pw/7/>

34. In 2020, WFP adapted its activities to adhere to government guidance during the COVID-19 pandemic. Assistance was temporarily provided through commodity vouchers (redeemable for pre-packaged food baskets) in order to adhere to social distancing measures. Later, outlets implemented protocols to ensure social distancing. For example, additional waiting sheds were added to facilitate compliance with COVID-19 safety guidelines.

35. WFP also worked with camp retailers, local farmers and Food and Agriculture Organization (FAO) to support local farmer integration through fresh food corners and farmers' linkages to aggregation centres and cooperatives. These centres supported various agricultural activities and aimed to ensure fair prices and prevent exploitation of vulnerable farmer groups.

#### **MDA in South Sudan**

36. WFP has implemented various MDA models in South Sudan, including Business-to-Business (B2B), directly contracted retailers (DC), and Retail-in-a-Box (RIAB).

37. Of the markets in this evaluation, Bor has had MDAs for the longest period. Since the 1990s, there has been some level of in-kind food assistance provided in this area, and in 2016 the current caseload of beneficiaries started to receive assistance through e-vouchers with retailers engaged through the direct contracting model. In 2018, half of the IDPs moved to Mingkaman, leading WFP to separate the two locations into different projects. A new Retailer Onboarding and Contracting (ROC) process was conducted in 2019, with most retailers re-contracted.

**Table 4. South Sudan: Beneficiaries and market partners by location and MDA**

Field Office	Market	MDA	# Market Partners	Start Date	Estimate # and Type of Beneficiaries
<b>Bor</b>	Bor	DC	141 retailers	2016	112,000 IDPs
<b>Mingkaman</b>	Mingkaman	DC	99 retailers	Jul-16	110,000 IDPs and host community (Increased support for IDPs and in lean season)
		B2B	4 suppliers, 101 retailers		
<b>Juba</b>	Gorom	B2B w/ mobile shops	1 supplier, 9 retailers	Apr-22	12,000 IDPs and host community
		RIAB	6 shops constructed	Sep-21	2,800 refugees
		B2B	2 suppliers, 6 retailers		

38. Mingkaman exemplifies new market creation. In 2016, assistance and associated MDAs started under the e-voucher modality with directly contracted retailers. However, challenges like price collusion amongst retailers emerged, prompting a Market Systems Analysis which recommended unrestricted cash transfers in Bor (starting in 2023) given the strong market, and recommended the switch to B2B model in January 2022 in Mingkaman to better regulate retailers. WFP kept the top 80 of 200 retailers in Mingkaman, who then subcontracted replacements, and both models of DC and B2B continued in these markets. In

2022, the operation expanded to Kalthok where a group of IDPs had moved, using mobile shops to establish presence before transitioning to a B2B-constructed market structure.

39. The Gorom refugee camp near Juba opened in 2011 and provided primarily in-kind food assistance until 2021. By September 2021, WFP constructed 6 shops using RIAB and contracted a B2B supplier to engage eight refugee (6) and host community (2) retailers. In January 2023, the switch to unconditional cash was also made, similar to Bor.

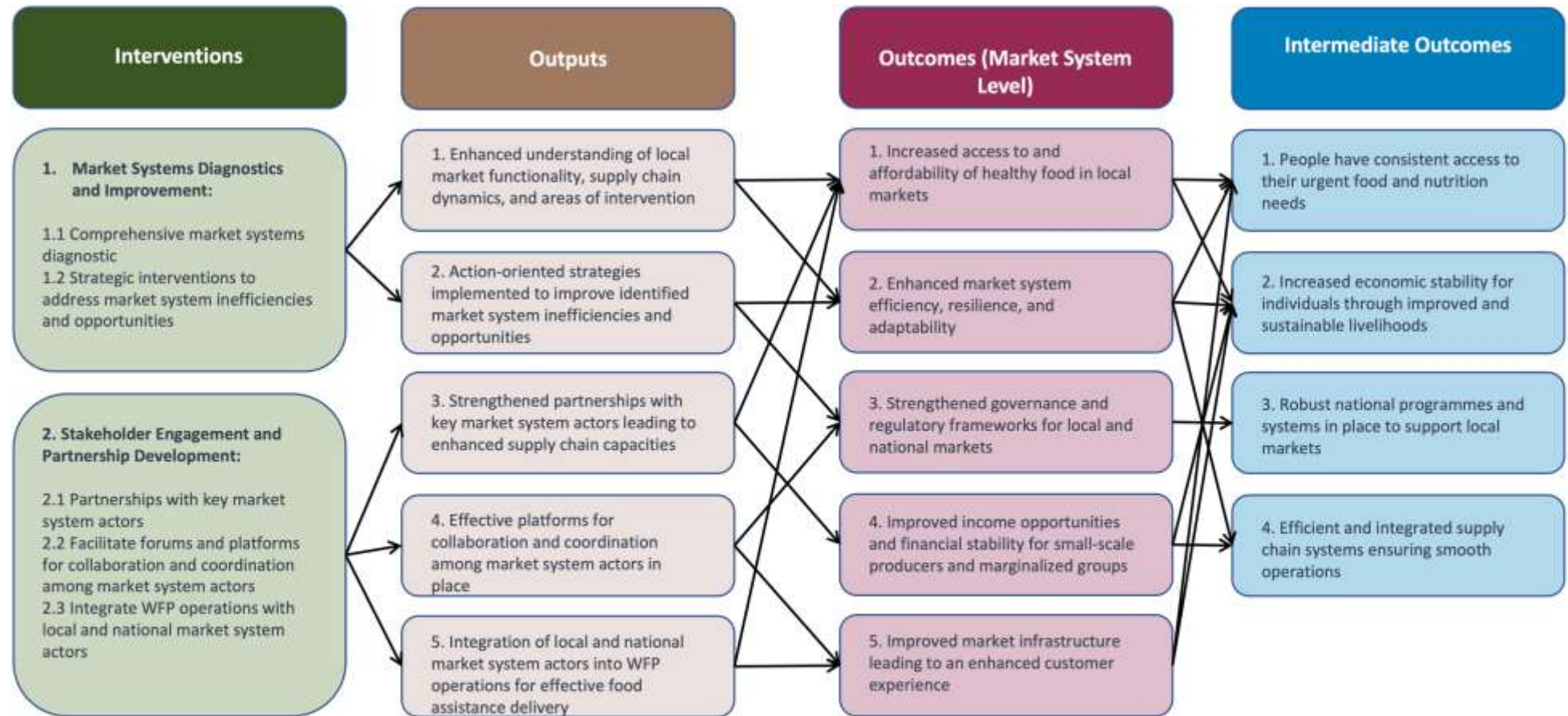
### ***Revised Theory of change (TOC)***

40. The terms of reference included a draft Theory of Change for SCOLR (Figure 7), which was reviewed, revised, and validated by the evaluation team during the data collection phase with key stakeholders including HQ and field staff. This revised version of the TOC focuses on strategically improving market systems through interventions, leading to specific outcomes at the market system level, which align with WFP Corporate Indicators and strategic interventions for improving market systems. It includes engagement with market actors and targeted assistance aimed at creating sustainable and resilient markets. Partnering with local and national market system actors enhance their capacity and knowledge, leading to improved market infrastructure, enhanced customer experience, and adoption of sustainable business practices. The outputs generated through these interventions contribute to desired outcomes at the market system level, such as improved access to healthy food, strengthened market governance, and increased market access for small-scale producers.

41. Assumptions underlying this TOC pertain to strengthened partnerships with market system actors, improved market infrastructure and customer experience, enhanced market governance and regulatory frameworks, increased access to affordable credit and financial services, and improved market linkages and partnerships.

42. The changes made by the Evaluation Team to the TOC aimed to enhance clarity, streamline interventions and outcomes, and integrate a more strategic and holistic approach. At the intermediate outcomes level, the revised TOC emphasizes a comprehensive view of people's access to food, integrating previously separate outcomes and introducing increased economic stability. The focus shifts to robust national programmes supporting local markets and removes references to standard operating procedures and inclusivity of local market infrastructure. At the outcomes level, the revised TOC combines access to and affordability of healthy food into one outcome, highlighting resilience, adaptability, and improved income opportunities. There is an enhanced focus on economic equality. At the Output Level, the revised version emphasizes a strategic understanding of local market functionality, supply chain dynamics, and intervention areas. It introduces action-oriented strategies and highlights the importance of strengthened partnerships and collaboration platforms among market system actors. At the Intervention Level, the revisions provide a more structured approach, categorizing interventions into Market Systems Diagnostics and Improvement, and Stakeholder Engagement and Partnership Development. The emphasis is on systematic strategies and engagements, demonstrating a strategic and broadened approach.

Figure 7. Revised Theory of Change



**Assumptions:** Strengthened partnerships with market system actors will enhance collaboration and coordination. Improved market infrastructure and customer experience will increase market demand and participation. Enhanced market governance and regulatory frameworks will promote fairness and transparency in market transactions. Increased access to affordable credit and financial services will stimulate market growth and business performance. Improved market linkages and partnerships will expand market access for small-scale producers and marginalized groups.



## Evidence that supports WFPs use of MDAs

43. A 2012 report by International Food Policy Research Institute (IFPRI) that compared the impact and cost-effectiveness of cash transfers, in-kind (food) transfers, and food voucher modalities in several urban and semi-urban Ecuadorian communities found that although all three modalities increase the quantity of food consumed by recipients, there were significant differences in the types of food consumed, the cost of implementation, and recipients' satisfaction and willingness to participate.<sup>81</sup> While food transfers resulted in the largest increase in calories consumed from cereals, food vouchers led to a larger increase in dietary diversity marked by increased consumption of vegetables, eggs, meat, and dairy products on a more regular basis.<sup>82</sup> The evaluation also reported that cash transfers were the most effective from the perspective of overall welfare for the beneficiaries because these programmes provided the highest level of freedom to beneficiaries to allocate funds as per their unique circumstances and needs.<sup>83</sup>

44. Similarly, as per Oxfam (2020), if functioning markets exist to supply people with food and other goods they need, cash is often the most efficient form of aid.<sup>84</sup> It helps circulate money through the local economy, supports local businesses, and can help communities recover faster. A larger academic study that synthesized evidence across 165 studies, similarly, presented a nuanced picture.<sup>85</sup> This study mentioned that while cash assistance does, indeed, improve a variety of outcomes from increased spending on food and other goods to education and health outcomes, it requires people to have access to functioning markets for them to use cash effectively.

45. Moreover, according to a BEAM exchange<sup>86</sup> study (2019), market systems development approaches and programming are based on a commitment to sustainable solutions to allow target populations to continue to derive socio-economic benefits beyond the period of intervention.<sup>87</sup> As a result, a market systems development approach also results in improvements in the livelihoods and the well-being of large numbers of people beyond the scope of the planned interventions. As per the study, use of this approach has resulted in longstanding benefits to both the agricultural and tourism sectors, allowing people to leverage seasonal earning opportunities to supplement income from household farming<sup>88</sup>.

46. A WFP study comparing Cash and In-Kind transfers also found that although the effectiveness for the two is similar, it is more efficient (in terms of costs) to deliver cash transfers than in-kind modalities (the most efficient being mobile money transfers, where possible).<sup>89</sup> However, the study indicates that more research is needed to determine which modality works better and several factors need to be considered when deciding which modality would be more effective, such as characteristics of the targeted population

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<sup>81</sup> Melissa Hidrobo et al. (2012). IFPRI Discussion Paper 01234 December 2012—Cash, Food, or Vouchers? Evidence from a Randomized Experiment in Northern Ecuador. Available from: <https://cdm15738.contentdm.oclc.org/utils/getfile/collection/p15738coll2/id/127326/filename/127535.pdf>

<sup>82</sup> This was attributed to marketing efforts and nutrition guidelines that limited how vouchers could be utilized. Due to their focus on generating higher food consumption and caloric intake, Food transfers reportedly led to larger impacts for the poorer households.

<sup>83</sup> The study also reported significant differences in the cost of implementing across these programs: The marginal cost for the three modalities was \$11.50 for a food transfer, \$3.03 for a cash transfer, and \$3.30 for a voucher.

<sup>84</sup> Hufstader, C. (2023). Cash is often the best form of aid in an emergency—And for fighting poverty. Oxfam. Available from: <https://www.oxfamamerica.org/explore/stories/cash-often-best-form-aid-emergency-and-fighting-poverty/>

<sup>85</sup> Francesca Bastagli et al. (2019). The Impact of Cash Transfers: A Review of the Evidence from Low- and Middle-income Countries. *Journal of Social Policy*, 48(3), 569–594. Available from: <https://doi.org/10.1017/S0047279418000715>

<sup>86</sup> “The BEAM Exchange is a specialist platform for knowledge exchange and learning about using market systems approaches to reduce poverty.” <https://beamexchange.org/about-beam/>

<sup>87</sup> Ripley, Matt, and Leyla Shamchiyeva. (2019) “Promoting Economic Transformation through Market Systems Development.” BEAM Exchange, <https://beamexchange.org/resources/1232/>.

<sup>88</sup> Ibid.

<sup>89</sup> Jeong, D & Trako, I. (2022). Cash and In-Kind Transfers in Humanitarian Settings: A Review of Evidence and Knowledge Gaps. World Food Programme. Available from: <https://www.wfp.org/publications/cash-and-kind-transfers-humanitarian-settings-review-evidence-and-knowledge-gaps>

and capacity of local markets.<sup>90</sup> This finding was echoed in a CBT evidence assessment which emphasized the importance of prioritizing sound analysis (particularly of beneficiary needs and preferences) at the design stage of cash-based programs, even under emergency conditions.<sup>91</sup>

### **Evidence of MDA results from previous evaluations**

47. Previous evaluations offer evidence related to the impact of CBT when complemented by market development activities on markets and food systems. A recent thematic evaluation of Supply Chain Outcomes in the Food Systems in Eastern Africa (including a case study on South Sudan)<sup>92</sup> investigated various supply chain activities and focused on assessing the relevance, results, and factors influencing outcomes within the area of food systems of WFP supply chains. Part of the report focused on market development, and it found that retailers reported increased revenue and profits attributable to the WFP scheme, however, the systems which benefit these retailers and wholesalers operate mainly in parallel without impacting local food systems. Similarly, the case-study on South Sudan<sup>93</sup> found that voucher-based CBT has promoted economic development, but the **benefits are limited almost exclusively to retailers participating in the system and the wholesalers supplying them**. In addition, wholesalers benefited the most, reinforcing their dominant position in the food system.

48. Another recent evaluation conducted in Southern Africa,<sup>94</sup> focused specifically on MDAs implemented as part of cash-based transfers and related interventions, noting this was an under-evaluated area of WFP work. Similar to this evaluation, it assessed WFP's contribution to market development and food systems using the Qualitative Impact Assessment Protocol (QuIP) methodology (explained in detail below). The evaluation reports that WFP-supported retailers saw positive change in the assortment and quality dimensions of market functionality, however, there was not much change in terms of the access and protection dimensions. Further to this point, **the evaluation observed gender disparities in the delivery of outputs and contribution to outcomes, with most MDAs being dominated by men and limited consideration given to the needs of persons with disabilities nor to intersectionality in identities**. Efforts to monitor, measure and address these gender and social inclusion aspects were also largely missing across the evaluated interventions. Evidence on sustainability was mixed and not strong; for example it was reported that gains related to infrastructure and capacity strengthening could be sustained, however there was limited evidence presented on the extent to which markets would continue to function adequately without government buy-in and reinforcement of activities such as price monitoring and/or how the withdrawal of assistance would change market supply and demand, amongst other factors.

49. Finally, the Local Economy-wide Impact Evaluation (LEWIE) study conducted in South Sudan in 2021 used simulations to assess the impacts of CBTs to beneficiary households on the local urban Juba economy. It found a local real-income multiplier of 1.11 for the Juba CBT program. This indicates a spillover of eleven cents resulting from the program's impacts on local production activities. Although this multiplier is significantly greater than 1.0, it is relatively smaller than other LEWIE studies reflecting weak local production linkages within the urban Juba economy. It also reflects Juba's relatively open economy as trade with markets across the country transmits many of the impacts of the CBT program to other parts of South Sudan. It also found that the largest income gains accrue to beneficiaries. They receive the transfer and also benefit, to a small degree, by the spillovers it creates. Beneficiaries capture around 96% of the total

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<sup>90</sup> Ibid.

<sup>91</sup> World Food Programme. (2021). WFP Evidence Summary Cash-based transfers Lessons from evaluations. Available from: <https://docs.wfp.org/api/documents/WFP-0000124601/download/>

<sup>92</sup> World Food Programme. Regional Bureau Nairobi. (2022). Thematic Evaluation of Supply Chain Outcomes in the Food System in Eastern Africa from 2016 to 2021—Decentralized Evaluation. Available from: [https://docs.wfp.org/api/documents/WFP-0000143985/download/?\\_ga=2.80445271.1199175360.1704318142-287098669.1699988849](https://docs.wfp.org/api/documents/WFP-0000143985/download/?_ga=2.80445271.1199175360.1704318142-287098669.1699988849)

<sup>93</sup> World Food Programme. Regional Bureau Nairobi. (2022). Supplementary Report: South Sudan Country Case-Study for the Thematic Evaluation of Supply Chain Outcomes in the Food System in Eastern Africa from 2016 to 2021. Available at: <https://www.wfp.org/publications/eastern-africa-supply-chain-outcomes-food-system-evaluation>

<sup>94</sup> World Food Programme (2021). WFP Contribution to Market Development and Food Systems in Southern Africa: A Thematic Evaluation 2018 to 2021. Available from: [https://docs.wfp.org/api/documents/WFP-0000136285/download/?\\_ga=2.223445727.590117783.1705680611-287098669.1699988849](https://docs.wfp.org/api/documents/WFP-0000136285/download/?_ga=2.223445727.590117783.1705680611-287098669.1699988849)

income gain from the CBT. While, non-beneficiaries do not get any direct benefit from the CBT, by definition. Nevertheless, they benefit indirectly, through local income and production spillovers.<sup>95</sup>

### **Gender equality, women's empowerment and wider human rights and inclusion dimensions**

50. In accordance with the WFP Gender Policy 2022<sup>96</sup> and guided by the identified gaps in data on MDAs gender-targeted activities and related results, the evaluation considered the extent to which the interventions were responsive to the diverse needs and priorities of all individuals within targeted communities as well as contributed to equitable access to and control over food security and nutrition, addressing the root causes of gender inequalities, and advancing the economic empowerment of women and girls. By examining these dimensions, this evaluation aimed to assess the extent to which the MDAs have contributed to promoting gender equality, reducing disparities, and fostering more inclusive market systems that benefit all individuals, regardless of their background or circumstances.

51. Firstly, the evaluation examined whether MDAs have effectively addressed the specific needs and challenges faced by women and girls. This involved assessing whether women had equal access to market opportunities, financial resources, and engagement in decision-making processes. It also entailed examining whether the interventions contributed to women's economic empowerment, including increased decision-making and control over resources. Additionally, the evaluation assessed whether gender-based constraints and inequalities were effectively addressed, promoting greater gender equality within the market system.

52. Second, women's empowerment and broader consideration of inclusion, intersectionality and human rights also involved analyzing whether the MDAs effectively targeted and reached individuals most at risk of marginalization, including possibly ethnic minorities, people living with disabilities, and those living in more remote areas. It assessed whether the interventions reduced disparities and improved the livelihoods of these groups, ensuring that they had equal opportunity to benefit from the market system improvements. To the extent possible, especially given that camps in Cox's Bazar are highly regulated, the evaluation examines whether the interventions contributed to reducing income and wealth inequalities within the targeted communities.

53. Thirdly, the wider human rights and inclusion dimension of the evaluation went beyond gender equality to encompass assessments regarding whether the MDAs effectively engaged and involved key stakeholders, such as local communities, civil society organizations, women's organizations, and marginalized groups, in the design, implementation, and monitoring of the interventions. It examined whether their voices, perspectives, and priorities were considered for ensuring that the interventions were responsive to their fundamental rights and unique needs and aspirations in line with the 'leave no one behind' principle.

## **1.4. EVALUATION METHODOLOGY, LIMITATIONS AND ETHICAL CONSIDERATIONS**

54. The evaluation used a theory-based, utilization-focused approach, using Qualitative Impact Assessment Protocol (QulP) and Cost-benefit Analysis (CBA) to assess WFP's contribution to strengthening the capacity of market actors and sustainability of market systems in Bangladesh and South Sudan. The evaluation was highly collaborative, working with a diverse range of internal stakeholders (SCOLR, OEV, Business Innovation & Change, and COs) to maximize learning and uptake of lessons. The evaluation team met these stakeholders, EC in particular, on a regular basis, and all methodological decisions in this evaluation were made with full consensus of the EC.

55. The evaluation primarily assessed outcomes at the market system level, but it also expanded the analysis of results to those at the intermediate level (i.e., WFP corporate indicators), as reflected in the revised ToC. The QulP approach was used to address impact and contribution questions regarding the direct recipients of MDA (traders and other relevant supply chain actors) and the end beneficiaries

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<sup>95</sup> World Food Programme. (2021). Local Economy-wide Impact Evaluation of the Urban Juba Cash-based Transfer Program

<sup>96</sup> World Food Programme. (2022). WFP Gender Policy 2022. Available from: <https://www.wfp.org/publications/wfp-gender-policy-2022>

(recipients of food assistance), as described in the Data collection methods section, which were illustrated in causal maps. In addition, financial data was collected through a cost breakdown matrix and analyzed to assess efficiency. Cost-benefit analysis was then applied to assess the marginal costs and benefits from the activities. The data collection sampling and process was sensitive to inclusion issues such as gender, disability, and age. Overall, this methodology allowed for the answering of five evaluation questions revolved around the criteria of relevance, effectiveness, efficiency, impact and sustainability that are described in Table 5. Further details on the methodology are provided in Annex 3.

**Table 5. Evaluation Criteria and Questions<sup>97</sup>**

Criterion	Evaluation Questions
<b>Relevance</b>	<p><b>(EQ1) To what extent are market development activities and related retail engagement interventions informed by country contexts and market inefficiencies identified during relevant multi-sector assessments?</b></p> <p>EQ1.1 To what extent are the market and/or retail assessment findings used to design and implement activities, <u>considering the differentiated needs and roles of women, men and marginalized groups?</u></p> <p>EQ1.2 To what extent are MDAs and REAs linked to the country strategic plan?</p>
<b>Effectiveness / Efficiency</b>	<p><b>(EQ2) To what extent have the identified MDAs and retail engagement activities implemented and achieved their objectives for men and women in the target groups and their wider local communities?</b></p> <p>EQ2.1 To what extent have MDAs / REAs enhanced the assortment, availability, prices and quality of food products for the different target groups [e.g., retailers and those receiving CBT] and indirect beneficiaries [e.g., host communities]?</p> <p>EQ2.2 To what extent have the MDAs / REAs contributed to enhancing beneficiaries' market interaction experience (purchasing power, choice, and access) outcomes? <u>To what extent did the implementation of MDA/REAs consider and address gender inequalities and promote gender equality and women's empowerment, both within the activities and in the wider market system?</u></p> <p><b>(EQ3) What factors are affecting the implementation of MDAs and retail engagement activities, and achievement of objectives (negatively or positively)?</b></p> <p>EQ3.1 What are the factors that negatively disrupted WFP's MDA and retail engagement operations in the targeted markets, and how did it influence the implementation? How did the programme mitigate and cope with these disruptions?</p> <p>EQ3.2 To what extent did the corporate tools and support provided from the HQ guide the CO to implement and achieve the objectives of the MDAs and retail activities?</p> <p><u>EQ3.3 How can the WFP country office mitigate the negative impact of the upcoming ration cut on the targeted beneficiaries and improve the efficiency and effectiveness of the current process?</u></p> <p><b>(EQ4) Was the implementation of MDAs and retail engagement activities cost effective?</b></p>
<b>Impact / contribution</b>	<p><b>(EQ5) To what extent did WFP contribute to improving resilience and initiating business expansion of WFP contracted suppliers and retailers?</b></p>

<sup>97</sup> The ET did not significantly change EQs beyond small clarifications and mainstreaming of gender, human rights and inclusion considerations. Notable changes made are underlined.

	<p><u>EQ5.1 To what extent did the MDA/REA contribute to building the capacity of market actors, including women and marginalized groups?</u><sup>98</sup></p> <p><b>(EQ6) Are there unintended (positive or negative) effects of WFP Market Development Activities and retail engagement activities in different country contexts and for different groups?</b></p> <p><u>EQ6.1 What were the unintended effects, positive or negative, of WFP market interventions for market actors? Did these interventions affect women's access to resources, economic opportunities and decision-making power?</u></p> <p><b>(EQ7) How do CBT activities (cash injection into the local economies and associated activities that enable beneficiaries to access the assistance) combined with supply side activities (supporting market actors and opportunities offered by engaging with WFP) contribute to positive change and what combination of activities contribute the most?</b></p>
<b>Sustainability</b>	<p><b>(EQ8) Are the results of WFP contributions sustainable after the interventions conclude?</b></p> <p>EQ8.1 What are the CO's exit plan and knowledge transfer strategy to the local communities for the MDAs / REAs?  EQ8.2 Are the direct WFP partners likely to continue adopting MDAs / REAs?  EQ8.3 Are the MDAs / REAs being adopted by market actors who are not directly linked to activities?</p> <p><b>(EQ9) What factors affect sustainability of WFP MDAs and retail engagement activities, and do these factors vary for different actors (men, women, youth, rural, per-urban, urban) and country contexts?</b></p>
<b>Lessons</b>	<p><b>(EQ10) What lessons emerged from country experiences and different approaches and how can WFP enhance MDAs / REAs to increase WFP contribution to market development and food systems?</b></p>

### **Evaluability assessment**

56. As part of its preparation, inception missions were conducted in each country allowing for in-depth discussions with key internal stakeholders, most of whom are part of the Evaluation Committee (EC) and/or Evaluation Reference Group (ERG), and preliminary site visits. Within these discussions, MDAs and processes were mapped, further sources of monitoring data and financial information were explored, and expectations for the evaluation were shared. Some key gaps identified in monitoring data included missing values and inconsistent data over time for tools like Retail Performance Monitoring Evaluations (RPMEs) and Retail Onboarding and Contracting (ROCs) reports in both countries. However, other documents like market system analyses (MSAs), SCOPE sales data, and complaint feedback provided complementary information to evaluate the activities. Limitations existed in identifying comparison groups, especially in Bangladesh where restrictions limited contracting to certain retailers, but non-contracted retailers were identified in South Sudan. Overall, despite some data and contextual gaps, the assessment concluded WFP's market development and retail engagement activities were evaluable as data could be obtained to answer the main evaluation questions.

### **Data collection methods**

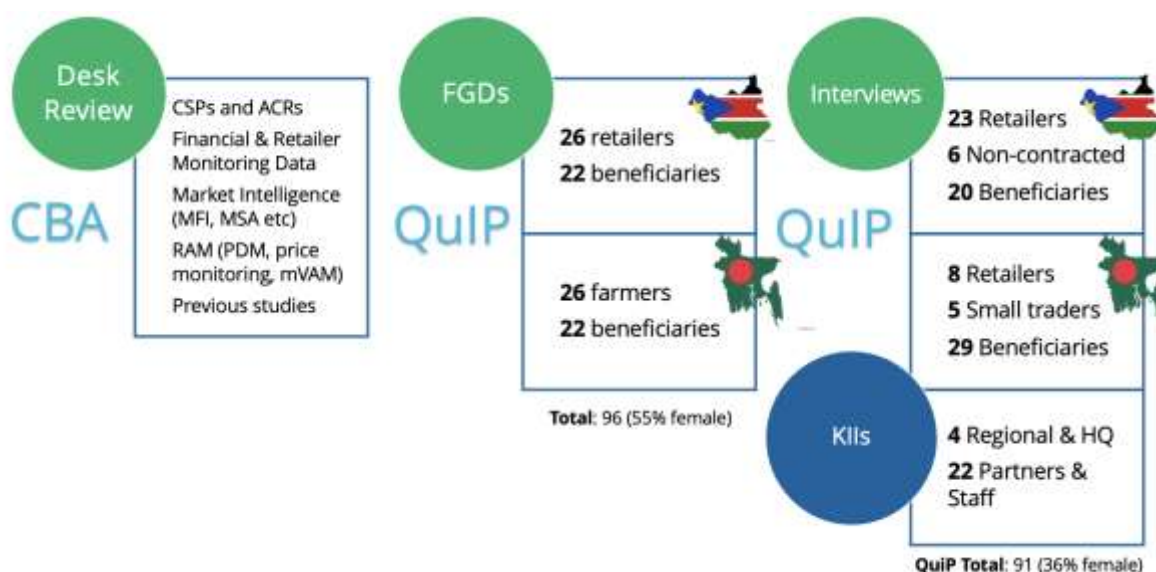
57. The evaluation combined qualitative and quantitative methods. This approach facilitated a robust triangulation process, strengthening the evidence base for all evaluation questions and sub-questions, ensuring the reliability and validity of the key findings. These methods are summarized in

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<sup>98</sup> This EQ was added under EQ3, however was later changed as better corresponded to EQ5.

58. Figure 8.

Figure 8. Methodology Overview



59. During the inception phase, the guidelines for purposive sampling for QuiP interviews and FGDs was determined, considering factors such as geographical location, age, gender, vulnerabilities, livelihood opportunities, and other demographic characteristics. This sampling approach enabled the evaluation to understand potential disparities in access, satisfaction, and the achievement of outcomes among different segments of the population. The data collection tools are presented in Annex 5, while Annex 4 outlines how they were applied to answer each evaluation question.

Table 6. Stakeholder types engaged in interviews and/or validation workshops

Stakeholder	Bangladesh	South Sudan
<b>Internal stakeholders</b>	WFP CO, WFP field office (FO) in Cox's Bazar, WFP Regional Bureau for Asia and the Pacific, WFP Headquarters, SCOLR	WFP CO, WFP FOs, WFP Regional Bureau for East and Central Africa, WFP Headquarters, SCOLR
<b>Contracted retailers and B2B suppliers</b>	Located in Dhaka and Juba- to understand the impact of the MDAs on their businesses.	
<b>Small shop operators</b>	In or surrounding the target markets to understand the spillover effects of the MDAs on the wider/host communities.	
<b>Smallholder farmer suppliers</b>	Based in Bangladesh	N/A
<b>National and local government officials</b>	Camp in Charge (Bangladesh), Agriculture and Food Safety Officers, Upazila officials	Refugee committee representatives, women's representatives for refugees, chamber of commerce/traders' union representatives, Relief and Rehabilitation Commission (RRC)
<b>Central External</b>	CPs and other NGOs operating relevant programming, United Nations Country Team (IOM).	
<b>Donors</b>	No	No

60. **In-depth desk review:** The ET reviewed 683 documents, including evaluations, research, assessment and monitoring reports (RAM), market intelligence reports, and financial data.

61. **Key informant interviews (KIIs):** KIIs, conducted in-person or remotely as feasible depending on the location and availability of stakeholders, explored the alignment of MDAs with market needs and government priorities, the integration of protection, gender equality and human rights considerations, and

the effectiveness of interventions in achieving intended outcomes and impacts and their likely sustainability. Many KIIs also heavily focused on costs and gathering of related data to contribute to CBA, which was a priority criterion for the EC. The evaluation employed a purposeful sampling approach to identify stakeholders for consultation during data collection. The types of stakeholders consulted through interviews are shown in Table 6, with a complete list presented in Annex 8.

62. **QuIP semi-structured interviews and focus group discussions (FGDs):** QuIP interviews and FGDs, including both closed and open-ended questions, were carried out with retailers and transfer beneficiaries. QuIP enabled the ET to gather evidence of effectiveness and impact through narrative causal statements collected directly from intended beneficiaries<sup>99</sup>. Respondents reported main changes in their lives over a pre-defined recall period and were prompted to share what they perceived to be the main drivers of these changes, and to whom or what they attribute any change. Both enumerators and respondents were not informed that WFP was the commissioning agency, nor that MDAs were the focus of the evaluation. The evaluation was framed generally as needs-assessment research for obtaining candid accounts of changes in the market situation on the supply and demand side over time. In addition, based on data gaps identified through the evaluability assessment, QuIP semi-structured interviews were seen as best use within the evaluation scope and resources for collecting quantitative data on benefits for CBA.

63. The sampling strategy for QuIP interviews and FGDs was purposive to represent different perspectives (men, women, elderly, youth, people living with disabilities) to the extent possible given available time, resource, and accessibility limitations. In Bangladesh, fewer retailers have been contracted and so a larger number of beneficiaries were interviewed in order to maximize value, and no FGDs with retailers were conducted. As the retail outlets are run systematically by Bangladeshi managers and employees in alignment with the procedures of the large-scale retailers for whom they work, it was enough to interview employees of 8 of the 12 retailers operating outlet shops in the camp. The evaluation also consulted with the WFP FO to sample beneficiaries for interviews and focus groups who had some alternative income generating activity (small traders and volunteers), and others whose only source of income was the voucher. Two FGDs with farmers engaged in the market linkages activities were also conducted.

64. In South Sudan, the evaluation team conducted QuIP interviews with 22 retailers and 20 with transfer beneficiaries receiving CBT assistance. More retailers were interviewed in South Sudan as WFP implements several different approaches to MDA, so it was important to increase the number of retailers interviewed for analyzing differences between approaches, as well as to compare with non-contracted retailers operating in the same markets. Ten interviews were conducted with B2B contracted retailers, seven with retailers directly contracted by WFP, five with non-contracted retailers. Two FGDs were also conducted with retailers and two with transfer beneficiaries in two markets targeted for the evaluation (which markets to select were identified in collaboration with the Logistics CBT and Contracting unit to provide different perspectives for analysis). See Annex 3 for more details on the sampling and Annex 6 for a detailed fieldwork schedule in each country. The detailed results of the QuIP survey, offering a comparative analysis of perceptions and experiences of the beneficiaries and retailers in Bangladesh and South Sudan, are available in the Annex 13.

### **Cost Benefit Analysis**

65. The methodology to conduct a Cost-Benefit Analysis (CBA) on MDAs in the two countries was initially established during the inception phase and was subsequently adjusted based on available primary and secondary data (See Annex 12).

66. The primary sources of the information are derived from administrative records, predominantly the SCOPE database. In addition to this, data has been gathered through direct interactions with staff across the two countries overseeing various activities, with store owners, managers, employees, and most

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<sup>99</sup> Qualitative Impact Assessment Protocol (QuIP) is an impact evaluation approach, that draws on contribution analysis, without a control group that uses narrative causal statements elicited directly from intended project beneficiaries. Respondents are asked to talk about the main changes in their lives over a pre-defined recall period and prompted to share what they perceive to be the main **drivers** of these changes, and to whom or what they **attribute** any change - which may well be from multiple sources. Further explanation is found at <https://www.betterevaluation.org>.

importantly, transfer beneficiaries via the QuIP interviews and FGDs with farmers in Bangladesh. The QuIP survey and FGD (in Bangladesh) were tailored to capture the requisite details to monetize the benefits. This includes specific data like the income of store owners in South Sudan, managers in Bangladesh, the number of employees, their salaries, and the time taken by beneficiaries to procure food from these stores. The decision was made to utilize QuIP interviews and FGDs for collecting quantitative data for CBA given the lack of comprehensive data covering all necessary localities and years and limited resources (e.g. budget, time) available to conduct a larger, representative survey. This approach, however, presents some limitations, which are further explained in Risks and limitations.

67. The ET developed cost breakdown matrices for different types of MDAs across countries as an analytical framework for systematically breaking down and presenting costs. The cost evaluation is broadly divided into two main categories: i. Establishment costs, the expenses that were necessary for the foundational setup of the MDAs. Key items in this category encompass the construction of stores, the process of identifying and selecting retailers, among other setup cost; ii. Recurrent costs (annual operational costs) encapsulate the recurrent expenses associated with running the MDAs, such as salaries, rents, and costs related to the mPOS machines. Within this category, recurrent costs of WFP's cooperating partners responsible for distributing and managing the CBT, considered (according to Field-level Agreements (FLAs)). Within this category, recurrent costs of WFP's cooperating partners responsible for distributing and managing the CBT<sup>100</sup>, considered (according to Field-level Agreements (FLAs)). Both of these broad categories consist of four distinct types of costs on assessment and contracting, ongoing operations, monitoring and evaluation, and overhead costs, which were used to structure the cost breakdown matrix and are further explained in Annex 3.

68. "Overhead costs" – the general administrative and operational expenses that cannot be directly attributed to a specific activity but are spread across various activities—covering areas like human resources, transportation, security, and other miscellaneous operational costs were not included. It was neither possible to extract such costs nor considered necessary as these did not vary with the modality of support offered.

69. On the benefits front, the CBA included three pivotal indicators: (1) "*Income growth for retailers*" (and additionally for farmers in Bangladesh) from 2018 to 2022 to estimate the livelihoods and income generation facilitated by MDAs (this benefit emphasizes the growth in income for retailers/shops);<sup>101</sup> (2) "*Local economic development*," gauged by collating incomes of shop staff (this encompasses the rise in additional monthly incomes the employees of the shops);<sup>102</sup> (2) Monetization of time savings in food procurement (monetization of the time for food procurement after the implementation of the MDAs).<sup>103</sup>

70. The analysis encompassed only the costs associated with the establishment and operation of MDAs and did not factor in the transfer values allocated via CBT in the form of e-vouchers. The CBA was facilitated by detailing total costs, including both fixed and recurring expenses along with in-kind distribution costing. Total benefits were assessed upfront, quantifying the monetary social benefits unique to cash/voucher systems and the non-monetized advantage of sustaining a market for food access. Additionally, the analysis determined the time required to recover fixed costs by converting annual monetized benefits from MDAs into the timeframe needed to offset the initial fixed costs.

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<sup>100</sup> CP roles and responsibilities in South Sudan related to CBT include distributing e-voucher to beneficiaries, identifying retailers, coordinating and assisting with training for retailers and beneficiaries, assisting with pre- and post-distribution monitoring, and addressing complaints. In Bangladesh CPs support E-Voucher implementation through engaging the community, assessing family demographics, and monitoring the retail operation.

<sup>101</sup> The inability to estimate the total number of farmers selling produce to retailers for the FFCs, using WFP administrative data, has hindered the calculation of income increases for farmers and their employees. As a result, these potential economic benefits to the farmers' communities could not be quantified or included in the CBA, limiting analysis comprehensiveness.

<sup>102</sup> Ibid.

<sup>103</sup> Transportation costs, initially in the frame, were later excluded due to their ties to external variables.



## Data analysis

71. **Content analysis** was used to convert content from the documents and interview notes into quantitative data according to the evaluation matrix. The developed codebook, closely aligned with the evaluation matrix, allowed the ET to answer evaluation questions, as well as to extract lessons, good practices, and recommendations. The analysis was done according to evaluation questions and sub-questions. The ET used Microsoft (MS) Excel for coding the key informant interview data and primary documents. For qualitative data cleaning, the ET carefully reviewed interview notes to ensure their completeness and clarity.

72. **Contribution analysis** was used to assess and identify the MDAs' contributions towards results through the lens of the TOC. Drivers, outcomes and attributions were systematically coded in the stories of change over identified points in time (2018, 2020, 2022), which enabled the team to test the assumptions and validity of the constructed TOC, refining as needed in accordance with findings. Preliminary mapping was conducted manually in MS Excel by multiple 'coders' (e.g. ET members), and then cleaned and quality controlled by one team member in order to ensure consistency in interpretation and categories of codes used. This cleaned data was subsequently organized by outcome areas of assortment, quality, price, etc. to develop Causal Maps aligned with the EQs.

73. **Comparative analysis** was used to study and contrast findings emerging from the country field visits, documentary review, and the views expressed by different stakeholders (including groups at higher risk of vulnerability) to assess differential results.

74. **Triangulation** was used throughout to ensure the reliability and quality of information to arrive at credible, reliable, and unbiased findings. The ET utilized a mixture of primary and secondary sources of data so that individual findings are based on several lines of inquiry and data sources. Each source of information brings unique perspectives, strengths, and limitations, and triangulation helps mitigate potential biases and capture a more complete understanding of the evaluated subject.

75. Causal Maps, MS Excel and PowerPoint were used to organize, analyze and visualize data and findings. Charts and diagrams visually depict the causal links and relationships between variables, stakeholders, and intervention strategies, specifically drawing from QulP interviews and FGDs.

76. Preliminary results were shared through country-level and HQ-level validation and learning workshops. These took place shortly after data collection at the country-level in the form of preliminary debriefings based on fieldwork; a subsequent remote HQ-level validation workshop took place to explain high-level findings and test conclusions and recommendations prior to the finalization of the evaluation report.

## Ethical and GEWE considerations

77. This evaluation conforms to the [2020 United Nations Evaluation Group \(UNEG\) Ethical Guidelines](#). DeftEdge ensured ethics integration at all stages of the evaluation cycle. This included, inter alia, obtaining informed consent, protecting privacy, confidentiality, and anonymity of participants, ensuring cultural sensitivity, respecting the autonomy of participants, ensuring fair recruitment of participants (including women and socially excluded groups) and ensuring that the evaluation results did no harm to participants or their communities.

78. The evaluation was conducted in accordance with international evaluation standards including the Organization for Economic Co-operation and Development's Development Assistance Committee (OECD/DAC) and United Nations Evaluation Group (UNEG) principles and guidelines. Additionally, the evaluation was guided by WFP's Gender Policy (2022) and integrated GEWE principles into the methodology, tools, and data analysis and reporting techniques used to ensure the participation, protection, and privacy of participants (women, men, persons with disabilities, and other groups).

79. Accountability to affected populations is an active commitment to use power responsibly by taking account of, giving account to, and being held to account by the people humanitarian organizations seek to assist (Inter-Agency Standing Committee). In all circumstances, due consideration to feedback and accountability were given. This included ensuring that communities were aware in advance of the purpose of the evaluation (within the limits of QulP methodology), engaging with representatives of all beneficiary groups, explaining how selection for respondents has been undertaken, ensuring informed consent for

participation. Respectful and transparent communication was a priority while ensuring that local customs and norms were understood and respected. This included respect for respondents' time by adapting data collection schedules to ensure participation did not interfere with necessary livelihood activities. In the COVID-19 context, this also included strict adherence to social distancing and any other public health requirements, part of the "Do No Harm" principle.

80. Gender was considered in all aspects of the evaluation, including data collection, analysis, and reporting. Evaluation questions were adapted to better mainstream gender, and specific questions were included in data collection instruments to gather information on women's inclusion in markets and decision-making, as well as access to resources, such as time and income. Additionally, FGDs with men and women in Bangladesh were held separately to capture their diverse perspectives and ensure cultural customs and local safety considerations are respected. For identifying observations that go beyond numerical equality, the evaluation coded and analyzed qualitative data using a gender lens. Aside from looking for differential results across men and women, the evaluation also sought to identify unintended consequences of the intervention on populations at higher risk of marginalization, such as persons with disability.

### Risks and limitations

Table 7 presents the main potential risks confronted by the ET, their potential impact on the evaluation and the suggested mitigation measures:

**Table 7. Main risks, impact, and mitigation measures**

Main risks	Mitigation measures
<p><b>Non-availability of ERG members and other external stakeholders</b></p>	<ul style="list-style-type: none"> <li>• The evaluation used innovative ways and contingency plans in collaboration with COs and EC. This included identifying alternate sources of information as well as highlighting gaps in discussing findings within the evaluation report.</li> <li>• In Bangladesh, 4 of the 12 contracted retailers during the evaluation period were no longer present in the camps therefore, small adjustments were made to interviews conducted in each location, with 8 of the 12 retailers interviewed.</li> <li>• There were some delays during the data collection period in Bor and Mingkaman, with unavailable stakeholders and heavy rains hindering progress. The ET was supported by the Chamber of Commerce to reach stakeholders and schedule meetings a few days delayed.</li> <li>• The ET planned to interview 2 contracted and 2 non-contracted retailers in Kalthok, however the WFP FO team indicated that no comparable non-contracted retailers were present in Kalthok therefore 4 B2B contracted retailers were interviewed at this location.</li> </ul>
<p><b>Data Gaps and non-heterogeneity of MDA approaches across the target countries</b></p>	<p>The use of proxy and/or secondary data to measure any emerging changes related to evaluation questions, discussions across countries to standardize as much as possible certain data collection or analysis exercises, and others. Country summary reports will be submitted to ensure country specific best practices and lessons are highlighted and tailored recommendations for each country provided. Where data gaps limited findings, it is noted.</p>
<p><b>Limited COs capacity to engage coupled with underestimate on time required to gather data for CBA.</b></p>	<p>The interviews and field phase occurred during the busy period for most COs staff, which involved year-end processes like preparing Annual Country reports, starting in April 2023. In addition, the prioritization of CBA by the EC during the data collection phase meant the focus of discussion in interviews, when available, was on understanding processes and financial data. CBA data collection took far longer than anticipated and required frequent consultations with WFP and follow-up with country offices to secure the required data. Future evaluations should consider conducting CBA separately to not overwhelm the evaluation process and overtake meaningful engagement with other evaluation</p>

	<p>questions. The ET sought to overcome this challenge by arranging additional interviews with stakeholders outside of the data collection period and utilizing the validation workshops to confirm/question key findings and present additional data sources.</p>
<p><b>Reliability of QulP for collection of benefit data for CBA</b></p>	<p>The selection of participants for the QulP method does not adequately represent the diverse universe of retailers, farmers, and beneficiaries in terms of both characteristics and quantity. This non-representative sample could skew the findings and limit their applicability. Additionally, respondents often face difficulties in accurately recalling specific details such as income levels, wages, and the time needed to procure food. This challenge in recollection can adversely affect the quality and reliability of the data gathered, further impacting the overall robustness of the CBA analysis. These challenges were mitigated by focusing on specific benefits, chosen in consultation with the SCOLR, as well as by reducing the income contributions of shop owners in South Sudan by 50%, and that of the number of employees in Bangladesh by 75%, in line with data collected during the field phase, thereby approximating the values of benefits conservatively.</p>
<p><b>Long length of QulP interviews</b></p>	<p>The ET in both countries reported that the retailer QulP interviews were particularly long. This challenge was overcome by remaining flexible during interviews to pause when necessary, so that the respondents could attend to their customers. However, this flexibility also made the days longer for data collection teams, and coupled with inconsistent internet connectivity, more difficult to submit interview notes and transcripts on a daily basis for quality control and/or translation. This was mitigated by extending the period for data cleaning and analysis to follow-up with data collection teams and respondents on unclear or outlier values. In case data was unclear, retailer contact details were also collected so that the ET could revert back to interviewees.</p>
<p><b>Maintaining the QulP 'double-blind' protocol</b></p>	<p>Given that camp officials were aware of the evaluation and may have informed respondents, there was potential for challenges in maintaining the QulP protocol. The evaluation team took several measures to mitigate this issue including: 1) Blind enumerators (Unaware of WFP's involvement in the evaluation) trained in QulP protocol. 2) Officials were not present during any interviews or FGDs. 3) Respondents were informed that WFP provided support to camp access for the research team.</p>

### Quality assurance

81. WFP has developed a Decentralized Evaluation Quality Assurance System (DEQAS) based on the UNEG norms and standards and good practice of the international evaluation community (the Active Learning Network for Accountability and Performance (ALNAP) and the OECD-DAC. It sets out process maps with in-built steps for quality assurance and templates for evaluation products. It also includes checklists for feedback on quality for each of the evaluation products. DEQAS was systematically applied during this evaluation and relevant documents have been provided to the evaluation team. Annex 3 describes how validity, utility, credibility, and independence were addressed.

## 2. Findings

### 2.1. RELEVANCE

#### EQ1 – TO WHAT EXTENT ARE MARKET DEVELOPMENT ACTIVITIES AND RELATED RETAIL ENGAGEMENT RELEVANT INTERVENTIONS INFORMED BY COUNTRY CONTEXTS AND MARKET INEFFICIENCIES IDENTIFIED DURING MULTI-SECTOR ASSESSMENTS?

EQ1.1: To what extent are the market and/or retail assessment findings used to design and implement activities, considering the differentiated needs and roles of women, men, and marginalized groups?

**Finding 1:** WFP made considerable efforts to respond to the needs of the community and address gaps in market efficiencies through the use of market monitoring and corporate tools when designing and implementing MDAs in each location. However, efforts could have been made to assess and document the particular needs of women and marginalized people in the design of MDAs and REAs, which would also enable WFP teams to better measure MDA impacts for different market actors.

#### Relevance of MDAs for WFPs work

82. WFP works to help people achieve food security and improve nutrition across the globe. Feeding people including those in emergency situations is an important aspect of WFP's work but a complex issue like hunger must be addressed from many angles. WFP not only works to save lives but contributes to changing lives as well, and one way it does this is through market development. One key informant described the importance of this approach very well by pointing out that, "**functioning and sustainable markets are a necessary condition to reaching zero hunger**"<sup>104</sup> and this is where MDAs come in. Beginning with a pilot in Kenya in 2015<sup>105</sup>, WFP has used MDAs to enhance market functionality and strengthen supply chains within the framework of CBT programmes. These activities are aimed at promoting economic inclusion, resilience, and food security among vulnerable populations. Evidence provided by evaluation respondents shows that MDAs have been contributing towards achieving these goals. For example, beneficiaries **in Bangladesh** have not only enhanced their food security and dietary diversity through the Fresh Food Corners established as part of MDA programming, but they have also enhanced their economic inclusion by having the opportunity to work as paid volunteers (significant, considering the refugees are not allowed to work outside the camps). As one refugee who is employed as a cleaner expressed, "*In 2019, I have got a job in this Camp-5,B4. With this salary my financial well-being is getting better.*" Another volunteer pointed out their improved diet stating that "*In 2018 me and my family took only green vegetables and lentils with rice. (In 2019-2022) I can afford different types of nutritious food like egg, fish, chicken etc.*" Farmers also reported improvements in their overall wellbeing over the course of the evaluation period as they have experienced increased income after receiving training and seeds provided by WFP and NGOs which has improved their crop quality and production.<sup>106</sup>

83. In **South Sudan** the introduction of vouchers provided the financial stability for families that enabled them to grow some food for sale which has improved their financial well-being.<sup>107</sup> One beneficiary mentioned, "*From the introduction of vouchers, we were able to buy important items that were nutritious in the*

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<sup>104</sup> KII, WFP staff

<sup>105</sup> World Food Programme (2021). WFP Contribution to Market Development and Food Systems in Southern Africa.

<sup>106</sup> QuIP FGD with farmers in Bangladesh

<sup>107</sup> Multiple QuIP beneficiary respondents

WFP-contracted shop in order to boost our health. We could take some farm surplus for sale in order to provide ourselves other needs.”<sup>108</sup>

84. Retailers also noted clear market development around them. One retailer from Gorom mentioned that there had been clear changes in the number of traders operating in the market because people invested after realizing that the market has growth. He said that his overall wellbeing has gotten better because of “*economic empowerment and training, all this have improved the wellbeing of my household.*”<sup>109</sup> Multiple retailers also noted improvements in their businesses because of the training provided by WFP and other agencies.

**There was improvement in decision-making and in how I carried out my business activities after taking some training activities by partner agencies.**<sup>110</sup>

85. Using corporate market intelligence tools, such as the Market Functionality Index and regular price monitoring, as well collaboration with local market actors (such as retailers, suppliers, manufacturers, and farmers), MDAs seek to identify and address context-specific market inefficiencies, improve the efficiency and effectiveness of CBT programmes, and create positive market dynamics. The goal is to achieve better outcomes for beneficiaries by improving market systems and ensuring that CBT interventions have a positive impact on local economies and food systems.

86. According to WFP staff, MDAs are highly relevant for WFPs work as they contribute to ensuring CBT will be possible by boosting market development from multiple approaches. On the retail side by contracting retailers (ensuring supply and fair prices) and diffusing retail best practices into less developed retail environments to create and kickstart markets while at the same time applying market systems analysis to map supply chains and understand inefficiencies, drawing on these findings to design MDAs that can address those inefficiencies. Under the right circumstances, the goal is for the markets to become self-sustaining over time, growing and thriving on their own and servicing communities that no longer require WFP food assistance. **In Bangladesh**, only outlets created by WFP are allowed to operate within the camps and livelihood activities are heavily restricted by the government therefore it is not as realistic to expect independent markets to evolve from the MDAs implemented. **In South Sudan** on the other hand, markets were created from scratch and the market connections and business skills gained through MDA activities have contributed greatly towards the establishment of self-sustaining markets. Voucher systems served as an important steppingstone for establishing markets where they previously didn't exist, and later WFP was proactive in addressing issues with market dynamic by conducting MSAs to identify solutions for addressing inefficiencies that would enable more independent growth. For example, the MSA in Bor found that transitioning to unrestricted cash would enhance competition and enable to the market to regulate itself.

### **Contribution of market and retail assessments to MDA design and implementation**

87. WFP corporate tools were used to ensure effective implementation of MDAs. **In Bangladesh**, supply chain experts were brought in to design the retail shops to optimize the space available and to ensure structures and processes were set up to maximize consumer experience for beneficiaries. During the design phase, WFP teams used the Market Functionality Index (MFI) and price monitoring to understand the market situation and establish fair prices when negotiating with retailers. There are now 12 contracted retailers, 19 outlets, 39 shops and 18 Fresh Food Corners in place. **When market inefficiencies were identified, Market Systems Analyses (MSAs) were carried out to review and optimize supply chains for specific products (e.g., rice, dry chilis, eggs).** RPME was also conducted once a month to ensure that all retailers met quality standards expected of them and a non-compliance tracker was used daily to monitor retail operations online, enabling effective follow-up where it was required.

88. **In South Sudan, which MDAs to implement are determined based on the market situation of each location. When there is interest to launch CBT in a certain location, an MFI is conducted**<sup>111</sup> to

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<sup>108</sup> QuIP, beneficiary in Bor

<sup>109</sup> QuIP, retailer in Gorom

<sup>110</sup> QuIP, retailer in Bor

<sup>111</sup> This is the current process for implementing new MDAs but the MDAs in Bor and Mingkaman were already established when the MFI tool was created.

**inform the decision making of which approach should be used.** Once assessments were conducted, MDAs were only initiated with approval by the Cash Working Group, which carefully considered the results of the assessments as well as input from relevant WFP units. To ensure that beneficiaries are charged a fair market value for the products they purchase using their e-vouchers, prices for the mandatory items provided by WFP retailers are negotiated and set each month based on Vulnerability Assessment Monitoring (VAM) price monitoring (conducted on a weekly basis given the market and currency volatility of South Sudan).

89. Resultingly, different combinations of MDA activities were implemented in each of the locations. At the refugee camp in Gorom, virtually no market existed until September 2021 when WFP established a RIAB location that was operated by retailers contracted by a supplier using the B2B system. In Mingkaman, the market was also created from scratch when in 2016, WFP switched from in-kind assistance to the e-voucher modality, providing assistance through directly contracted retailers. Responding to issues of price collusion among retailers and the lack of local access to supply identified by the MSA conducted in 2021, WFP encouraged wholesalers to supply the market in Mingkaman and used a combination of directly and B2B contracted retailers for the remainder of the evaluation period. In Kalthok, WFP switched from in-kind assistance to e-vouchers with B2B in January 2021. As no physical market existed here either, retailers initially used mobile shops transported by the B2B suppliers, but these suppliers soon established more permanent shops that were used until the end of the evaluation period. In Bor, assistance was provided through e-vouchers and directly contracted retailers from 2016 until 2022, at which point WFP made the switch to unrestricted cash. This shift was made after the 2021 MSA found that moving to unrestricted cash would allow beneficiaries to get the best value for money and avoid targeted pricing and fixing of voucher prices. RPMEs were intended to be conducted regularly (e.g., once a year in Mingkaman) to ensure retailer compliance with WFP requirements.

90. WFP documentation and staff in both countries indicated that **market assessment tools (MFI, MSA) were used to design appropriate MDAs and modifications according to market need and inefficiencies. Corporate monitoring tools (RPME, price monitoring) were used to ensure that MDAs respond to market needs and that contracted retailers are operating in compliance with WFP expectations** (price, quality, assortment, services and compliance). **In Bangladesh**, MFIs were conducted in the four catchment areas in 2020 and 2021 and MSAs when needed throughout the evaluation period. RPMEs are consistently conducted each month.

91. **In South Sudan**, the tools were applied less consistently: MFIs were only conducted in Gorom (as MDA/REAs were already operational in Bor and Mingkaman when this tool was developed), and an MSA was conducted for Bor and Mingkaman markets in 2021. Retailer Onboarding and Contracting (ROC) was conducted in markets where retailers were directly contracted (once in Bor and twice in Mingkaman). RPME was conducted once a year in Mingkaman and Bor, but only once in Gorom and Kalthok. Without more consistent use of MFI and RPME, it was not possible to measure changes in the market over time and see the impact of MDA/REAs through monitoring data. More frequent RPMEs might also enable the WFP team to identify challenges for the retailers and provide any follow-up capacity building that might be needed, though is dependent on context, given RPME data was highly uniform in Bangladesh. Refer to EQ3.2 for further analysis on the utility of corporate tools.

### **Inclusivity considerations**

92. **In terms of inclusivity considerations and MDA design processes, there was evidence that WFP made efforts to respond to the needs of women and marginalized people. In Bangladesh**, the retail outlets were set up with special consideration given to vulnerable groups. Women and disabled individuals were given priority in services and inclusive infrastructure was put in place for people with disabilities (ramps, special lines for those with great needs, porter services).<sup>112</sup> The market linkages programming also promotes women's participation in the aggregation centres and value chain development trainings. For example, the Farm2Go tool (a digital negotiation space<sup>113</sup>), enables women to engage with the market activities without physically going to the market. Women's empowerment is further

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<sup>112</sup> KIIs, WFP staff in Bangladesh

<sup>113</sup> WFP 2022, Innovative Digital Solutions, <https://docs.wfp.org/api/documents/WFP-0000145598/download/>

promoted through the Enhancing Food Security and Nutrition programme where female participants receive an additional allowance, behavior change communication training, income-generation training and the opportunity to participate in women's self-help groups.<sup>114</sup> **In South Sudan** efforts were also made to include female retailers in the onboarding and training processes, to ensure that women felt safe in the market settings and to ensure that markets would be accessible to everyone including those with disabilities.<sup>115</sup>

93. However, **the evaluation found minimal evidence of how analysis of consultation with women and marginalized people was used to determine how their needs would best be met through MDAs and inform activity design and processes for measuring specific outcomes for women and marginalized people.** Even though women may have been interviewed during the planning phase (For example, during REVA assessments and FGDs with women during MFI processes in Bangladesh and women were included in FGDs during the MSAs in Bor and Mingkaman), gendered analysis of the information from these interviews could be more specifically addressed in MFI reports, retailer training materials or activity documents/presentations (how MDAs were designed to maximize women's empowerment) especially within a context of strong cultural gender norms. The Thematic Evaluation of WFP Contribution to Market Development and Food Systems in Southern Africa<sup>116</sup> cited similar findings stating that *"The incorporation of gender dimensions and needs of youth, the disabled, and other groups in MDAs was generally weak in the design of MDAs across all countries."* It pointed out that this might be attributed to the fact that the WFP MDA Guidance did not include steps for these considerations.

94. Also, it would be useful to specifically assess the impact of women's participation in MDAs. Monitoring processes/indicators to measure these changes should be in place from the design phase to assess unique outcomes for women whether as beneficiaries, volunteers, farmers supplying aggregation centres or retailers. This is included in the recommendations section.

95. The importance of vouchers for female empowerment was mentioned frequently in both key informant and QuIP interviews. Due to restrictive cultural norms in both countries, women do not traditionally have strong roles in the supply side of market systems (e.g., as retailers or suppliers) and would be less likely to be involved in household decision-making processes involving cash.<sup>117</sup> When e-vouchers were introduced, they were registered in the name of female members of the household to promote women's decision-making when it comes to food purchases for their households.

***"By entrusting women with the cards, WFP interventions subtly elevated their role in household financial management, allowing them to decide how to utilize the funds, and reinforcing their position as key financial contributors and decision-makers within the family."*<sup>118</sup>**

96. However, it is still important to be mindful of how gender norms affect activity outcomes. The WFP-UNHCR joint assessment in Cox's Bazar found that while women may have possessed e-vouchers, it was male household members deciding what items to re-sell and how to use the cash from the sales possibly leading to disempowerment of women in food security.<sup>119</sup> Interviews with beneficiaries in Bangladesh supported this finding as the women interviewed frequently mentioned that it was their husbands that make the decisions in the household. Only women who were the heads of households because they did not have a husband present, or their sons had moved out reported being responsible for decisions made in the household.<sup>120</sup> Beneficiaries interviewed in South Sudan also confirmed the importance of vouchers for female empowerment. For example, one respondent from Bor stated that, *"During Voucher time women*

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<sup>114</sup> WFP, Enhancing Food Security in Cox's Bazar. Available at:

<https://documents.wfp.org/stellent/groups/public/documents/communications/wfp279524.pdf>

<sup>115</sup> KII, WFP staff in South Sudan

<sup>116</sup> WFP (2021). WFP Contribution to Market Development and Food Systems in Southern Africa

<sup>117</sup> QuIP, beneficiary in South Sudan; UNHCR-WFP. (2019). UNHCR-WFP Joint Assessment Mission (JAM) Report 2019: Cox's Bazar, Bangladesh. <https://data2.unhcr.org/en/documents/details/72273>

<sup>118</sup> KII, WFP regional staff

<sup>119</sup> UNHCR-WFP. (2019). UNHCR-WFP Joint Assessment Mission (JAM) Report 2019: Cox's Bazar, Bangladesh.

<sup>120</sup> QuIP, beneficiaries in Bangladesh

were having full responsibility. From this period (2022) men who used to keep away from (vouchers) have now jumped in to share this little cash with their wives."<sup>121</sup>

EQ1.2: To what extent are the market development activities and related retail engagement activities linked to the country strategic plan?

**Finding 2:** The increasing proportion of CBT in CSP budgets demonstrates MDAs' growing relevance. However, while functioning markets are recognized as an important pre-requisite for the effectiveness of CBT, MDAs are not directly mentioned in WFP's corporate strategy and there are no mechanisms in place for measuring MDA effects and impacts. This limits the extent to which COs are able to integrate specific considerations related to planning, monitoring and reporting on MDAs. Consequently, lessons and achievements resulting from MDAs have low visibility both internally (WFP management) and externally (cooperating partners and donors).

97. MDAs were acknowledged by both WFP staff and government representatives as being highly relevant for government strategies in Bangladesh and South Sudan; however, the evaluation did not find evidence of government consultation in designing MDAs and the extent of government involvement in the implementation of MDAs in each country varied drastically.

1. **In Bangladesh**, the government plays a strong role in the way the camps are managed and strictly regulates access and operations therein. As a result of these restrictions, only WFP contracted retailers are allowed to operate shops within the camps thus determining the MDA approach to be implemented. **Government representatives interviewed for the evaluation indicated that while MDAs are aligned with government strategies, they would like to see more government involvement at the design stage of such interventions.** For example, one respondent mentioned, *"The concept of market development matches our country's development priorities, I'm absolutely sure of that. In a way, these Rohingya relief initiatives attracted international funding and created a lot of work opportunities."* He later went on to say, *"If the UN organization improves cooperation, develops a plan with more government involvement than it has at present, and plans the programme after a need assessment in the camp, I am convinced that interventions will have lasting beneficial effects and impacts for a very long time after the operation has ended."*<sup>122</sup> The importance of government involvement was also recognized as important by WFP staff. For example, one WFP respondent stated that *"Governments should lead because issues like trade and market policies and enforcing food safety and quality in the markets lies with the government. We just support (facilitation), government needs to take lead because they are the ones who have to enforce it."*<sup>123</sup>

98. **In South Sudan**, WFP's CSP was aligned with the interim national development strategy and government mainly allowed WFP to operate independently. Government influence in MDAs mainly extends only to identifying locations where they did not allow WFP to distribute unrestricted cash. However, it is interesting to note that according to KIIs, **MDA efforts contributed to improvements in the way local authorities managed the traders they represented and enhanced relationships between local authorities and the traders.**<sup>124</sup>

### CBT in Bangladesh and South Sudan

99. The evaluation found CBT as a proportion of CSP budgets and actual distributions to be increasing in importance, thus emphasizing the increasing relevance of MDAs for optimizing benefits drawn from these transfers. Table 8 shows an increase in the % of CBT in CSP revisions for both countries.

<sup>121</sup> QuIP, beneficiary in South Sudan

<sup>122</sup> KII, government representative in Bangladesh

<sup>123</sup> KII, WFP staff

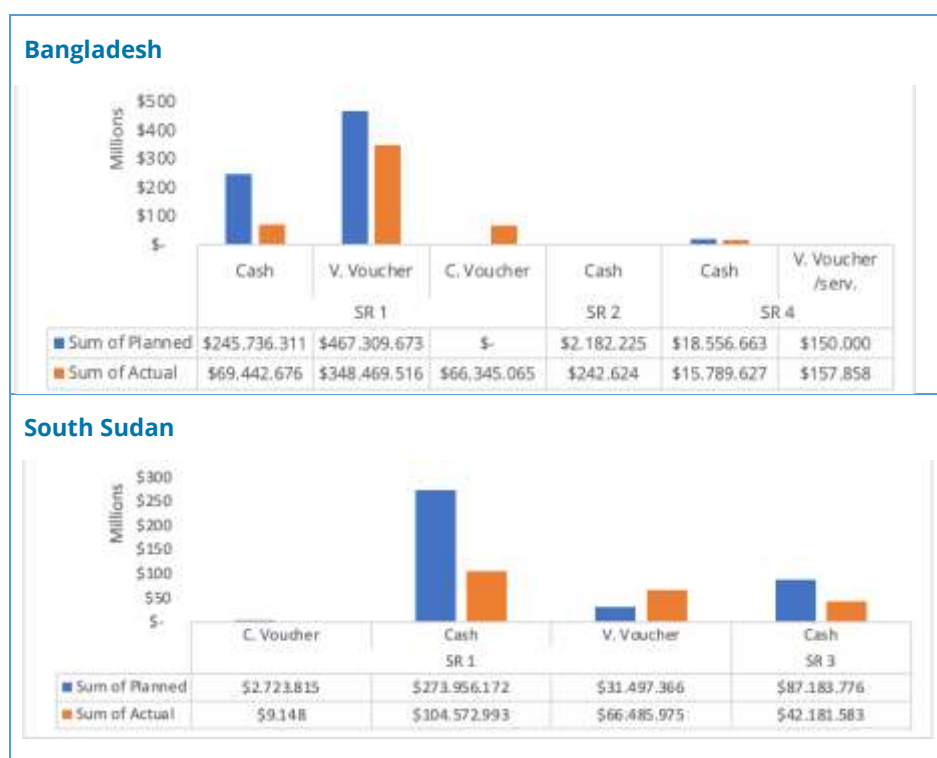
<sup>124</sup> KIIs, WFP and local authorities, South Sudan



**Table 8. CSPs in Bangladesh and South Sudan**

Country	CSP	Budget M\$	% of CBT	M\$ CBT	CSP Beneficiaries	CSP Beneficiaries by sex
Bangladesh	CSP 2017 -2021 and CSP 2022-2026	969	37%	358	3,853,158	Girls/Women 55%
	Revised	1,368	42%	576	5,407,600	Girls/Women 55%
South Sudan	ICSP (2018-2021) <sup>125</sup>	3,885	7.5%	293	4,909,688	Girls 40% - Boys 33% - Women 17%
	ICSP 2018-2021 Revised in 2022	5,043	8%	395	6,438,927	Girls 40% - Boys 33% - Women 17%

**Figure 9. Overall CBT and Commodity Voucher Distribution (USD) 2018-2022**



100. According to the Annual Country Reports (ACRs) from 2018 to 2022, value vouchers<sup>126</sup> made up a significant proportion of cash transfers in both Bangladesh and South Sudan, highlighting the relevance of MDA programming for these countries. (See Figure 9 for overall CBT distributions in both Bangladesh and South Sudan for the evaluation period).

<sup>125</sup> World Food Programme. (2023). Evaluation of WFP contribution to market systems in South Sudan and Bangladesh from 2018 to 2022 – Decentralized Evaluation. Terms of Reference.

<sup>126</sup> WFP uses two types of vouchers in its assistance programmes globally, value vouchers which fall under CBT and commodity vouchers which fall under Supply Chain as part of in-kind distribution. The locations targeted for this study mainly used value vouchers except for a brief period from April to November in 2020 in Cox's Bazar when refugees received food assistance in commodity vouchers in order to minimize human contact during the Covid19 pandemic. Therefore, **references to vouchers in this report refer to value vouchers unless otherwise stated.**

## CSPs

101. **In Bangladesh**, WFP CSP 2017-2021 had a revised budget of \$1.3 billion,<sup>127</sup> which had increased to \$1.6 billion in the 2022-2026 CSP. 52% of this budget was allocated to CBT under three strategic outcomes (with the aim to reach a target population of 2,581,656).

102. The CSP underwent five revisions between 2017 and 2021. The value of CBT transfers changed throughout these revisions, starting from an initial budget of \$54,503,301 and progressing to \$106,180,888 (revisions 1 and 2), then to \$142,403,179 (revisions 3 and 4), and ultimately reaching \$357,912,233 (revision 5). As of April 2021, all in-kind food distributions were replaced with e-voucher assistance at WFP retail outlets in the camps and thus provided food assistance to all refugees, registered and unregistered. WFP partnered with UN agencies (e.g., FAO, IOM, UNHCR), national and international organizations (e.g., Red Crescent Society, BRAC), local government authorities (e.g., Camp-in-Charges), and financial service providers (e.g., bKash).

103. MDAs, particularly the implementation of CBT (e-vouchers in Cox-Bazar), from 2017 to 2022, were influenced by several external events including the influx of Rohingya refugees, the COVID-19 pandemic, and natural disasters like cyclones and floods. The arrival of Rohingya refugees in 2017 necessitated immediate humanitarian response. WFP's CBTs played a vital role in providing life-saving assistance to both the Rohingya refugees and vulnerable Bangladeshi communities. CBT allowed for cash assistance to be provided directly to beneficiaries, enabling them to meet their immediate food and non-food needs and minimizing the impact of humanitarian crisis or natural disasters such as cyclones and floods on local market systems. Furthermore, during the height of the COVID-19 pandemic, WFP temporarily shifted modality for refugees to commodity vouchers (redeemable for pre-packaged food baskets). The use of the commodity vouchers became crucial in maintaining the provision of assistance while adhering to government regulations and minimizing the risk of virus transmission.<sup>128</sup> The adaptability of WFP to shift from e-vouchers to commodity vouchers allowed for timely and efficient assistance to affected communities, enabling them to access essential goods and services amidst the health crisis.

104. CBTs were also used to support pregnant and lactating women,<sup>129</sup> the food-insecure population of Cox's Bazar and the disaster-affected areas to enhance food security and nutrition,<sup>130</sup> as well as the population of Chittagong Hill Tracts,<sup>131</sup> including children, pregnant and lactating women, and primary school students.

105. **In South Sudan**, WFP implemented an interim CSP 2018-2022 to reach 6.4 million beneficiaries at a total budget of \$5 billion. Of this budget, 8% (395US\$ million) was planned for CBT, with a focus on providing nutrition-sensitive food assistance to crisis-affected populations and food and nutrition assistance to refugees. Food-insecure smallholder farmers and communities in non-conflict zones were also engaged in livelihoods development programming aimed to enhance their resilience to seasonal climate shocks throughout the year.<sup>132</sup>

106. WFP aided crisis-affected and food-insecure populations and refugees through various transfer modalities, including in-kind food assistance, CBT, and a hybrid food basket combining in-kind rations and CBT. This assistance was facilitated through WFP's extensive network of 15 field offices, the Integrated Rapid Response Mechanism (IRRM), and partnerships with eight national and 15 international cooperating partners (CPs), including FAO, UNICEF, UNOPS, World Bank, ACROSS, Catholic Relief Services (CRS), Norwegian Refugee Council (NRC), and Joint Aid Management (JAM).

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<sup>127</sup> World Food Programme. (2018, 2019, 2020, 2021, 2022). Bangladesh Annual Country Reports 2018, 2019, 2020, 2021, 2022. Available from: <https://www.wfp.org/publications/annual-country-reports-bangladesh>

<sup>128</sup> WFP 2020, Bangladesh Annual Country Report

<sup>129</sup> Activity 1 until 2021 of the SO1

<sup>130</sup> Activity 5 from 2019 to 2021 of SO2 until 2021 and Activity 1 of SO 1 in 2022

<sup>131</sup> Activity 6 until 2021 of the SO1, Activity 1 of the CSP 2022-2026

<sup>132</sup> World Food Programme. (2018, 2019, 2020, 2021, 2022). South Sudan Annual Country Reports 2018, 2019, 2020, 2021, 2022. Available from: <https://www.wfp.org/publications/annual-country-reports-south-sudan>

107. The beneficiaries of cash-based transfers saw the following changes from 2021 to 2022: Activity 1 increased from 563,268 (56% women) to 570,651 (56% women), Activity 2 from 274,026 (54% women), and Activity 4 from 262,000 (54% women) to 357,150 (54% women). Due to challenges such as violence, displacement, gender inequalities, economic downfall, climate shocks, and the disruption caused by COVID-19, WFP increased the number of beneficiaries by 31% and the overall CSP budget by 30% in the CSP revision.<sup>133</sup>

### Global Strategy

108. Though the relevance of market development for WFP is evident, it is at times difficult to situate MDAs within WFP priorities when it comes to alignment with WFP strategy at the global level. WFP is increasingly moving to CBT, which without functioning markets, would not be possible. Although some locations where WFP operates have well-functioning markets with robust supply chains in place, others are isolated refugee camps with little to no markets in place thus requiring extensive market and retail development before CBT modalities can be implemented. While retail engagement (activities related to retail store selection, contracting processes to improve assortment, price, quality and whatever provides the best shopping experience to beneficiaries) was easily defined as part of the Supply Chain unit's sphere of influence within WFP programming, the shift towards CBT broadens the scope of retail engagement to include market systems development; and according to KIIs, for MDA to be better integrated into the global strategy, there needs to be a shift in the skills and understanding of the market systems approach (moving beyond the pure logistics of procurement storage and distribution to understanding retail and market systems).<sup>134</sup>

109. Although, the importance of functioning markets as a pre-requisite for moving to CBT was widely recognized in both WFP documentation and interviews conducted for the evaluation, at the global strategic level, WFP does not have mechanisms in place for measuring the impact of MDAs. For example, even though **MDAs are being implemented in many countries where WFP operates, there were no indicators included in WFP's current corporate results framework for assessing the impact of these MDAs. This limited integration of MDAs into CSPs and also constrained WFPs visibility in this area of work with donors.** Furthermore, multiple KIIs from WFP mentioned that there was not always enough knowledge of the market systems approach or motivation among upper management to take on market development as a priority, and this complicated how activities were rolled out and supported at the country level. They indicated that the challenge for WFP emanated from its transition from in-kind food assistance to CBTs, as much of its supply chain expertise traditionally focused on the pure logistics side of WFPs work (procurement, storage, delivery of food). Corporate KPIs for measuring progress in the supply chain functional area all focused on these aspects of WFPs work.<sup>135</sup> It was stated as important to identify how these logistics skills can be applied to providing support for the private sector/existing market systems and supply chain so that the markets are able to absorb CBTs but also continue sustainably once WFPs assistance dissipates.

110. **In Bangladesh**, MDAs made up an important aspect of WFP's efforts to enhance food security and nutrition given that most of the food assistance provided in Cox's Bazar is provided through the e-voucher system and redeemed with WFP contracted retailers. WFP's engagements with retailers and linkages with local farmers were mentioned in the annual reports each year. However, without indicators to measure the contribution of WFPs efforts towards market development, the ability to demonstrate the impact of these activities is limited.

111. **In South Sudan**, the Logistics CBT and Contracting Unit is involved in the CSP development process. The CSP had a cash component and MDA was an important means for being able to implement CBT in the country.<sup>136</sup> However, there was no specific mention of MDAs in either the CSP or annual reports.

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<sup>133</sup> Ibid.

<sup>134</sup> KIIs, WFP staff at HQ and regional levels

<sup>135</sup> The 3 KPI are: % of post-delivery losses. % of tonnage uplifted as per agreed date. % of metric tons unreconciled as indicated in the WFP Annual Performance Report for 2021, ANNEX III-A: DETAILED ANALYSIS OF CORPORATE KEY PERFORMANCE INDICATORS. ([https://executiveboard.wfp.org/document\\_download/WFP-0000139257](https://executiveboard.wfp.org/document_download/WFP-0000139257))

<sup>136</sup> KIIs, WFP staff, South Sudan

**If the role of WFP in working towards market development was more clearly defined within the corporate level strategy, it would be easier for countries to explicitly integrate MDAs into their CSPs and subsequently include KPIs that would allow the organization to measure the impact of MDAs and report on progress to donors and other relevant stakeholders.**

112. Overall, MDAs were found to be highly relevant for ensuring the success of WFP's efforts towards achieving zero hunger globally. They pave the way for sustainable thriving markets, provide beneficiaries with enhanced nutrition and dietary choice, and contribute to economic empowerment by building market linkages and retail capacity and creating livelihood opportunities. MDAs were also aligned with national strategies related to food security and economic development. The most important issue to be addressed in this area was to clarify how market development fits strategically for WFP within the Supply Chain CBT, Markets and Retail unit and at the global level so that all stakeholders both internal and external better understand WFP's role in influencing market systems going forward. With clear strategy established for MDAs, it will be important to determine corporate level monitoring indicators that enable WFP to monitor and report on the progress of their influence in market systems development and their impact for diverse market actors.

## 2.2. EFFECTIVENESS

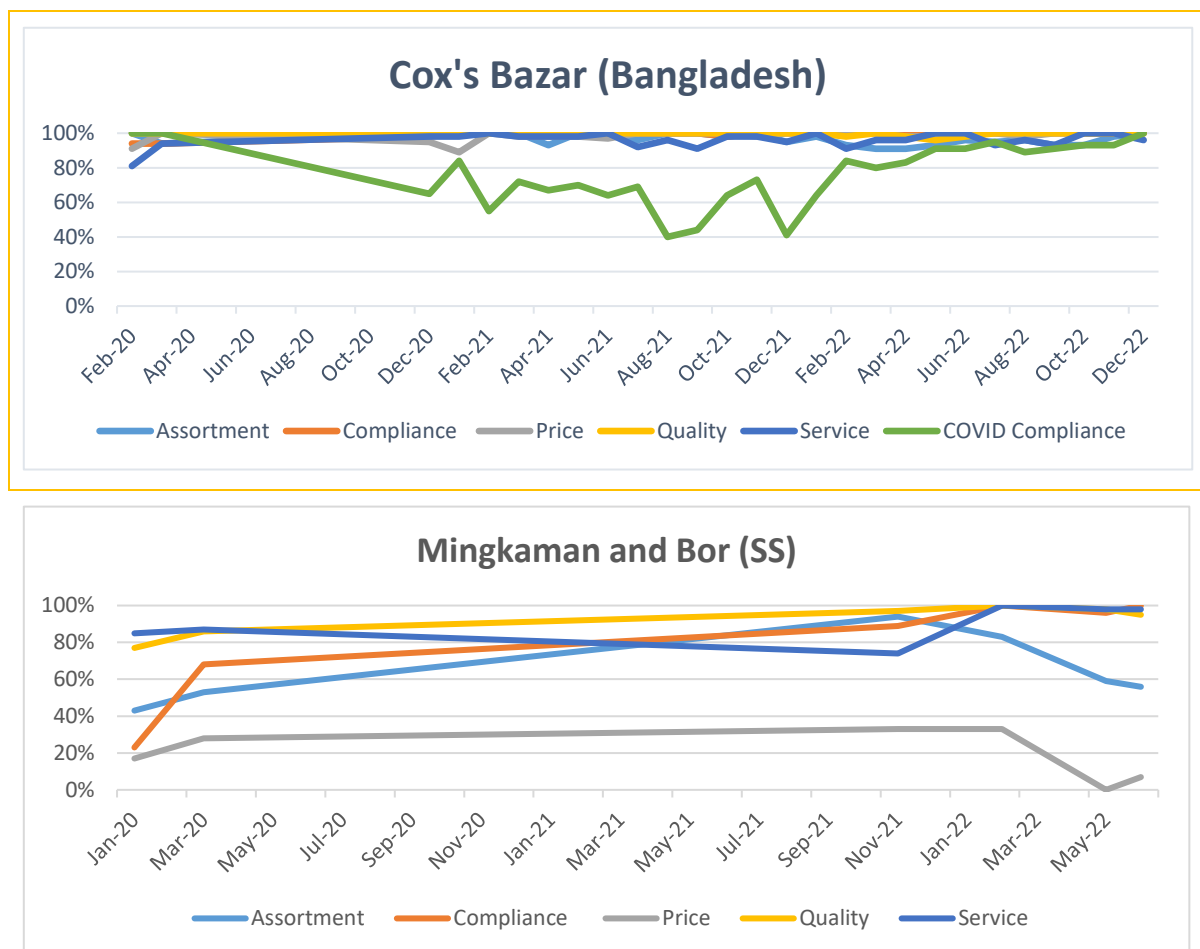
### EQ2 – TO WHAT EXTENT HAVE THE IDENTIFIED MDAS AND RETAIL ENGAGEMENT ACTIVITIES IMPLEMENTED AND ACHIEVED THEIR OBJECTIVES FOR MEN AND WOMEN IN THE TARGET GROUPS AND THEIR WIDER LOCAL COMMUNITIES?

EQ2.1: To what extent have MDAs and retail engagement activities enhanced and impacted the assortment, availability, prices, and quality of food products for the different target groups [e.g. retailers and those receiving CBT] and indirect beneficiaries [e.g. host communities]?

**Finding 3:** MDAs have contributed to increased availability of nutritious foods in targeted markets in both Bangladesh and South Sudan, though the level of evidence is variable across operational contexts on indicators of assortment and price, in particular, given inconsistent use of retailer and market monitoring tools. There are notable strengths in Bangladesh, where retailers maintained well-stocked and diversified shops with quality food items, and success in this regard is largely attributed to WFP trainings and contractual agreements that elevated standards. In addition, WFP's monitoring and interventions focused on optimizing commodities have mitigated challenges with fluctuating product availability and prices and resulted in a more diverse assortment of nutritious food. In South Sudan, MDAs enabled improvements in shop infrastructure, product sourcing, and supply chain relationships for retailers, positively impacting product quality and availability. However, the changing value of vouchers in Bangladesh and high inflation in South Sudan still affected perspectives of affordability for beneficiaries.

113. As highlighted under EQ 1.2, WFP programmes have not explicitly included objectives, indicators, and targets specifically related to MDAs, except for general capacity strengthening and technical support outputs. Several key performance indicators are integrated into market intelligence tools, such as the MFI dimensions, which are intended to be measured across all WFP operations that engage retailers. To measure the performance of the retailers and the effectiveness of WFP activities in the market, SCOLR units use RPME focused on specific key performance indicators. The primary indicators of interest in this evaluation are **assortment, availability, price, and quality**. However, the above indicators have not been tracked consistently in the same format to allow for substantial analysis of results over the years under evaluation in each country, particularly for South Sudan (Figure 10) (see EQ3.2 on page 54 for further analysis on corporate tools). In Bangladesh, RPME assessment data is consistently available across months and markets from 2020 – 2022, with gaps from 2018-19, though there is little variation in shop / retailer performance. As such, the assessment of effectiveness relies largely on primary data collected through the evaluation.

Figure 10. Available RPME Over Time



Note: Analysis based on available RPME data for Cox's Bazar retailers from February 2020 to December 2022 and Mingkaman and Bor retailers from January 2020 to June 2022. Retrieved from Tableau dashboard.

### Assortment and availability

114. The **assortment** of essential goods dimension indicates which classes of goods to meet essential needs can be purchased in a marketplace and how much choice is offered.<sup>137</sup> It is measured by increases in the MFI and RPME (see Figure 10) scores for this dimension over time. The **availability** dimension assesses whether certain products are scarce or likely to get scarcer in the short run, and measured by the percentage of selected food basket that is in stock during monitoring visits. These two indicators were often referred to inter-changeably by retailers and beneficiaries and are therefore presented together.

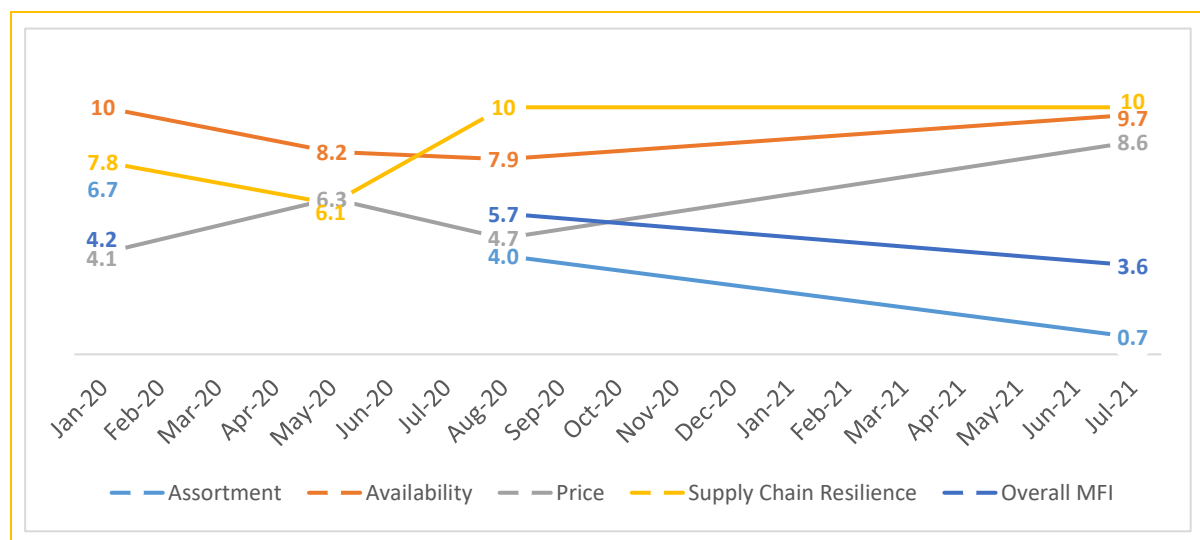
115. Evidence from the RPME, MFI and Incident Tracking tools reveals variable results for the assortment of essential goods in Cox's Bazar amongst retailers. In Bangladesh, RPME questions<sup>138</sup> focused on the availability of stock for monthly approved fixed commodities, the availability of locally produced items inside the shop, and whether fixed items are neatly displayed at all times (amongst other indicators). Data shows **contracted retailers' relatively consistent ability to maintain well supplied shops with diversified products, quality and brands**, with 91% to 100% receiving a 'very good' or 'good' rating from February 2020 to December 2022. Availability, primarily assessed through the MFI, was also scored

<sup>137</sup> WFP, MFI Guidance

<sup>138</sup> To note, the questions in the 'Bangladesh - RPME Dashboard' in Tableau under 'assortment' are aligned with 'quality' in the RPME questionnaire, and visa versa, and therefore the ET switched the data on these components assuming this was a data entry mistake.

consistently high in Cox's Bazar over the one-year period with data available, starting at 10.0 in January 2020 and reducing to 7.9 at lowest in August 2020 to jump back to 9.7 in July 2021. This highlights the functionality of market actors to sufficiently stock and supply goods in accordance with current and future consumer demand of Rohingya refugees.

**Figure 11 Available Market Functionality Index Dimensions Over Time in Cox's Bazar**



Note: Analysis based on available Market Functionality Index (MFI) data in VAM Market Monitors for Cox's Bazar from January 2020 to December 2022. Retrieved from <https://www.wfp.org/publications/wfp-bangladesh-market-monitor>.

116. However, ratings for assortment within the MFI significantly differed, with Cox's Bazar generally seeing a low rating of 4 out of a possible score of 10 in August 2020 and an exceedingly low score of 0.7 in July 2021, providing a contrasting picture to RPME of limited variety and choice in essential products for consumers. The MFI, in some cases though, is reflective of the overall market situation in and around the camps, thus showing possible differences in consumer demand and/or retailer expectations and capacity to maintain sufficiently varied stocks across markets.<sup>139</sup> For example, few retailers and beneficiaries spoke to any changes in the assortment and availability of goods in QuIP interviews and FGDs, with several retailers noting a need for further stocks or that they experienced stock shortages in response to an increase in demand. However, these responses primarily came from small non-contracted traders who stocked non-essential items such as cigarettes and chocolates in informal markets [who are not included in QuIP maps].

**Table 9. Highest frequency counts of causal statements on availability and assortment in Bangladesh**

	Positive		Negative	
	Availability	Assortment	Availability	Assortment
WFP-supported market engagement	12	-	-	-
Reduced voucher value and/or humanitarian activity	-	-	4	-

Note: Frequency of cause-effect links drawn / referenced by all beneficiaries (n=51) and retailers (n=8) engaged through 37 interviews and 2 focus groups in Bangladesh.

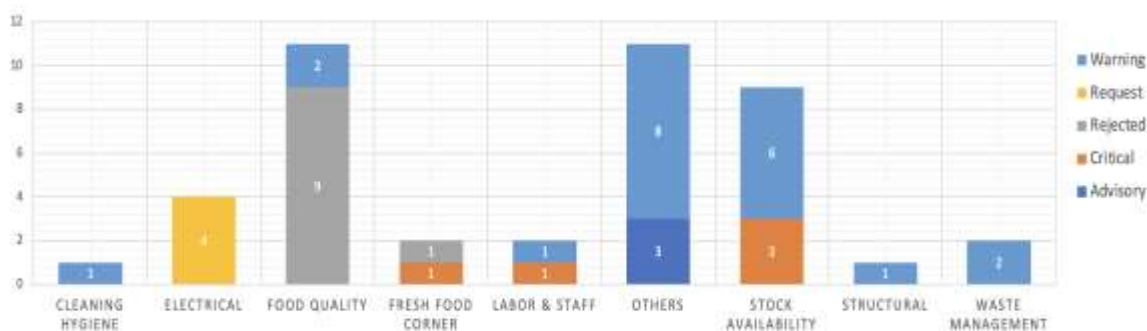
117. In e-voucher retail outlets, the assortment of goods was primarily dictated by the fixed food basket set by WFP, coded under 'WFP-supported market engagement' in Table 9 and Figure 13, while the MFI looks

<sup>139</sup> The MFI data varied by report for Cox's Bazar, whether it was disaggregated by e-vouchers and informal markets or aggregated to provide one overall score. For example, in January 2020 the MFI analysis disaggregated by e-vouchers specifically, revealing the low score of 1.2, though later data is presented in aggregate for Cox's Bazar. It is therefore still unclear or lacking sufficient evidence for explaining why the MFI for assortment of e-voucher retail outlets jumped from 1.2 of 10 in the MFI in January 2020 to 100% in February 2020 in the RPME data, except that different metrics/questions are used to calculate the scores for these two tools.

at a larger assortment of other essential goods, including sanitation items and medicines (explaining some variance between MFI and RPME). In outlets, retailers were typically required to stock 50 fixed and flexible items, including at least 3 fresh items in FFCs; and from April to November 2020, the switch from value to commodity vouchers to minimize COVID-19 contagion risks further influenced the required stocks. Contracted retailers/shop managers noted that food stocks under value vouchers are limited to an average of two days according to contractual arrangements, and fresh foods are intended to be routinely stocked 1-2 times/day, so this allows retailers to plan, and outlets were rarely without sufficient stocks. Three (of eight) contracted retailers did note that essential, high-demand items with increasing or volatile pricing, such as oils or fresh items like fresh fish, were more difficult to maintain sufficient stock in accordance with WFP requirements.

118. Incident tracking data revealed the same (see Figure 12), with a high majority of incidents reported on stock availability in retail shops and warehouses linked to running out of oils or fresh fish early in the day, the latter was resolved to some extent by stocking dried fish. **Increased engagement with new suppliers, FFC and increasing produce supply to markets by local farmers were highlighted as key drivers of increased assortment and availability of goods by retailers and beneficiaries** (see Figure 13). In addition, **WFP's monitoring and interventions focused on optimizing commodities have mitigated challenges with fluctuating product availability and prices and resulted in a more diverse assortment of nutritious food** being continuously stocked, according to key informant interviews with WFP staff and CPs.

**Figure 12. Snapshot of Retail Partner Performance based on Incident Tracking Results – Bangladesh**



Note: Extracted from the WFP Bangladesh CO Presentation, Retail Unit, CXB Supply Chain, Retail and Market – May 2023

119. In **South Sudan**, RPME data shows variability in retailers' ability to maintain well supplied shops with diversified products, quality and brands, with 43% receiving a 'very good' or 'good' rating in January 2020, increasing to 94% by November 2021 and then dropping again to 56% by June 2022. The low scores on assortment for South Sudan were primarily brought down by Bor in 2020, which has maintained the directly contracted modality since 2016; though by June 2022, retailers in Mingkaman also failed to significantly improve scores.<sup>140</sup> The MFI conducted in Gorom in 2021 also provides a snapshot of assortment for that location, which was similarly low with a rating of 5 out of a possible score of 10 (i.e. 50%), indicating limited choice in essential products for consumers.

120. The **primary drivers of reduced or variable assortment and stock shortages (i.e. availability) according to retailers and beneficiaries were inflation and fluctuations in the exchange rate for dollars**, which reportedly influenced consumer demand for specific products (see Table 10). However, the **guaranteed revenues by being a contracted retailer<sup>141</sup> facilitated retailers' ability to stock more food items, including nutritious options, and enabled the resilience of markets for some retailers**. This is supported by key informants, including WFP staff, non-governmental partners and local authorities in

<sup>140</sup> There is less data available for Bor retailers from 2021 – 2022 within Tableau.

<sup>141</sup> This falls under 'increased demand' and 'vouchers' in the table for South Sudan assortment and availability, in which retailers noted introduction of vouchers and their associated retailer contracts driving increased revenues and regular demand and ability to increase stocks. Conversely, there still were references to 'increased demand' leading to 'stock shortages' (mentioned 7 times)

Gorom, Bor and Mingkaman. Contracted retailers are given a basket of items they must include in the shop's assortment of goods which they were able to plan and stock, which has led to them stocking more variety.<sup>142</sup>

*Before intervention, there were few food items in the basket available for beneficiaries for example, cereals, vegetable oil, pulses and salt. Now the food basket has expanded, and it includes sorghum, maize flour, wheat flour, salts, oil, lentils, milk and so on. The available assortment has improved the nutritious intake of food consumed by beneficiaries and improved health; more nutritious food products are available in the market but after vouchers ended, shops are shrinking, and a reduced amount of nutritious food are available.*<sup>143</sup>

**Table 10. Highest frequency counts of causal statements on availability and assortment in South Sudan**

	Positive		Negative	
	Availability	Assortment	Availability	Assortment
Inflation	-	2	6	18
Increased / unmet demand	-	3	7	-
Improved infrastructure, technology and systems	-	6	-	-
Business and market development trainings	4	-	-	-
Increased engagement with new suppliers	-	4	-	-
Distribution of value vouchers	5	2	1	-
Climate-related shock	-	-	1	3
High prices	-	-	-	2

Note: Frequency of cause-effect links drawn / referenced by all beneficiaries (n=42) and retailers (n=49) engaged through 43 interviews and 4 focus groups in South Sudan.

121. The switch to unrestricted cash assistance from vouchers in South Sudan, coupled with currency fluctuations, reportedly undermined some smaller, previously contracted retailers' capacity to maintain stocks and compete with larger retailers in the area; interviewed retailers highlighted how the modality shift initially disadvantaged South Sudanese, and particularly female, retailers in favor of refugee and foreign retailers, including Somali and Sudanese suppliers and retailers.<sup>144</sup>

*In 2019, the market was competitive because of the voucher, and it became less competitive because of the change [to cash]...Most traders who are depending on vouchers collapsed. They were not able to sustain their shops because of the dollar rate.*<sup>145</sup>

*During 2018-2019, there was growth in the number [of market actors]. This has changed at the time the voucher system stopped because it was keeping many women in business.*<sup>146</sup>

122. While the impact of the shift to unrestricted cash on retailers and markets is outside the scope of this evaluation, these emerging findings on how the planning and transition was perceived by retailers and their ability to maintain stocks and compete provides relevant lessons that are further highlighted under EQ5 and EQ6.

<sup>142</sup> KII, WFP Staff, South Sudan

<sup>143</sup> Ibid.

<sup>144</sup> The nationalities of contracted retailers interviewed for QuIP surveys varied depending on the location. In Gorom all respondents were refugees, in Bor all respondents had National IDs, and in Mingkaman and Kalthok there was mix of refugees and South Sudanese respondents (Assumption –for Bor and Mingkaman the differentiation was made using the type of ID provided in WFP contractor shortlists. It was assumed that those providing passports rather than South Sudanese National IDs were refugees)

<sup>145</sup> QuIP, Male retailer, Bor, South Sudan

<sup>146</sup> QuIP, Female retailer, Mingkaman, South Sudan



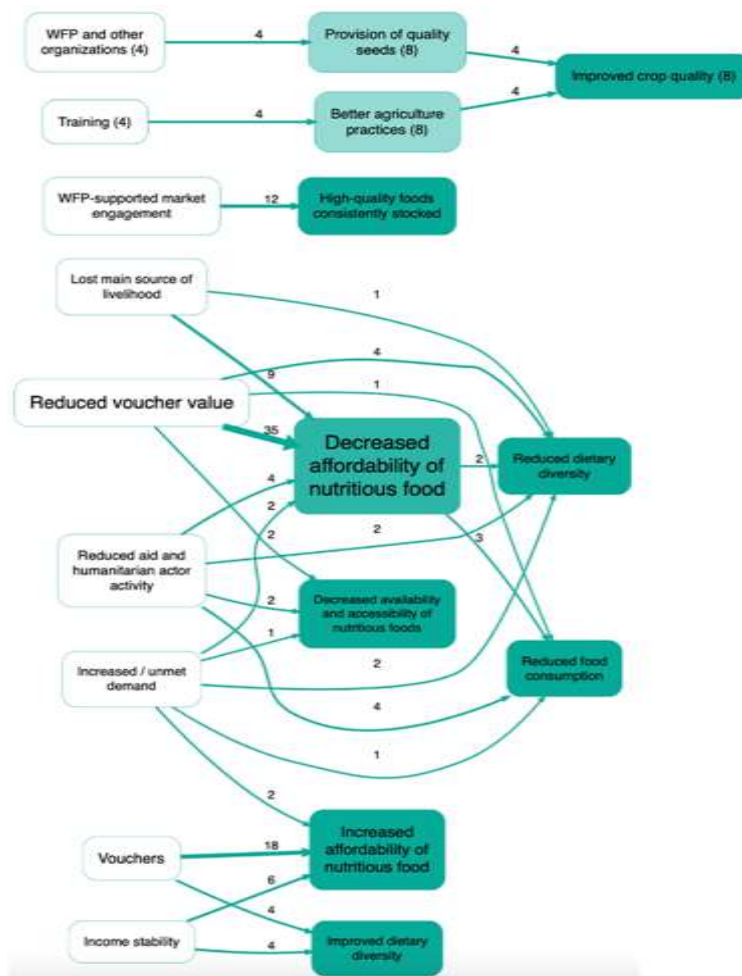
## Quality and Price

123. The **quality** dimension is measured by increases in the food quality score of WFP engaged shops over time from the RPME and a broader sample of shops through the MFI. In Bangladesh, it is also measured through the incident tracker.

The **price** dimension assesses price trends and volatility. Both rising prices and excessive volatility show that the market is not functioning well. While there are multiple mechanisms for price monitoring, this evaluation looks at primarily the MFI and RPME data, which measure whether the price of selected food basket in WFP contracted shops are aligned or lower than other stores in the same market, as well as available price monitoring and market systems analysis reports. In QulP interviews and FGDs in both countries, **beneficiaries mostly spoke to the 'affordability' of food items when prompted to discuss the facilitating factors or limits to the availability and consumption of high quality, nutritious foods.** As such, these dimensions are presented together.

124. In Bangladesh, given that WFP has higher standards for e-voucher outlets, the unavailability of **fresh foods** was not reported by interviewed beneficiaries and RPME data on **quality rarely fluctuates far below 100%** (see Figure 10). By March 2022, WFP and FAO interventions for operational aggregation centres had sold 1.76 million kg of vegetables of which 14,000 kg had been supplied for Fresh Food Corners.<sup>147</sup> According to QulP (see Figure 13Figure 19), **business support, trainings and provision of seeds, increased engagement with new suppliers and local farmers, and food quality control standards** (coded primarily within WFP-supported market engagement), **improved quality of crops produced and subsequently stocked in FFCs** as well as increased customer/beneficiary satisfaction with the availability of quality food items. In some cases, given the higher quality standards for WFP products, **food items provided in e-voucher outlets, such as dry and chilled fish, have been found to be more nutritious compared to local market alternatives in host communities.**<sup>148</sup>

**Figure 13 Causal Links for changes in Assortment, Availability, Quality and Price Dimensions in Bangladesh**



Note: Map shows frequency of cause-effect links drawn / referenced by all beneficiaries (n=51) and retailers (n=8) engaged through 37 interviews and 2 focus groups in Bangladesh.

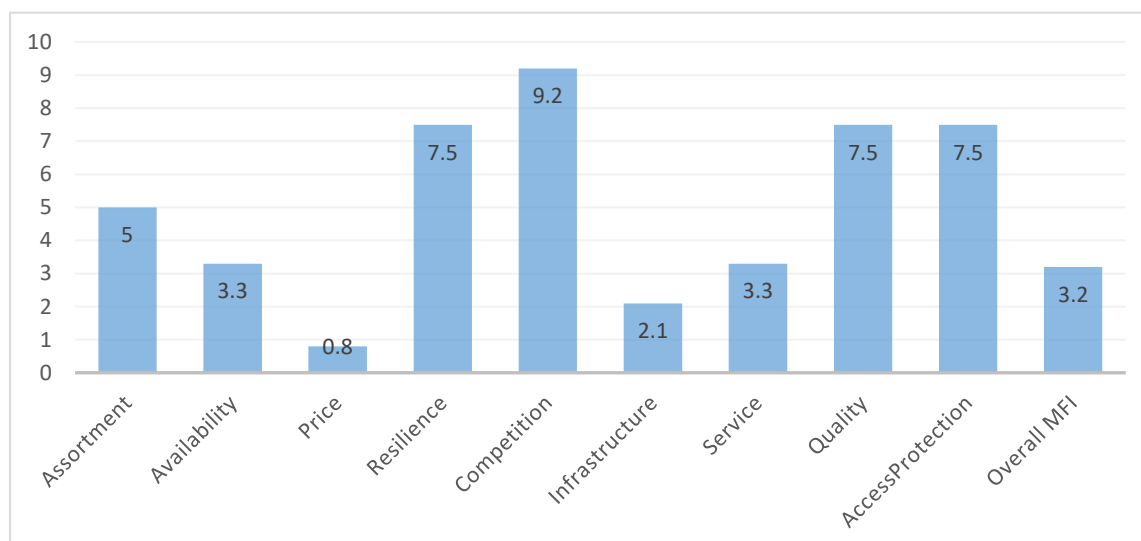
<sup>147</sup> Food and Agriculture Organization of the UN. (2022) Cox's Bazar, Bangladesh. Progress Summary (February to April 2022). Available from: <https://www.fao.org/3/cc0257en/cc0257en.pdf>

<sup>148</sup> Key informant interviews with suppliers and WFP staff; World Food Programme (2022). Market Assessment in Bhasan Char, Bangladesh Assessing the functionality of emerging marketplaces serving Rohingya refugees in Bangladesh February 2022

125. However, given refugees' restricted access to employment and opportunities for self-reliance in Bangladesh, beneficiaries frequently emphasized how **changes to the voucher amounts and associated changes in humanitarian activity and opportunities for employment as volunteers directly influenced their purchasing power, bolstering or eroding their ability to afford nutritious food items, regardless of whether items were made available in FFCs.**<sup>149</sup>

126. There is limited MFI data available for evaluated markets in **South Sudan** outside of the 2021 Gorom baseline, which already scored a 7.5 for quality (75%) prior to the introduction of B2B/RIAB modalities (see Figure 14).

**Figure 14 Market Functionality Index - Gorom, South Sudan**



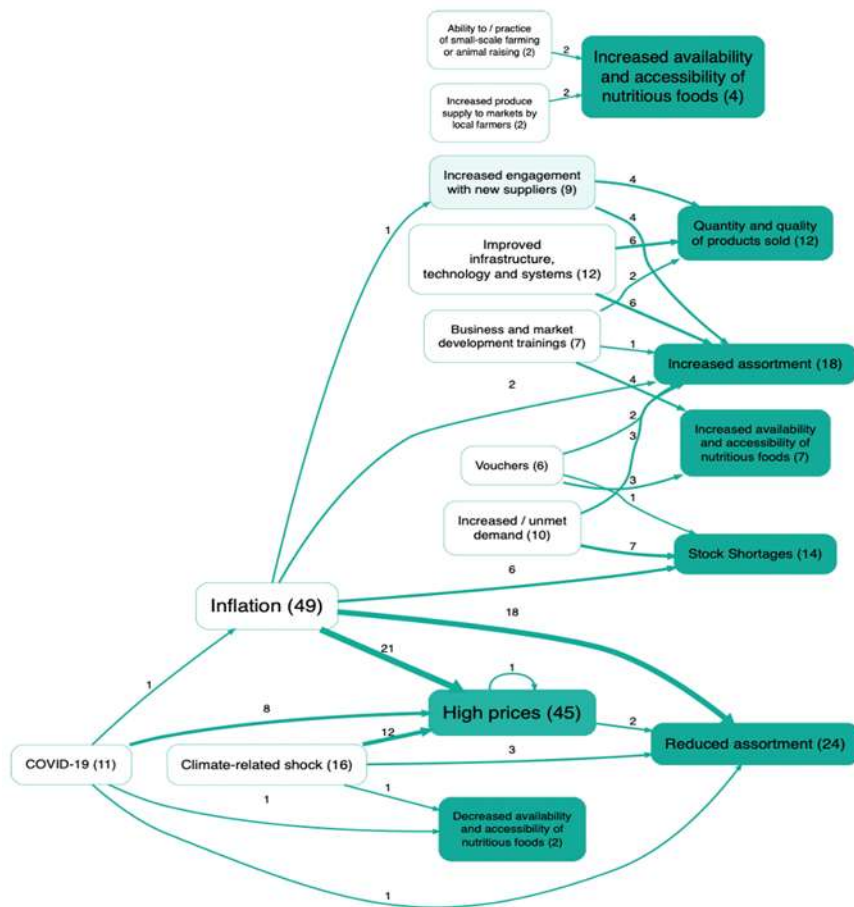
Note: Analysis based on available MFI scores for Gorom, South Sudan from 2021; data for other locations within the evaluation are not available.

127. According to retailer responses, the **improved quality of food and goods from 2018 to 2022 was attributed to increased business capital, which facilitated better product sourcing, and the development of strong supply chain relationships, ensuring a steady supply of high-quality items.** Additionally, retailer trainings and motivation to make significant infrastructure upgrades in shops, such as enhanced storage and maintenance, contributed to this improvement and highlighting the contributions of MDAs/REAs (see Figure 15).

128. Although fresh vegetables and meat were not part of the contracted retailer assortment, and work to optimize the fresh food supply chain was not included as part of MDAs in South Sudan, both KIIs and QuIP interview respondents emphasized how the ability for beneficiaries to farm increased the availability and quality of nutritious foods in the market, while also reducing prices through competition between

<sup>149</sup> QuIP, beneficiaries in Bangladesh

**Figure 15. Causal Links for changes in Assortment, Availability, Quality and Price Dimensions in South Sudan**



Note: Map shows frequency of cause-effect links drawn / referenced by all beneficiaries (n=42) and retailers (n=49) engaged through 43 interviews and 4 focus groups in South Sudan.

imported and local products and increasing affordability. As highlighted by one WFP staff member in South Sudan, “Due to local farming practices by small-scale producers who are also beneficiaries, more locally produced food is being brought to the market. This has helped to reduce the prices of nutritious food because of competition between imported and locally produced food items.”<sup>150</sup>

129. The linkages made between more local producers in Bangladesh and suppliers in South Sudan were noted across key informants, including UN Agencies, cooperating partners and WFP field staff, as key to facilitating the supply of diverse and nutritious foods in camp areas and displacement settings.

130. In terms of price, the experience of market prices in Cox’s Bazar is relative to the stakeholder being interviewed. While beneficiaries largely emphasized the diminishing voucher size as affecting the affordability of goods, especially proteins like eggs and fish, retailers emphasized broadly market dynamics, inflation and supply chain disruptions as the primary

factors increasing product prices. Price was seen as highly susceptible to external factors, including regulatory measures on imports/exports, climate and health shocks, as well as peace and economic crises such as COVID-19 and the war in Ukraine. The sharp rise in prices from the pandemic and high price volatility for essential food items, such as rice and red lentils, continued to affect overall market functionality in Cox’s Bazar through the evaluation period.

131. A market assessment in nearby Bhasan Char, an island area where some Rohingya refugees have been relocated, reported general feelings that prices in the e-voucher outlets are high, and should be reduced, as some beneficiaries observe slightly cheaper prices in the local camp markets. WFP’s market monitoring of evaluated markets confirms that some items indeed have slightly higher prices in the outlets (such as fish) due to higher quality standards for WFP products compared to public markets, while other items have lower prices in the WFP outlets (such as rice).<sup>151</sup>

132. From the perspective of retailers, available MFI data for Cox’s Bazar shows slow increase in scores from January 2020 to July 2021 on price, moving from 4.1 to 8.6 out of 10 respectively, indicating informal and contracted retailers’ positive perceptions of the increasing stability of prices in Cox’s Bazar markets. KIIs with partners and WFP staff highlighted that while prices are highly volatile, they are largely set by the government, and WFP’s market monitoring and routine price negotiations with suppliers have at least

<sup>150</sup> KII with WFP staff

<sup>151</sup> WFP (2022). Market Assessment in Bhasan Char.

ensured the most essential items are not cost-prohibitive for beneficiaries. For example, the prices of onions in Bangladesh have been volatile since India's export ban in September 2019,<sup>152</sup> though were on the decline by August 2020,<sup>153</sup> and stability of pricing for Rohingya refugees was mitigated through sourcing from China, Turkey and Pakistan (See EQ 3.1).

133. Farmers in FGDs spoke about how the influx of Rohingya refugees from 2017–2018 and subsequently humanitarian aid in their community has increased demand for fresh produce and subsequently also prices in their community. In this sense, **rising prices have both positively and negatively affected farmers. While they are receiving higher prices for their goods, and therefore incomes, given the increased market value of produce and reduced need to interface with market intermediaries / brokers through their participation in the market linkages programme, they also perceive negative effects of increased demand on the affordability of fresh produce for host community members.** Although changes in prices, as noted above, are driven by a multitude of external factors, it is still important to monitor how these perceptions influence social cohesion.

134. QulP interviews and monitoring data across sources indicate that prices in **South Sudan** have been highly unstable, primarily driven by volatile exchange rates for the dollar. Significant external factors (e.g., inflation, currency volatility, insecurity and climate shocks) prevented MDAs from having an impact on affordability of goods for both retailers and beneficiaries, simultaneously affecting assortment. However, beneficiaries noted that without such humanitarian intervention supporting the security and some regulation of markets, the accessibility and affordability of goods was limited.

135. March 2020 RPME assessment data revealed that the majority of the 303 surveyed retail shops' overall performance "*Needs Improvement*" (43%), with a greater proportion performing poorly in Bor compared to Mingkaman markets. **In both cases, poor performance was largely driven by assessments of 'price' as few shops had their prices lower than the non-contracted shops.** The 2021 Gorom MFI similarly highlighted low scores for pricing (0.8), highlighting not only price increases but most notably high levels of unpredictability, delaying the introduction of unrestricted cash into the market.

136. An MSA of Mingkaman and Bor markets (July 2021) was conducted to understand the root causes of high prices and market inefficiencies in these markets and boost beneficiary purchasing power. The report highlighted that Bor functioned relatively well, with many wholesalers and retailers present and accessible to beneficiaries/consumers, however retailers experienced challenges with price fluctuations and beneficiaries revealed experiencing high commodity prices, collusion and targeted pricing. The main recommendations for Bor for solving the issue of price gouging were to more strictly regulate retailers with monthly price ceilings and stronger monitoring and sanctioning or to shift unrestricted cash to allow beneficiaries to get the best value for money (the latter of which was implemented in 2022). In Mingkaman, in addition to the problem of price gouging, retailers faced challenges with high costs caused by the absence of wholesalers and therefore higher transport and handling costs when replenishing stocks. Recommendations for Mingkaman included bringing wholesalers to the market and advocating for preferred supplier agreements. The solution chosen to address these challenges was to keep the best performing retailers directly contracted and add B2B contracted retailers as well. However, this change caused tension between the contracted and B2B retailers (See EQ6 for further details). For both markets it was recommended to incentivize retailers to use mPOS correctly and record itemized sales data and provide capacity strengthening for business skills as well as refresher trainings to ensure sustainability. In June 2022, among the 87 shops assessed in Mingkaman, a notable 95% received 'Good' or 'Very Good' ratings after changes were made in accordance with the MSA.

**EQ2.2a: To what extent did the MDAs/REAs contribute to enhancing beneficiaries' market interaction experience (purchasing power, choice, dignity, treatment, quality of food presented, and access) outcomes?**

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<sup>152</sup> Oscar M. Caccavale et al. (2020). Assessing the functionality of marketplaces serving Rohingya refugees in Bangladesh. World Food Programme. Available from: [https://rohingyaconference.org/doc/WFP\\_Marketplace\\_Functionality\\_Serving\\_Rohingya\\_Bangladesh.pdf](https://rohingyaconference.org/doc/WFP_Marketplace_Functionality_Serving_Rohingya_Bangladesh.pdf)

<sup>153</sup> World Food Programme. (2020). Market Monitor. Cox's Bazar, Bangladesh – May 2020. WFP. Available from: [https://docs.wfp.org/api/documents/WFP-0000118100/download/?\\_ga=2.124449032.329501549.1694465385-1104509865.1694198769](https://docs.wfp.org/api/documents/WFP-0000118100/download/?_ga=2.124449032.329501549.1694465385-1104509865.1694198769)

**Finding 4:** Providing assistance through market interactions rather than in-kind distribution empowers beneficiaries with improved financial literacy, purchasing power, choice and flexibility to select preferred foods, qualities and brands to meet their needs. Additionally, linking assistance to local markets sparked trader incentives to provide expanded, reliable services by setting up shops in proximity to distribution centres, transporting and stocking food, selling on time, and meeting community preferences. Ultimately, market-based assistance not only facilitated effective distribution, but strengthened local market functionality to enhance beneficiaries' market interaction experience and community food security outcomes. While beneficiaries in both Bangladesh and South Sudan initially enjoyed increased access to nutritious foods, subsequent reductions in transfer values and reduced humanitarian activity in target areas have disrupted progress at the time of evaluation, with immediate effects including decreased beneficiary satisfaction, purchasing power and increased use of coping mechanisms (such as buying nutritious food items less frequently).

137. Respondents highlighted the important difference in retail experience when moving from in-kind assistance to electronic vouchers, marking a significant shift in beneficiaries' market interaction experience. In contrast to in-kind food distributions, cash-based modalities empower individuals by providing a shopping experience that parallels conventional consumer behavior. For example, one stakeholder in South Sudan mentioned that the transition has helped "*alter the mindset of people to think about buying things*" and improved their "*capacity to interact with traders.*" Previously reliant on food distributions, beneficiaries are now acclimated to a marketplace ecosystem, thus becoming "*comfortable*" with the concept of budgeting and purchasing. As remarked in KIIs with WFP, CPs and local authorities, when assistance is provided through market interactions, it facilitates opportunity for displaced persons to be consumers again, contributing to improved financial literacy, choice and flexibility in selecting preferred foods, qualities and brands as they plan and budget for what items to buy to meet the needs of their families and bargain with retailers.

138. **This shift not only empowers communities with improved purchasing power but also incentivizes traders to set up shops in proximity to the distribution centres (South Sudan) or in refugee camps (Bangladesh), establishing new markets in previously inaccessible or difficult areas.** As previously highlighted, retailers in Bangladesh are larger national companies which were not previously serving such a large customer-base in Cox's Bazar, and sought to satisfy their new customers and maintain their shops by strictly adhering to WFP's contractual terms. According to REVA-6<sup>154</sup>, satisfaction rates among the Rohingya community increased across all service categories between 2021 and 2022, with significant increases in satisfaction with food assistance (77%, up by 20 percentage points from 2021). **These increases were largely attributed to the stabilizing effects of WFP's e-vouchers and associated MDAs insulating beneficiaries from high inflation rates in external commodity markets.** The e-voucher outlets maintained relatively consistent quality, quantity, and pricing for goods, including fresh food items like fish and chicken, thereby protecting beneficiaries from market volatility and contributing to increased satisfaction levels.

139. **In South Sudan,** it was noted that providing in-kind assistance faced occasional challenges with moving food to the distribution locations on time, given the lack of infrastructure, flooding and security issues. With retailers incentivized to enter markets and grow businesses, **beneficiaries were more reliably able to secure their food needs as traders looked to increase their customer base and "bring the food to sell on time when they know there will be demand."**<sup>155</sup> **Coupled with tools for addressing market functionality, such as MFI and MSAs, markets were brought closer to consumers.**

140. With vouchers and more stable markets, refugees and IDPs in both contexts **could consistently afford more preferred and nutritious items** like eggs, fish and meat that were previously unobtainable with irregular cash earnings or reliance on in-kind assistance. Economic stability also played a role, as increased income from various sources (as volunteers in Bangladesh or in small-scale agriculture in South

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<sup>154</sup> WFP Bangladesh. (2023). Refugee Influx Emergency Vulnerability Assessment (REVA-6) Report.

<sup>155</sup> KII with WFP staff

Sudan given increased safety and opportunities provided by humanitarian action) enabled households to diversify their diets. **Interviewed beneficiaries in South Sudan noted that when humanitarian aid exits or reduces, security in the area and stability of the markets are negatively affected, making food less affordable and livelihood activities, such as farming, less accessible, thus harming progress towards greater food security.**

141. Several beneficiaries in Bangladesh and South Sudan specifically highlighted access to nutritious fresh vegetables, fruits and animal-source proteins as key improvements during the voucher period, and also opted for fortified rice, high-quality oils and packaged spices when given the choice. As noted by a female IDP in South Sudan, "there were [previously] no nutritious foods in many shops because the retailers were having less capital...this change [to increased nutritious options] was positive, the factors were increased capital [of retailers] and the introduction of the voucher." A male refugee in Bangladesh said, "[i]n 2020, I got a voucher card which includes 1210-1212 BDT...With this I was capable to buy apples, oranges and meat for my children." However, many reported to have lost this choice again when transfer amounts declined under the voucher modality (referenced 35 times in Bangladesh, see Figure 13).

142. Reductions in transfer amounts under the voucher modality between 2020-2022, disrupted market growth and reduced beneficiary purchasing power. Many beneficiaries across both contexts reported being unable to maintain previous quantities and varieties of goods accessed. A female beneficiary from South Sudan shared, "in 2020, the [incremental decreases] have affected my family's [ability] to afford all the nutritional foods." About 50% of the beneficiaries interviewed reported no longer affording nutritious items, impacting food consumption, especially among pregnant women, nursing mothers, children and the elderly. Some key informants in Bangladesh highlighted how the additional "burden" of taking care of newly pregnant and/or aging household members impacted the rest of the households' adequate consumption of nutritious food items as values decreased.

143. The frequency and direction of changes reported by beneficiaries in Bangladesh and South Sudan are indicated in **Error! Reference source not found. In Bangladesh** (n=29), responses to closed-ended questions in the QulP interviews reveal a mixed outlook on various indicators, ranging from financial well-being to confidence about the future. A recurring theme across most indicators is a tilt towards negative experiences or expectations. Most notably, household purchasing power and overall health and happiness have emerged as areas of concern, with 17 and 16 respondents reporting a decline in each category, respectively. In **South Sudan**, beneficiaries were more optimistic about the direction of change and their current situation.

**Table 11. Direction of changes reported by beneficiaries in Bangladesh and South Sudan**

	Bangladesh			South Sudan		
	Positive	Negative	Same	Positive	Negative	Same
Change in Livelihood and financial well-being	7	11	11	11	8	1
Change in household's buying power or purchasing capacity	9	17	3	9	10	1
Change in household's food consumption patterns	11	13	5	10	10	0
Change in overall health and happiness of your household	6	16	7	14	3	3
Change in confidence about the future	13	7	9	17	1	2

Note: Participating beneficiaries were asked to describe openly changes experienced across various domains, and a closed-ended follow-up question was asked to define clearly whether the change was 'positive', 'negative' or 'the same'. "Positive" denotes improved or increased, and "Negative" denotes decreased or got worse. This table shows the frequency of responses for 20 interviewed beneficiaries in South Sudan and 29 in Bangladesh. Dark blue represents the highest value and white indicates the lowest value for each country.

144. From QulP analysis, the driving factors for beneficiaries reporting adequate livelihoods and financial well-being were WFP assistance in the form of value vouchers, increased aid and humanitarian actor activity, and income from new employment. Receipt of vouchers was also frequently linked to the affordability and consumption of nutritious foods and other commodities. Similarly, descriptions of reduced assistance values and reduced aid and humanitarian activity were linked to decreased affordability of nutritious foods, diminishing household wellbeing, and reduced beneficiary satisfaction. Increased engagement in crop production, land ownership, and the presence of vouchers were frequently linked to beneficiaries' reported sense of agency and choice.

*"In 2019, I have got a job in this Camp-5, B4. With this salary my financial well-being is getting better."<sup>156</sup>*

*"The conversion of E-voucher to cash has a negative impact, as the cash provided to me does not meet my needs."<sup>157</sup>*

*"The change<sup>158</sup> was positive, the reason for the change was the intervention made by humanitarian organizations, this intervention has provided food and skills to start up new livelihoods activities."<sup>159</sup>*

145. The differences between perceptions amongst South Sudan and Bangladesh beneficiaries on the current situation and their future outlooks lay in the conditions **in Bangladesh**, with vouchers being households' primary source of income given access to livelihood activities and opportunities for self-reliance are restricted and outside their control due to their refugee status. While in **South Sudan**, beneficiaries interviewed had highlighted their religious faith as a source for their positivity, as well as access to some alternate livelihood activities and the belief that humanitarian actors would continue to support in dire circumstances.

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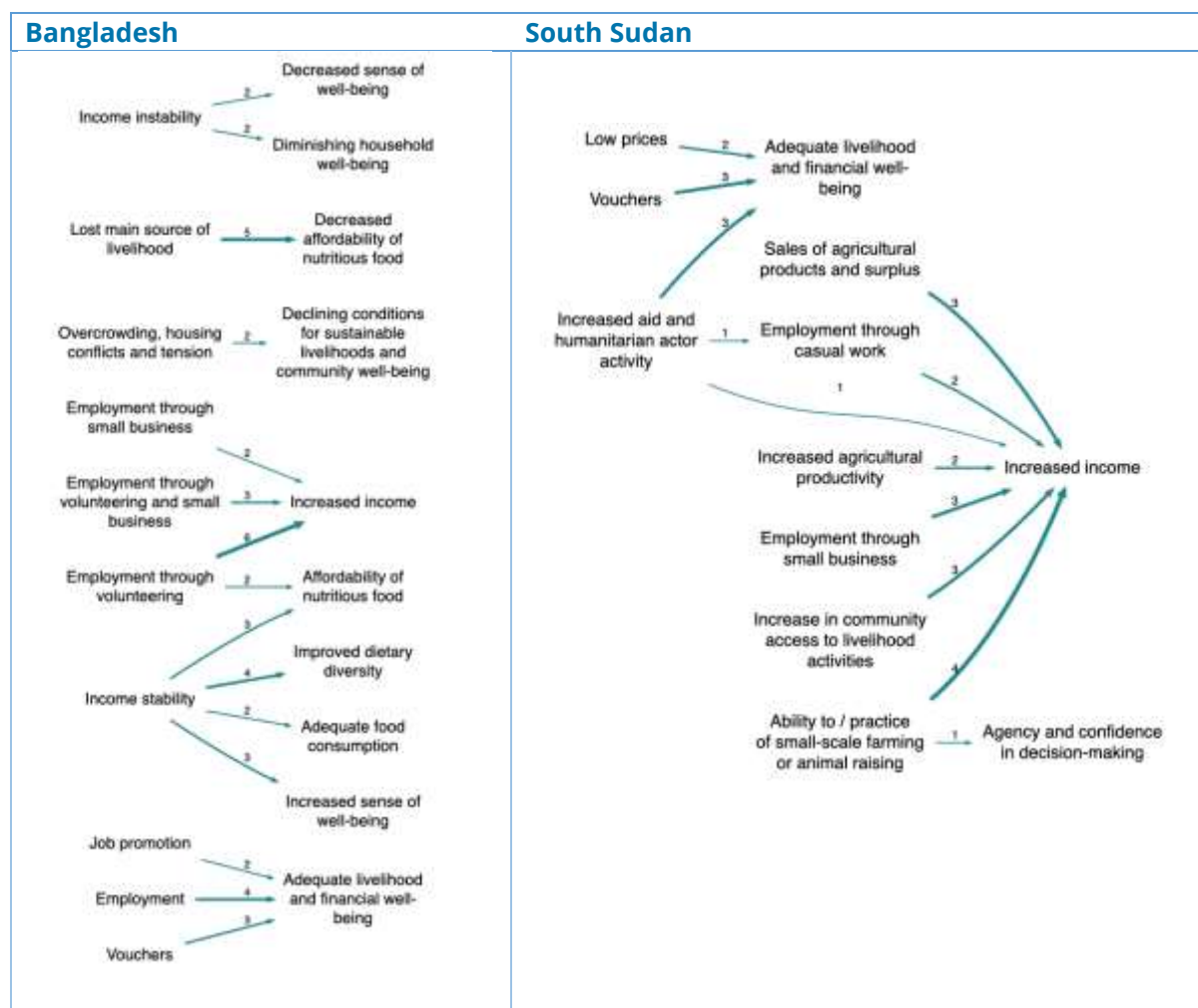
<sup>156</sup> QulP, Female Beneficiary, Bangladesh

<sup>157</sup> QulP, Female beneficiary, South Sudan

<sup>158</sup> Response to an open query on "Changes in Livelihood and Financial Well-being of Household."

<sup>159</sup> QulP, Female beneficiary, South Sudan

**Figure 16. Combined factors contributing to changes in beneficiary livelihoods in Bangladesh & South Sudan**



Note: Map shows frequency of cause-effect links drawn / referenced by all beneficiaries in Bangladesh (n= 51) and South Sudan (n=42) engaged through interviews and focus groups.

**EQ2.2b: To what extent did the implementation of MDAs/REAs consider and address gender inequalities and promote gender equality and women's economic empowerment, both within the MDAs and in the wider market system?**

**Finding 5:** MDAs/REAs promoted the participation of women by raising awareness, assisting with registration documents, and facilitating connections with traders' unions. Women also gained market access and income through volunteer opportunities in shops and aggregation centres. This helped change perceptions and advance women's economic empowerment to some extent, yet prohibitive gender norms continue to affect MDA implementation and outcomes, highlighting the need for sustained efforts to ensure equitable participation and benefits. Consideration of persons with disabilities and vulnerable groups was also reflected in outlet and FFC design in Bangladesh.



146. According to WFP's Gender Strategy<sup>160</sup>, the organization's ability to realize its strategic objectives depends on it delivering food and nutrition assistance in a way that addresses the differing needs, priorities and experiences of the women, men, girls and boys with whom it works. All interventions strive towards achieving equitable access to and control over food security and nutrition, addressing root causes of gender inequalities and advancing the economic empowerment of women and girls.

147. WFP made efforts to ensure women's access to and control of food security for their families by assigning e-vouchers to a female member of each beneficiary household. This was intended to place financial decision-making power into women's hands<sup>161</sup> and is in accordance with strategies defined in the WFP Cash Policy.<sup>162</sup>

148. In terms of MDAs, integrating women into retailer activities and market settings was considered outside of cultural norms, especially in **Bangladesh**, where women rarely worked as retailers or traders in the market. The provision of job (a contractual obligation for retailers in Bangladesh<sup>163</sup>) or volunteer opportunities in camps (for example stocking goods and cleaning shops, etc.), acted as a catalyst for economic empowerment of the beneficiaries, in terms of increased income, agency and decision-making power, which seemed to disproportionately benefit women. Government and cooperating partners as well as WFP staff have observed that women now have better access to markets and income generation activities by becoming volunteers in Cox's Bazar retail shops and aggregation centres. And although systematic and regular awareness-raising on women's rights and economic empowerment was not an activity within MDAs, simple participation started to change attitudes and behaviors to a limited extent. One government interviewee mentioned, *"Women are so pious that they obey orders not to go outside from their husbands or guardians. Their husband, however, has also given his consent to participate in these activities because of easy access to the market and the possibility of making money."*<sup>164</sup>

149. The same participation and mobility restrictions were not present in **South Sudan** to the same extent; however, market settings are generally dominated by males and most female traders operated at the micro-level, casually selling a limited selection of vegetables. There are further barriers to entry, as even South Sudanese male traders reportedly struggled to compete with other foreign traders coming from more established markets in Ethiopia, Sudan and Somalia. WFP did make deliberate efforts to facilitate women's participation by visiting the market locations ahead of retailer trainings to inform small female-owned businesses of the requirements to become contracted retailers (e.g., preparing the registration documentation needed to qualify), and the traders union also helped register them. This new approach may have been initiated in response to the findings of the 2022 Supply Chain study which found that, *"Women, youth, and disabled groups are frequently well-represented in small-scale initiatives, but their participation declines as the financial requirements to partake in supply chain programs increase (for example, the tender process is viewed as gender neutral, yet few women respond in practice – only 2 out of 23 in South Sudan and none in Sudan)."*<sup>165</sup> Although there are still few females contracted as retailers, respondents did report a positive shift in perceptions surrounding women's market engagement.

***"Normally women were not allowed to do business in open places like market due to cultural norms and beliefs but after WFP MDA intervention, everything changed, traditional beliefs on disparity in gender roles were reduced and many women entered the market. Women access resource and economic***

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<sup>160</sup> World Food Programme. (2022). WFP Gender Policy 2022. Available from <https://docs.wfp.org/api/documents/WFP-0000141111/download/>

<sup>161</sup> KII, WFP staff, Bangladesh

<sup>162</sup> World Food Programme. (2023). Cash Policy. WFP/EB.A/2023/5-A, available from: [https://executiveboard.wfp.org/document\\_download/WFP-0000148946](https://executiveboard.wfp.org/document_download/WFP-0000148946)

<sup>163</sup> Retailer contracts stated "At a very minimum 50% of POS operators should be Rohingya females and at least 50% of total staff must be female."

<sup>164</sup> KII, local authority, South Sudan

<sup>165</sup> WFP 2022, Thematic Evaluation of Supply Chain Outcomes in the Food System in Eastern Africa from 2016 to 2021

**opportunities through received trainings in entrepreneurship, business plan, market strategy, customers care and management.”<sup>166</sup>**

150. A local authority representative in Bor also commented on the impact of MDAs on women’s empowerment stating, *“I am thinking that due to inclusion of women into [activities], and development of their skills to start new business or running of existing business, they have improved the living standard of their families, especially women who are heading households.”* Income generated from these opportunities not only provided immediate relief but also enabled many female beneficiaries (7 of 17 interviewed) to venture into new livelihood opportunities, such as setting up small businesses and shops or initiating small farming activities, which further facilitated and increased their purchasing power and subsequently access to quality foods. Several women respondents highlighted how these income sources increased their decision-making power and purchasing ability from 2018-2022, as well as dignity and hope for the future. When asked about their confidence about the future, responses were mostly positive with 17 of 20 respondents expecting improvements; many remained optimistic given their current employment or given the livelihood skills acquired from trainings from WFP and other non-governmental actors.

151. There was evidence of consideration for persons with disabilities in the design of the outlet and FFC systems in **Cox’s Bazar**, as the market areas were designed to ensure accessibility, separate lines were created for those with greater needs, and there was a porter system in place to assist disabled, elderly and female heads of households with the transportation of products to their homes. Respondents in **South Sudan** also mentioned that WFP ensures there are no barriers for accessing markets for disabled people, but there was more limited evidence in this regard, suggesting gaps still exist.

### **EQ3 – WHAT FACTORS ARE AFFECTING THE IMPLEMENTATION OF MDAS AND RETAIL ENGAGEMENT ACTIVITIES, AND ACHIEVEMENT OF OBJECTIVES (NEGATIVELY OR POSITIVELY)?**

EQ3.1. What are the factors that negatively disrupted WFP’s MDA and retail engagement operations in the targeted markets, and how did it influence the implementation? How did the programme mitigate and cope with these disruptions, including gender-specific or inclusion-related challenges?

**Finding 6:** Challenges encompassed a wide range of factors, from supply chain issues to social and environmental challenges, which interact with and reinforce each other and were responded to through further retailer capacity building and awareness-raising, market systems analysis, price monitoring and negotiation, and collaboration with local authorities. This approach aimed to stabilize the market, ensure fairness, and minimize disruptions to beneficiaries and other stakeholders, highlighting the importance of having adaptive mechanisms in place to respond to unforeseen challenges in market-based interventions. However, high prices and exchange rate fluctuations, especially in South Sudan, presented significant challenges, and the transition from vouchers to unrestricted cash also required substantial adjustments from both beneficiaries and retailers, with the effects yet to be determined.

152. KIIs identified challenges encompassing a wide range of factors, from supply chain issues to social and environmental challenges, which interact with and reinforce each other and were responded to through further capacity building, market systems analysis, price monitoring and negotiation, and collaboration with local authorities. **In Bangladesh**, climate change-related factors such as seasonal weather patterns, flash floods, and monsoon rains can disrupt agricultural activities and supply chains. In addition to the inability to farm during extreme weather events, waterlogging also makes it difficult for farmers to cultivate crops and can result in diminished harvests and subsequently increased prices for goods given the low supply. For example, flooding in June and July 2022 impacted harvests and the price of rice in August and September; though rice pricing is regulated by the government, once government introduced imported varieties, WFP switched to imported rice from India to reduce and stabilize costs.

<sup>166</sup> KII, CP, South Sudan

Figure 17. WFP Negotiated Price Trends, 2022-23



Note: Extracted from the WFP Bangladesh CO Presentation, Retail Unit, CXB Supply Chain, Retail and Market – May 2023

153. Relatedly, challenges arise from the harsh climate, limited availability of agricultural land, imbalance of the host-community and refugee populations, and inability of Rohingya refugees to start alternative livelihoods activities given national policy on the temporary status of ‘Forcibly Displaced Myanmar Nationals’.<sup>167</sup> **Local farmers are only able to provide approximately 20 - 30% of fresh produce to meet demand from the Rohingya population**, with the remaining sourced from other suppliers.<sup>168</sup> Although there is still an over-reliance on external suppliers, market linkages created between local farmers and aggregation centres as well as improved fresh food handling and storage protocols (rolled out through WFP trainings) have helped increase sourcing of local products. The programme has also helped farmers circumvent the challenge of middlemen taking advantage of them (in terms of price). Now they are able to sell directly to the aggregation centres at fair prices and have access to direct negotiation with traders through the Farm2Go App.<sup>169</sup>

154. The challenge of fluctuating prices had notable implications for the overall implementation of activities. The uncertainty in pricing occasionally led to inconsistencies in retail operations and could disrupt the regular flow of goods and services in the market. To address this, thresholds were established, setting limits within which retailers couldn't alter the prices, and the introduction of aggregation centres limited the involvement of intermediaries. In addition, WFP actors have worked on improving the social awareness of retailers, emphasizing respectful interactions with the public and understanding beneficiaries' needs and rights.

*“Changing retailers' profit-centric mindset to focus on long-term benefits and sustainable business practices has been a challenge but essential for programme success.”<sup>170</sup>*

155. **This approach aimed to stabilize the market, ensure fairness, and minimize disruptions to beneficiaries and other stakeholders, highlighting the importance of having adaptive mechanisms in place to respond to unforeseen challenges in market-based interventions.** QuIP interviews and FGDs highlighted ways retailers adapted as a result of the social awareness trainings; for example, in the face of more restricted mobility during COVID-19, several retailers highlighted changes in ‘service offerings’ by providing delivery of food baskets to the most vulnerable households, primarily persons with disabilities and pregnant and lactating mothers.

156. In **South Sudan**, market disturbances were more regular and sometimes outside the scope of MDAs. Since before the period under evaluation, markets have been negatively affected by rapid inflation, insecurity, and logistical constraints when supplying goods. In 2017, the devaluation of the South Sudanese

<sup>167</sup> Inter Sector Coordination Group. (2021). 2021 Joint Response Plan: Rohingya Humanitarian Crisis (January - December 2021) - Bangladesh. Available from: <https://reliefweb.int/report/bangladesh/2021-joint-response-plan-rohingya-humanitarian-crisis-january-december-2021>

<sup>168</sup> KII, CP, Bangladesh

<sup>169</sup> KII, WFP Staff, Bangladesh

<sup>170</sup> KII, WFP Staff, Bangladesh

pound presented severe challenges affecting importation of goods from neighboring countries as well as populations' ability to afford market goods,<sup>171</sup> which is a situation that continues. B2B suppliers consistently expressed high expectations for contract agreements, often requesting payment in dollars to adapt to economic fluctuations in the country.

157. KIIs in Bor, Gorom and Mingkaman all note how high prices and exchange rate fluctuations diminish the purchasing power of beneficiaries and negatively impact market growth. This is exacerbated by high government taxes and fees imposed by local authorities, conflict and insecurity on transport routes and in displacement settings, and poor trade infrastructure (notably, roads), creating many barriers to entry for retailers. Climate-related shocks, particularly the flooding which occurred in Bor in 2021 also negatively influenced market activities, which was mitigated through food and nutrition assistance. According to OCHA,<sup>172</sup> nearly 180,000 people were internally displaced from Jonglei State (where Bor is located) in 2021, which grew in 2022 as waterlogged soil failed to recede prior to the next season's flooding. Retailers and beneficiaries indicated that the introduction of e-vouchers and associated REAs helped increase retailer capital and subsequently assortment in shops, given the situation was quite dire without the presence of WFP's activities. Though not part of MDAs, improved infrastructure, particularly roads, also facilitated the recovery of goods in local markets after climate shocks.

158. In some locations, there was resistance to change amongst community leaders and beneficiaries who were reluctant accept the switch from in-kind distributions to vouchers or unrestricted cash, concerned that it might result in receiving fewer goods. The transition from in-kind food distributions to vouchers required them to adapt to new purchasing methods (i.e., that vouchers were equivalent to cash), affecting their market interaction experience and necessitating slow adjustments in their understanding of buying goods. WFP took several measures to ensure that this transition went smoothly. Retailers were trained on shop management and to use the point-of-sale (POS) systems effectively, improving their financial literacy and ensuring the smooth operation of voucher-based systems. WFP and implementing partners also engaged with community leaders and conducted awareness campaigns to address resistance to change, emphasizing the benefits of cash-based assistance, such as increased dignity, choice, and flexibility [see EQ2.2].

159. The absence of market regulations and constantly changing exchange rates provide limited mechanisms for managing price fluctuations. In certain instances, the formation of monopolies or cartels distorted free-market competition, leading to adverse effects like price gouging. In Bor and Mingkaman, traders quickly formed alliances, and reportedly manipulated market prices when price monitoring took place to secure favorable pricing when negotiating the prices for the voucher items, reducing the purchasing power of beneficiaries and potentially leading to disputes and conflicts. This is not the first evaluation to note a similar finding. Price collusion was also identified as a problem in the 2022 Supply Chain evaluation<sup>173</sup>, and an evaluation conducted in 2018 in Jordan also found that the use of e-vouchers effectively created a pseudo-monopoly of WFP contracted shops, resulting in inflated prices.<sup>174</sup>

160. Additionally, some retailers colluded with beneficiaries to divert voucher money for non-food items, slowing down the demand for essential commodities supplied by WFP. Further, KIIs highlighted instances in which retailers disregarded agreements and handed over machines to colleagues, leading to

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<sup>171</sup> REACH Initiative. (2017, March 30). South Sudan: Understanding markets supply chain challenges amidst increasing food security needs. Available from: <https://m.reliefweb.int/report/1968059>

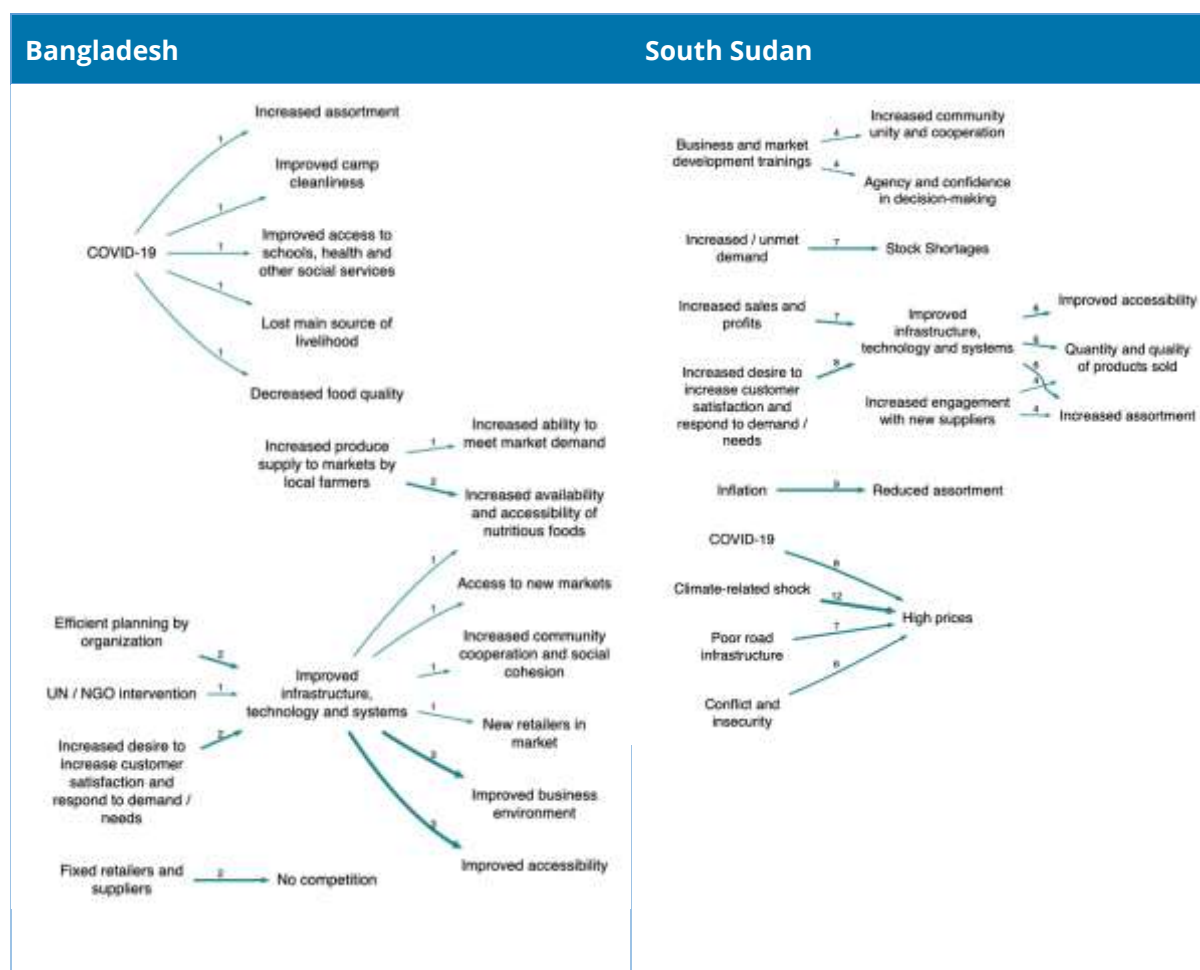
<sup>172</sup> Bahr, N., & Ghazal, E. (2022). South Sudan Flooding Snapshot No. 2 (2). Office for the Coordination of Humanitarian Affairs. Available from: [https://www.humanitarianresponse.info/sites/www.humanitarianresponse.info/files/documents/files/south\\_sudan\\_flooding\\_snapshot\\_no.2\\_11-oct-2022.pdf](https://www.humanitarianresponse.info/sites/www.humanitarianresponse.info/files/documents/files/south_sudan_flooding_snapshot_no.2_11-oct-2022.pdf)

<sup>173</sup> WFP 2022, Thematic Evaluation of Supply Chain Outcomes in the Food System in Eastern Africa from 2016 to 2021; Supplementary Report: South Sudan Country Case-Study

<sup>174</sup> Oscar Lindow et al. (2018). WFP's General Food Assistance to Syrian Refugees in Jordan 2015 to mid-2018. Evaluation Report. Available from: [https://docs.wfp.org/api/documents/WFP-0000101797/download/?\\_ga=2.209879441.508957254.1701120590-1520977825.1700707418](https://docs.wfp.org/api/documents/WFP-0000101797/download/?_ga=2.209879441.508957254.1701120590-1520977825.1700707418)

delays in payment and contractual disputes. The causal linkages for supply chain disruption identified through QulP interviews are presented in Figure 18.

**Figure 18. Causal links between external factors affecting supply chain and market activities**



Note: Map shows frequency of cause-effect links drawn / referenced by all retailers in Bangladesh (n= 8) and South Sudan (n=49) engaged through interviews and FGDs.

161. The ability to adapt to changing market dynamics and challenges, and not being rigidly bound to a set formula, significantly enhanced the programme's effectiveness. In South Sudan, vouchers were initially a good tool to kickstart market activities, but recognizing the challenges they posed in the longer run (e.g., price collusion), there was a pivot towards unrestricted cash transfers, reflecting adaptability. In Bangladesh, shop owners initially faced challenges but managed to recalibrate and scale up their operations to fit into the changing market dynamics, signifying a flexible approach.

162. Gender-specific or inclusion-related challenges are reflected under EQ2.2 and section 2.4. Impact.

EQ3.2: To what extent did the corporate tools and support provided from the HQ -including short-term missions (TDY)- help the CO to implement and achieve the objectives of the MDAs/REAs?

**Finding 7:** Corporate tools and support from HQ, such as the MFI and RPME, have been key in supporting COs implementing MDAs. While MFI provides valuable market insights, its lack of flexibility for local contexts is noted as a limitation. RPME, especially in Bangladesh, has proven crucial for effective retail operations monitoring, but adapting it to specific country needs remains challenging. Price monitoring, essential in understanding market dynamics, faces issues like volatility, particularly in South Sudan, though other tools like MSAs filled data gaps and provided strategic insights. The support from HQ, including in the rollout of new modalities, has been responsive, but there is a recognized need for better integration of these tools and enhanced guidance to manage complex market situations effectively.

163. KIs indicated that corporate tools and support provided by HQ units played a significant role in helping COs in implementing MDAs. Tools like MFIs and price monitoring in the design phase, and RPME in the implementation phase, enhanced the planning, execution, and monitoring of MDAs. HQ provided support in developing tools, and both HQ and regional bureaus (RBs) provided support when launching new activities with design or training for WFP and any other stakeholders involved in implementation.

164. MFI is considered a valuable tool and preliminary step for understanding market strengths and weaknesses prior to the implementation of any MDA. As a strength, the MFI is standardized and provides a clear comparable gauge of market functionality across all countries and markets, however, conversely, there are challenges due to its inability to be modified for local contexts according to corporate guidelines.

165. The RPME, implemented regularly in Cox's Bazar and less frequently in evaluated markets in South Sudan, stood out as an exceptionally valuable tool. **In Bangladesh**, RPME coupled with the incident tracker, were used as monitoring tools and feedback mechanisms for country teams, holding WFP accountable to beneficiaries and allowing for the collection of actionable data for continuous improvement. These tools were especially crucial in the decision-making process related to contract extensions with the retailers in Cox's Bazar. The regularity of the monitoring through RPME, and ability to adapt questions based on context and need, also ensured that retailers remained aligned with the goals and standards set out by the COs. However, retailers became accustomed to the questions and timing of monitoring visits, and in highly controlled markets such as in Cox's Bazar, the RPME became less useful over time with consistently high-scoring, and as such the daily incident tracker became more actionable for the COs.

166. RPME can also be a challenge for countries that are less clear on what information is needed as each country must develop their own RPMEs. South Sudan and Bangladesh both have staff in place with expertise on market systems approaches, however respondents from the RBs mentioned that other countries have less knowledge of the e-voucher modality and its implementation, thus requiring more extensive support to customize tools. It was also noted that **adaptations to country contexts were relative and not systematic, and increased guidance from HQ on how to adapt tools would be useful for country offices and ensure some comparability between markets and even countries**. For example, the evaluators note that only one of the questions forming the RPME component of price actually looked at prices relative to other markets / shops, while the majority looked at the placement of prices to improve shopping experiences for consumers. Scores for pricing in Bangladesh were high when contrasted against the more rigorous price monitoring tool, and scores in South Sudan (for markets not covered in this evaluation), were noted to be consistently low, considering the context and strong weighting on perceptions of actual product prices.

167. Given these limitations, price monitoring was vital in understanding market dynamics and providing insights for retail, supply chain and VAM teams responsible for regularly negotiating fair market prices for flexible and mandatory goods. It helped in maintaining a check on market fluctuations and avoiding exploitative pricing, ensuring that beneficiaries received goods at reasonable rates. Still, a primary challenge faced is price volatility in markets, especially in **South Sudan**. Although price setting is already done on the basis of multiple sources gathered by VAM, supply chain and retail teams, several interview respondents suggested to **further triangulate price data against other market actors' and cash working groups' monitoring and assessments, as well as to incorporate more advanced forecasting**

**algorithms or predictive analysis to anticipate market fluctuations better and stabilize prices for both beneficiaries and retailers.** However, COs noted limited budget allocation to expand market and price monitoring activities for cash-based modalities and price monitoring is mainly outside the SCLOR unit's scope of responsibility.

168. In terms of the support offered by HQ, KIs praised the SCOLR team for being responsive and providing support for tailoring tools, designing data collection plans and conducting analysis in accordance with needs, and notably for the roll-out of B2B (South Sudan) and RIAB modalities (South Sudan and Bangladesh). The guidance and workflow documents on RIAB are therefore an important contribution to the implementation of MDAs globally, which were created based on Bangladesh and South Sudan case studies.

169. The level of support from RBs varied based on the need, though in both countries regional support only augmented what was already being driven by COs and HQ. Some recommendations from the respondents emerging in this regard were to improve the systematic integration of corporate tools into different projects. Currently, there are challenges with siloed systems, and there is a need for efforts to integrate these tools more systematically and address challenges like price volatility. MSAs have been another useful tool for analyzing and mitigating challenges affecting market functionality, including price volatility and supply issues [see EQ1.1 and 2.1], though more **regular updates or workshops on effective use of MSAs, as well as best practices and innovative solutions related to market challenges were requested.**

**EQ3.3: To what extent did the market development activities and related supply chain interventions contribute to building the capacity of market actors, including women and marginalized groups?**

170. This question will be addressed under 'EQ5. To what extent did WFP contribute to improving resilience and initiating business expansion of WFP contracted suppliers and retailers?' where the report discusses how capacity building has strengthened the resilience of market actors.

**EQ3.4: How can the WFP country offices mitigate the negative impact of the upcoming ration cut on the targeted beneficiaries and improve the efficiency and effectiveness of the current process?**

171. This question will be addressed in the Bangladesh Country Report given the EQ was specifically added to the evaluation scope by the Bangladesh CO and most relevant to the COs current context.

## 2.3. EFFICIENCY

**EQ4 – Was the implementation of MDAs and retail engagement activities cost effective?**

**Finding 9:** The implementation of MDAs in Bangladesh and South Sudan demonstrates significant cost-effectiveness, with positive returns on investment, with immediate financial benefits of MDAs but also their increasing returns over time, especially after initial setup costs are covered and systems are optimized in both countries.

- The CBA for the MDAs activities in Bangladesh and South Sudan shows contrasting efficiency and effectiveness. Bangladesh's total MDA implementation cost is significantly higher at USD 8,814,632 compared to South Sudan's USD 2,832,775. Despite serving more beneficiaries, Bangladesh's annual social benefits are lower (USD 1,456,502) than South Sudan's (USD 1,935,315).
- The recovery period for establishment costs is 1.68 years for Bangladesh, indicating a longer time to offset initial investment with social benefits. In contrast, South Sudan's much shorter recovery period of 0.23 years indicates higher efficiency in investment versus social benefits return.

172. To implement the MDAs in Bangladesh, the total expenditure stands at USD 8,814,632, with establishment costs amounting to USD 2,449,480. This includes the costs for the construction of 13 shops, totaling USD 2,265,680.77, which corresponds to 92.5% of the establishment costs. For South Sudan, the overall cost is USD 2,832,775, broken down into an establishment cost of USD 454,879 and recurrent costs of USD 2,377,896. The last-mile distribution costs, inflation adjusted are USD 10,771,295 in Bangladesh and

USD 5,226,298 in South Sudan, to serve the same number of beneficiaries in 2022 (921,300 in Bangladesh and 276,800 in South Sudan).

173. The social benefits, derived from the combination of the three indicators, income generation, local development, and the value of time saved, correspond to USD 1,456,502 for Bangladesh and USD 2,044,266 for South Sudan.

**Table 12. Country-wise Breakdown of Expenditure and Benefits for MDA Initiatives**

Country	Total Expenditure (USD)	Establishment Costs (USD)	Recurrent Costs (USD)	Last-mile Distribution Costs (USD)	Social Benefits (USD/year)
Bangladesh	8,814,632	2,449,480	6,365,152	10,771,295	1,456,502
South Sudan	2,832,775	454,879	2,377,896	5,226,298	1,935,315

174. When focusing on the recurrent phase, which aligns with the second phase of the MDAs and considers only the ongoing costs, the annual expense is USD 6,365,152 for Bangladesh (being the overall USD 8,814,632) and USD 2,348,029 for South Sudan (compared to the full USD 2,832,774).

175. **For Bangladesh, the recovery period, which is the time needed for social benefits to offset the establishment costs, is calculated to be 1.68 years (or 20.18 months).** This is determined by dividing the establishment costs of USD 2,449,480 by the annual social benefits of USD 1,456,502. **In the case of South Sudan, the recovery period is considerably shorter, at just 0.23 years** (or approximately 2.82 months). This figure is arrived at by dividing the establishment costs of USD 454,879 by the annual social benefits of USD 1,935,315. See Annex 12 for further details on the CBA methodology.

## 2.4. IMPACT

### EQ5. TO WHAT EXTENT DID WFP CONTRIBUTE TO IMPROVING RESILIENCE AND INITIATING BUSINESS EXPANSION OF WFP CONTRACTED SUPPLIERS AND RETAILERS?

**Finding 10:** MDAs contributed to expanding businesses by providing access to markets that retailers and suppliers would not otherwise have engaged with, and enabling improved product quality and customer service, and increased income. Capacity building played a strong role in improving resilience as market actors learned not only how to comply with WFP requirements but also retail best practices, business management and negotiation skills. In South Sudan, training sessions also served as networking opportunities, bringing together local authorities, retailers and suppliers to further strengthen market linkages.

MDAs have also expanded markets by directly contributing to improved market linkages with local producers. In Bangladesh farmers have received training, gained access to aggregation centres and have enhanced their capacity to negotiate prices and ensure quality food supply. In South Sudan markets were created from scratch (Gorom, Mingkaman) and are now thriving and growing creating business for suppliers, retailers and local farmers alike.

#### *Improving resilience through expanded businesses and markets*

176. Retailer resilience can be defined as a retailer's capacity to endure and recover from various challenges, such as economic fluctuations, supply chain disruptions, natural disasters, or other external pressures. WFP assesses retailer resilience during MFI's by asking retailers about ability to meet



demand/restock and their vulnerability to supply chain disruptions (access to multiple supply sources).<sup>175</sup> MDAs contributed to the resilience of retailers engaging with WFP by enabling retailers to expand their businesses through improvements in the supply chain and retailer best-practice training, creating lasting market linkages and strengthened relationships with their customers. In Bangladesh, WFP's interventions led to improved product quality and diversity in markets. The introduction and strengthening of markets and quality checks ensured a consistent supply of nutritious products reaching markets. The presence of retail shops, including the later addition of Fresh Food Corners, had consistently expanded in Cox's Bazar since their introduction in 2018. The denser network of WFP market outlets led to increased competition, diversification, and distribution of products, ensuring that the market can better withstand external shocks and disruptions.<sup>176</sup> Although the retailer employees interviewed for the evaluation may not have perceived this enhanced density or other changes in the market (see Figure 19), these businesses **have expanded their reach by gaining access to new markets and also improved their business practices in order to meet WFP's rigorous quality standards.**

*"The emphasis on changing retailers' perspectives – transitioning them from a mere profit-making mindset to one of reinvestment, innovation, quality improvement, and branding – has also cultivated a more sustainable business model. This paradigm shift ensures that the businesses can continue to thrive even after WFP's direct involvement concludes."<sup>177</sup>*

177. Farmers had also been linked with retailers through MDA programming, which enabled them to expand their farms and increase their incomes. Over the evaluation period, the average annual household income for farmers has increased by USD \$236 (+143%) and annual salaries paid by farmers to agricultural workers increased by \$12 (+39%).<sup>178</sup> Also, during focus group discussions farmers reported a positive impact on their resilience because of training they received from WFP, FAO and cooperating partners. Using new techniques, seeds and fertilizer, they were able to meet the demand for fresh products. One farmer commented, *"the quality is important because customers prefer good quality over the price. If we supply the fresh products regularly the demand also increased gradually."* This emphasis on providing consistent quality benefits both these farmer suppliers and the consumers seeking good value for money.

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<sup>175</sup>World Food Programme. (2021). Market Functionality Index: Technical Guidance.

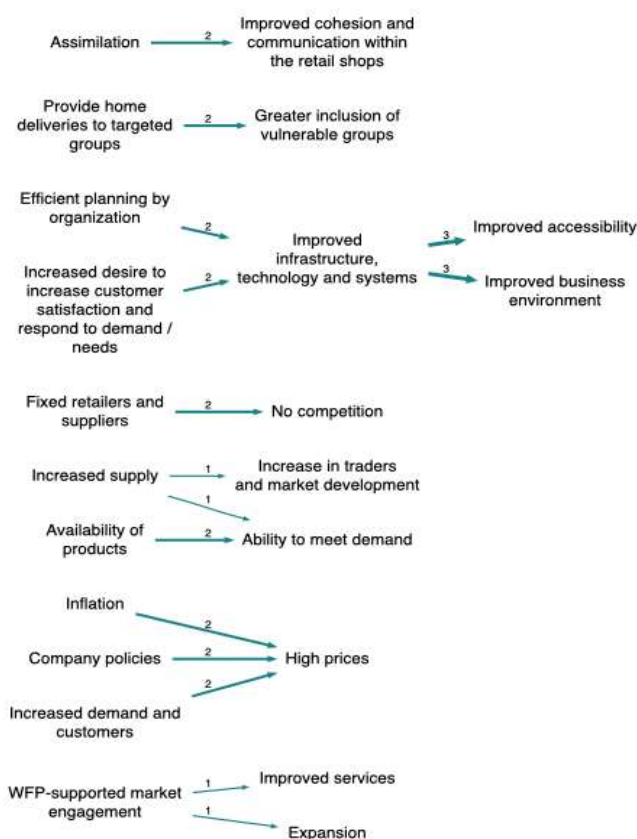
[https://docs.wfp.org/api/documents/WFP-0000114503/download/?\\_ga=2.103914368.1079128731.1704995921-287098669.1699988849](https://docs.wfp.org/api/documents/WFP-0000114503/download/?_ga=2.103914368.1079128731.1704995921-287098669.1699988849)

<sup>176</sup>KII with WFP staff

<sup>177</sup> KII with WFP staff

<sup>178</sup> FGDs with farmers

**Figure 19. Causal Links to Business Growth in Bangladesh**



Note: Map shows frequency of cause-effect links drawn / referenced by all retailers in Bangladesh (n= 8) through 8 interviews.

178. In **South Sudan**, the impact of MDAs was clear and drastic as **physical markets were initiated on bare land and continued to grow and thrive even after WFP had completed MDA activities** in those markets (Gorom, Mingkaman).

***"If I could remember or flash back to 2013-2017, this market (Mingkaman) was tiny with no products available, but now it has grown to the big market with diverse items and innovation."***<sup>179</sup>

179. Retailers interviewed in Bor and Mingkaman indicated that they have been able to expand their businesses since the introduction of MDAs. For example, during a FGD in Bor, one retailer commented, *"[t]he change was significant to us because as the business expanded, we were able to provide employment to our people. It has impacted positively because we were able to manage our shops well."* Another female retailer from South Sudan reported significant business growth, expanding from one to two shops and enhancing her sales and restocking frequency.

***"The positive change in growth level was the impact of the contract I got from the UN agencies. So my sale was big. So in a month, I can restock 3 times."***<sup>180</sup>

<sup>179</sup> KII, CP, South Sudan

<sup>180</sup> QuIP, contracted retailer, South Sudan

180. Analysis of QuIP data demonstrates that out of 31 retailer responses, 23 demonstrated evidence of business growth in their ventures between 2018 and 2022, as evidenced by activities like increasing stock levels, expanding shop sizes, opening new outlets, and hiring additional employees (See Figure 20).

**Figure 20 Causal Links to Business Growth in South Sudan**



Note: Map shows frequency of cause-effect links drawn / referenced by all retailers in South Sudan (n= 49) through 26 interviews and 2 FGDs

This **significant proportion of businesses demonstrating growth suggests a positive impact of MDAs/REAs on market conditions and on retailer development**, indicating successful adaptation to market demands and an overall enhancement in their business capacities.

181. Suppliers also remarked that they were expanding their business to provide supplies in locations where they did not operate before the introduction of WFP's interventions. Traders' union and RRC representatives also observed that there had been a clear improvement in the way shops operated in markets due to the training provided by WFP for both contracted and non-contracted retailers alike. These findings are in line with the findings of the South Sudan case study contributing to the Thematic Evaluation of Supply Chain Outcomes in the Food System in Eastern Africa, which noted that impact was seen with the retailers and suppliers who were more resilient and carried a wider range of goods.<sup>181</sup>

182. While there was clear evidence of positive impact among market actors in South Sudan, resilience could prove fragile. Retailers, cooperating partners and local authorities expressed concern over decreases in supply as vouchers came to an end. In Gorom, for example, B2B suppliers stopped bringing goods to that location once the B2B contract was complete (mainly due to issues of security on the road).

Respondents across sources did mention, however that some gaps in supply were now being filled by local producers who were able to provide goods at more affordable prices.<sup>182</sup>

183. By transitioning from in-kind distributions to vouchers and later to unrestricted cash transactions in South Sudan, WFP's interventions supported the gradual expansion of the markets. Such initiatives allowed small farmers and local vegetable sellers, who might not have had the infrastructure to work directly with WFP, to compete actively, thus controlling pricing dynamics. A notable achievement mentioned by WFP staff, the Chamber of Commerce representative and B2B supplier was the fostered trust between market actors and the community in South Sudan. Streamlined operations and fortified supply chain management practices also helped traders grow through shared knowledge.

### Changes reported by retailers

184. Summarized in Table 13 are the frequencies and direction of changes in Bangladesh and South Sudan across nine market indicators, including assortment, availability, quality and price. **In Bangladesh** (n=8, exclusive of small traders), a notable trend is increase in prices, reported by 7 retailers. However, the

<sup>181</sup> WFP 2022, Supplementary Report: South Sudan Country Case-Study for the Thematic Evaluation of Supply Chain Outcomes in the Food System in Eastern Africa from 2016 to 2021. Available at: <https://www.wfp.org/publications/eastern-africa-supply-chain-outcomes-food-system-evaluation>

<sup>182</sup> FGDs and KIIs with WFP and CPs

Bangladesh responses leaned more towards no substantial change with regards to the supply chain resilience (e.g., capacity of retailers to meet demand), competition, infrastructure, product quality, amongst other indicators. Overall, the market in Bangladesh was a bit less dynamic for retailers than in South Sudan, with many retailers describing close adherence to WFP instructions and policies on assortment and display, services, and food quality control contributing to customer satisfaction and business growth (notably through increased number of retailer outlets).

**Table 13. Direction of Changes reported by retailers in Bangladesh and South**

	Bangladesh			South Sudan		
	Positive	Negative	Same	Positive	Negative	Same
Changes in Assortment of Products	3	0	5	19	0	4
Changes in Availability of Products	2	1	5	19	1	3
Changes in Overall Prices	7	1	0	23	0	0
Changes in the Supply Chain Resilience	2	0	6	21	0	2
Changes in Marketplace Competition	1	0	7	17	5	1
Changes in State of Infrastructure	2	0	6	20	0	3
Changes in Services Provided	4	0	4	12	6	5
Changes in Quality of Products	2	0	6	20	0	3
Changes in Accessibility and Protection	1	0	7	22	0	1

\*In the table above, "Positive" denotes improved or increased, and "Negative" denotes decreased or got worse.

185. **In South Sudan** (n=23), all 23 contracted and B2B retailers indicated increased prices, which was followed by positive changes in accessibility and protection (22) and supply chain resilience (21). A general uptick in marketplace competition was noted, which was seen as positive and contributed to enhancements in the quality of products, improved infrastructure and broader market development, and subsequently aspects of accessibility and protection. A notable example from South Sudan highlighted how improved interest and investment in these markets facilitated investments in road and electricity infrastructure, making visiting the shops easier and safer for beneficiaries despite the time of day. Community support systems were also largely reported to be either moderately or highly available and easily accessible.

### **Enhanced resilience through capacity building**

186. A core element of MDAs has been the emphasis on skill enhancement. By equipping market actors with the necessary tools and knowledge, MDAs assisted them to run their businesses effectively and mitigate the challenges faced in day-to-day business operations. These skill-building exercises were not merely confined to business operations but also incorporated elements of financial literacy, business management, and negotiation tactics.

187. **In Bangladesh**, vendors were trained on WFP procedures, customer service, good practices in food handling and hygiene, stocking, and managing retail operations. Training on respecting and understanding customers' needs also improved positive interactions between market actors and instilled a sense of community responsibility among retailers.<sup>183</sup> Training was also provided to local farmers on agriculture techniques as well as price negotiation, both contributing to increasing their capacity to meet market demand and profitability.<sup>184</sup> Farmers reported that they are better able to meet market demand as they have been receiving seeds and training for agriculture technique and fertilizer production.

<sup>183</sup> KIIs with local authorities and WFP

<sup>184</sup> KIIs with CP and WFP, Bangladesh

**The ability increased to meet the local market demands over the past two years as the production rate improved due to the good quality of seeds provided by RIC (WFP CP) as well as the training.<sup>185</sup>**

188. **In South Sudan**, training was provided on retailer best practices to all contracted retailers during onboarding including areas such as optimal shop arrangement, sanitation/waste management, business management, good budgeting and accounting system, risk and time management. Participants in these trainings reported improvements for their businesses resulting from these trainings. For example, during the retailer FGD in Mingkaman, retailers mentioned that they now could arrange their products in a way that attracts more customers. Cooperating partners also observed improvements:

**The capacity of the market actors was improved, and they were able to attract control and influence their customers, supply more products of diverse categories, and improve the quality of goods sold in different shops.<sup>186</sup>**

189. Furthermore, training sessions were attended by suppliers, retailers and local authorities and provided a valuable networking and partnership building opportunity for various market actors. For example, one local authority in Bor stated that, *“WFP has contributed positively to the market development because it has provided capacity building package to support the implementation process, entire operations and help in the sustainability of businesses.”*

190. Many beneficiary respondents in South Sudan also mentioned the valuable impact training and community meetings initiated by international organizations has had for them. This has contributed to improved relationships between IDPs and host communities, improved skills and economic empowerment. One respondent mentioned that in 2018 there was no forum to bring us together to interact. They commented that in the period of 2020 -2022, the changes in the community were positive because there were a lot of training and community engagement activities initiated humanitarian agencies. They had a positive outlook for the future expressing that *“the training and the economic empowerment I have acquired from the humanitarian agencies has given me a glimpse that the future is bright.”<sup>187</sup>*

191. Understanding the ever-evolving marketplace was another cornerstone of interventions. Activities facilitated a greater understanding of market dynamics, enabling traders, suppliers, and other stakeholders to strategize effectively. This incorporated shifts in transaction methodologies (e.g., moving from vouchers to unrestricted cash), understanding price points, and navigating challenges like monopolies and cartels. **In Bangladesh**, a focus on product diversification and understanding consumer demand equipped vendors to adapt to the changing market landscape. In **South Sudan**, the intervention greatly improved the understanding the needs of local markets and all the available supply chains. This understanding has positively impacted on growth of retailers and wholesalers' businesses, it created resilience in local market despite of eminent challenges and risks.<sup>188</sup>

### **Improvements in market linkages**

192. MDAs also contributed to improving retailer and farmer resilience through the improvement of market linkages. The relationships developed among market operators established through MDAs are expected to remain long after the interventions have terminated (South Sudan), leading to more resilient and sustainable market systems in the long run. KIIs in both countries and across CPs, Traders Union, suppliers, and WFP staff emphasized that MDAs directly contributed to improving relationships between market actors, empowering small-scale farmers to supply fresh and affordable products in the markets and contributing to the resilience and sustainability of local markets by ensuring availability of products.

193. MDAs had contributed to developing market linkages with local producers, in particular. **In Bangladesh**, the farmer linkage intervention started as a separate section of the market for farmers to sell their products directly to the beneficiaries at pilot farmer's markets. WFP also envisioned to support farmers establish their own shops and connect directly with hotels and other businesses to reduce their

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<sup>185</sup> FGD with farmers, Bangladesh

<sup>186</sup> KII, CP, South Sudan

<sup>187</sup> KII, Female beneficiary Mingkaman

<sup>188</sup> KIIs with WFP

dependence on WFP, but these plans were discontinued due to issues with supply. In 2021, the system was streamlined and transitioned into 18 aggregation centres to tackle logistical issues and ensure that the farmers could meet demand collectively. These centres connected the farmers to FFC in the camps through the WFP contracted retailers.<sup>189</sup> WFP and its partners had provided training for local farmers which helped them to improve their productivity but equally important was the direct access to retailers that had enabled them to negotiate fair prices collectively, bypassing middlemen who were manipulating pricing when buying products from farmers individually. WFP staff and cooperating partners observed that farmers had increased their resilience through the creation of farmer groups, and they could now maintain accurate accounts, cultivate seasonal crops, negotiate prices and ensure quality food supply. Farmers indicated that they now work together in groups of 25 to 30 members. One FGD participant mentioned, “Some farmers did not want to share their knowledge but right now, they share everything with each other.”

194. **In South Sudan**, respondents in all three markets mentioned that MDAs had contributed to creating opportunities for local producers to supply their products directly to retailers in the markets. As stated by a Trade Union representative, “small-scale farmers are empowered, and they are able to supply local markets with agricultural products, and with ability to negotiate prices and guarantee the quality food supply. This change increased their efficiency, market competitiveness and profitability.”

## **EQ6: ARE THERE UNINTENDED (POSITIVE OR NEGATIVE) EFFECTS OF WFP MARKET DEVELOPMENT ACTIVITIES AND RETAIL ENGAGEMENT ACTIVITIES IN DIFFERENT COUNTRY CONTEXTS AND FOR DIFFERENT GROUPS?**

### *Spillover Effects*

**Finding 11:** Spillover effects of MDAs in Bangladesh include the economic empowerment experienced by volunteers in FFCs as refugees are otherwise not able to engage in regular employment opportunities. The market linkages intervention also had an impact on the wider community as local producers have gained training and market access that otherwise would not have existed. In South Sudan, there has been a clear spillover effect in the wider community as markets were created from scratch, subsequently creating job opportunities (e.g. bodaboda operators, porters). Also, some retailer training is provided for any retailer (not just those qualifying for the onboarding process) thus improving services and quality beyond of shops outside WFP engagement.

195. **In Bangladesh**, spillover effects for markets in the surrounding community were less evident as the Cox’s Bazar markets are only accessible to refugee populations and only contracted retailers are allowed to operate within the camp. However, as per KIIs with government officials, CPs and WFP, the market linkages programme enabling farmers to supply their products directly to the camps had a strong impact for farmers’ livelihoods and also provided the opportunity for host community members sell their fertilizer directly to buyers and farmers. As indicated by local authorities, government representatives, WFP and CP KIIs, the most **important spillover effect of MDAs was the income generation opportunities created for refugee beneficiaries** as volunteers working in and supporting the retail, FFC outlets and aggregation centres.

196. As a result of the implementation of MDAs in **South Sudan** spillover effects were observed both for the wider community as well as for market actors not directly involved in the intervention. Support for ROC qualification for any retailer and training provided for contracted retailers resulted in an improvement of good practices across the market (KIIs with WFP). Other retailers and small-scale businesses (e.g., those selling tea, vegetables, and fruits) had set up shop around the market created by WFP. There was also visible job creation in the host community (e.g., employees in the shops, bodaboda drivers, porters). Through participation in WFP activities, local authorities had also improved their relations with market

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<sup>189</sup> World Food Programme (2021). Annual report Bangladesh 2021; WB-WFP joint food assistance brief; KII with WFP staff.

actors and their capacity to promote best practices in markets where they operate, as per Traders Union and WFP KIIs.

### Positive intended and unintended effects

**Finding 12:** The most noteworthy positive unintended effect in Bangladesh was the recognition by market actors of the importance of providing quality products and services and in South Sudan many respondents noted the strong impact MDAs have had for the trust developed among market actors. MDAs were negatively affected by ration cuts which led to the inability of beneficiaries to buy enough nutritious foods to meet household needs resulting from ration cuts in Bangladesh. In South Sudan negative effects included lopsided power relations between B2B suppliers and traders and tension between ROC and B2B retailers; voucher systems leading to price gouging, exclusion of non-contracted retailers; lower availability of nutritious food after transition to unrestricted cash. Also, underlying gender norms can lead to conflict and even GBV over who makes decisions regarding control of vouchers or cash.

197. KII respondents identified several positive effects that resulted from engagement with MDA activities. In **Bangladesh** the unintended positive impact that stood out most was the **recognition by market actors of the importance of providing quality products and services**. Farmers realize that higher quality products led to higher demand and profits, suppliers improved their delivery processes to meet WFPs quality and punctuality demands,<sup>190</sup> and retailers had come to recognize the importance of customer service, product quality and reinvestment for long-term benefits.<sup>191</sup> Also, farmers, who previously lacked proper access to markets, gained vital experience and skills. Working with MDA introduced them to digital (Farm2Go) and collective negotiation dynamics which enhanced their bargaining power and fostered a sense of unity.

198. In **South Sudan, development of trust among market actors** was the most mentioned impact. Suppliers, FO staff, local authorities and refugee representatives all pointed out that lasting bonds between suppliers and retailers as well as between retailers and consumers had developed. For example, a B2B supplier stated that, *"Through MDAs, suppliers have built trust and credibility with the retailers, and the community, helping the supplier to identify and address supply chain issues, providing guidance on best practices for retailer's performance, encouraging continuous improvement in supply chain management capabilities, and supporting trader growth through knowledge sharing."* Working with retailers on their development can help increase position, collaboration and trust. It had also resulted in improved business strategies and goals for development and helped suppliers and retailers become more aware of and responsive to customer needs. Other positive unintended outcomes of note included: increased taxes to government (through the increased number of registered retailers) and increased access to loans from existing microfinance for traders because their shops could be used as collateral assets.

### Negative unintended effects

199. Some negative unintended effects also emerged during the evaluation. In **Bangladesh** all comments on negative effects were related to the reduction in transfer values. Rather than being unintended effects of the MDAs themselves, evaluation respondents frequently commented on the negative unintended effects the ration cuts had for MDA programming. Although this challenge was beyond the timeframe of the evaluation and sphere of influence of the SCOLR team, it had had a strong impact on the demand side of the supply chain. Several beneficiaries commented in FGDs that although fresh and nutritious foods were available in the market, they could no longer afford these. A supplier interviewed also noted a decrease in demand for their products with sales dropping by roughly 60% after the decline in e-voucher value.

200. In **South Sudan**, the models used to implement B2B gave a lot of power to the suppliers as the traders basically became virtual employees of the suppliers that contracted them. B2B suppliers also

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<sup>190</sup> KIIs with suppliers and WFP

<sup>191</sup> KII with WFP

negotiated with WFP to be paid in USD which protected them from price volatility and gave B2B retailers an advantage in the market over the directly contracted retailers who were paid in pounds. This caused tension between B2B and directly contracted retailers.<sup>192</sup> The strategy devised to address this issue in the future is to minimize the use B2B as much as possible and find retailers through Retailer Onboarding and Contracting (ROC) first and then only supplement with B2B if the supply chain circumstances require it.

201. Other problems emerged in South Sudan relating to e-vouchers and associated market dynamics including:

- Price gouging due to traders becoming familiar with each other and then colluding on prices. Understanding the timing and system for WFP price monitoring, retailers increased prices during monitoring visits and then the local officials also benefited with extra taxation. According to the CO, vouchers were good for starting market activities but after a while the system is vulnerable to manipulation in favor of certain market actors.
- Using the voucher modality limited competition with non-contracted retailers outside the voucher system (e.g., with cash even small farmers who are not necessarily qualified to work with WFP can compete and help control pricing).
- Both local authorities and retailers commented on negative impacts on availability of products with the shift of modality from vouchers to unrestricted cash. Although it was also noted that this gap was at least partially filled by local producers who were able to supply more affordable fresh food than the imported alternatives. Also, some contracted retailers struggled to remain competitive through this transition.

202. Finally, there were some unintended effects related to gender. Post-distribution reports from 2018 to 2022 in South Sudan show a notable trend: women increasingly play a pivotal role in decision-making concerning food usage. **This gender participation becomes more balanced when the voucher modality is involved, with both men and women becoming actively engaged in the decision-making process. However, the switch to unrestricted cash transfers resulted in some men taking over the cash distributions, causing family conflicts and disempowering women's economic roles.** Three KII respondents in South Sudan mentioned that some women became victims of violence during domestic disputes over control of the vouchers and/or the cash provided as food assistance. It was also noted during the MSA conducted in Bor and Mingkaman that beneficiaries at times found it challenging to access the feedback mechanisms and hotline. This could be better managed to ensure accessibility and encourage women to report domestic incidences related to CBT. Men making decisions related to cash from re-sold food assistance items in Cox's Bazar<sup>193</sup> also demonstrates the importance of accounting for the underlying gender dynamics that might affect women's wellbeing and access to food even when they were the intended recipients of assistance.

## **EQ7.HOW DO CBT ACTIVITIES (CASH INJECTION INTO THE LOCAL ECONOMIES AND ASSOCIATED ACTIVITIES THAT ENABLE BENEFICIARIES TO ACCESS THE ASSISTANCE) COMBINED WITH SUPPLY SIDE ACTIVITIES (SUPPORTING MARKET ACTORS AND OPPORTUNITIES OFFERED BY ENGAGING WITH WFP) CONTRIBUTE TO POSITIVE CHANGE AND WHAT COMBINATION OF ACTIVITIES CONTRIBUTE THE MOST?**

203. In both countries targeted for this evaluation, it was not possible for WFP to shift directly from in-kind to unrestricted cash-only distributions. The **supply side activities were vital for providing an enabling market environment that would support the distribution of CBT. In Bangladesh**, external retailers were not allowed to operate within the camps and small-scale beneficiary traders did not have much access to nutritious products beyond selling excess from in-kind distributions. **In South Sudan**,

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<sup>192</sup> KIIs with WFP, MSA in Mingkaman.

<sup>193</sup> UNHCR-WFP. (2019).



markets were created from scratch in Gorom and Mingkaman. If assistance had remained in-kind, the markets would have remained limited and unable to support consumer demand/nutrition needs. Bor had an existing market, but MDAs made a difference in the way markets functioned. As per the South Sudan CO, traders used to come to Juba for their goods but now the wholesalers went there supplying to retailers after the intervention started. Even when WFP had switched to unrestricted cash, they were still there supplying to the retailers in Bor.

204. Regarding which combination of activities contributed the most **in South Sudan**, some beneficiaries from Bor expressed a preference for e-vouchers over unrestricted cash as they were concerned about fluctuations in purchasing power when prices for certain products increase in the markets. While beneficiaries who are also farmers viewed the transition to unrestricted cash as positive as it provided the opportunity for them to sell their products to beneficiaries as well.<sup>194</sup> This positive outcome was also supported by the LEWIE study conducted in Juba in 2019 to measure spillover effects of CBTs which mentioned that although non-beneficiaries did not directly benefit from CBT, they did benefit indirectly through income and production spillovers.<sup>195</sup> Some stakeholders affected by WFP programming also expressed concerns over the potential misuse of funds with unrestricted cash assistance. For example, the government did not allow WFP to provide cash in some locations due to security issues and concerns over the misuse of funds. Currency volatility is also a major challenge in South Sudan, although WFP made every effort to use frequent price monitoring and market trend analysis when establishing the transfer value each month, purchasing power can drastically change between setting the transfer value and the actual date of distributions. That said, it was found that implementing a voucher system for too long can lead to supplier monopolies and price gouging<sup>196</sup>, highlighting the importance of finding the right balance between MDAs and shifting modalities to optimize alignment with market circumstances.

205. As all beneficiaries receive assistance through e-vouchers in Cox's Bazar, comparisons between e-vouchers and unrestricted cash transfers did not come up with respondents in Bangladesh. For MDAs in South Sudan, WFP respondents emphasized the importance of cash programming and livelihood training alongside MDAs to ensure market demand and a chance for the market to respond and grow even once the vouchers are removed. Complementary projects (e.g., asset creation, livelihood development, best practice farming) also contribute to improving purchasing power so that when WFP assistance shifts to unrestricted cash or transfers need to be reduced, the markets can continue to thrive without WFP. WFP country staff explained that voucher systems had a very positive impact for enabling beneficiaries to access fresh food that would never have been provided through in-kind distributions and regain confidence in market interactions using cash. However, prolonged use of the voucher modality in certain markets sometimes was reported to cause issues such as price gouging and supplier monopolies.

## 2.5. SUSTAINABILITY

### EQ8: ARE THE RESULTS OF WFP CONTRIBUTIONS SUSTAINABLE, I.E., LIKELY TO PERSIST AFTER INTERVENTIONS CONCLUDE?

**Finding 13:** Respondents across both countries indicated a lack of exit strategy when it comes to MDAs. In Bangladesh, particularly in Cox's Bazar, the potential for markets to evolve independently are limited due to government restrictions on the operation of markets within the camps and regarding livelihood opportunities for refugees making it highly challenging to develop long-term plans and exit strategies. In South Sudan, the lack of a clear exit strategy has caused market disruptions, challenges for small-scale retailers to compete and left future management of resources uncertain. Despite this, the knowledge and market linkages created by MDAs are acknowledged as important for sustained growth, highlighting the need for well-developed and communicated exit strategies.

<sup>194</sup> QuIP, beneficiaries in Gorom South Sudan

<sup>195</sup> WFP (2021), LEWIE Juba Urban-CBT report

<sup>196</sup> KII with WFP staff

### EQ.8.1. What are the COs' exit plan and knowledge transfer strategy to the local communities for the Market Development Activities and related supply chain interventions?

206. KIIs with WFP staff and CPs revealed the lack of an exit strategy in both countries. The situation in **Cox's Bazar** is unique in that the camps are strictly regulated and only WFP is allowed to operate markets within the camps. As it is expected that refugees are only in Bangladesh temporarily, there are also strong limitations on their movement and access to livelihood opportunities which prevent Rohingya refugees from developing their own means of subsistence, which is directly linked with their dependence on WFP-supported CBTs. These circumstances create challenging circumstances for developing long-term plans and exit strategies.

207. National stakeholders in Bangladesh indicated that they were not aware of any MDA exit strategy being in place. A review of corporate and project documents such as the CSPs and ACRs also showcased a lack of exit plan and strategy. This may be due to the fact that the current policy hinges on the assumption that the refugees will be able to go home thus negating the necessity of an exit strategy if the camp markets cease to exist. However, as the refugee situation persists with no viable solution for returning on the horizon, longer term contingency strategies are important. As it stands, it is not clear how WFP envisions its interventions to remain sustainable if and when MDAs come to end. Given that restrictions are likely to continue in the long-term, it appears as though an exit strategy involving independent markets would not be realistic and the most likely exit pathways for WFP will involve transferring food assistance activities over to local government management. Such a transfer would rely on the government's motivation to continue with such programming.

208. Similarly in **South Sudan**, stakeholders remarked that WFP lacked a clear exit plan to promote the continuation of MDAs upon the conclusion of activities. This was also corroborated from the review of corporate and project documents such as country strategic plans, which also did not mention exit plans or strategies. Several respondents indicated that MDAs were terminated with very little notice, causing disruptions in the markets. For example, when WFP shifted from the B2B model with vouchers to unrestricted cash in Gorom, the B2B supplier no longer supplied retailers there and they suddenly had to adapt to this gap in the supply chain. It would have been useful to contract the B2B supplier or provide a WFP supply chain advisor to support retailers to adjusting and setting up alternative supply chain solutions. Similarly, it was also reported that many retailers struggled and some even went out of business with the sudden shift to unrestricted cash in Bor.<sup>197</sup> Although this shift was positive for market functionality through increased competition, more support for retailers during the transition would have been beneficial. Staff from Chambers of Commerce and Traders Unions could be trained by WFP to provide additional support for retailers to strengthen their competitive capacities. Also, long-term ownership of the RIAB shops built for the project in Gorom was left unclear. Although the traders who were last contracted have continued to use the shops (mainly on distribution days only), they have not invested in improving or maintaining them as they see them as WFP property. It would have been more effective to at least set up long term user agreements to encourage investment.<sup>198</sup> Outcomes could also have been improved if exit strategies would have been in place from the design phase.

209. Although the funding situation is highly dependent on rankings of vulnerability within a context of stretching limited funds to address immense humanitarian need across the country, it is nonetheless vital for strategies to be in place for dealing with shifting priorities.

210. Despite this apparent lack of a coherent exit strategy, stakeholders did acknowledge that the knowledge, market linkages and opportunities created because of MDAs were considered important steps for sustained growth. For example, one interviewee remarked that the MDAs were "*self-sustainable*" owing to the gains in market linkages, opportunities, and knowledge transfers. Similarly, another interviewee remarked that the training provided by WFP is knowledge that can be transferred and utilized by other relevant stakeholders, which made these activities sustainable. Overall, a need to develop and communicate exit strategies to national stakeholders was evident.

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<sup>197</sup> QuIP interview with retailer in Bor

<sup>198</sup> KIIs with WFP

## EQ8.2. Are the direct WFP partners likely to continue adopting market development activities and related supply chain interventions?

**Finding 14:** There is a likelihood that market actors will continue to use business skills obtained through capacity development and that relationships developed, such as between farmers and wholesalers, will continue to grow.

211. KIIs suggested that MDAs create essential market linkages between different stakeholders. As an illustration, a national stakeholder **in Bangladesh** elaborated linkages between farmers and wholesalers, which created opportunities for retail at fair value for the produce. Others indicated that the construction and establishment of market-related infrastructure such as physical shops near the refugee camps and engagement of the local workforce enhanced market's resilience. Several stakeholders stressed the importance of leveraging these market linkages and opportunities by transferring market maintenance to government partners after the intervention's conclusion. Most key informants suggested that traders, retailers and suppliers involved in MDAs were using the training imparted to them, including by transferring their learning to others. Further, based on a self-assessment of WFP partners, the likelihood of their continuing to adopt MDAs after the completion of the interventions themselves was rated high. The Government of Bangladesh had reportedly committed to continuing these activities after the conclusion of the intervention, though there was no concrete evidence to assess the likelihood of this.

212. KIIs with WFP staff, cooperating partners, and local authorities **in South Sudan** also indicated that they were continuing with activities learned under MDAs because of improvements in their capacity, market supply, engagement with authorities and market connectivity. Resultingly, the evaluation found evidence to suggest that they were more likely to continue utilizing the newly established or improved market linkages with retailers, suppliers, and small-scale farmers. It was also revealed that the MDAs had increased local capacity to organize other livelihood activities such as farming, livestock, and small businesses, which were expected to increase markets' resilience. Hence, WFP's skills development activities had better integrated remote communities within markets in South Sudan.

## EQ8.3 Are the market development activities and related supply chain interventions being adopted by market actors who are not directly linked to the programme, taking into consideration marginalized and disadvantaged groups?

213. Limited evidence was available on the adoption of MDAs by those not directly linked to the interventions. KIIs with WFP staff mentioned that local community members involved in the capacity building training were likely to impart what they have learned to others in their community. They expected these members to continue to positively impact market development and supply chain in target areas, which was in turn expected to build market linkages, structures and opportunities and increase market resilience for stakeholders beyond direct beneficiaries. Other than this limited evidence from both Bangladesh and South Sudan, it was not evident whether these interventions were also being adopted by other market actors who were not directly linked in these countries. A review of the decentralized evaluation of WFP's MDAs in Southern Africa also had revealed the need for improved partnerships and linkages with other market actors.<sup>199</sup>

## EQ9- WHAT FACTORS AFFECT SUSTAINABILITY OF WFP MDAS AND RETAIL ENGAGEMENT ACTIVITIES, AND DO THESE FACTORS VARY FOR DIFFERENT ACTORS (MEN, WOMEN, YOUTH, RURAL, PER-URBAN, URBAN) AND COUNTRY CONTEXTS, ETC.?

### EQ9.1 To what extent do different factors affect the sustainability of WFP MDAs and retail engagement activities?

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<sup>199</sup> WFP (2021). WFP Contribution to Market Development and Food Systems in Southern Africa

214. Several factors were identified that could affect the sustainability of MDAs. Overall, the sustainability of MDAs globally depends on the knowledge, skills, motivation and buy-in on part of the stakeholders responsible for implementing them. The most common factor that could impede market development, as revealed in Bangladesh KIIs, was the lack of consumer independence as the refugee population is totally dependent on e-vouchers and lack avenues for independent income generation. This coupled with diminishing international funding and potential for subsequent social discontent and unrest were of great concern to the respondents. Government partners in the agricultural sector also indicated that the sustainability of MDAs was affected by various factors such as reliance on traditional agricultural practices as well as a lack of widespread commercial farming and agribusinesses. Inflation, climate change and corruption were other factors reported to affect sustainability in Bangladesh.

215. In South Sudan political crisis and fragility of peace, per KIIs, were the most important factors affecting sustainability. Frequent violent conflict both within South Sudan and its neighbors lead to insecurity, market instability and supply chain disruptions, pressure on resources from IDPs and refugees, and currency volatility. Economic crises including currency devaluation, price volatility and inflation also significantly affected the sustainability of market development efforts. Other relevant factors included the availability of funds, accessibility of market locations (due to both security issues and inadequate infrastructure), and a dependable supply of products.

216. Uncertainty of long-term funding is a perennial problem faced not only by the two countries targeted for this evaluation but all WFP programming across the globe. It is a major challenge to secure funding for long term humanitarian support when new crises and vulnerable populations constantly drain finite funding and resources. Although the first priority is for Rohingya refugees to be able to return home, the avenues for achieving this, do not seem feasible, at least in the foreseeable future resulting in a long-term reliance on support from international aid. The strong impact on livelihoods and wellbeing resulting from ration cuts in Cox's Bazar emphasizes the extent to which the beneficiary population is dependent on CBT and the ongoing need for long-term support from the international community and government stakeholders. However, respondents with any form of income (as volunteers or small shop owners) besides the vouchers had a much more positive outlook for the future.<sup>200</sup>

*" Since I got the volunteer job in 2019, I am able to provide nutritious food to my family gradually my income has been increasing and I can afford quality foods like eggs, fish, meat etc."<sup>201</sup>*

217. Given the importance of volunteer positions emphasized by respondents for their overall sense of wellbeing, it would be useful to create as many of these positions as possible. It is also important to maintain positive relations with the host community and the market linkages programme is an excellent way of achieving this. Continuing to expand this and other livelihood programming with the local community will help greatly in strengthening local market actors and pave the way for the possibility of integrating refugee communities at some point in the future.

218. Despite these numerous factors that could impede sustainability, it was widely acknowledged that the training provided for traders, market actors and other stakeholders was highly relevant for improving retailer operations and farm practices in both evaluation countries. Participants in both KIIs and farmer FGDs indicate that training participants have been applying new knowledge to improve their businesses and increase the quality of their products. Relationships and market linkages created through MDAs are also strong factors that will contribute to the long-term sustainability of the expected outcomes of these interventions.

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<sup>200</sup> QuIP interviews with beneficiaries in Bangladesh

<sup>201</sup> QuIP beneficiary in Bangladesh

## 2.6. LESSONS LEARNED

### EQ10- WHAT LESSONS EMERGED FROM COUNTRY EXPERIENCES AND DIFFERENT APPROACHES AND HOW CAN WFP ENHANCE MDAS AND RETAIL ENGAGEMENT TO INCREASE WFP CONTRIBUTION TO MARKET DEVELOPMENT AND FOOD SYSTEMS?

219. The evaluation found robust evidence for key lessons that WFP can use in future programming relevant to its market development interventions, including:

220. **Risk management:** A need for WFP to develop risk management plans was readily apparent, particularly in view of escalating socio-economic, climate-induced and geographic conflicts such as the COVID-19 pandemic and Ukraine war that affected global supply chains with major implications for the beneficiaries and markets in both the countries.

221. **Tools and guidance:** Tools and guidance from HQ generally worked well. A combination of standardized tools and guidance with some modules for country-specific needs appeared to be the right approach for adaptive market assessments. WFP should continue using a combination of standardized corporate tools along with context-specific adaptations for market assessments and monitoring. It should also provide more guidance to country offices on how to customize such tools and their use (in terms of frequency, resources, how to integrate gender-sensitive materials and training approaches etc.). The regular RPME monitoring and particularly the incident tracker was found to be a good practice implemented by the Cox's Bazar team. Monthly monitoring helped to ensure retailers complied with the high WFP standards but also provided a regular feedback mechanism for identifying and resolving issues as they come up. It would be beneficial to replicate this approach in other countries. Also, once WFP HQ establishes corporate indicators for measuring the impact of MDAs, these indicators will need to be systematically integrated into MDA guidance documents and monitoring tools.

222. **Maintaining positive relations with the host community:** Beneficiary respondents from both Bangladesh and South Sudan both reported tension within the community between new arrivals (e.g. the Rohingyas in Cox's Bazar or IDPs fleeing flooding in South Sudan). Local farmers in Bangladesh expressed concern that the arrival of refugees caused an increase in the prices of local produce, but they experienced positive change in their overall wellbeing after receiving training and engaging in the farmer groups created through MDAs. In South Sudan, several beneficiaries mentioned that initial conflict between IDPs and the host communities were eased after humanitarian agencies carried out training and initiated community gatherings. This emphasizes the importance of engaging with the local community through community outreach and also livelihood enhancement programmes to promote peace and local economic development. Investing in local producers, suppliers, storage, and distribution could reduce reliance on imports and prove effective in stabilizing prices. Building livelihoods for host communities facilitates the ability of local producers to cope with supporting the additional refugee population and prove effective at stabilizing prices thus reducing the concerns local community members might have regarding the pressure placed the increased demand for food. It is also important to monitor and respond to the concerns of the host communities to support social cohesion.

223. **Collaboration, communication and advocacy:** Big intractable political challenges such as those relating to the status of refugees requires working across multiple international organizations including the UN system and non-governmental organizations. The extent of advocacy, communication and collaboration needs are best considered from the outset.

224. **Enhancing participation of female traders:** It was a good practice in South Sudan to take initiative and go ahead of onboarding to inform potential female retailers of requirements and assist with registration. This is a practice that could be replicated in other countries. WFP can also follow up with contracted retailers to make sure they are comfortable operating mPOS and provide additional training if needed to ensure persons with lower financial literacy and technology skills are not left behind due to difficulties in maintaining compliance.

225. **Identifying the ideal timing for use of B2B:** Experience in South Sudan shows that WFP should only use B2B when the supply chain circumstances require it. The B2B set up led to unequal power relations both between B2B suppliers and retailers (independent retailers becoming de facto employees) and tension between the B2B and directly contracted retailers (B2B supplier negotiated to be paid in USD

which protected them from price volatility while the others were paid in pounds). More sustainable market growth can be achieved through directly contracting retailers; however, this has significant cost and time implications for WFP.

226. **Importance of good infrastructure:** While infrastructure wasn't a primary focus of MDAs, it emerged frequently in discussions on market functionality. Not having appropriate and safe infrastructure for the transport/supply of goods to these remote markets is a critical element of market development.

227. **Market monitoring and analysis:** Findings highlight the importance of robust market monitoring, analysis and forecasting to keep up with volatile market dynamics, identify solutions for market inefficiencies, determine appropriate transfer values, and prompt modality shifts when needed. This could be enhanced by triangulating more data sources, using predictive analytics, and allocating more resources for market analysis.

228. **Adapting transfer modalities:** Findings showed that while voucher systems can be highly effective initially, they may enable harmful market behaviors over time in some contexts. WFP should remain adaptable in shifting between modalities (vouchers, unrestricted cash, in-kind) based on changes in market functionality and efficiency. Ideally, WFP should aim to transition more quickly to unrestricted cash where functioning markets exist and promote competition by engaging a wider diversity of market actors.

229. **Integrating cash and market-based programming:** The evaluation showed the interdependency of cash-based transfers and well-functioning markets. WFP should continue integrating and sequencing CBT and MDA programming to simultaneously strengthen both demand and supply.

230. **Incorporating exit strategies:** Lack of exit plans caused uncertainty and operational disruptions. A gradual, community-led transition process should be mapped from onset through localized skills transfer, asset handover plans, and government coordination.

231. **Market systems expertise:** Sustained, long-term engagement and nurturing of market systems is vital. This requires dedicated specialist capacity, not just temporary troubleshooting around emergencies.

## 3. Conclusions

On the basis of triangulated findings presented above, the evaluation concludes that:

### Conclusion 1: Effectiveness and impact on market and beneficiary resilience

232. WFP's MDAs and retail engagement led to expanded assortment, availability and quality of essential goods in both countries. Supporting market linkages with local producers boosted competition, affordability and consumption of nutritious items. Although retailers in Bangladesh perceived much less change in the markets where they operate than their South Sudanese counterparts, retailers from both countries reported that capacity building enhanced their operations, product handling, infrastructure and service provision. Although pricing remained a challenge due to external shocks, monitoring and supplier negotiations kept staple and nutritious foods largely accessible, especially in contexts with more market regulations.

233. In Bangladesh climate change, limited availability of agricultural land, and dependence on traditional agricultural techniques are being addressed through the provision of extension services for farmers (access to quality seeds and training on improved techniques) and improved access to markets through the aggregation centres established by WFP and its partners. WFP also ensured fair pricing and maximizing supply chain efficiency by regularly negotiating fair market prices with contracted retailers and conducting MSAs to identify and address any arising market inefficiencies (e.g. switching to a cheaper rice variety). In South Sudan, initial hesitancy to shift from in-kind to voucher systems was overcome by training retailers for customer service and POS management, meeting with community leaders and conducting awareness campaigns, including targeted campaigns to promote women's readiness to participate as retailers.

234. These supply-side improvements, combined with demand driven by CBT (primarily e-vouchers), enabled beneficiaries to interact with dignity as consumers again, choosing preferred, nutritious items aligned to household needs. Multi-directional spill-over effects were also observed – from farmers profiting

through direct market access to non-contracted retailers adopting best practices from WFP trainings. Sustained support enabled gradual transitions toward greater competition and choice.

235. However, gains in access to nutritious foods proved highly sensitive to changes in CBT modalities and values. For example, beneficiaries and their representatives in Cox's Bazar noted significant drops in their ability to afford nutritious food and strong impacts on negative livelihood outlooks as a result of ration cuts. These results demonstrate the extent to which beneficiaries are dependent on food assistance to meet their needs and feel secure in their livelihood situations. In South Sudan, the shift to unrestricted cash had both positive and negative initial effects. The supply chain reliability was disrupted in Gorom with the completion of the B2B programming and some retailers in Bor struggled to keep up with their competitors when unrestricted cash was introduced. On the other hand, this shift provided the opportunity for more local producers to sell their products to beneficiaries in the markets and enhanced competitiveness among retailers resulting from this shift addressed the issue of cartels and price gouging thus enhancing beneficiary purchasing-power. Nevertheless, beneficiaries frequently expressed concerns over the shift to unrestricted cash and not being able to buy as much nutritious food as they used to be able to (often referring to the extreme currency volatility as the cause). Retailers also frequently identified the drastic increase in the value of the dollar as the cause for struggling to maintain assortment in their shops and to compete with foreign traders. It would therefore be beneficial to provide some ongoing support for retailers (Either from WFP supply chain experts or through the chambers of commerce/traders' unions) even after WFP contracts have ended. The results also highlight the importance of parallel gender equality and women's empowerment and socio-economic development activities and programmes (e.g. employment opportunities like the volunteer programme in Fresh Food Corners in Bangladesh or food growing training for IDPs being provided in South Sudan) given that maintaining transfer values in the long term depends on external factors beyond WFPs control (e.g. funding constraints, new emergencies drawing resources). Other unintended consequences arose relating to elite capture and market monopolies, reiterating the need for adaptive modalities and localized understanding grounded in participatory approaches and gender and inclusion analyses.

### **Conclusion 2: Advancing gender equality and inclusion**

236. Efforts were clearly made to enhance equal gender participation in MDAs and ensure access to the markets regardless of one's sex or disability. Assigning e-vouchers to women aimed to shift household decision-making, aligning with women's caregiving roles. Retailer trainings also consciously integrated women and facilitated entry. However, the evaluation found that consultation with women and marginalized people were poorly reflected in the programming. It was not clear how analysis from consultations with women and vulnerable groups were used to determine how to meet their needs and maximize economic participation through MDAs. Means for measuring the extent of their participation and changes in economic empowerment were also lacking.

237. Restrictive norms still constrain female mobility and market roles. Where gains occurred, women reported increased incomes, confidence and livelihood ambitions - but reductions in transfer values also disproportionately impacted female-headed households and/or microbusinesses. Unintended consequences like domestic disputes over control of food assistance and the disempowering effects of voucher re-selling underscore the need for gender analyses when shifting modalities. Persistent barriers around disability inclusion were also noted.

238. Ultimately, while initial steps to facilitate inclusion are promising, transformative change requires systematic application of gender lenses in assessments, monitoring and modalities, alongside meaningful participation, targeted capacity building and multi-sectoral action on root constraints around policy, infrastructure, capacities and attitudes. Sustained resourcing for more specialized market systems expertise would also enable more adaptive, equity-focused programming. If WFP aims to fulfill its commitment to advancing gender equality through food security interventions, then women's voices must guide the design.

### **Conclusion 3: Delivering efficient and sustainable outcomes**

239. The evaluation affirmed the strong relevance of MDAs for enabling cash-based assistance and stabilizing crisis-affected markets, directly aligning with WFP's work towards achieving zero hunger globally. Market assessments and monitoring systems facilitated evidence-based design that was responsive to context-specific constraints and opportunities.

240. Once established, MDAs proved to be a comparatively efficient option, with establishment costs recovered in less than two years and lower recurrent costs, providing nutritional and social benefits to vulnerable populations. Bangladesh, with higher initial costs and a longer recovery period, focuses on long-term market development, serving a larger beneficiary base. In contrast, South Sudan's approach, characterized by lower initial costs and quicker recovery, indicates a strategy for more immediate impact in resource-constrained environments. These contrasting models underscore the importance of tailoring market development strategies to specific local contexts, balancing initial investments with sustainable, long-term benefits. Strengthened market actor capacities and relationships were also expected to outlast interventions to some degree. However, dependence on external funding and a lack of clear exit strategies threaten sustainability.

241. Without concrete plans for a phased, community-managed transition, infrastructure investments and market growth are jeopardized by sudden programming changes or funding shocks. Refugee policies restricting self-reliance and government restrictions on modalities pose additional structural barriers. With high dependence on external support, creating an enabling environment for self-reliance among crisis-affected populations is essential for realizing durable solutions towards more lasting and equitable access to nutritious diets through well-functioning local food systems. That being said, given the restrictions on refugee livelihood development in Cox's Bazar promoting self-reliance for refugees there, this challenge is beyond the scope of the MDA team to address, and it would be more beneficial to focus on the economic resilience of the host community by continuing to expand the market linkages programming and livelihood training for host communities.

242. This requires advocating alongside partners for more adaptable policy frameworks and predictable multi-year financing suited to responsible, community-led transitions. Clearer positioning around WFP's evolving market development role in corporate and country-level strategic frameworks would assist. In addition, developing context-specific pathways for phasing down direct support as local actors assume greater ownership would also mitigate sustainability risks.

243. In terms of process for the assessment of costs and benefits, it's important to recognize that, as a pilot initiative, the scope of costs and benefits incorporated in the CBA was limited. Not all costs were included, and the benefits focused did not fully capture the nutritional aspects, reflecting the nascent stage of this methodological approach. The emphasis on retailers in the selection of benefits, although not exhaustive, provided valuable insights into the potential economic impacts of MDAs.



## 4. Recommendations

244. Recommendations included within this table were validated through two regional workshops and multiple rounds of feedback from the ERG. More specific country-level recommendations are described and prioritized within the separate Bangladesh and South Sudan country reports.

#	Recommendation	Responsibility (one lead office/entity)	Other contributing entities	Priority: High/ medium	By when
1	<p><b>Recommendation 1:</b> Hold discussions at global strategic level to establish exactly how to more explicitly integrate market development into existing or new corporate policies and manuals, especially in relation to the different in-kind, cash, voucher and capacity strengthening transfer modalities. Actions should include:</p> <ul style="list-style-type: none"> <li>As possible, HQ Supply Chain CBT, Markets and Retail should participate in key strategic planning meetings with the Supply chain, Programme and Cash-based transfers units.</li> <li>Acknowledging the critical role of functioning markets in the switch to unrestricted cash, HQ Supply Chain CBT, Markets and Retail in coordination with HQ Cash-based Transfers should review the cash policy and cash and vouchers manuals (or other relevant units and policies) to develop recommendations for MDA / REAs more explicit integration.</li> <li>Conduct a detailed gaps analysis for HQ SCOLR to identify resources needed, in terms of staffing structure across levels, training, finances, internal / external partnerships, to implement and oversee the MDA aspects of the different updated corporate policies and/or guidance.</li> <li>Regular updates or workshops on market systems approaches, best practices and innovative solutions related to market challenges that could further equip management at all levels (HQ, RB and COs) to manage and advise on on-ground situations driven by complex market situations more effectively.</li> </ul>	WFP HQ – Supply Chain CBT, Markets and Retail	WFP HQ – CBT  WFP RBs	<b>High</b>	12-24 months (Deadline: end of 2025)
2	<p><b>Recommendation 2:</b> Establish corporate indicators within the Corporate Results Framework (CRF) to measure MDA outcomes, ensuring that some indicators measure the gender-related outcomes of MDAs. In addition, ensure adequate disaggregation of existing corporate indicators, by sex and geography, to allow for improved analysis on the results of market development activities in target markets. As part of this process, integrate clear</p>	WFP HQ – Supply Chain CBT, Markets and Retail	WFP HQ – Research, Assessment and Monitoring	<b>High</b>	12-24 months (Deadline: end of 2025)

	<p>measurement strategies into the Corporate Indicator Compendium, and pilot indicators through the corporate monitoring system (RAM) in a sample of COs. COs to provide feedback on indicators and available measurement guidance to improve learning and support finalization. The following are examples of indicators at different levels that can be considered and expanded on for CRF indicators and country-specific indicators:</p> <ul style="list-style-type: none"> <li>• Potential output level indicators: # of retailers receiving retailer training (disaggregated by sex), # of contracted retailers (disaggregated by sex), # of times RPME is conducted per year.</li> <li>• Potential outcome level indicators: % increase in revenue for retailers, % of contracted retailers achieving certain performance scores, % of contracted retailers that had their contracts renewed, % of beneficiaries reporting increases in assortment, availability, and quality of nutritious foods in the markets where MDA operates.</li> <li>• Impact: Ensure more systematic use of MFIs for measuring change over time, at least conducting MFIs before and after implementation to measure change and assess impact.</li> <li>• Cost-benefit Analysis: In order to measure benefits of the MDAs for improving CBA of MDAs and of different modalities, WFP should define a set of measurable benefits at the global level with each country adding a few specific benefits according to the local context and objectives when the CBA is conducted. The existing CRF includes some indicators on livelihoods and health, that if possible, to be disaggregated by geography or specific populations, would be relevant in this regard, including outcome indicators such as: Consumption-based coping strategy index, food consumption score, livelihood coping strategies for essential needs, minimum dietary diversity for women and girls of reproductive age, amongst others. Other possible benefits to measure include: increased purchasing power among beneficiaries, improved income or agricultural productivity of households or farmers engaged in the supply chain, women's economic empowerment, and expanded networks and collaborations between retailers, shops, and farmers.</li> </ul>		WFP RBs		
3	<p><b>Recommendation 3: Enhance the use of corporate tools, particularly RPME, to allow for standardization and comparability across countries, especially if used as a tool for measuring newly developed corporate indicators (per recommendation 2), while still supporting customization per country. Ideally, the RPME should be mandatory and implemented at least quarterly:</b></p> <ul style="list-style-type: none"> <li>• Expand the Custom Questions section of the RPME guidance document to provide more support for countries developing their own retailer monitoring tools based on their unique contexts and experiences. This would include streamlining processes for countries to develop tailor-made tools while at the same time applying similar</li> </ul>	WFP HQ – Supply Chain CBT, Markets and Retail  WFP HQ – Research,	WFP COs	<b>Medium</b>	6-12 months (Deadline: end of 2024)

	<p>approaches and measuring mechanisms that would enable comparison of data across countries, where needed.</p> <ul style="list-style-type: none"> <li>Specify gender-related custom questions to be included in the RPME guidance.</li> <li>Expand on existing RPME guidance so that it is aligned with and included in guidance provided on other corporate indicators and tools (e.g. the corporate indicator compendium)</li> <li>When there are issues with retailer compliance revealed through RPME, develop a capacity building action plan.</li> <li>It may also be useful to create a 'light' or abbreviated version of RPME to be used on a more frequent basis (in the way incident tracking was used in Bangladesh). This version could also be used to periodically (e.g. quarterly) monitor non-contracted retailer performance to compare differences between contracted and non-contracted retailers or to monitor retailer capacity in markets where WFP uses unconditional cash assistance.</li> </ul>	Assessment and Monitoring			
4	<p><b>Recommendation 4:</b> In future cost-benefit analyses, it is critical to define at both corporate and country levels the specific expenses to include in the cost analysis (such as whether to limit to last-mile delivery or not) and, importantly, which benefits to consider.<sup>202</sup> It is paramount to establish a detailed CBA plan prior to the initiation of the MDA. This plan should outline the monitoring tools to be employed and specify the type of information that needs to be collected. To achieve this, existing WFP tools like market assessments and corporate monitoring tools should be utilized, potentially supplemented with surveys to collect missing information aligned with the considered benefits. It is crucial that these tools cover all territories, are updated at least annually, and include the required breakdown by gender, age, and disability.</p>	WFP HQ – Supply Chain CBT, Markets and Retail	WFP Business, Innovation and Change Unit  WFP HQ – Research, Assessment and Monitoring	<b>Medium</b>	6-12 months  (Deadline: end of 2024)
5	<p><b>Recommendation 5: WFP should invest in the sustainability of market development activities to mitigate the effects of humanitarian funding constraints and ration cuts.</b> MDAs' intentional focus on household and market resilience will contribute to mitigating shocks and operational constraints. Actions should be tailored to each country context and include:</p>	WFP COs	WFP HQ and RBs	<b>High</b>	12-24 months  (Deadline: end of 2025)

<sup>202</sup> WFP should establish benefits at a global level, while allowing each country to incorporate specific benefits unique to their local context and objectives. As evidenced in the comparative table in Annex 12. Comparing the CBA conducted during the evaluation with others CBA studies in South Sudan, demonstrates how the definition of intended benefits (ranging from changes in retailers'/communities' perspectives, to nutritional, product variability, economic, or social aspects such as women's empowerment) critically shapes the outcomes of the CBA.

	<ul style="list-style-type: none"> <li>• Long-term ownership of assets (e.g. RIAB) should be integrated into the relevant guidance documents (e.g. RIAB Workflow document could include an additional step / chapter for exit strategy rather than ending with delivery).</li> <li>• Considering the emphasis placed on livelihood development activities by both beneficiaries and retailers, it would be beneficial for WFP to expand existing market linkage programmes that connect farmers with local markets and provide training for them for agriculture production, business management and use of digital platforms. This will likely involve increasing linkages and coherence with other WFP strategies, programmes, as well as other agencies operating in same markets/areas to devise contextually relevant partnerships/plans focused on household and market resilience. Continue to build positive relations with the local authorities and communities to identify pathways for unified intervention strategies that ensure the sustainability and resilience of MDAs after shocks or through contextual constraints. Good relations and communication with government representatives will also enable discussions on the value and impacts of MDAs and the importance of functional markets so that they are on board for supporting and continuing with MDAs moving forward.</li> <li>• Enhance community feedback mechanisms surrounding MDAs. Ensure that beneficiary communities are consulted on contingency plans, their specific feedback on facilitating market and household resilience clearly summarized, and subsequent plans effectively communicated back.</li> <li>• WFP to work closely with relevant government actors, private sector and communities on a contingency plan to ensure continuation of the demand and supply to allow the transition between modalities. For example, integrate retailer training activities which prepare them and support them temporarily through transitions between modalities, particularly the transition to unrestricted cash.</li> <li>• Maintain flexible distribution systems that are responsive to market intelligence and retailer assessments in order to maximize effectiveness of the transfer modality and amounts.</li> </ul>				
6	<p><b>Recommendation 6:</b> Be more intentional and clearer on the means for mainstreaming gender and inclusion considerations and results of related consultations:</p> <ul style="list-style-type: none"> <li>• In-depth needs assessments and gender analyses focusing on market systems and supply chains should be conducted at the design phase of MDAs and better integrated into market systems analyses and other tools and guidance to ensure that the appropriate measures are in place to assess and address the needs of all intended beneficiaries. Collaborating with local women’s organizations and community groups can</li> </ul>	WFP COs	WFP HQ, RB and CO Gender Officers	<b>High</b>	6-12 Months (Deadline: end of 2024)

	<p>aid in assessing, crafting and implementing measures to improve the inclusivity of supply chains and market systems. In addition, consulting with internal gender experts to ensure all tools and guidance are gender responsive.</p> <ul style="list-style-type: none"> <li>• Informed by above-mentioned gender analyses on market systems and supply chains, integrate culturally-relevant strategies for promoting women's participation and economic empowerment as part of MDAs. For example, continue to provide additional training to female entrepreneurs to close gender gaps in retailer participation, follow up with contracted retailers to make sure they are able to operate mPOS and provide additional training if needed (lower financial literacy of women might make it more difficult for them to maintain compliance), and/or work with local authorities to ensure representation of women in business committees or other leadership roles. Once strategies are devised, ensure clear indicators for monitoring progress and results on gender equality are devised.</li> <li>• Ensure that partnerships established with other external and internal agencies / institutions prioritize gender equality.</li> </ul>				
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**WFP Supply Chain CBT, Markets and Retail  
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