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USAID'S PRIVATE SECTOR ENGAGEMENT AMIDST COVID-19: A LANDSCAPE STUDY

FEED THE FUTURE MARKET SYSTEMS AND PARTNERSHIPS ACTIVITY

JUNE 1, 2023

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The Feed the Future Market Systems and Partnerships Activity is advancing learning and good practice in market systems development and private sector engagement within USAID, USAID partners, and market actors. For more information, access to technical resources, and opportunities to engage, visit www.agrilinks.org/msp.

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EXECUTIVE SUMMARY

In order to better understand how USAID engaged with the private sector to improve firm resilience during the COVID-19 pandemic — and to what extent the agency was successful in doing so — USAID commissioned research through the Private Sector Engagement (PSE) Hub in collaboration with the Bureau of Policy, Planning and Learning's Office of Learning, Evaluation and Research (PPL/LER), as part of a series of learning activities related to USAID's COVID-19 Learning Agenda. This research was funded through a buy-in from USAID's PSE Hub and implemented by DAI with support from MarketShare Associates through the [Feed the Future Market Systems and Partnerships Activity](#) (MSP). The findings will be used to inform future USAID programming and prepare the agency to respond effectively to future shocks.

This report presents findings from the first phase of this research, a landscape review of 30 USAID-funded Activities active between January 2020 and March 2022 and working in over 20 countries, as well as across four regions. As detailed more in [Exhibit 1](#) (p. 7), the Activities represented work by 16 different implementing partners facilitating diverse forms of PSE programming across a variety of agricultural and non-agricultural sectors (e.g., tourism, ICT, finance).

The three core research questions of this study and key findings, explored in more detail in the body of this report, are summarized below.



What were the main challenges and risks that the COVID-19 pandemic created within market systems, particularly for firms?

- Most Activities faced similar governmental measures, such as limits on public gatherings, stay at home orders, and restrictions on travel within the country that severely impacted the ability of the private sector to operate. The most common shocks and risks that firms faced, as reported by Activities, were **sudden loss of revenue, increases in operating costs, and an inability to export and sell products**. Firms also faced reduced demand in both domestic and export markets, leading to price volatility in select agricultural sectors, as well as transportation disruptions. Firms had difficulties importing raw materials, further exacerbating supply chain issues. Liquidity problems were also prevalent, and commercial financing dried up due to risks associated with the pandemic, making it difficult for companies to access financing from financial institutions and cooperatives. Reduced staffing and business closures all further contributed negatively to firm productivity. [Exhibit 2](#) (p. 8) presents the most common governmental measures and their impact on the private sector.
- The five most common pandemic-associated shocks and/or challenges cited at the market systems level were **disruption of domestic supply chains, decreases in demand and supply of key commodities, higher transportation costs (including cargo), rising prices of agricultural products, and risks to human health**. Some sectors — such as

tourism and hospitality, export-oriented industries, or value chains that were reliant on imported raw materials and inputs and those that dealt with perishable goods — were more vulnerable to shocks created or exacerbated by the COVID-19 pandemic than other sectors, as explored under [Finding 2](#) (p. 12).

- Half of Activities reported being affected by shocks other than COVID-19 during the pandemic, including natural disasters (e.g., such as cyclones Idai and Eloise in Mozambique and Hurricanes Eta and Iota in Honduras), Russia's war in Ukraine, and other health epidemics (such as Ebola outbreaks in the Democratic Republic of Congo (DRC) and Uganda). **Understanding the concurrence and range of shocks and stresses that the private sector is exposed to** was found to be important when designing strategies to improve firm and market systems level resilience. Considering the diverse shocks affecting the private sector can inform resilience-strengthening strategies that minimize the likelihood of firms adopting “negative” coping behaviors, which can have a ripple effect on the broader market systems, as detailed further in [Finding 3](#) (p. 14).



What were the results associated with strengthened firm and market system resilience from different PSE strategies implemented by USAID during the COVID-19 pandemic?

- **Activities engaged with the private sector using, a wide range of PSE strategies** (see [Annex 4](#), p. 63) and private sector partners, such as micro-, small-, and medium-sized enterprises (MSMEs) both formal and informal, lead/anchor firms, financial institutions, investors, business associations, cooperatives, multinational corporations (MNCs), tech start-ups, and smallholder farmers.
- **Implementing partners (IPs) targeted firms with different risk profiles depending on the objective that their PSE strategies** were pursuing to respond to the COVID-19 pandemic (see [Finding 6](#), p. 20), **from small businesses** that would have otherwise collapsed without assistance to **established lead firms** that had the capacity to provide key goods and services during the pandemic.
- Activities used a **range of operational mechanisms and PSE modalities to respond to the COVID-19 pandemic**, such as grants (that included both traditional cost-share and leverage from the private sector to complement USAID's contribution), technical assistance, procurement, sub-contracts, and blended finance. In the limited instances where Activities had no grant funding, it resulted in creative ways to engage with the private sector.
- **USAID has been successful in supporting firms to enhance their sales, jobs, and business performance during the COVID-19 pandemic.** Most Activities that reported on these three outcomes in their formal monitoring system met their indicator targets. Many Activities also implemented **PSE strategies at the industry/market system level to support industries** through the collection of evidence that was used to inform policy responses and/or the convening of industry groups to align on joint response to the pandemic and key trade policies. The tourism industry in Honduras and the export-led value chains in Afghanistan are two notable examples of this discussed in [Finding 2](#) (p. 12). Some Activities also

invested resources strategically to strengthen the broader market system, beyond firm-level resilience (see [Finding 8](#), p. 24).

- **Few Activities set up specific COVID-19 reporting mechanisms to capture specific results of COVID-19 related PSE strategies implemented during the pandemic. This limitation has made the attribution of Activity results solely to pandemic-related PSE challenging.** IPs documented their interventions and results mainly through existing means, such as quarterly/annual reporting or drawing from existing indicators (e.g., “Value of annual sales for farmers and firms”). IPs that did invest in disaggregating or differentiating results directly tied to COVID-19 response reported on metrics, including sales, jobs, financing, and private sector leverage (see [Annex 5](#), p. 72). In addition, **many Activities developed rich learning products during the pandemic to share lessons learned** and practical examples of adaptations across different sectors with other IPs (see [Annex 7](#), p. 75). Seventy percent of Activities developed at least one learning product, and 40 percent developed multiple learning products.
- Government control measures, such as limitations on staff travel, also inhibited the collection of monitoring data critical for assessing activity results. However, **a few monitoring, evaluation, and learning (MEL) adaptations emerged that enabled IPs to continue their MEL activities during the pandemic, which USAID can build on for future efforts** (see [Box 4](#), p. 23).
- In the agricultural sector, **Activities that invested in strengthening local distribution networks (e.g., through last-mile distribution models) and customer-centric models allowed firms to recover better during the pandemic** (see [Finding 16](#), p. 37). While some of these investments occurred prior to the pandemic, many IPs have further invested into this area and innovated new models to lead to greater results. Other newer Activities also have naturally shifted towards these approaches in response to supply chain and market disruptions in local and export markets.
- Many Activities leveraged their PSE strategies not only for mitigating the negative impact of the pandemic on firms, but also harnessing new commercial opportunities created by COVID-19. MSP identified several trends on key change within market systems that cut across sectors and market context, which USAID's PSE strategies contributed to through their COVID-19 response (e.g., **seizing new domestic markets in agricultural and non-agricultural sectors, pushing towards the digitalization of critical services, and accelerating the diversification of their economy** (see [Finding 15](#), p. 36).



What are the lessons learned around emerging good practices on firm and market system resilience that can inform future PSE programming?

- While most of the Activities **(70%) conducted some type of COVID-19 assessments, their focus, depth, and how findings were used varied greatly among Activities.** Some Activities conducted rapid surveys with a limited sample size for internal use while others

leveraged digital technologies to send out multiple surveys to thousands of businesses working in varied sectors. About half of the Activities used the information internally to help adapt their interventions to the COVID-19 context while only one-fifth of the Activities shared data externally with key stakeholders to inform their recovery strategy. These assessments were critical in helping IPs design relevant interventions. Some Activities also invested in developing specific tools that USAID can leverage and adapt to prepare for future shocks. Others engaged in scenario planning to prepare their Activities to pivot more easily depending on how the pandemic would unfold in the short run (see [Finding 17](#), p. 39).

- According to interviews with IPs and review of qualitative evidence available, key factors that facilitated effectiveness of PSE strategies during the COVID-19 pandemic included having **established relationships with the private sector prior to the pandemic, existing trusted relationships between governmental and private sector actors, co-creation with the private sector, and a flexible learning and adapting mindset**. Some Activities were also better positioned to respond to the pandemic than others due to an existing mandate or objective (e.g., existing component on business support for MSMEs, mandate to work in ICT) prior to COVID-19. Furthermore, those that put learning and adaptive management central to their project management were well placed to pivot successfully.
- There is an **opportunity to revisit the type of flexibility that can be granted to IPs in terms of administrative and regulatory requirements during this type of crisis**. During interviews, IPs suggested more flexibility around microgrants and relaxing grant competition requirements in time of crisis, and other mechanisms (e.g., crisis modifier¹, etc.).

¹ USAID's 2022 Resilience Policy Revision defines crisis modifiers as "a tool used by development programs to repurpose internal budgets or new contingency funding for quick action to protect development gains, preserve recipient assets, and prevent or delay the need for humanitarian response."

I. BACKGROUND

COVID-19 was a unique shock that was global in nature and which affected every company around the world, regardless of size. At the onset of the COVID-19 pandemic, USAID invested to address the pandemic, aiming to mitigate the impact and shore up positive gains of USAID investments. These investments in COVID-19 responses came through a variety of modalities, but there is limited aggregate data on USAID's and its IPs' approaches to mitigating COVID-19 stressors and pivots to ongoing programming.

Study Purpose

Tackling this challenge, *the purpose of this study is to understand how USAID engaged with the private sector to improve firm resilience during the pandemic and to what extent the Agency was successful in doing so.*




The findings of this study will be used to inform future USAID programming and prepare the Agency to respond effectively to future shocks. The study involved conducting a landscape assessment to scan, aggregate, and analyze existing experience and evidence from implementers involved in agricultural and other economic growth programming across a variety of contexts. A secondary phase of the study will focus on gaps identified in the landscape assessment and will be addressed using primary, qualitative research.

This report represents findings from the landscape assessment and will be updated at a later date to incorporate additional findings from the second phase once available.

This research was funded through a buy-in from USAID's PSE Hub and implemented by DAI with support from MarketShare Associates through the [Feed the Future Market Systems and Partnerships Activity](#). This research was overseen collaboratively by the PSE Hub and PPL/LER, as part of a series of learning activities related to USAID's global response to the COVID-19 pandemic.

Research Questions

The core research questions guiding this study are:

		
<p>What were the main challenges and risks that the COVID-19 pandemic created within market systems, particularly for firms?</p>	<p>What were the results associated with strengthened firm and market system resilience from different PSE strategies implemented by USAID during the COVID-19 pandemic?</p>	<p>What are the lessons learned around emerging good practices on firm and market system resilience that can inform future PSE programming?</p>

[Annex I](#) (p. 54) presents the full set of questions including the 13 sub-questions.

Key Definitions

Definitions of key terms used in this research are described in Box I below.

Box I – Key Definitions

Key Definitions

Activity is implemented by an IP, which reports on the Activity to USAID.

Private Sector Engagement (PSE) is a strategic approach to planning and programming through which USAID consults, strategizes, aligns, collaborates, and implements with the private sector for greater scale, sustainability, and effectiveness of development or humanitarian outcomes. *Source: USAID PSE Policy.*

Joint engagement between USG and private sector. An engagement can be tangible (e.g., financial assistance, materials, provision of goods and services) or informational (e.g., convenings, facilitation, strategy development) exchange between a private sector actor and the USG or USG implementer. An engagement counts if the interactions between the USG and the private sector result in a documented exchange (e.g., memorandum of understanding, strategy, activity design documentation) that affects the approach or programmatic strategy or objective in achieving the desired U.S. foreign assistance objective. *Source: USAID's definition of PSE-I indicator.*

The private sector is defined as for-profit, commercial entities and their affiliated foundations; financial institutions, investors, and intermediaries; business associations and cooperatives; micro, small, medium, and large enterprises that operate in the formal and informal sectors; American, local, regional, and multi-national businesses; and for-profit approaches that generate sustainable income (e.g., a venture fund run by a non-governmental organization (NGO) or a social enterprise). *Source: USAID PSE Policy.*

Resilience is the ability of people, households, communities, countries, and systems to mitigate, adapt to and recover from shocks and stresses in a manner that reduces chronic vulnerability and facilitates inclusive growth. *Source: Resilience at USAID (2015).*

Market Systems Development (MSD). USAID's MSD approach focuses on addressing the root causes of poor system performance by identifying leverage points in the system where interventions can drive systemic change. Programming also addresses systemic constraints that can unlock growth in multiple value chains by intervening in, for example, cross-market input supply systems, information services, financial services (including insurance and other means of asset protection), logistics, and the enabling environment. *Source: "Integrating a Market Systems Approach in Programming," Feed the Future (Nov 2022).*

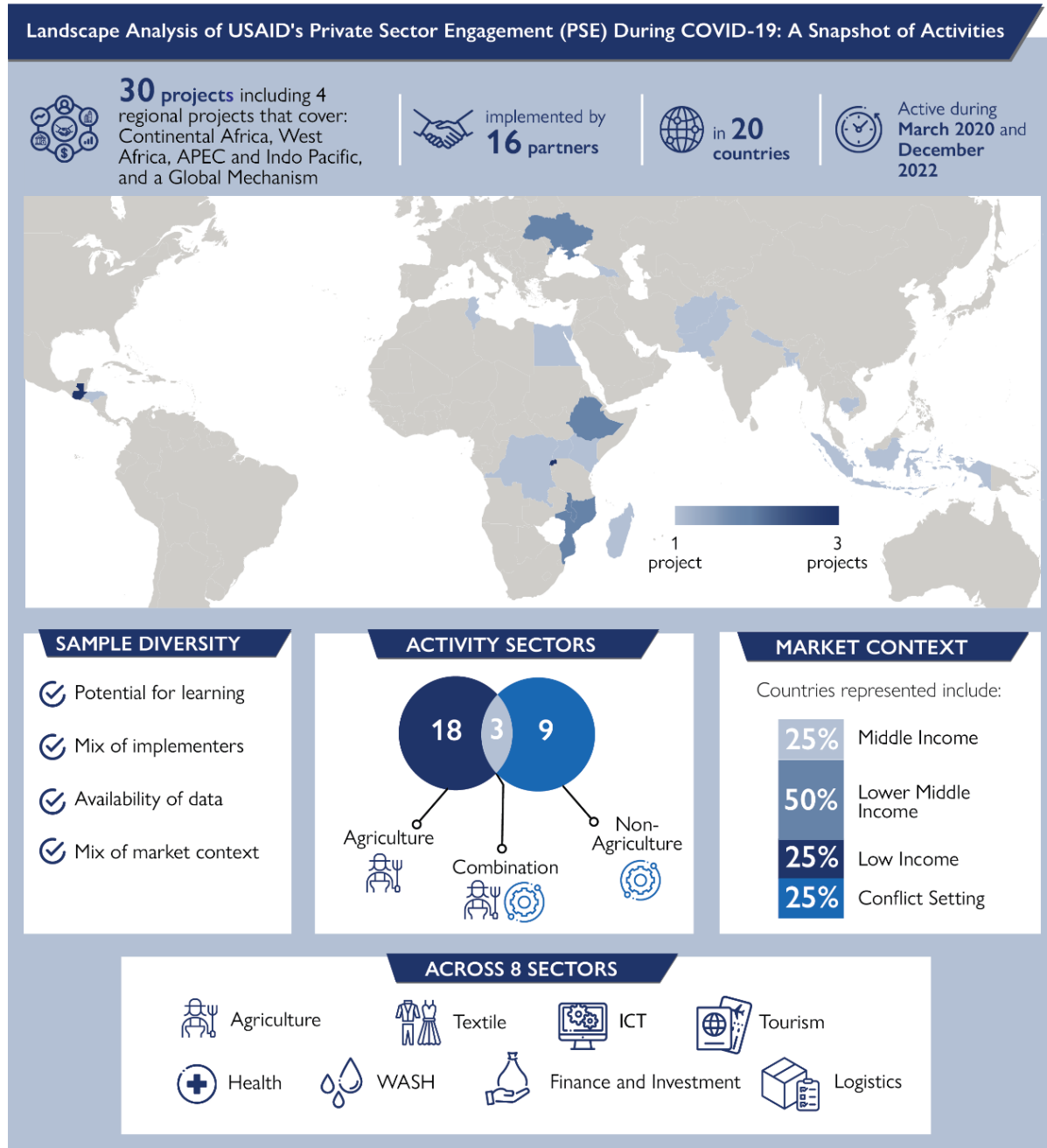
Market systems resilience can be understood as the ability of a market system to respond to disturbance in a way that allows consistency and sustainability, or that leads to improvement, in the market system's functioning. *Source: Guidance for Assessing Resilience of Market Systems (2019).*

Shocks are external short-term deviations from long-term trends that have substantial negative effects on people's well-being, level of assets, livelihoods, safety, or their ability to withstand future shocks. Shocks can be slow-onset like drought or relatively rapid onset like flooding, disease outbreak, or market fluctuations. *Source: "Sagara, B. (2018). Resilience Measurement Practical Guidance Note Series 2: Measuring Shocks and Stresses. Produced by Mercy Corps as part of the Resilience Evaluation, Analysis and Learning (REAL) Associate Award.*

Research Design and Methodology

To address the learning questions posited in this assessment, the research team implemented a mixed-methods research design utilizing secondary data as the main source for conducting the analysis. When deemed necessary, the team employed a triangulation methodology that integrated primary data obtained through brief interviews. The figure below summarizes key features of Activities included in the research. [Annex 2](#) (p. 56) provides the acronyms for each Activity in the sample. [Annex 3](#) (p. 58) provides detailed information on the research process, such as sample selection, data collection, data analysis, data quality assurance, research ethical practices, and research limitations.

Exhibit 1 – Landscape Analysis of USAID's PSEs During COVID-19: Snapshot of Activities



2. FINDINGS

Findings are organized according to the three high-level learning questions (LQs). The findings discussed under each follow the sub-research questions highlighted in boxes based on available data. Evidence gaps are summarized at the end of each section and in the [Areas for Further Research](#) (p. 51).

LQ #1 – What were the main challenges and risks that the COVID-19 pandemic created within market systems, particularly for firms?

This section presents findings on the first high-level LQ, explored through these questions:

1.1 What type of shocks and/or risks did COVID-19 create or exacerbate for firms?

1.2 What type of challenges and/or shocks did COVID-19 create or exacerbate within market systems (e.g., supply chain and market disruption, etc.)?

1.1 What type of shocks and/or risks did COVID-19 create or exacerbate for firms?

Key Finding 1 – Shocks and Risks for Firms



Most Activities faced similar governmental measures, such as limits on public gatherings, stay at home orders, and restrictions on travel that severely impacted the ability of the private sector to operate. However, the intensity of those measures and their impact on the private sector varied greatly among countries.

Across the sample of 30 Activities, governments implemented various mitigation measures that exacerbated the impact of the pandemic on private sector firms. Governments enacted common mitigation measures with varying breadth and intensity. The most common measures observed were limits on public gatherings (60%), stay at home orders (53%), restrictions on travel within the country (50%), international border closures (47%), and business closures (37%). Some types of measures caused more of a negative impact than others. Exhibit 2 summarizes the key governmental measures that were implemented in Activity geographies during the pandemic and describes the common impacts firms faced due to these measures.

Exhibit 2 – Most Common COVID-19 Measures Taken By Government in Activity Countries

Government Measures	Impact on the private sector across agricultural and non-agricultural sectors
Restrictions on public gathering	<ul style="list-style-type: none"> ▪ Restrictions on gatherings made in-person service delivery, technical assistance, training, field days, and demonstrations impossible or less economical. ▪ Cooperative unions and members were unable to meet. ▪ Closures, capacity restrictions, and decreased access to public markets drove down demand.

Government Measures	Impact on the private sector across agricultural and non-agricultural sectors
	<ul style="list-style-type: none"> ▪ Retail, transportation, personal services, tourism, manufacturing, and informal sectors were commonly affected. ▪ Restrictions on gatherings and celebrations reduced demand for livestock purchases. ▪ Implementing social distancing required businesses to invest in personal protective equipment (PPE) and other equipment that increased their operational costs.
Restriction on travel within country	<ul style="list-style-type: none"> ▪ Timely delivery of technical assistance was affected. ▪ Agricultural transportation networks were disrupted. ▪ Delivery of processing and construction equipment was delayed. ▪ Domestic tourism markets were disrupted. ▪ Domestic consumer markets diminished. ▪ Access to agro-inputs decreased due to travel restrictions in remote and rural areas.
Stay at home orders/lockdown	<ul style="list-style-type: none"> ▪ Stay at home orders and lockdowns significantly decreased demand in domestic consumer markets due to lack of access to markets. ▪ Because of the lockdown, the operations of manufacturers, exporters, wholesalers, retailers, and service providers were all significantly affected across Activity geographies.
International border closure	<ul style="list-style-type: none"> ▪ International border closures and disruptions in international trade caused significant challenges for input and export markets. ▪ Businesses had trouble accessing raw materials and inputs from established trade routes, shipping delays, and closures impacted the value chains of perishable goods, and limited international tourism affected demand in tourism focused consumer markets.
Business closure	<ul style="list-style-type: none"> ▪ Closures of non-essential businesses and retailers caused severe cash shortages. ▪ Restaurants, school closures, and closures of markets decreased demand for agricultural products. ▪ Closures of agribusinesses limited access to inputs and other agricultural suppliers. ▪ Closures of financial institutions limited access to finance for small and medium enterprises (SMEs).
Curfews	<ul style="list-style-type: none"> ▪ Curfews in Activity geographies restricted business openings and operations. ▪ These restrictions prevented people from getting to their fields or traveling freely to certain regions.
Closure of public markets	<ul style="list-style-type: none"> ▪ Closure of public markets significantly decreased demand across agricultural markets, notably in perishable goods. ▪ This led to increases in food waste, low domestic prices, and decreases in agricultural production.

Government Measures	Impact on the private sector across agricultural and non-agricultural sectors
Reduction in freight flights	<ul style="list-style-type: none"> ▪ Reductions in freight flights caused increasing costs for cargo and increasing operational costs for firms.

Source: Authors' analysis of IPs' reports and key informant interviews (KIIs) with IPs.

The measures, combined with the widespread impact of the pandemic, had profound ripple effects across various markets. Many Activities reported significant financial losses for firms, including widespread decreases in firm revenue and increases in firm operating costs. Firms also faced reduced demand in domestic and export markets, affecting over half of Activities, and leading to price volatility in select agricultural sectors.

Transportation disruptions were a common occurrence, with one-fifth of Activities reporting issues with transporting goods. Additionally, firms in one-third of Activities had difficulties importing raw materials, further exacerbating supply chain issues. Liquidity problems were also prevalent, with 40 percent of Activities reporting challenges in accessing financing from financial institutions and cooperatives.

The disruptions had a profound impact on productivity, with 3 percent of Activities experiencing a decrease in productivity due to various factors such as supply chain disruptions, reduced staffing, and business closures.

There were also social risks and negative stigmas associated with the pandemic that affected private sector firms. In the sample analyzed, 10 percent of Activities reported social and psychological effects on staff and communities. In some cases, communities placed negative stigmas on urban migrants and factory workers, who were viewed as being associated with higher rates of COVID-19 infections. These stigmas had a significant impact on the affected workers' mental health and well-being.

These governmental measures contributed to decreased demand and disrupted marketing channels for firms, leading to cash flow constraints as they tried to keep their employees on salary. There was the ripple effect from companies losing markets, thereby needing to purchase fewer inputs (raw materials), thereby reducing the demand for seeds, and so on. Many Activities mentioned this, such as **Transforming Market Systems (TMS)** in Honduras, which noted during a [learning event](#) on market systems resilience that *“the chain of consequences that result from these coping behaviors cascading from enterprise to individual to household to consumer and back to enterprise are likely to have impact into the future.”*

Box 2 below presents the results of an in-depth survey conducted in Uganda on the impact of the pandemic on firms with support from **Feed the Future Uganda Inclusive Agricultural Markets Activity (FTF IAM)**.

Box 2 – Top Impacts of COVID-19 Pandemic on Firms in Uganda**Top Impacts of COVID-19 Pandemic on Firms in Uganda**

The main results of the impact of COVID-19 pandemic on firms in Uganda from this in-depth survey include: (1) **Financial distress and bankruptcy** due to low cash flow coverage — 85% of firms had less than 3-month runway; (2) **Business revenue decreases** across companies of all sizes; (3) **Work attendance dropped** significantly and layoffs increased; (4) **Increase of over 30% in the cost of inputs and operating costs**. Businesses unlikely to absorb these costs in the aftermath of COVID-19, resulting in higher prices for the consumers; (5) **Large decline in export volumes**, including sectors such as education (catering to foreign students), ICT, health and social work, construction, trade, and transport and storage; (6) In agriculture, **prices of essential inputs and transport services increased**, labor costs doubled for most farms, and the closure of institutions — the biggest consumers of grains and pulses — meant that some produce had no access to markets.

Source: COVID-19 Impact On Agricultural Market Systems In Uganda And Coping Mechanisms For Resilience, USAID Feed The Future Inclusive Agricultural Markets Activity Report By the National Alliance Of Agricultural Co-Operatives In Uganda (NAAC). February 2022.

1.2 What type of shocks and/or risks did COVID-19 create or exacerbate within market systems (supply chain and market disruption, etc.)?

The challenges and shocks caused by the COVID-19 pandemic had negative ripple effects throughout the market systems of the sample Activities. The most significant shock was the disruption of supply chains, with most Activities reporting disruptions in local supply chains that included impacts from border closures. The pandemic also caused a decrease in demand in consumer markets, with half of the Activities reporting decreases in demand for key commodities and one-fifth of Activities reporting a decrease in overall consumer spending due to the economic downturn. The limited access to markets for producers and consumers also led to inefficiencies between supply and demand.

Additionally, about one-third of Activities reported higher transportation and shipping costs, while another third of Activities reported price increases for agricultural products. Moreover, one-fifth of Activities in the sample reported financial distress and bankruptcy throughout the market systems due to low cash flow coverage. More specifically, a few Activities reported financial liquidity crises, the depreciation of currency in the market system, and volatility in financial markets. Furthermore, risks to human health played a significant role in decreasing productivity in manufacturing and agro-processing, affecting one-third of the sample.

These findings resonate with the results of an in-depth analysis carried out by **AGRA's Food Trade Coalition for Africa (FTCA)** and that evaluated the impact of the COVID-19 pandemic on food systems or food security in Sub-Saharan Africa through the review of a total of 57 studies conducted in 2020 as presented in Box 3 below.

Box 3 – Main Shocks That Occurred in the Food Systems in Sub-Saharan Africa**Main Shocks That Occurred in the Food Systems in Sub-Saharan Africa**

COVID-19 poses challenges on top of this picture of risk and vulnerability. Emerging evidence around the impact of this pandemic shows that there are three major shocks and disruptions that have occurred in food systems following the outbreak of the pandemic namely: **Trade policy shocks** with countries indirectly changing their policy positions as they impose various pandemic containment measures which include border closures; **Logistical shocks** which limit the flow of food products domestically and within the region as a result of travel restrictions; and **Supply and demand shocks** at many levels of the supply chain impacting the flow of produce and inputs regionally and globally, heightening the risk of food insecurity and loss of livelihoods.

Source: "Impacts of the Covid-19 Pandemic and Associated Policy Responses on Food Systems in Sub-Saharan Africa," AGRA, April 2021

Key Finding 2 – Sector Vulnerability to Shocks

Some value chains — such as tourism and hospitality sectors and export-oriented industries that were reliant on imported raw materials and inputs and those that dealt with perishable goods — were more vulnerable to shocks created/exacerbated by the COVID-19 pandemic than other sectors.

Tourism and hospitality

Tourism and hospitality industries were particularly susceptible to the shocks caused by the pandemic due to the border closures, restrictions on movement, closure of non-essential businesses, and decreased demand from consumers. In Pakistan, the **Small and Medium Enterprise Activity (SMEA)** conducted a COVID-19 survey that revealed that 75 percent of the hospitality enterprises they supported had to close their operations. Similarly, in Honduras, a survey conducted by the **TMS** showed that tourism-related enterprises, such as lodging, tour operators, food services, and arts and entertainment, were more likely to use negative coping mechanisms, such as laying off or suspending staff and closing down their operations, compared to other enterprise profiles. Additionally, high value artisans in tourism focused markets, as seen in Georgia's **Economic Security Program (ESP)**, lost revenue through the cancellation of craft exhibitions and restrictions on international tourism. The tourism and hospitality industries heavily rely on travel and in-person interactions, and the sudden decrease in demand and revenue had a severe impact on their ability to operate during the pandemic.

Export-oriented industries

Export-oriented industries are highly vulnerable to trade restrictions and decreases in international demand. At the onset of the pandemic, this vulnerability was particularly felt by industries that heavily relied on cross-border trade, had significant scale, limited cash flow, and relatively thin profit margins. A notable example of this vulnerability was **Afghanistan's Value Chain Crops (AVC)** where a two-month

border closure with Pakistan resulted in a loss of \$40 million in agricultural products among project-supported firms. Across Afghanistan. It is estimated that losses for all firms in the agro-processing and export sector exceeded \$100 million, resulting in the loss of 3,000 non-farm jobs. At the time of **AVC's** 2020 annual report, the project reported that 10 percent of firms permanently closed and only 20 percent were still in operation while the rest remained dormant. [Finding 11](#) (p. 27) explores **AVC's** interventions in more detail.

In Uganda, **FTF IAM** provided a detailed analysis of the impact of COVID-19 on the country's export-oriented industries. Through a study conducted by the Ugandan Ministry of Trade and UN Capital Development Fund in 2020, it was reported that for 63 percent of companies, their export volumes will go down, while 49 percent believe that their exports will decline by more than 20 percent. By sector, the hardest hit are private educational institutions which cater to foreign students (91%). Almost 70 percent of companies in information and information technology services also expect a drop in their export volumes.

In other cases, activities found that Global G.A.P. certification processes were delayed for firms, while currency fluctuations significantly affected the price of export-oriented commodities.

Value chains reliant on imported raw materials and inputs

Agricultural, agro-processing, and manufacturing value chains that were reliant on imports of raw materials, inputs, and component assembly parts were also significantly vulnerable. The closures of trade routes and international manufacturing delays had adverse effects on firms' productivity and farmers' ability to access inputs for agriculture. In Mozambique, the **Feed the Future Mozambique Agricultural Innovations (FTF Inova)** partners were hit particularly hard due to their reliance on consistent imported inputs that supplied the last-mile agricultural networks. Agro-processors also faced challenges in accessing raw materials from countries in lockdown and had to source from other markets at higher costs.

Moreover, the manufacturing sectors in some projects were significantly affected. For instance, **INVEST** Activity reported a lack of availability of component parts in select manufacturing sectors. Additionally, some implementation-focused projects, such as **Rural Access to New Opportunities in WASH (RANO-WASH)** in Madagascar, were impacted by high costs of construction materials and equipment necessary for private sector development and delivery of affordable water, sanitation, and hygiene (WASH) services.

Perishable goods

Perishable goods value chains were significantly vulnerable during the COVID-19 pandemic due to the need for quick transport, significant investment in operating infrastructure, and reliable access to international and domestic consumer markets. This vulnerability was especially evident in Activities focused on animal products since production and collection takes place daily, whereas horticulture production is seasonal.

For instance, **Cooperative Development Activity 4 (CD4) in Rwanda and Malawi** found that dairy value

chains are disadvantaged because they require extensive resources such as cooling tanks, refrigerated cooling units, access to electricity to power refrigeration, temperature-conditioned vehicles for transport, housing and health costs for dairy animals, and access to milk processing facilities. This meant that decreases in revenue, as occurred due to market losses during the pandemic, immediately impacted the cooperatives' ability to cover the costs of this expensive equipment and infrastructure.

Similarly, **FTF ROW** highlighted the vulnerability of the egg value chain. At the onset of the pandemic, egg producers were unable to access their established export markets, resulting in potential economic losses of around \$8,947 (RWF 10 million²), in addition to investment expenses, lost opportunity costs, and the risk of destocking. This critical situation presented egg producers with several challenging options amidst rising uncertainty, including dumping their eggs, selling them at throwaway prices, expanding their storage, or creating new markets for their products.

Indoor, in-person production processes

While the least economic impact was felt by desk jobs that could be done from home behind a phone or computer, conversely, large scale in-person manufacturing and processing operations were hit hard by the risk to human health and the restrictions on travel and gathering. As an example, COVID-19 research under the Ukraine **Economic Resilience Activity (ERA)** found that farmers faced fewer disruptions in productivity than processors did.

Key Finding 3 – Shock Frequency and Concurrence



Half of Activities were affected by shocks other than COVID-19 during the pandemic, including natural disasters, Russia's war in Ukraine, and other health epidemics. Understanding the frequency and concurrence of shocks and stresses that the private sector is exposed to is important when designing strategies to improve firm and market systems level resilience as it can predict their likelihood of adopting "negative" coping behaviors, which can have a ripple effect on the broader market systems.

Half of the Activities in the sample dealt with another shock (or multiple ones) during the COVID-19 pandemic. Twenty percent of Activities faced a natural disaster during the pandemic. For instance, **TMS** endured two other major shocks with hurricanes Eta and Iota; **FTF Inova** dealt with cyclones Idai and Eloise in 2021 during a COVID surge; and in Nepal, the **Feed the Future Knowledge-based Integrated Sustainable Agriculture in Nepal (FTF KISAN II)** area of operation faced a major flood. The second most common other shocks cited by Activities was the effect of Russia's war in Ukraine on businesses at the later stage of the pandemic. Increases in fuel and input prices were felt in the most rural areas, such as South Kivu in the DRC. Some Activities also faced another health epidemic with the Ebola outbreak in DRC (**FTF SVC** and **FTF IAM**). Other reported shocks included a volcanic eruption, locust outbreak, and military coup.

Understanding the concurrence of shocks and stressors is important as it may condition how firms react and the type of behaviors they may adopt. In a 2020 **TMS** Market Systems Diagnostic, the Activity noted that *"the severity of shocks and stressors experienced is the principal determinant of whether enterprises resort*

² | USD = 1,117.58 RWF, per May 5, 2023.

to negative coping behaviors³. To mitigate coping behaviors then requires minimizing exposure to shocks and stressors through prevention and/or transformational strategies.” This indicates considering the frequency and concurrence of other shocks is crucial for designing interventions to improve firm resilience, especially for countries that are prone to multiple market stressors. [Finding 14](#) (p. 35) below provides more details on the type of coping behaviors that the private sector adopted to respond to the COVID-19 pandemic.

LQ #2 – What were the results associated with strengthened firm and market system resilience from the different PSE strategies implemented by USAID during the COVID-19 pandemic?

This section is structured around two key themes: 1) identify what type of PSE strategies USAID used to respond to the COVID-19 pandemic, and 2) understand what the results of those PSE strategies were. It answers six research questions within these two themes, which are:

- 2.1 What types of COVID-19 shocks and/or risks (e.g., supply chain disruption, health of workers, marketing chain) were addressed by USAID's PSE strategies in order to strengthen firm/market resilience?
- 2.2 What are the PSE strategies USAID has implemented to strengthen firm resilience during the COVID-19 crisis? ⁴
- 2.3 How and to what extent were USAID's PSE strategies during COVID-19 designed to go beyond firm-level resilience to strengthen the resilience of the broader market system?
- 2.4 What were the results of USAID PSE strategies implemented during COVID-19 to strengthen firm and market systems resilience (examining nearer to longer⁵-term results)?
- 2.5 What type of changes in firms' behavior have been observed as a result of pandemic-related risks? (e.g., coping strategies, adoption of new technologies, pivoting business model, diversifying markets, etc.)?
- 2.6 In analyzing across Activities, are there groupings that emerge such as differences in findings by market context, sectors, firm type/risk profile, or operational modalities?

³ Negative coping behaviors are coping behaviors that shift the harm of shocks towards individuals and households who are employees, suppliers, or consumers (such as laying off staffs).

⁴ In the implementation plan, Question 2 was segmented into six sub-questions. However, upon analyzing the data, the research team identified that Question 2.2 ("How have USAID's PSE strategies applied during COVID-19 pandemic differed depending on market context, firm size/risk profile and operational modalities?") was similar in scope to Question 2.6 and that a Question specifically addressing the types of PSE strategies used by USAID was missing. Therefore, the research team replaced Question 2.2 with a new question ("What are the PSE strategies USAID has implemented to strengthen firm resilience during the COVID-19 crisis?") that more directly addresses the research objectives. This reflexive process ensured that the qualitative research design was responsive to the data and context and increased the rigor and validity of the findings.

⁵ We define medium to long-term results as results that can be observed two years after pandemic was declared (Jan 2022).

2.1 What types of COVID-19 shocks and/or risks (e.g., supply chain disruption, health of workers, marketing chain) were addressed by USAID's PSE strategies in order to strengthen firm/market resilience?"

Key Finding 4 – Most Common Shocks Targeted by USAID



USAID's PSE strategies targeted seven main shocks and/or risks to strengthen firm/market resilience. Among the most common in the Activity sample were supply chain disruption, change in market demand, liquidity risks for businesses, and food insecurity due to commodity shortages.

USAID PSE strategies were mainly focused on addressing seven challenges and shocks in response to the COVID-19 pandemic:

- Addressing supply chain disruptions (43%);
- Addressing market and demand disruptions by helping businesses pivot their business models or by strengthening the business operations of cooperatives and unions to adapt to the crisis (43%);
- Supporting the liquidity issues of businesses and financial institutions (37%);
- Supporting food security efforts to reduce the impact of commodity shortages and unavailability (20%);
- Employing PSE strategies focused on inclusion to reduce the impact of COVID-19 on marginalized groups (13%);
- Reducing productivity in manufacturing due to the risk to human health (13%); and
- Strengthening alliances and private sector participation to support linkages to MSMEs (7%).

Overall, USAID's PSE strategies were designed to tackle the various challenges and shocks brought on by the COVID-19 pandemic, with a focus on supporting businesses, financial institutions, and marginalized groups, and strengthening linkages within the private sector.

2.2 What are the PSE strategies USAID has implemented to strengthen firm resilience during the COVID-19 crisis?

A range of PSE strategies were used, as illustrated in Exhibit 3, which draws from USAID's definition of PSE type from the PSE Policy⁶. Going a level deeper than the broad categories of PSE identified in the PSE Policy, this research further organized types of PSE by key strategies and presents notable examples of interventions in [Annex 4](#) (p. 63). This was done through a review of the secondary data made available from IPs and analyzed through an Excel-based coding sheet. The table is not exhaustive and is meant to capture the range of PSE strategies used by the sample Activities during the pandemic. Summarized trends, include:

- Many Activities (40%) supported **formal and informal businesses in pivoting their business models to stay in business**, by helping them to upgrade a new function in the market system, access new markets and buyers (mainly domestically), and/or develop new distribution channels for their products.
- One-third of the Activities supported MSMEs in **improving local food production to prevent any food security crisis due to disruption of supply chains and markets**, through the development of challenge funds targeting local MSMEs or helping firms access key inputs that became inaccessible due to supply chain disruption.
- Almost one-third of the Activities focused their PSE on the **provision of health-related information and equipment (goods and services)** to the private sector by leveraging existing partners' distribution channels to distribute key goods and services or partnering with factories to help them pivot and produce critical PPEs or medical suppliers.
- One-fifth of the Activities supported financial institutions (commercial banks, microfinance institutions (MFIs), savings and credit cooperatives (SACCOs), etc.) in lending to MSMEs (and farmers/producers), through grants, blended finance, sub-contracts, and technical assistance.
- Almost one-third of the Activities focused on digitization of the supply chain through the development of e-commerce, e-traceability systems, online platforms for transport services, social media marketing, pre-order systems, and/or agritech solutions.

Nearly half of the Activities developed PSE strategies specifically **targeting marginalized groups, including women and youth**, through technical assistance, training, and coaching, etc. [Finding 18](#) (p. 41) details some on the impact of COVID-19 on women- and youth-led businesses, including examples.

Key Finding 5 – Facilitation Techniques

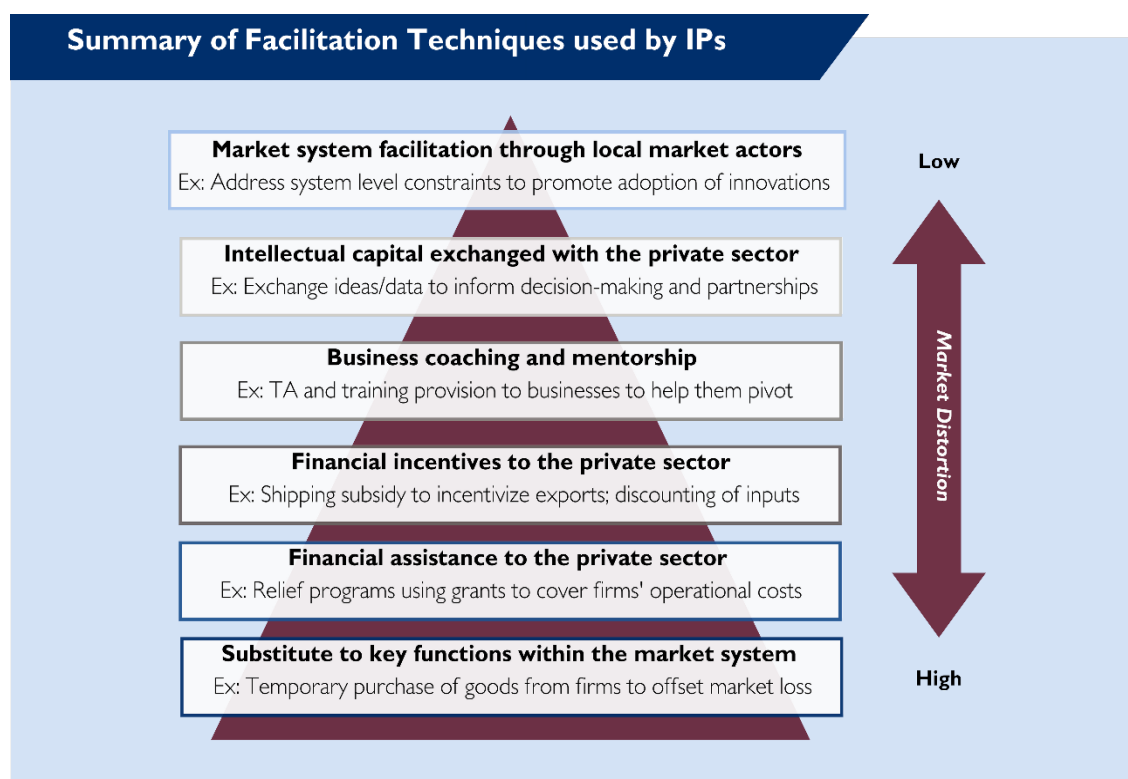
⁶ This analysis is based on the research team's best judgment at the time of the conduct of the landscape assessment, and as such, may contain some expected level of subjectivity. While it does follow USAID's definition of Indicator I "Type of Private Sector Engagement" as defined by the PSE Hub, this analysis relied on desk research and secondary data analysis and did not conduct the necessary due diligence on data that a field MEL Specialist would do to formally report on that indicator to USAID. Considering this, the analysis can be understood and used as an indication of trends in the type of partnerships that occurred during the pandemic.



PSE strategies implemented by IPs drew from a range of facilitation techniques to support the private sector in recovering from the pandemic depending on the market context. Facilitation techniques include playing a temporary and direct role in the market systems, purchasing key commodities to compensate for immediate market loss due to the pandemic, and addressing obstacles to innovation that could benefit the largest number of firms.

Activities used various facilitation techniques to implement their PSE strategies, see below.

Exhibit 4 – Summary of Facilitation Techniques Used by IPs During COVID-19



Source: Adapted by authors from “Youth, Women, and Market Systems Development in Agriculture and Supporting Markets: Landscape Analysis and Case Studies Report,” Exhibit 1, p. 2.

Generally, USAID and its implementers aim to minimize market distortions caused by directly inserting a program into fulfilling a key function in the market. However, in times of crises, sometimes more direct intervention is called for in the immediate response. For example, one Activity acted as a temporary **substitute to a key function within the market systems**. When the pandemic hit, **Feed the Future Rwanda Orora Wihaze (FTF ROW)** averted the collapse of the egg market, which lost access to its export market in Congo due to border closure. **FTF ROW** initially purchased eggs directly from producers in Gakenke district through a purchase order and then distributed them to a new domestic market and a child nutrition program. This relief activity occurred within the first month of the pandemic and quickly evolved into a more sustainable intervention as several private actors were willing to develop the first egg collection center in Gakenke. **FTF ROW** supported that effort to set up the egg collection center, through grant, and provided technical assistance to help it develop its business model

and build new market linkages domestically (e.g., health centers, schools, and bakeries) for the first time since the collapse of the export market in Congo.

Some Activities also provided financial relief to MSMEs to help them stay in business by providing either **financial assistance**, for instance via grants, or through **financial incentives**, via targeted subsidies or price discounting, to help them cover some operational costs. For instance, **AVC** provided 30 percent shipping subsidies to incentivize exports through new routes and transport means and to overcome the increases in shipping costs due to the COVID-19 pandemic. In Ukraine, **ERA** negotiated discounted inputs to beekeepers. Similarly, several market system development (MSD) Activities also brokered partnerships with input agro-dealers/distributors to offer discounted seeds and fertilizers to farmers.

Moving away from financial assistance, some Activities provided **business coaching and mentorship support** to help firms withstand the crisis. For example, in Guatemala, **Creating Economic Opportunities (CEO)** implemented a crisis mitigation program that provided technical assistance to MSMEs in non-agricultural sectors on financial and commercial topics, which helped reduce the adverse impact of the pandemic on company operations (e.g., sales recovery, reduced lay-off and job recovery)⁷.

A lighter facilitation technique involves providing information to businesses to help them make strategic decisions. For Activities operating in thin markets, where there are fewer potential partners and that are often crowded out by “free” donor money, sharing ideas can go a long way. **FTF Inova** has noted that “**intellectual capital** can be as important as financial capital.”⁸ This Activity has drawn from [Deal Notes](#) (which is a simple template that helps to explain the logic behind making an investment with a private company to advance the overall learning and transformation of a market system⁹) and memorandums of understanding to provide the technical space necessary for the private sector to engage with the Activity team on business strategy to identify opportunities for win-win partnerships.

Some Activities also implemented activities that targeted key constraints at the market systems level. For example, in **Honduras**, **TMS** engaged in **market systems facilitation** through local actors to improve the innovation environment so that many SMEs could benefit from key innovations. To support Honduran e-commerce, providers developed new direct food delivery options to households, **TMS** worked with relevant government of Honduras agencies and chambers to develop biosecurity protocols needed by the industry to enable food delivery and disseminated training to thousands of workers in the food services sector.

⁷ Most firm-level technical assistance is not considered strictly PSE; yet, technical may be leveraged to incentivize companies to buy in and provide their own resources. There may be some overlap with PSD in the examples. See methodology section for more details on that.

⁸ For more information, please refer to "Partnering with the Private Sector to Solve Complex Problems: Some Observations about PSE in Thin Markets" at <https://www.marketlinks.org/blogs/partnering-private-sector-solve-complex-problems-some-observations-about-pse-thin-markets>.

⁹ For more information, please refer to the definition of Deal Notes from the MSP Tools Library published on BEAM Exchange at <https://beamexchange.org/resources/1617/>.

Key Finding 6 – Firm Size/Risk Profile



Through their PSE strategies, Activities engaged with a range of private sector actors, including MSMEs (formal and informal), lead/anchor firms, financial institutions, investors, business associations, cooperatives, MNCs, tech start-ups, and smallholder farmers. Activities targeted firms with different risk profiles, depending on their PSE strategies in response to COVID-19.

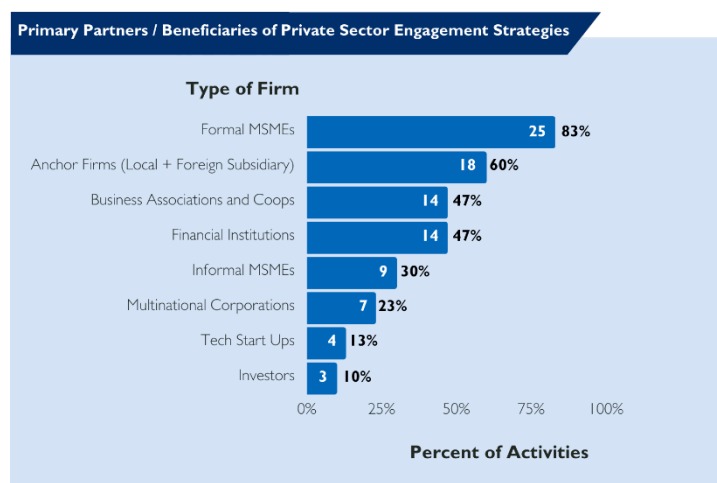
Activities engaged with a wide range of private sector actors through their PSE strategies during the COVID-19 pandemic, as depicted in Exhibit 5. Most Activities engaged primarily with formal MSMEs and lead/anchor firms. About half of the Activities engaged with business associations and/or cooperatives, and another half partnered with financial institutions. About one-third of the Activities in the sample worked with MSMEs in the informal sector. Seven activities leveraged MNCs as part of their PSE strategies. Three Activities engaged with investors, such as fund managers, venture capital companies, and stock market brokerage firms.

The objective of PSE strategies varied greatly among Activities. Some relief programs focused on reaching many MSMEs that would have otherwise collapsed without assistance and had further knock-on effects as well. **FTF ROW's** relief intervention to save the egg market in Rwanda falls into that category, as discussed on page 19 above. Other Activities preferred to focus on SMEs with lower risk profiles. For example, **CEO** in Guatemala assessed MSMEs according to their risk profiles and categorized them in three brackets: low-, middle-, and high-risk SMEs. **CEO** would only target SMEs with low- and middle- risk profiles and did not support the high-risk SMEs. Other Activities that took an MSD approach, such as **FTF Inova**, targeted “innovative SMEs” as recipients of its challenge fund — businesses that had the capacity to scale up innovation. According to an interview with the former chief of party, more than the ability to fulfill a cost-share requirement, the important factor in selecting firms during the pandemic was the commitment of the company and to what extent once the program has ended, the company would continue to invest.

Some Activities supported large partners or lead firms that could play a strategic role in supplying essential goods and services most needed during the pandemic. For instance, in Tunisia, **Opportunities, and Business Success (JOBS)** supported through grants, existing client firms and new leads that produce medical suppliers for Tunisian healthcare workers and waste management companies to help meet the increased demand for medical waste treatment services to combat the pandemic.

Other Activities targeted lead/anchor firms because they could solve market system constraints.

Exhibit 5 – Primary Partners/Beneficiaries of Private Sector Engagement Strategies



Honduras TMS partnered with “disruptive”¹⁰ private sector partners to scale broader systems changes that occurred because of the pandemic and those that build long-term resilience capacities in the Honduran economy and reduce the drivers of outmigration. These changes include “direct-to-consumer distribution channels through e-commerce,” “decentralization of agroindustry operations and supply chains,” “diversification of product and market mix of agroindustry,” and “investment in risk-mitigating technologies and infrastructure.”¹¹ [Finding 15](#) (p. 36) provides more details on some of these trends.

A few Activities sought partnerships with more innovative non-traditional service providers in the agriculture sector to address market systems constraints, such as transport challenges when the government restricted the movement of goods. For example, **FTF IAM** partnered with an agritech startup to scale up a mobile and unstructured supplementary service data (USSD) platform that allowed farmers and traders to search for available means of transport for their agro-inputs and produce at the outbreak of COVID-19, when the government of Uganda’s restrictions on movement meant that farmers were not allowed to move with their produce and were expected to transport their produce on trucks or motorbikes to marketplaces.

These findings invite reflection on the importance of understanding the broader context to target the “right” firms during a crisis to achieve desired outcomes. Considering the overall health of the sector, as did the egg market intervention in Rwanda, was critical in having the Activity layer in humanitarian relief elements in its broader market development approach and avoid the overall collapse of the market (see [Finding 7](#) below). In market systems resilience, the goal is not to save all firms but to ensure that the functions that are in place in the market systems allow firms to withstand shocks and stressors in the long run, which may mean letting high risk firms disappear and invest in those that would have the capacity to innovate and scale up innovation with a little support. **TMS** has reflected on these questions in a [webinar](#) on market systems resilience.

Key Finding 7 – PSE Modalities



Activities used a range of PSE modalities to implement their PSE strategies to respond to the COVID-19 pandemic, including grant (with traditional cost-share), private sector leverage, technical assistance, procurement, sub-contract, and blended finance. Only a few had no grant funding to rely on.

Activities used a range of PSE modalities to implement their PSE strategies to respond to the COVID-19 pandemic, including grants (with traditional cost-share), co-investment (private sector leverage), technical assistance, procurement, sub-contract, and blended finance. Most of the Activities used a mix of PSE modalities to deliver results and relied on technical assistance. Over half of the Activities used traditional grants and a bit less than half of the Activities co-invested with the private sector (including through pay-for-performance grants with private sector leverage). Almost half of the Activities that implemented grant programs focused on building long-term resilience capacities of businesses (e.g., new

¹⁰ For more information on this topic, see "Harnessing Disruptions to Advance Transformational Change in Honduran Food and Agricultural Systems" at <https://agrilinks.org/post/harnessing-disruptions-advance-transformational-change-honduran-food-and-agricultural-systems>.

¹¹ Ibid.

business model, diversification of markets, etc.).

Four Activities had no grants available and relied either exclusively on technical assistance or a mix of technical assistance and sub-contracts and/or procurement to implement their PSE strategies. This lack of grant funding led to innovative ways to engage with the private sector through strategic use of sub-contracts or purchase orders. For example, **INVEST** brought down risk to financial institutions lending to SMEs through developing new instruments like first loss guarantees (Tunisia), and also carried out pay-for-results with transaction advisors (Moldova and Italy).

A few Activities also used blended finance to engage with the private sector. For instance, as part of its COVID-19 Grand Fund, **JOBS** issued grants to MFIs to provide new lending products combining grant funding with commercial lending to thousands of vulnerable MSMEs impacted by COVID-19, with an emphasis on those owned by women and/or youth and in underserved interior regions. In Uganda, **FTF IAM** partnered with an investment advisory transaction firm to set up a revolving seed capital fund to act as a source of working capital – bridge – finance for the agribusinesses that were investment-ready but unable to raise short-term financing before the pandemic.

Some Activities also used grants to incentivize investors to come into markets that would have otherwise been too risky. The **Feed the Future West Africa Trade and Investment Hub (FTF WATIH)** awarded to an investor a \$2 million investable first loss grant in early 2021, under its COVID-19 rapid response program, in partnership with U.S. International Development Finance Corporation (DFC), which provided a 50 percent second-loss guarantee. These instruments allowed the investor to launch its first fund in Africa and expand access to finance to SMEs and MFIs in four fragile markets — Burkina Faso, Guinea, Mali, and Sierra Leone — that are too high risk for fund investors. By the end of FY2021, the investor raised \$20.6 million and fully utilized the grant by capitalizing two SMEs in Mali, two SMEs in Sierra Leone, and one MFI in Sierra Leone (no loss has been incurred against the First Loss).

Lastly, several activities, including some that took a market systems development approach, layered relief-type interventions into their development approaches when the COVID-19 pandemic hit. Based on the review of IPs' documentations and initial interviews with IPs, flexibility was important in terms of the selection of target firms, the degree of facilitation the Activity could realistically undertake with partners, and the core focus of the assistance. For instance, **JOBS** in Tunisia worked with MSMEs that had operational difficulties and that, according to an interview with the IP, the Activity would have not targeted otherwise in their mainstream activities. At the request of USAID, **TMS** in Honduras implemented a relief grant program to inject \$1 million into 5,000 MSMEs in 90 days to rescue them from the pandemic.

A similar trend can be found for Activities that did not have any grant fund available and did not receive any COVID-19 add on. For example, in DRC, **Feed the Future Strengthening Value Chains (FTF SVC)** noted through an interview that the Activity had to “shift its PSE practice from larger facilitation to coaching and mentoring of informal and formal businesses when the pandemic hit” to respond to private sector needs.

Some Activities operating in thin markets, such as **FTF Inova** in Mozambique, found themselves covering more costs than they would have under their market systems development approach. Some “hand

holding” was needed even with innovative SMEs to ensure they could continue operating. According to an interview with former **FTF Inova** chief of party, while “giving money” on long-term Activities can distort markets, it is important to be flexible when implementing during a crisis when the window of action is limited, as providing the right support at the right time, even if heavier handed, may help a company with the capacity to adopt an innovation and scale it up to survive, which in turn can strengthen overall market systems by providing services that can help many more firms.

Lastly, 40 percent of IPs have innovated in terms of their operations (e.g., remote technical assistance, grant making and MEL process) to continue to deliver results on their PSE strategies during COVID-19 as presented in Box 4 below. Some Activities consider incorporating these innovations into their operational models post pandemic.

Box 4 – IPs Innovate Operationally to Optimize PSE During the COVID-19 Pandemic



IPs Innovate Operationally to Optimize PSE During the COVID-19 Pandemic

The review identified instances of IPs investing in adapting their operations to the pandemic to continue implementation of PSE activities, including:

- Use of digital tools to communicate remotely with partners. **Feed the Future Egypt Rural Agribusiness Strengthening (FTF ERAS)** developed a **Remote Technical Assistance model** that consists of drawing from a variety of digital tools, including phone calls, virtual meetings, and using SMS and WhatsApp to send text and voice messages, photos, videos, and on-demand question-and-answer support to private partners and farmers.
- Adjust Grant Under Contract programs to ease cash flow pressure on grantees without adding new funds to the grant agreement. **Feed the Future Partnering for Innovation (FTF P4I)**, which used a fixed-amount-award to engage with private sector on a milestone basis, split targets for milestone-based grants to smooth grantee’s cash flow. Other Activities, such as **Georgia Economic Security Program (ESP)**, reduced the cost share requirement to ensure that grantees could meet the requirement.
- Hire local enumerators to continue **MEL reporting** to overcome restriction on movement of people within the country.

Source: KIs with IPs, review of Activities’ reports.

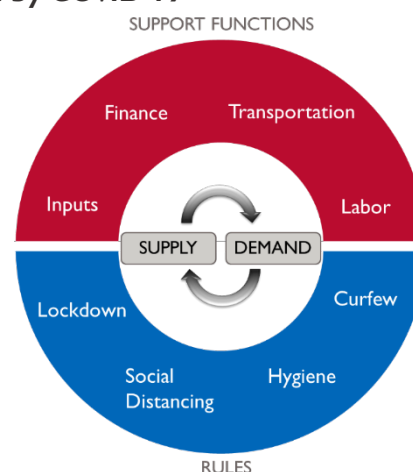
2.3 How and to what extent were USAID’s PSE strategies during COVID-19 pandemic designed to go beyond firm-level resilience, to strengthen the resilience of the broader market system?

This section explores how USAID’s PSE strategies sought to strengthen the resilience of the broader market system. **FTF IAM** offers a Covid Market Systems Framework¹² that can help to frame learning of how projects moved beyond firm-level support. One-third of Activities identified as ‘building short-term resilience,’ while over half of them identified as ‘building long-term resilience.’”

¹² NAAC MSD Final Report, IAM.

The COVID-19 market system is depicted by the donut displayed in Figure 1. The core market consists of producers/suppliers of various agricultural commodities (depicted by the “Supply” box) and the buyers of agricultural commodities such as traders and processors (depicted by the “Demand” box). Four key support functions were found to have been significantly affected by COVID-19 and had major effects on core market dynamics. These markets were the inputs, finance, transport, and labor markets, depicted in the top red portion of the donut. The most impactful regulations include lockdown (which restricted the movement of people, goods, and services), social distancing (which affected both physical interactions and number of people in a given space), hygiene, and curfew (which restricted movement of people).

Figure 1 – Market System Functions and Rules Affected by COVID-19



Key Finding 8 – Market Systems Principles



Even during the start of the pandemic and as it progressed, it was still possible for Activities to be guided by market systems principles and invest resources strategically to strengthen the broader market system, beyond firm-level resilience.

In Uganda, **FTF IAM**, launched a COVID-19 expression of interest (EOI) in 2020 and then a Market Resilience Facility in 2021 to support the local private sector. The EOI garnered 100 responses, most were firm-level requests to purchase trucks to move food and other ‘traditional business grants’ requests. Five partners were selected to collaborate with across access to finance, transportation, private extension support, business planning, and market research. The five partners that were selected **focused on solutions that were addressing systemic constraints whose ‘COVID-19 innovations’ could hopefully unlock bottlenecks for many other businesses facing similar pain points**. For example, the Activity invested in an investment transaction advisory firm that rapidly developed and launched a scenario planning tool for Ugandan SMEs to forecast supply and demand, manage their supply chains effectively, and understand the cash flow implications of various COVID-19 scenarios.

As a result of COVID-19, a major systemic shift across the world was more direct-to-consumer distribution channels through e-commerce. Many USAID Activities offered support to immediately support this drastic disruption. **TMS** in Honduras, for example, engaged several private sector food distributors to establish direct-to-consumer distribution channels, through co-funding, to help open new collection and dispatch centers in expanded geographic areas and diversify the number of growers and other local businesses, such as bakeries, which sold through these platforms. More details on how **TMS** supported e-commerce adoption by MSMEs is available in [Finding 10](#) (p. 26)

In DRC, **FTF SVC** supported key shifts of market actors’ behavior that had a transformational impact on market systems resilience in soybean and coffee value chains. For example, women’s bean and soybean

market associations took the initiative to connect with one another and to implement group purchasing and sales demonstrating their shock absorption capacities. These associations demonstrated further resilience through structural adaptations, evolving from small, informal groups and progressed to that of formal associations with legal recognition and documents; setting up more effective formal committees to make decisions for the association; engaging in dialogue with local authorities to influence decisions on market improvement; reducing bribery and extortions; and providing services to their members, particularly granting credit through mutual aid and savings groups. Furthermore, as a result of support from the Activity, these associations took steps to establish agreements with producers to make improved seeds available to increase bean and soybean productivity, indicating a broader level of market resilience.

Key Finding 9 – Restructured Value Chains Governance



The disruption of regional and global supply chains led to more localization and restructured value chain governance, which MSD-oriented Activities could strategically invest in.

The decentralization of agricultural market systems in beneficiary countries, including Uganda, has pushed processing operations and product sourcing to be more resilient¹³. Government imposed restrictions on transporting goods by land, water, and air during COVID-19, accelerated investments by lead firms to localize supply chains to mitigate the impacts of future shocks.

An example of USAID's PSE strategies to support lead firms to localize supply chains was in Honduras, where one of the largest potato chip agro-processors that imported potatoes from South America and Europe experienced major supply disruptions. To harness this disruption, TMS supported a pilot with local growers to test new varieties, invest in certified inputs, and upgrade product quality to be able to enter these new local higher value market channels. The initial pilot generated a proof of concept, and the mechanism is now scaling to include other smallholder growers in this supply chain. The rapid demand by local smallholders entering new contract grower models saw the entrance of commercial banks offering new agri-financing in a sector where local growers had not been able to compete with imports.

Another example of USAID's PSE strategies to support lead firms to localize supply chains was in Bangladesh, where consumers' fears of local outdoor wet markets resulted in skyrocketing demand for supermarkets that needed to expand local sourcing. As a result, supermarkets, which had already begun to promote higher food safety standards, needed to rapidly increase their links to local smallholders farmers, many of which had only been selling to the traditional (now less popular/less hygienic) local wet markets. The **Feed the Future Bangladesh Horticulture, Fruits, and Non-Food Crops Activity (FTF BHF)** harnessed this disruption by linking supermarkets to farmer groups and to regional GLOBAL G.A.P. certifying bodies (based in India). The agriculture inspection service providers first conducted a 5-day 'virtual audit' (first of its kind), and then flew to Bangladesh as soon as air travel could begin. The pilot resulted in GLOBALG.A.P. certification for farmers for seven crops, linked to 20 retail outlets of a

¹³ "COVID-19 Impact On Agricultural Market Systems In Uganda And Coping Mechanisms For Resilience" USAID Feed The Future Inclusive Agricultural Markets Activity Report By The National Alliance Of Agricultural Co-Operatives In Uganda (NAAC). February 2022.

leading supermarket, and offered proof of concept for expansion of such a model. The Activity facilitating a virtual audit during the pandemic was a key aspect to address systemic constraints for farmers to enter into these new higher value market channels.

Key Finding 10 – Leveraging Digitalization for Resilience



USAID investment in tech innovators piloting agritech, fintech, and digital marketing solutions that were addressing systemic constraints (disease and pest management, finance, transport, and marketing) helped to increase the uptake of ICT solutions by farmers and MSMEs seeking.

The pandemic offered a unique opportunity for tech innovators piloting agritech, fintech, and digital marketing solutions to scale their products and services. Many countries saw an increased willingness on the part of farmers and agribusinesses to invest in new online and app-based risk-mitigation technologies and services related to disease and pest management, access to finance, transport, and marketing. Tech innovators sought to leverage new technologies to help value chain actors address key shocks and stresses posed by the pandemic, thereby supporting overall market resilience. While some of these solutions had already been in the market, they had not been as widely adopted until the pandemic's urgency pushed farmers and agribusinesses to test new ways of accessing extension services, conducting market research, using e-payments, and connecting with buyers online.

FTF BHF, in partnership with USAID Bangladesh Digital Agriculture Activity, promoted innovative digital solutions to improve farmer services that enhance the quality of products to meet market standards, reduce transaction costs and improve the efficiencies along the supply chains in the market systems. One pilot, for example, trained farmers on an agritech app which offers diagnosis and technical assistance from extension workers by uploading images of their problems to the app. It has cut down on travel time, maintained COVID-19 safety measures, improved productivity in the field, and reduced food waste losses while providing weather information, allowing farmers to be informed to mitigate the impact of climate change. The inability of extension workers to travel during the pandemic was the impetus to test this innovation, which is now beginning to scale in regions of Bangladesh.

FTF IAM invested in a mobile- and USSD-enabled platform that allows farmers and traders to search for available means of transport for their agro-inputs and produce in a way that makes them gain higher income. **FTF IAM** invested in helping a local fintech provider develop a digital trading platform and mobile application that brings together agro-inputs providers, mechanization service providers, finance and insurance services providers, and commodity buyers to transact with one another.

FTF ROW facilitated the increased utilization of digital platforms for payments and information sharing. According to the Activity's Midline Evaluation Assessment, the adoption of Mobile Money Rwanda ('Momo pay'), a digital payment platform launched in September 2021, has been a major driver of innovation in payments, as nearly three-quarters of respondents who reported payment innovations specifically mentioned Momo pay. Respondents cited COVID-19 and the need to avoid close human contact as a key reason for the transition to digital payments. This highlighted the importance of innovations on digitalization for resilience, as it enables businesses to continue operating during crises.

TMS partnered with a financial technology start-up in Honduras, Sube Latinoamérica (Sube), to develop

a scalable, revenue-based subscription business model to support e-commerce adoption by MSMEs. TMS and Sube co-created the Sube Journey to take entrepreneurs on an interactive path to identify how they can change business models to create an online sales funnel and guide them through their first online sales through the educational content platform (called Sube Academy). To address the need for more tailored support to MSMEs, TMS and Sube created a secondary network of 110 ICT advisors to the platform to consult with MSMEs on website development, social media marketing, and related services. The Sube platform has grown to incorporate new payment options and opened its e-commerce platform with third-party digital payment companies, including PayPal, Clinpays (Atlantida), Todo Pago, and Tengo. As of 2022, 3,807 Honduran enterprises developed websites and started the e-commerce journey, registering more than \$7 million in e-commerce sales by Honduran MSMEs in 2021 and 2022¹⁴.

2.4 What were the results of USAID PSE strategies implemented during COVID-19 pandemic to strengthen firm and market systems resilience (examining nearer to longer-term results)?

To answer this sub-research question, an analysis was conducted on how Activities performed across a set of outcomes/indicators and how Activities reported on their COVID-19 PSE strategies and whether any adaptation and/or innovation took place in terms of MEL processes to respond to the pandemic. Key trends in findings of USAID PSE strategies implemented during COVID-19 pandemic to strengthen firm and market systems resilience were noted.

Key Finding 11 – Successful Results from USAID PSE Strategies



USAID has been successful in supporting companies to enhance their sales, jobs, and business performance during the COVID-19 pandemic. Most Activities that reported on sales, new jobs created/sustained, and/or business performance improved, met their indicator targets during the pandemic. Many Activities also facilitated PSE at the industry/market system level to support industries to weather the shock. (e.g., supporting collection of evidence that were used to inform policy responses, convening of industry groups to align on joint response to the pandemic and key trade policies, or building the capacity of the private sector to shift key market actors' behaviors leading to transformational impact on market systems resilience).

To perform the data crossing and grouping of activities, the analysis focused on three outcomes/indicators: sales increased (for example, EG.5-15 Percentage change in sales of firms receiving USG-funded assistance), new jobs created or sustained (for example, (Custom) Number of full-time equivalent (FTE) jobs created with USG assistance), and business performance improved (for example, EG.5.2-1 Number of firms receiving USG-funded technical assistance for improving business performance).¹⁵ The rationale to select these metrics was based on three main points: (1) indicators that demonstrated improvement at the company level, (2) indicators that seem to best capture the nature of

¹⁴ Honduras TMS, Final Report, Task Order NO. 1, February 2023.

¹⁵ Seventy-five percent of the Activities that make up the sample (n=22) reported at least on one of the three outcomes selected by the team as the most prevalent across activities (sales increased, new job created/job sustained and business performance improved). Data collection as well as the cross-analysis process considered the official documents shared by the points of contact for each Activity. In this case, when identifying the adoption of indicators and the values achieved based on the targets, in order to maintain a coherent analysis pattern, only Annual Reports for the years 2020 and 2021 were analyzed, when available.

the PSE that occurred during COVID-19, and (3) the most commonly cited indicators and metrics used by Activities during the review. Beyond a few exceptions, indicators were not specific to the COVID-19 pandemic, (see [Finding 12](#), p. 29) but focused on overall Activities and outcomes. However, it should be noted that some Activities had to revise their targets for different indicators due to COVID-19.

The cross-analysis indicated that Activities were still capable of operating and delivering high-quality results. Moreover, companies were still able to increase sales values, hire more employees, retain jobs, and improve business performance. For example, 94 percent (16) of the Activities that reported on sales met their indicator targets. Similarly, of the 18 Activities that measure improved business performance, 7 percent met their indicator targets. Lastly, of the 12 Activities that reported on new jobs created/sustained, 70 percent met their indicator targets.

These findings suggest that USAID has been successful in supporting companies to enhance their sales, jobs, and business performance during the COVID-19 pandemic. Nevertheless, there is no counterfactual or control group that shows how the outcomes would have differed if the implementation had taken a different approach, which is a limitation for this study.

Some COVID-19 related PSE strategies reached significant scale. For example, USAID awarded \$10 million in incremental funding to **JOBS** (in August 2020) to implement a rapid recovery grants program (direct funding). Through its \$8.7 million awarded, **JOBS** leveraged \$43 million from partner contributions and provided relief to 21,306 MSMEs, sustaining 43,607 and creating 4,722 jobs. The fund's objectives were to support enterprises impacted by COVID-19 to recover and re-hire, sustain, or add employees and help them deliver essential goods and services to combat the pandemic. **JOBS** achieved this through the following: 1) MFI grants to provide new lending products combining grant funding with commercial lending to thousands of vulnerable MSMEs impacted by COVID-19 (with emphasis on those owned by women and/or youth and in underserved interior regions); 2) Small business grants, ranging from \$5,000-\$7,000, and targeting businesses with less than 20 employees, especially women-owned and in underserved regions; and 3) Partner grants to **JOBS** existing client firms and new leads in vital economic sectors and producing essential goods and services to combat the pandemic.

Many Activities also implemented PSE strategies at the industry and market system level to support industries to weather the shock by supporting collection of evidence that was used to inform policy responses, convening of industry groups to align on joint response to the pandemic and key trade policies, or building the capacity of private sector to shift key market actors' behaviors leading to transformational impact on market systems resilience. The tourism industry in Honduras (**TMS**) and the export-led value chains in Afghanistan (**AVC**) are two notable examples of this. More details on how **FTF SVC** worked with cooperatives to shift their behaviors and transform market systems are available in [Finding 8](#) (p. 24).

TMS supported the government of Honduras and organizations in developing a crisis management framework for the tourism sector — initially in reaction to a political crisis in 2019 that disrupted the tourism sector and then to respond to the COVID-19 pandemic. The tourism sector formed the Tourism Emergency Table, the first national public-private dialogue (PPD), responding to the critical need for government support for recovery. As no data was available on the impact of COVID-19 on the tourism sector, the Activity redeployed a national enterprise survey effort to directly measure the

disproportionate effects of COVID-19 on the sector. As documented in a [Marketlinks Blog](#), “*within 30 days, the Tourism Emergency Table then presented to the President of Honduras and his economic cabinet the results of this survey, which led to an amendment to the relief package with special provisions for tourism. This initiative has since consolidated into a more permanent MSME observatory function to monitor the Honduran economy, including the tourism sector.*”

On April 10, 2020, Pakistan decided to close all border crossing points with Afghanistan, which prevented Afghanistan from importing food products and medical supplies and from exporting all types of goods—bringing export-led agriculture to its knees. Considering the vital importance of re-opening the borders between Afghanistan and Pakistan, **AVC**, in collaboration with Harakat Afghanistan Investment Climate Facility Organization, supported the government to comply with biosecurity protocols at two border crossings (Spin Boldak and Torkham borders) by recruiting, training, and deploying over 40 operators, which led Pakistan to re-open both border crossing points on June 22, 2020. Building on this success, the Activity continued working closely with the Afghanistan Chamber of Commerce and Industries, the Ministry of Industries and Commerce, and the Office of the Presidential Envoy for Pakistan Affairs to address trade issues affecting trade prospects and competitiveness of Afghanistan’s export products. In collaboration with the USAID Pakistan Regional Economic Integration Activity, **AVC** facilitated the participation of representatives of Afghanistan’s private and public sector in the first virtual PPD held in July 2020.

Key Finding 12 – Tracking COVID-19 Results



There has been a low level of investment into setting up specific COVID-19 reporting mechanisms to capture results of COVID-19 related PSE strategies implemented during the pandemic. Activities documented their interventions and results mainly through existing means, through quarterly/annual reporting, or drawing from existing indicators. Except for a few cases, most Activities did not add any specific COVID-19 indicators or adapted their MEL plan to report on the results of their COVID-19 responses. Some Activities, however, did invest some effort in tracking key results, and a few innovations have occurred to enable Activities to continue their MEL activities during the pandemic, which USAID can build on for future effort.

While most Activities have implemented either a new set of COVID-19 interventions or made technical adaptations from their mainstream activities (or had done a mix of both), only one-fifth of Activities added new COVID-19 related indicators (or disaggregation of existing indicators) to capture the results of their PSE programming in response to COVID-19 (see [Annex 5](#), p. 72). All these Activities received additional budget from USAID through COVID-19 Add-Ons, except one. More than half of Activities used existing indicators as part of their MEL plan for mainstream activities, and several of them adjusted their initial indicator targets to reflect new challenges that partners were dealing with due to the pandemic.

[Annex 5](#) (pg. 72) tracks formal indicators (with a PIRS); however, many programs did track and report on specific metrics that just weren’t made formal indicators. Seventy percent of Activities also documented COVID-19 related results as part of their quarterly and annual reporting, and one-third as part of technical reports. The metrics that were mainly used by IPs to discuss the results of their PSE interventions to respond to COVID-19 included:

- Sales increased

- Number of new jobs created (or sustained/maintained)
- Production increased
- New distribution channels developed
- New technology adopted
- New market reached

One Activity, which did not receive any additional funds for COVID-19, also invested in setting up its own MEL system to track the results of its COVID-19 PSE response. In response to the economic emergency resulting from COVID-19, CEO in Guatemala designed and implemented a crisis mitigation strategy between April 2020 and January 2021 to help MSMEs reduce the adverse impact of the pandemic on company operations. Implemented regionally through the Activity's three Regional Crisis Mitigation Teams (located in Quetzaltenango, Huehuetenango, and Guatemala), CEO's crisis mitigation program consisted of the provision of technical assistance to SMEs in financial and commercial topics which helped companies' sales begin to recover, and then grow again, and helped reduce the risk of laying off staff, and then gradually re-instating staff suspended or laid off.

CEO set up a monitoring system to capture jobs which were maintained or recovered by allied companies as a result of support during the pandemic. As depicted in Figure 2 below, CEO generated a baseline that allows for comparative information and quantification of the effects of the pandemic and the results of CEO assistance. CEO's emergency support program helped companies maintain 74 percent of their workforce (nearly 1,000 jobs which were suspended in 2020 were recovered). Fifty-two new jobs were created, mostly in accounting and online sales. Companies did better in sales, not only recovering their pre-COVID sales figures but on average, achieving 4 percent growth.¹⁶

Figure 2 – CEO's Reporting Process on Its Crisis Mitigation Program



Source: "Employment Generation During the COVID-19 Pandemic," Brief, CEO.

It is also worth noting that half of the Activities in the sample faced additional shocks during the pandemic, as explained in [Finding 3](#) (p. 16), which may have made it even more difficult to isolate the results of specific COVID-19 related PSE strategies.

During the research team's initial discussion with IPs, some IPs mentioned that there were no specific guidelines provided by USAID on how to adjust MEL reporting during the COVID-19 pandemic and that they were not prepared to monitor their relief activities. The lack of USAID-specific MEL guidance may

¹⁶ Success Story: "USAID helps business survive and thrive during the global pandemic," CEO.

explain the low level of investment in MEL reporting during the pandemic and the lack of comparability of data across interventions. However, **CEO** shows that developing a targeted MEL system during a global crisis is possible. Several IPs also innovated their MEL processes, which can inform USAID's future guidance to IPs on how to adapt MEL systems during a crisis. For example, **FTF ROW** hired local enumerators to ensure continuity in MEL reporting despite travel disruptions within the country).

While few Activities invested into adapting their MEL system, many developed rich learning products during the pandemic to share lessons learned and practical examples of adaptation across different sectors with other IPs. Seventy percent of Activities developed at least one learning product, and 40 percent developed multiple learning products. Some of these lessons learned are analyzed under LQ#3.

While it was not possible to contrast near-term to longer-term results across Activities due to the lack of standardized indicators and documented evidence, many Activities have found that some short-term adaptations to COVID-19 have led to unexpected long-term benefits for SMEs. These include:

- In its annual report, **FTF KISAN II** notes that *“disrupted markets and services provide opportunities to strengthen linkages and expand services that benefit firms and customers.”* As part of its COVID-19 response, **FTF KISAN II** supported the development of branchless banking through local agrovets and retail outlets, digital banking, micro-insurance through local cooperatives, and home delivery services by agrovets.
- Many Activities supported MSMEs in adopting measures to ensure safety, health, and hygiene in their day-to-day operations. Some Activities reported that these interventions not only helped ensure workers and customers' safety but further improved social capital between businesses and their customers. For example, **FTF Inova** embedded health support services into its engagement with the private sector, such as providing information on COVID-19, best practices to prevent infection, and providing access to remote medical consultations.
- Many Activities used digital tools to maintain communication with partners and provide them with remote technical assistance and extension services. These digital tools were also used to communicate with smallholder farmers. **FTF KISAN II** noted in an annual report, *“video-based extension services pushed through mobile devices and shared, extend reach and promote uptake of new technologies and practices.”* Some Activities have found that using video-based communication material was well suited to reach marginalized populations that often have low literacy levels. Many Activities have invested in digital upgrades to ensure communication among staff working remotely. Some Activities, like **ERA** noted that these new tools have not only improved the digital skills of staff but also strengthened participation in learning across Activity teams.

Key Finding 13 – Market Systems Resilience Indicators and Metrics



Some Activities attempted to quantify changes using certain indicators and metrics of market system resilience, which were evaluated within the framework of the MSD approach. Although this approach considers changes at the actor level in its analysis, its primary focus is on changes that occur at scale and impact the overall performance of the market system.

Approximately one-third of Activities employed the MSD approach, incorporating market systems resilience indicators or internal metrics prior to the outbreak of the COVID-19 pandemic in early 2020. Following the pandemic's onset, a number of these Activities integrated the COVID-19 case into their pre-existing indicators/metrics for market system resilience.

Aspects concerning *connectivity and network, innovation, cooperation (or trust and cooperation), diversity, and behavior change* were included as indicators and/or metrics. These indicators relied primarily on qualitative data, which was analyzed thoroughly and subsequently quantitatively fed into indices and indicators.

A **TMS** study published in April 2021 provides an example of how to adopt market systems resilience indicators and metrics. Through the Market System Diagnostic, **TMS** analyzed 43 variables and highlighted several key *business resilience capacities*, including diversity, connectivity, rule of law, power dynamics, safety nets, and innovation.

As an illustration, the Market System Diagnostic report highlights the importance of innovation as a business resilience capacity, stating that "*innovation, adaptation, and the pivot are the main mechanisms used by the private sector to mitigate risks, solve problems, and facilitate recovery in the face of shocks and stressors*" (p. 47). In conducting their diagnostic, **TMS** identified several factors predictive of the degree of innovation achieved in the past year, with an emphasis on having a qualified workforce and access to quality support services. Consistent with the MSD approach, the report also notes that, in analyzing market systems resilience, researchers focus not on individual instances of innovation, but rather on innovation at scale that impacts the overall performance of the market system.

Innovation was also something that **FTF Inova** focused on, applying the Business Innovation Index (BII) and contextualized the COVID-19 pandemic in the qualitative analysis before quantifying the findings and generating the Average Business Innovation Index. This index was employed as a system change measurement tool (a type of metric) linked to Activity 2, referring to support systemic change evaluation, learning, and sharing. Its primary objective was to encourage contemplation on business innovation promotion and to endeavor to gauge changes within the system in this regard.

FTF Inova played a significant role in fostering intentional business innovation and investment in Mozambique's agriculture sector through its "Future Food — First Mozambique Supply Chain Innovation Challenge," or Challenge Fund Initiative. Thus, despite the effects of the COVID-19 pandemic that had hit Mozambique's agricultural market system, the actors in the Activity's zone of influence continued to invest in innovations and adaptations in their businesses so that there was no decrease in the BII — on the contrary, there was a slight increase in the average index.

FTF ROW also utilizes the BII and leverages it as an indicator of activity, specifically the "Average Business Model Innovation Score". In the Midline Assessment, carried out in 2022, qualitative data was collected to gauge the BII, accounting for the pandemic context and assessing the impacts of the shock on various market actors. This analysis considered the BII score to measure changes in the system and to identify areas of improvement and possible interventions. Based on **FTF ROW's** Midline Assessment Report, even in the face of the COVID-19, innovation across the market system, among different market actors, and within different categories saw broad increases from baseline to midline. **FTF ROW's**

partners scored a higher-than-average BII as was expected since the Activity is working with these partners primarily to spur market innovations.

FTF ROW also adopts another market systems resilience indicator, specifically "*Observed shifts in trust and cooperation between smallholder producers and other market actors*". The Midline Assessment conducted in 2022 collected data and analyzed the impacts of the COVID-19 pandemic on trust and cooperation relationships, considering formal and informal rules and expectations affecting information flow, financing, and commercial exchange of goods and services between animal-source foods (ASF) producers and other market actors. The main findings showed that compared to the Baseline in 2020, trust index scores increased, while cooperation index scores decreased slightly in the Midline in 2022. However, these index changes did not represent a significant shift in the market system dynamics. Despite the challenges posed by COVID-19 restrictions on movement and price shocks related to the Russian-Ukraine conflict, market actors were able to find ways to continue making commercial transactions and forming short-term commercial relationships, with some offering and monitoring informal credit.

It is noteworthy how various Activities that adopted the MSD approach incorporated the impact of the COVID-19 pandemic in their interventions and indicators for market system resilience. Box 5 below provides examples of how Activities have used “connectivity and network” as a market resilience indicator/metrics during the pandemic.

Box 5 – Connectivity and Network as a Market Systems Resilience Indicator/Metric**Connectivity and Network as a Market Systems Resilience Indicator/Metric**

Twenty percent of Activities invested in strengthening or creating new networks of partners across different value chains. There is some qualitative evidence that strengthening the network of partners across the value chain can strengthen businesses' ability to pivot. The creation and/or strengthening of these enterprise linkages generates the ability to access different services and markets, the diversification of business models, and can increase the chances of resilience.

The connectivity and network indicator garnered significant attention among market system resilience indicators due to its widespread usage, including the assimilation of the diverse impacts of the COVID-19 shock. Some examples are described below.

FTF KISAN II (Nepal): During the pandemic, partners learned that trust in their usual small network was not enough to face the crisis. The Activity was able to address this gap by leveraging its broad networks to support its partners. It did this by bringing new traders to farmers, connecting delivery companies to its network of farmers and cooperatives, and linking farmers and cooperatives to digital payment platforms and lending programs.

TMS (Honduras): Few companies in Honduras are confident in their network connections; they are isolated and trapped without alternatives, access, or options. The Activity utilized connectivity strategies, including improving infrastructure and logistical services through the creation of logistical centers, agro-parks and/or industrial centers that provide reliable access to electricity, roads, and water for MSMEs. Another connectivity strategy was strengthening digital intermediaries and platforms that reduce search and other transaction costs between MSMEs. This Activity defined connectivity as links between companies and their ability to access various services and markets. Connectivity can be physical in the form of roads, electricity services, water and sanitation infrastructure, and transport services.

FTF Inova (Mozambique): To strengthen relationships, particularly with smallholder farmers, the Activity worked to embed health support services, such as providing information on COVID-19, best practices to prevent infection, and provide access to remote medical consultations. These services were based the Activity's efforts to improve market relationships and trust, investments in supply and retail chains, and increase health security for smallholder farmers.

2.5 What type of changes in firms' behavior have been observed as a result of pandemic-related risks? (e.g., coping strategies, adoption of new technologies, pivoting business model, diversifying markets, etc.)?

Key Finding 14 – Behavior Change



Firms pivoted their business models, adapted their behaviors, and innovated in many ways to survive and thrive during the pandemic, although some firms adopted negative coping behaviors to survive. These negative coping behaviors can shift the risk and the negative effects of shocks and stressors from the enterprise-level to individual- and household-levels.

Firms pivoted their business models, adapted their behaviors, and innovated in many ways to survive and thrive during the pandemic. Activities that have conducted firm-level surveys in the past year, highlight some of the following observations of how firms' behaviors have changed:

- Use of digital and communication technologies and new procurement/supply delivery channels
- Online channel, and telephone communication, to reach out to customers, receive orders, and take payments
- Changes to procurement and supply delivery channels, switching to local materials where possible
- Firms relying more on door-to-door delivery
- Investing in more efficient payment models, such as digital payment platforms, e-wallets, etc., to help agribusinesses stay competitive and conduct business safely while limiting strains on cash flow
- Ensuring reliable and safe access to valuable agri-inputs and technical support for farmers by helping agribusinesses explore innovative ways to reach customers while avoiding group-based activities (e.g., SMS dissemination, virtual outreach, and store-to-farm input delivery)

On the other hand, some Activities observed that local enterprises lacked the resilience capacities to mitigate, adapt, and recover from severe disruptions. Negative coping behaviors adopted by enterprises created significant, deleterious economic effects and social harm. The most common negative coping behavior was laying off or suspending staff, thereby shifting the risk and economic shocks from the enterprise-level to the individual- and household-levels. This occurred primarily in sectors that were more vulnerable to pandemic downturns (e.g., tourism) (see [Finding 2](#), p. 12). In Rwanda and Malawi, CD4 observed that “side selling”¹⁷ increased in response to the limited markets and market volatility, as cooperative members did not want to delay selling or miss a sale opportunity to sell in bulk through their cooperative.

¹⁷ Side selling refers to the behavior of farmers who are members of a cooperative but decide to sell their produce outside of their usual market (the cooperative).

2.6 In analyzing across Activities, are there groupings that emerge such as differences in findings by market context, sectors, firm type/risk profile, or operational modalities?

Through cross-data analysis, grouped findings in the agricultural and tourism sectors that cut across market context (i.e. different income levels of countries) emerged. Beyond the groupings presented in Finding 15 and 16 below, there is no other overall trend in PSE modalities that emerged in the research in terms of firm type/risk profile, operational modalities, and market context. The methodology section ([Annex 3](#), p. 58) provides more specifics on the type of cross-data analysis performed.

Key Finding 15 – Trends Across Sectors and Markets Context



Several key changes within market systems occurred during the COVID-19 pandemic, which USAID's PSE strategies contributed to through their COVID-19 response. These trends cut across different sectors and market context. Several Activities engaged with the private sector to seize new domestic markets, digitalize supply chains and critical services, and diversify their economy. Many Activities focused their PSE strategies on mitigating the negative impact of the pandemic on firms, and harnessing new opportunities created by COVID-19.

Key change within market systems occurred during the COVID-19 pandemic that can be observed across sectors and market context (in both low- and middle-income countries). The pandemic created opportunities for companies to **seize new domestic markets in agricultural and non-agricultural sectors**. In the agricultural sector, **TMS** harnessed a new opening in domestic markets for local potato chips processing (due to disruption of potato imports by COVID-19). **TMS** coordinated with the National Potato Council to secure necessary clearances so that local businesses could import industrial-variety potato seeds from the U.S. and supported local growers to grow for the local chip processor. Many other Activities supported MSMEs to adopt similar pivots, including **FTF Inova**.

ESP worked with private sector tourism partners (business associations, hotels, restaurants, tourism agencies, destination management organizations, and airports) and the Georgia National Tourism Administration to pivot marketing and promotion efforts from international tourism to domestic tourism. This included collaboration with the government of Georgia to produce promotional videos, a social media toolkit, a COVID-19 messaging strategy, and the development of domestic tourist-focused content. **ESP** also partnered with 30 hotels, guesthouses, wineries, and restaurants to develop the Tourism Matching Fund, which linked businesses with a tourism marketing firm to develop a social media strategy and content to reach t customers. These efforts assisted the sector in adapting to the near-term realities of COVID-19 and laid a solid foundation for recovery.

Another example of USAID's PSE strategies to help tourism companies revamp domestic tourism was **TMS**. **TMS** and the National Chamber of Tourism launched the "Experiences of Tomorrow" Fund to provide \$180,000 of start-up prize money for experience innovations (e.g., natural parks, new leisure and entertainment attractions). As stipulated in the Activity's Final Report, the goal of the competition fund was to *"spark domestic travelers' interest in outdoor and cultural activities and to help restart the tourism industry after the international tourism market had effectively closed with the COVID-19 pandemic."* The winners received seed capital to implement their vision for a new tourism experience. **BAC Credomatic Bank** also contributed additional financing to the winners.

COVID-19 has created an unprecedented **push towards the digitalization of critical services** most needed by MSMEs across market context, sectors, firm profiles, and operational modalities. As shown in [Annex 4](#) (p. 63), Activities have heavily invested in digitalizing supply chains in agricultural and non-agricultural sectors (e.g., ICT, tourism, logistics) and across market systems functions (e.g., marketing, transport, finance). One-third of Activities invested in the development of e-commerce, e-traceability systems, and online platforms for transportation services. One-fifth of the Activities in the sample invested in digitalizing financial services (e.g., online loan application, branchless banking, and mobile payment). **KISAN II** acknowledges in a [learning brief](#) that “*COVID-19 accelerated digitization of market systems in Nepal.*” Recognizing prior investment from USAID and the government of Nepal in digitalization of the agricultural sector, the brief considers that these initiatives “*have gained momentum since the onset of COVID 19.*” In addition, some Activities, like **JOBS**, which also had policy components as part of its Activities, noted in an interview that this push towards digitalization can also help foster the digitization of key government and business services (see the “JoussourInvest” marketplace example in [Annex 4](#) (p. 67).

COVID-19 represented an opportunity for countries to **accelerate the diversification of their economy**. **TMS** noted in a [learning blog](#) that “*the disruptions caused by market closures from COVID-19, transport constraints, and price volatility in export markets have only accelerated the Honduran agroindustry's desire to invest in the diversification of their product and market offers.*”¹⁸ **TMS** has partnered with 12 businesses to help them diversify their market to respond to market closure and price volatility in export markets during the pandemic. **TMS** helped firms develop 17 products and market offers and secure niches nationally and internationally in commodities such as coffee, cacao, plantains, sweet potato, cassava, potato, breadfruit, fruits, vegetables, and non-timber forest products.

Similarly, for countries with an import trade deficit, COVID-19 crisis was also an opportunity to promote import substituting strategies and diversify their economy. **FTF KISAN II** promoted investment in strengthening local maize and rice value chains, two largely imported commodities in Nepal. Through its supplemental scope of work, **FTF KISAN II** brokered partnerships with 25 firms targeting an additional 35,900 farming households in which the private sector bought produce from farmers and provided them with extension services. According to the Activity’s annual report, fine rice and maize produced for feed and other industrial purposes by **FTF KISAN II**-affiliated farmers in eight districts provided a substitute for 8.6 percent of fine rice imports and 24.8 percent of feed and industrial maize imports.¹⁹

¹⁸ “Harnessing Disruptions to Advance Transformational Change in Honduran Food and Agricultural Systems.” (2021, March 3). Agrilinks. Retrieved from <https://agrilinks.org/post/harnessing-disruptions-advance-transformational-change-honduran-food-and-agricultural-systems>.

¹⁹ Market System and Private Sector Resilience during COVID-19 Lessons From Nepal.

Key Finding 16 – Last-Mile and Customer Centric Models



In the agricultural sector, there is qualitative evidence that Activities that invested in strengthening local distribution networks (e.g., through last-mile distribution model) and/or promoted customer centric interventions to expand firms' domestic market share allowed firms to recover better during the pandemic. While some of these investments occurred prior to the pandemic, many Activities have further invested into this area and innovated new models to lead to greater results, such as a pre-order system to improve input suppliers' inventory management, or direct-to-customer delivery model to further expand domestic market reach. Other newer Activities have naturally shifted towards these approaches in response to supply chain disruption in local and export markets.

As **TMS** noted in a [webinar](#) on market systems resilience on learning and reflections from actions taken in response to COVID-19, *“we tend to think of resilience in the context of what happens after a crisis has happened. But we see that the characteristics of the system that were in place before the shock are often as significant for the recovery.”* About one-third of the Activities had already established relationships with private sector partners prior to the pandemic. Many Activities had invested into improving input distribution through the establishment of new last-mile delivery routes and/or in developing customer centric models to expand companies' market share in domestic markets. There is qualitative evidence that Activities that invested into these models were better positioned to help firms weather the supply chain and market disruptions that occurred due to the COVID-19 pandemic.

For instance, according to **FTF Inova's** COVID-19 impact assessment, *“last-mile distribution innovations enabled farmers in rural areas to obtain necessary supplies and continue farming despite countrywide travel restrictions.”* In addition, the distribution networks that **FTF Inova** helped establish and grow were used to provide vital information on how to cope with COVID-19 and provide PPE to people who needed it.

At the time that the pandemic hit, **Feed the Partnering for Innovation (FTF P4I)** had 40 partnerships established globally, some of which focused specifically on supporting input suppliers to expand their distribution networks and establish last-mile delivery routes to improve farmers' access to key inputs. During the pandemic, **FTF P4I** helped these input suppliers adopt digital solutions to strengthen the delivery of high-quality agricultural inputs to smallholder farmers. For example, **FTF P4I** supported input suppliers in adopting enterprise resource planning (ERP) platforms to optimize their inventories and sales, use real-time data insights, and increase resilience for future shocks.

Some Activities adopted a similar approach as part of their PSE strategies to respond to COVID-19 pandemic. For instance, **Kenya Feed the Future Kenya Crops and Dairy Market Systems (FTF KCDMS)** has partnered with agro-dealers to co-invest in a franchise model to meet last-mile distribution of inputs to farmers in rural, underserved areas. An agro-leader distributor created a sales system to keep the shops well-stocked and allowed them to purchase on credit and repay after making sales. The firm tripled its sales in 10 months because of the franchise and agent model and hired 11 staff members.

FTF Inova and **FTF P4I** supported local firms to expand their domestic market share through the adoption of more customer-centric models that are more inclusive of smallholder farmers. As part of their COVID-19 adaptation, both Activities leveraged digital technologies to help them adopt direct-to-consumer delivery models. For instance, through its Challenge Fund, **FTF Inova** supported a local company that farms, slaughters, packages, and distributes chicken on the domestic market to introduce a

zero-inventory, “farm-to-fork” online marketplace that secured traceable deliveries of safe, healthy, vacuum-sealed organic chicken to key local markets. According to the Activity’s report, this direct-to-consumer model further demonstrated the value of sourcing food from local farmers and growers.

LQ#3 – What are the lessons learned around emerging good practices on firm and market system resilience that can inform future PSE programming?

The implementation plan for this research suggests that all research questions under LQ #3 (except 3.1) would necessitate primary data collection to be addressed during the second phase of the research process, if prioritized by USAID. The section below presents key findings and hypotheses as they emerged from desk research and initial conversations with IPs during this landscape assessment. The questions under LQ#3 are:

- I.1 To what extent were implementer-led, COVID-19 related initial assessments useful in shaping PSE strategies employed and what data points were most/least useful?
- I.2 What factors supported or constrained the effectiveness of PSE strategies during COVID-19?
- I.3 Are there any other shocks and/or risks that USAID should have focused on to lead to greater results?
- I.4 What should future USAID programming focus on to help reduce the impact of shocks on firms (absorptive capacity) and improve the longer-term restorative capacity of market systems?
- I.1 Are there ways that USAID could reduce regulatory requirements and constraints in times of emergency that would allow for better PSE assistance?

3.1 To what extent were implementer-led, COVID-19 related initial assessments useful in shaping PSE strategies employed and what data points were most/least useful?

Key Finding 17 – COVID-19 Assessments



Seventy percent of Activities conducted some type of COVID-19 assessments, but their focus, depth, and how findings were used varied greatly. About half of the Activities used the information internally to help adapt their interventions to COVID-19 context while one-fifth of the Activities shared data externally with key stakeholders to inform their recovery strategy. Some Activities also invested in developing specific tools, such as a tracker to help USAID Missions better track COVID-19 impact on target economies. Others engaged in scenario planning to prepare their Activities to pivot more easily depending on how the pandemic would unfold.

Seventy percent of the Activities conducted COVID-19 assessments in the first few months after the pandemic hit. The nature and goals of the COVID-19 assessment varied greatly among Activities. Some

Activities conducted rapid surveys with limited samples while others leveraged digital technologies to send out multiple surveys to thousands of businesses, like **TMS**. About half of the Activities that conducted a COVID-19 assessment or survey did it multiple times. The goal of these assessments varied greatly, with half of the Activities used the findings from the COVID-19 assessment internally to help adapt their interventions to COVID-19 context, while others sought to explain why some firms coped better than others. **FTF KISAN II** conducted a specific assessment²⁰ that analyzed key factors explaining why some firms coped better than others during the pandemic (see [Annex 6](#), p. 74).

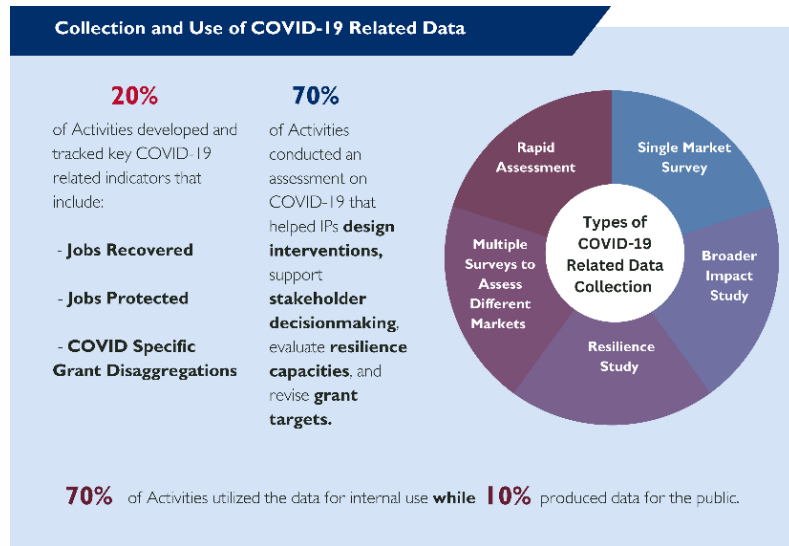
A quarter of the Activities shared the results of their COVID-19 assessments externally with key stakeholders to improve their decision-making on how to react to COVID-19 pandemic. Activities with an enabling environment component tended to leverage the COVID-19 data generated to facilitate dialogue among public and private sector actors. For example, **TMS** noted, in a [webinar on Managing Impact Measurement and Management to the COVID-19 Pandemic](#), that *“the output of the analysis we were looking for is not a report but a conversation between managers, policy-makers, and key stakeholders who are in positions of power and authority to make adaptive decisions that influence broad outcomes.”* Results from the first survey carried out in April 2020 and the second in May 2020 led to different results, highlighting different factors that matters to firms at different points in time. While “adapting products” and “finding new buyers” were important to firms in April, “trust in alliances” and “trust in rules and regulations” became more important a month later, showing that *“networks and institutions will play a larger role in long-term recovery.”*

CD4 studied the impact of the COVID-19 pandemic on 89 agricultural cooperatives across eight countries. Data for this study was collected during three rounds (May, June, and July 2020) to assess how cooperative operations adapted over time due to COVID-19. Results were shared widely online at the height of the pandemic. As the chief of party noted in a [learning blog](#), one of the most startling data points of the study was *“the percentage of agricultural cooperatives impacted by COVID-19. Ninety-four percent of the cooperatives surveyed reported severe impacts to revenue generation and household income, as well as other stressors. Though this statistic is not surprising given the impact that COVID-19 has had on the global economy, it is important to evaluate this statistic through a local lens. For example, in Rwanda, a country that has over 4,000 cooperatives (...) disruptions to cooperative operations can greatly impact food security.”*

²⁰ Study on the Factors that Have Enabled Private Companies to Remain Competitive During the COVID-19 Pandemic, July 202, KISAN II.

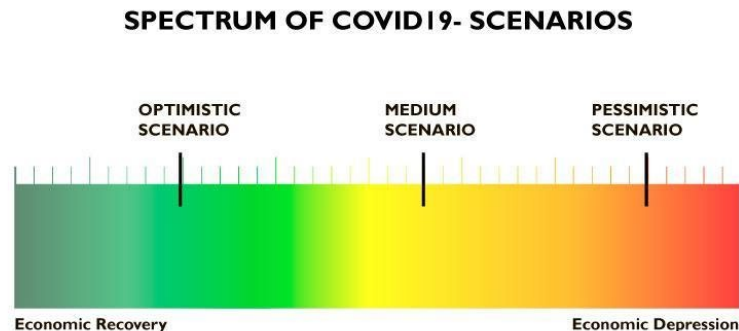
Some Activities developed specific tools to help USAID's Missions better understand the impact of the pandemic on target economies. **US-Support for Economic Growth in Asia (US-SEGA)** developed a COVID-19 Economic Impact Tracker for the Asia-Pacific region, which tracks developments in a selection of health and economic indicators and policy responses in all 31 USAID/Asia Bureau partner countries. The tracker included *"highlights on new GDP forecasts, relief spending, and levels of vulnerability, as well as subregional highlights and special features on reported deaths and tourism"* and *"a global and regional economic update, a set of global indicators, country-level news, policy response updates, and indicator tables."*

Exhibit 6: Collection and Use of COVID-19 Related Data



Other Activities leveraged data to conduct scenario planning. **JOBS** engaged in such an exercise and finalized it in the first half of June 2020, when Tunisia was among a few countries globally to end confinement and curfew.²¹ According to "Scenario Planning for COVID-19," **JOBS** *"needed to visualize several possible crisis outcomes and then determine its response."*

Exhibit 7: Spectrum of COVID-19 Scenarios



The Activity has chosen three possible scenarios to guide program activities, recognizing that *"there are not truly three "scenarios" or inflection points"* but rather *"hundreds of possible outcomes and scenarios."* As illustrated in Exhibit 7, *"the possible economic impact of the pandemic is a spectrum. It reflects the possibilities for the best possible outcome (green, a quick return to normalcy) to a world-wide depression (red)."* The value of this exercise has been to gather the senior project staff and engage in intense discussion with stakeholders. It helped the Activity be in a better position to envision how they would respond to certain events and plan for them in order to remain agile as a project.

²¹ "Scenario Planning for COVID-19," USAID's JOBS.

Key Finding 18 – COVID-19 Impact on WOBs



Some of the most useful data points generated by implementer-led COVID-19 assessments were the impact of the pandemic on specific target groups. Many COVID-19 impact assessments or business surveys revealed that women-owned businesses (WOBs) and youth-led businesses were more affected by COVID-19 pandemic, which helped Activities better target those groups. About half of the Activities documented some targeting of WOBs and other marginalized groups as part of their COVID-19 related PSE strategies.

There is qualitative evidence from the COVID-19 assessment conducted by IPs that WOBs have been more affected by COVID-19 pandemic. For example, **FTF WATIH** documents in its COVID-19 Impact on Business Survey Report (2020) that *“youth/women-owned businesses were hit harder and forced to make more layoffs.”* **FTF WATIH** surveyed 344 businesses in 2021 and found that *“adult- and female-owned business are more vulnerable to the negative impacts of the pandemic while availability of support to mitigate these negative impacts has not been deliberately targeted at these vulnerable groups.”*

As part of its COVID-19 rapid response plan, **FTF WATIH** provided \$21.5 million in co-investment grants to 23 partners to manage the pandemic's economic impact in West Africa. Co-investment partners have been able to integrate marginalized populations into their growth strategies and illustrate the value of hiring women and youth in non-traditional and supervisory roles. For instance, a Ghana-based fair-trade enterprise, received a co-investment grant from **FTF WATIH** and was able to leverage 2 million in private financing, which helped the company mitigate its 90 percent loss in domestic retail sales and a 40 percent loss in global sales, and prevented the firm from laying off its workers, the majority of whom are women. Similarly, **FTF WATIH** supported a Togolese fair trade shea company to rapidly secure the additional shea kernels needed to fulfill its 2021 forecasted orders. This support aimed to preserve over 300 jobs, create 20 new shea processing positions for women and youth, and sustain income for 6,352 women shea kernel collectors.

Acknowledging gender based digital exclusion in Pakistan and the exacerbations caused by the COVID-19 pandemic, **SMEA** partnered with a major multinational technology company to promote digital inclusion of WOBs during the pandemic and help them connect to new markets. The technology company adapted its digital marketing training modules to WOBs' needs. Through this partnership, **SMEA** was able to build the digital literacy of more than 700 women, including WOBs in Pakistan at the height of a global pandemic.

According to a rapid assessment of the impact of COVID-19 on WOBs, **AVC** reports that the COVID-19 pandemic *“has been harder for WOBs that are generally less capitalized and hence more vulnerable. Afghan WOBs have lagged behind their male-owned counterparts, due to external factors, such as socio-cultural gender norms, a biased legal system, and poor access to finance and markets, but most importantly, due to their underdeveloped entrepreneurial capacity. The latter prevents WOBs to respond to external shocks in a rapid a business savvy fashion”*²². To support WOBs, **AVC** fostered partnerships among women-owned export firms and producers of jams, marmalades and pickled vegetables located in Kabul. Some firms subcontracted the processing of fresh and dried fruit into jams and marmalades for sale during Ramadan

²² How are Afghan Women Owned Enterprises Coping?, April 2020, Week 3 Update.

or used social media to help set up a home delivery system.

Some Activities initiated interventions targeting women, youth, and marginalized groups prior to the pandemic that helped firms withstand the crisis. Between 2018 and 2020, **FTF SVC** facilitated two Gender Action Learning System (GALS) trainings for 353 individuals and businesses (of which 40 percent were young women and 24 percent young men). These participatory exercises helped them identify the root causes of inequalities that limit them from achieving their individual, household, or organizational goals, (such as increasing income, expanding their agricultural enterprise, building a home, or increasing food security). Through a visioning exercise, they identified pathways to challenge norms about gender roles, responsibilities, and unequal access to and control of resources and income to reach their objectives. **FTF SVC** trained 112 GALS champions who volunteered to coach and track participants' progress. Using a complexity-aware methodology, Most Significant Change, **FTF SVC** carried out an assessment of the GALS intervention and found out that all the firms survived thanks to the facilitation that the Activity has done (e.g., training, tool, pivot).

The findings presented under sub-research questions 3.2, 3.3, 3.4, and 3.5 are select hypotheses based on evidence available and reviewed when addressing LQ #1 and #2 above. Additional primary research to confirm these hypotheses may be conducted as decided in collaboration with USAID during the Pause and Reflect Session and the Primary Research Plan design.

3.2 What factors supported or constrained the effectiveness of PSE strategies during COVID-19?

Key Finding 19 – Factors that Constrained PSE



Key factors that constrained effective PSE during the pandemic were USAID regulations, length of approval (see [Finding 24](#), p. 47), and the existence of multiple shocks and stresses that some countries faced during the pandemic.

Most of the constraints cited by IPs related to USAID regulations and the length of approval, especially for grants under contract. Those are discussed under sub-research questions 3.5 below. Another constraining factor documented by IPs is when an area of operation faces multiple shocks and stresses. In Afghanistan, **AVC** reported uncertainty due to multiple shocks such as lack of electricity and extreme weather conditions. Similar to what happened in Afghanistan when the Taliban retook the country, in the case of Ukraine, with a relatively thick and sophisticated economy, the onset of Russia's invasion completely derailed **ERA's** PSE programming underway in the east of the country. **ERA** staff and most people also affiliated with **ERA** partner MSMEs and universities were displaced. Another good example is that DRC **FTF SVC** dealt with Ebola, volcano eruption, and the impact of Russia's war in Ukraine on fuel cost. All of these shocks combined created more obstacles to firms and markets and hindered the potential effectiveness of PSE strategies compared to what they would have been with just the pandemic alone.

Key Finding 20 – Factors that Facilitated PSE



Key factors that facilitated effectiveness of PSE strategies during the COVID-19 pandemic included having established relationships with the private sector prior to the pandemic, existing trusted relationships with governmental and private sector actors with resources, co-creation with the private sector, and a flexible learning and adapting mindset. Some Activities were also better positioned to respond to the pandemic than others due to existing mandate/objective (e.g., component on business support for MSMEs, mandate to work in ICT). Furthermore, those that put collaborating, learning, and adapting (CLA) central to their project management, were well placed to pivot successfully.

Having **established relationships with the private sector prior to the pandemic** facilitated the effectiveness of PSE strategies during COVID-19. Thirty percent of Activities that started prior to the pandemic had established relationships with the private sector that they could leverage. These Activities were more easily able to access credible and rapid market information and possibly more able to easily design fit-for-purpose new COVID-19 related PSE activities. Activities that were relatively new when the pandemic hit needed to learn about priority private sector needs while building trust and credibility amidst startup activities, leading to possibly more challenging and time-consuming processes to implement meaningful COVID-19 PSE activities. For instance, **FTF Inova** reported that when the pandemic hit more than three years into the Activity, it was able to capitalize on their strong reputation and in-country networks to more effectively launch the Challenge Fund than if they had tried to implement it from the start of the Activity.

Activities that started right when COVID-19 began, but leveraged private sector partnerships from

previous USAID investments, were able to more relatively smoothly begin/continue working with these market actors because they already understood USAID rules and regulations and reporting requirements. Even though **FTF BHF** began in the middle of the pandemic, they worked with some of the lead firms that its predecessor project (**AVC**) worked with, such as Shwapno supermarket and its retail outlets, and built on previous years of investment, partnerships, and lead firm engagement to have successful value chain interventions and reporting, even with limited ability to engage in in-person monitoring.

Activities reported that **ensuring ongoing and reliable government coordination** was important. Twenty percent of Activities reported dialogue/good coordination with the public sector (e.g., maintaining regular interactions, including virtual, with the county and national governments) as a factor that supports effective PSE. The **FTF KCDMS** FY 2021 annual report stated, *“maintaining regular interactions, including virtual, with the county and national governments is important, as that helps their continued awareness of KCDMS; and enabling county internet access ensures critical meetings with government officers and joint activities between with KCDMS.”*

Co-creation of solutions with the private sector led to innovative and effective PSEs. One example is the **Jalin** Activity that was designed to co-create all interventions with local public and private stakeholders. **Jalin** co-created the rural ambulance feeder transport program, and the multinational textile company COVID-19 education program. Both were originally designed for improving maternal and child health but were able to pivot during COVID-19 to provide related assistance. **INVEST** also took a co-creation approach, particularly in the Italy COVID-19 response buy-in where it was tasked with boosting private sector production of medical inputs to support the COVID-19 response.

The use of CLA practices was key to effective PSE strategies. In addition to the adaptations flagged above under **Jalin**, in **ERA** pause and reflect sessions were held to discuss how to pivot under COVID-19, how to prioritize the most strategic PSEs, how to improve the online training, and technical assistance that was offered under COVID-19. Each pause and reflect session was followed by a learning memo outlining action items, person responsible, and next steps.

IPs working in **IT or IT-friendly sectors** were well positioned to leverage private sector resources relevant to pivoting to online work. For example, the **SMEA** team was fortunate that a big portion of its demand-based business development services menu and the service providers were well placed to provide digital services, such as ecommerce web solutions/apps, digital marketing, online tools for financial management, ERP, etc. Mobility restriction during the pandemic also forced companies to adopt these tools and their demand surged further. **ERA** provided support to university partners to go online, and link produce farmers with online marketing sites and new open air and direct-to-consumer deliveries.

3.3 Are there any other shocks and/or risks that USAID should have focused on to lead to greater results?

Key Finding 21 – Informal Markets



COVID-19 pandemic had a devastating impact on informal markets. Supporting the continuous functioning of local food markets is crucial during a crisis to avoid food security issues. Only a limited number of Activities in our sample directly focused their interventions on informal markets during COVID-19 pandemic. This may be an area to support in the future.

One shock that deserves further USAID attention is supply chain disruption in the informal sector due to local market closure to prevent public gatherings and contain the spread of the virus. In its study on the impacts of the COVID-19 pandemic and associated policy responses on food systems in Sub-Saharan Africa, the Food Trade Coalition for Africa highlights the critical role of informal markets in the food security of (primarily but not only) the urban poor. The study notes that the policy measure to close or restrict informal markets has been detrimental to market vendors and consumers, and this underscores how these markets are (in normal times) nodes of food value chain resilience.

A few Activities have supported the functioning of informal markets, mainly to avoid a food crisis. For example, **FTF SVC** built the capacity of trader associations to buy in bulk and continue sourcing and selling at markets, reducing the impact of COVID-19 (see [Finding 8](#), p. 24). **FTF IAM** has partnered with six organizations to strengthen the capacity of market associations to manage innovative interventions that promote COVID-19 protocols and sustainable health and safety measures in 13 markets (e.g., water access associations, women's associations, driver associations, and market vendor associations).

In addition, **ERA** helped support local producers by creating special local open air farmers market events, and simultaneously helped produce growers transition to online sales by connecting them with a social media marketing company that marketed their produce online with beautiful photos as a great health-inducing alternative during a time when health and immunity boosting was paramount.

In their evidence synthesis paper,²³ the Food Trade Coalition for Africa recommends policy-makers “*acknowledge the importance of informal markets during a public health crisis like the COVID-19 pandemic, (to) find better ways to engage with those whose livelihoods and food access depend on such markets. In the event of another such crisis, it is imperative to support the continuous functioning of local food markets; to improve their sanitary conditions; to collaborate constructively with market leadership and trader associations to build capacity to adhere to social distancing guidelines; and to be patient as markets and shopkeepers adjust.*”

²³ Andrew Agyei-Holmes et al., “Impacts of the Covid-19 Pandemic and Associated Policy Responses on Food Systems in Sub-Saharan Africa: A Synthesis of Evidence” (Food Trade Coalition for Africa, April 2021), <https://ftcafrica.org/wp-content/uploads/2021/07/Covid-19-Impacts-on-Food-Systems-in-SSA-Evidence-Synthesis.pdf>.

3.4 What should future USAID programming focus on to help reduce the impact of shocks on firms (absorptive capacity) and improve the longer-term restorative capacity of market systems?

Key Finding 22 – Absorptive Capacity



To reduce the impact of shocks on firms, IPs can build firm capacity to excel in proactive adaptive management as learning organizations. For this, they need to have strong skills in evidence-based decision making and be flexible enough to quickly adapt production, strategy, and marketing. This flexibility will be well served by maintaining a strong and diverse business network. Furthermore, IPs can advocate, provide, and facilitate the use of risk mitigating tools through public and private networks such as insurance, reserve funds, and data systems that inform MSMEs of market demand and trends.

To improve **firm absorptive capacity**, three Activities suggested supporting firms to develop and adopt risk management plans and carry out more proactive risk and scenario planning. Furthermore, one IP suggested the need for better cash flow planning, savings, and reserves for contingencies. Behind both of these suggestions is the capacity of firms to take in data on markets, customer preferences, analyze, and adapt. In other words, to be data-driven proactive learning organizations, also the suggestion of on Activity.

Several Activities that had a mandate to work with the public sector (**FTF ROW**, **FTF KDCM**, **FTF SVC**, and **FTF KISAN II**) stressed the importance to **better link the private sector to the public sector**. This aligns well with the suggestion in [Finding 20](#) (p. 43) that coordination with the public sector was key. For example, connection with the local governments allowed businesses to access critical business permits that allowed them to operate. Furthermore, most governments provided additional support to businesses during the pandemic in addition to regulations that could be burdensome.

A second factor that **CEO** suggested as important to improving absorptive capacity, was to **support firms in developing and adopting a risk management plan**. Relatedly, the **ERA** program provided crisis management training and technical support to firms adapting their business model, strategies, and marketing in the new COVID-19 reality.

Key Finding 23 – Restorative Capacity



To improve the longer-term restorative capacity of market systems, IPs can advocate and provide technical assistance for and facilitate more risk mitigating tools through public and private networks such as insurance, reserve funds, and data systems that inform MSMEs of market demand and trends. IPs can facilitate private sector coordinated workforce development informed of private-sector-needs for both technical and soft skills.

Activities can advocate for, facilitate, and inform a variety of business resilient-enabling environment aspects. For example, Activities can **facilitate private sector coordinated workforce development**. This education and training of workers will be informed of private sector needs for both technical and soft skills that will support the flexible adaptive firm skills referenced above in Key Finding 23. In the case of **ERA**, there was an interesting PSE where medium-sized enterprises provided their premises for dual education. The students received theoretical instruction at the university part of the

day, and then practical on the job skills application at firms for another part of their day²⁴. In this way, students learn skills relevant to the private sector, and firms are networked with potential future employees with the skills they need. Meanwhile, the analytical soft skills from education are even more important for restorative capacity of firms as part of market systems.

Another interesting and related PSE under **ERA** was the implementation of case competitions. In this methodology, firms provided real life problems they were facing as “cases,” and then teams of students studied the problems, proposed solutions, and received feedback. This both sharpened the student’s analytical and business problem-solving skills, as well as provided ideas and solutions to participating firms. These examples indicate that one of the ways for Activities to improve firm resilience is to make sure workers have innovative IT-enabled skills, which can be done in partnership with local universities and skills schools- and the private sector that informs on the needed skills and curricula.

Based on desk research and interviews with IPs, several Activities also suggested specific areas that USAID programming can focus on to facilitate a market system that has less risk to firms, such as:

- Provide agricultural insurance (including for cooperatives) (suggested by **CD4** and **FTF KISAN**);
- Assist companies that have the capacity to adopt an innovation and scale it up (suggested by **FTF Inova** and **Feed the Future Harvest II (FTF Harvest II)** in Cambodia;
- Establish cooperative savings funds product options (suggested by **CD4**, **FTF ROW**);
- Diversify understanding of markets as well as marketing, to help firms have options (also focusing on domestic markets) (suggested by **FTF ROW** and **FTF Harvest II**); and
- Improve real time data systems that provides information on markets, prices, threats, and trends. This will allow firms to strengthen evidence-based decision making bolstered by data systems across government/private sector and across countries.

3.5 Are there ways that USAID could reduce regulatory requirements and constraints in times of emergency that would allow for better PSE assistance?

Key Finding 24 – USAID Regulatory Requirements



USAID has the ability in times of crisis to provide more flexibility to IPs to engage with the private sector in administrative and regulatory requirements. IPs have suggested more flexibility around microgrants and relaxing grant competition requirements in times of crisis.

There are several ways that USAID can provide more flexibility to IPs in times of crisis to allow for a more rapid response. These include the following:

When IPs put together their grants’ manuals, they often propose microgrants with smaller documentation requirements and administrative burdens. USAID may reject this option (as was the case with **ERA**) but having it as an option for a crisis such as a pandemic is useful to be able to quickly push out a larger number of small grants to MSMEs.

²⁴ MOUs were signed with the partner universities, and the hosting firms.

In the case of **FTF Inova**, they were suggested to implement grants as part of their COVID-19 response. The staff was surprised how long grant implementation took considering they had been operating with deal notes implemented more rapidly in the past. Generally speaking, the administrative burden of rigorous implementation of “regular” grant procedures is often not as fast as anyone would like. In some cases, direct procurements made by a project, leveraging other private sector investments in a partnership, can be quicker than grants implementation, also a lesson-learned in wartime Ukraine with the **ERA**.

In the case of Russia's war in Ukraine, grant competition requirements were waived so that grants could be awarded to beneficiaries without a competition. This is facilitated by ADS Chapter 303 regulations that mention the possible rationale for this exception: “Responding to a disaster, violent conflict, political crisis, or other emergency situation that requires an award to be made more rapidly than unrestricted competition can accommodate.” While in the case of Ukraine the exception is made due to the “violent conflict” clause, in a case such as pandemic it could logically be justified as “other emergency situation” referenced above.

Meanwhile, **other regulatory burdens can also be reduced in times of emergency**. As an example, also in wartime Ukraine, the Mission **waived the existing geographic code** to allow procurements from the neighboring European Union. In times of crisis, this is a good option for USAID to pick up on to allow for greater flexibility and smaller timelines to get aid to those who need it. Furthermore, in wartime Ukraine, some Activities were able to receive a **one-year waiver on environmental review processes**, whereas all Activities carrying out procurements were able to make use of **simplified environmental review forms** to speed up environmental review and approvals.

3. LOOKING AHEAD

Recommendations and Opportunities

While providing USAID with detailed recommendations would necessitate further research on LQ#3 through primary data collection (e.g., KIs with Activities' staff), below are high-level recommendations for USAID through this landscape assessment.

1. To ensure that PSE strategies improve firm resilience during times of crisis, USAID could **embed resilience concepts and programming more explicitly within PSE, MSD, and other economic growth programming and not just in resilience focus countries or humanitarian relief programs.** USAID's recently released 2022 Resilience Policy Revision (Draft of December 2022) recognizes the importance of resilience to a broad spectrum of USAID's objectives, including economic growth.²⁵ This new policy, once finalized, will present an opportunity to build upon. Evidence from this study shows that it is important when designing interventions to improve firm resilience to consider the history, frequency, and concurrency of shocks as it can be a predictor of whether firms will be most likely to rely on negative coping behaviors.
2. To advance learning on how PSE can improve firm and market systems resilience, USAID could invest in **developing guidelines for IPs on the best course of action in monitoring and evaluating new PSE related interventions, pivots, and adaptations when a crisis hits.** Many Activities received additional funding from COVID-19 appropriations. However, the way results were tracked, and MEL systems were not standardized across Activities. Several IPs mentioned that there were no guidelines available from USAID on how to track results of PSE-related adaptations and pivots and on how to adapt MEL systems when the first cases of COVID-19 erupted. There would be a value for USAID to ensure that quality evidence is generated in the time of crisis to allow USAID and IPs to start building quality data on adaptation and results across shocks and stresses to learn more about the most effective ways to improve resilience capacities of firms and market systems through PSE.
3. The unprecedented level of digital adaptation and innovation that took place during the pandemic demonstrated how digital technology can help ensure that Activities can continue to operate, engage with private sector partners, and communicate with end beneficiaries in remote areas during a major crisis. To better support innovation and uptake of digital technologies to bolster firm resilience during times of crisis, USAID could **continue to invest in supporting digitalization of supply chains (e.g., e-commerce, digital means of payment, etc.) and could also encourage IPs to continue using some of the new tools as a more standard way to "do business" with partners and end beneficiaries** (e.g., WhatsApp groups, developing video messages to encourage inclusion, remote technical assistance, etc.). The unprecedented level of digital adaptation and innovation that took place during the

²⁵ <https://www.usaid.gov/sites/default/files/2022-12/Resilience-Policy-Revision-Jan-2023.pdf>

pandemic demonstrated how digital technology can help ensure that Activities can continue to operate, engage with private sector partners, and communicate with end beneficiaries in remote areas during a major crisis.

4. To facilitate private sector engagement that improves firm and market systems resilience, USAID could **explore how it can provide more flexibility to IPs in terms of their administrative and regulatory requirements for engaging with the private sector in a time of crisis**. USAID should structure awards to allow IPs to adjust some of their programming and requirements, such as how to disburse microgrants more quickly, relax grant competition requirements in times of crisis (e.g., exception of competition already approved in grant manual during a crisis), add a “crisis modifier” in contracts and cooperative agreements, or provide a waiver with a ceiling for emergency situation embedded into cooperative agreement contracts. USAID should build these mechanisms from the start of an Activity (through a crisis mitigation plan) to ensure that the IP already has a pathway that does not require contracting officer (CO) approval when a crisis hits.

Evidence Gaps

During this landscape assessment, evidence gaps were identified across most research questions defined collaboratively with USAID. These research areas include topics that exceed the scope and learning objective of this study and/or would necessitate additional resources to undertake as part of this learning effort. The topics below are areas that the PSE Hub could investigate if judged pertinent for the agency’s overall learning objectives. The main evidence gaps identified during the landscape assessment are presented below according to the three LQs.

Evidence Gaps related to LQ#1. While most of the Activities faced similar control measures from governments, governments have lifted them at a different pace, allowing key sectors and economies to bounce back more quickly than others. For instance, Nepal has experienced strict and repetitive lockdowns over a long period of time while curfew and stay at home orders were lifted more quickly in Tunisia. However, evidence was too scarce and scattered across Activities to be able to categorize and group countries (and their corresponding Activities) according to the intensity of those measures and their corresponding impact on businesses, but this could be an area of further research for USAID. This could help USAID better understand the nuances and range of control measures that took place during the COVID-19 pandemic and identify which ones were the most effective (and less detrimental to businesses) at balancing health security with economic survival.

Evidence Gaps related to LQ#2. Gaps and areas for further research are presented below:

- **Firm size/risk profiles.** There is not enough evidence on the selection criteria used by Activities to select private sector partners and on the risk profile of firms in the documentation gathered for this study to understand whether most Activities targeted firms with lower risk profiles or higher risk profiles and which approach would lead to greater results (related to 2.2).
- **Market system resilience indicators.** Identifying resilience and changes in the market system demands substantial research efforts and high-quality data collection and analysis to obtain reliable results. The Activities discussed in this report were able to conduct assessments that

captured and measured some market system resilience indicators, such as innovation, cooperation (or trust and cooperation), diversity, and behavior change (and some Indexes). However, further examination of these cases could provide insights into whether market system development approaches facilitate businesses to pivot more effectively and easily (related to 2.3).

- **Innovations.** Private sector actors have pivoted and adapted their business strategies to the pandemic, which allowed them to stay in business, grow their sales, and maintain or create new jobs, among other variables. A further area of research would be to understand the extent to which some of these adaptation/innovations that occurred during the pandemic, with support from USAID's PSE work, are still in use by private sector post pandemic and understand the extent to which others have adopted/replicated them. While this research would be too extensive for the Deep Dive Phase, one adaptation or innovation could be selected (e.g., an agritech or ICT solution) and develop a case study as described below (related to 2.3).
- **Behavior change.** There is limited evidence on the factors that determine whether firms would adopt negative coping behaviors versus innovate during a crisis. TMS focused on that aspect. Understanding these determining factors would inform how USAID can facilitate firm innovation versus relying on negative coping behaviors in future programming (related to 2.5)
- **Trends across sectors and market context.** There is qualitative evidence that many Activities invested in certain trends, including seizing new domestic markets in agricultural and non-agricultural sectors, pushing towards the digitalization of critical services and accelerating the diversification of their economy in response to the COVID-19 pandemic. Despite cross data analysis, no additional grouping could be identified on other variables, such as market context, sectors, type of firm, and operational modalities. There is not enough evidence at the desk research level to make these correlations (related to 2.6).

Evidence Gaps related to LQ#3. Based on the evidence found under sub-research question 3.1, implementer-led COVID-19 related assessments informed IPs that WOBs and youth-led businesses were more affected by the COVID-19 pandemic than other businesses. This document presented some initiatives/interventions that were carried out by Activities to provide financial support, technological access, and technical training to these businesses. However, it could be interesting to understand why this type of business/firm was most affected by the COVID-19 pandemic shock and what could be the best ways to build resilience capacities for these specific groups in times of crisis.

Regarding the remaining sub-research questions (3.2, 3.3, 3.4, and 3.5), available data was gathered and analyzed on best practices that could inform USAID future programming. Since there is no treatment and control group in this research, nor is there a counterfactual to show what would have transpired should things have been implemented differently (as referred to in the limitation section), the bulk of the recommendations fall into the category of data-informed hypotheses. Most of these were suggested by one or two Activity teams.

Areas for Further Research

Considering the evidence gaps identified above, the following two approaches could be taken to conduct the next phase of the research — the Select Deep Dive Phase (primary data collection):

- **Approach #1: Detailed investigation of a specific topic through a case study** (through

in-depth and focused collection of primary data from IPs, market actors, or a mix of both)

- **Approach #2: Additional primary research to refine some of the landscape assessment initial findings** presented here (through a broader and wider primary data collection).

A few illustrative examples follow.

Approach #1 (Case study):

A **case study** is a research method that involves an in-depth and detailed examination of one specific case. For this study, it will aim to analyze the interventions, the outcomes, the success stories, and the lessons learned that can be connected with the way that this specific Activity applied PSE strategies in response to the COVID-19 pandemic.

While considering some dimension of LQ/sub-questions in specific regions or market contexts would address some evidence gaps identified above, it would necessitate using comparative study methods. These methods, including cross-case analysis, would exceed the resource available under this research. These types of studies, following a qualitative approach, require full dedication of the research team for a considerable period so that they can be successful in all research stages and research procedures.

Option 1: Adaptation/innovation developed (under LQ#2): The pandemic offered USAID an unprecedented opportunity to bring innovation into their Activities. USAID provided support to a variety of tech startups (agritech, fintech, e-commerce, etc.) that were offering digital services to MSMEs and farmers. A case study could be developed by selecting a tech innovator that USAID supported during the pandemic and investigating how viable and scalable its business model has been beyond donor grant support, post-pandemic. This would require KIIs with both the IP and local market actors.

Approach# 2 (refinement of the landscape analysis):

The second approach is to complement the landscape assessment by conducting additional qualitative analysis building on primary data collection to refine some of its initial findings. Targeted KIIs and follow-up with home office and/or field staff from target Activities to further refine and contextualize some of the findings of this landscape assessment, focusing on one to two research question(s), depending on the evidence gap to be filled could be conducted. USAID would then be provided with a revised version of the Landscape Assessment for these sub-research questions that can be targeted towards those aspects of primary interest to USAID, which will be prioritized with USAID during the next phase.

As suggested in the implementation plan, future research could focus exclusively on refining some of the **hypotheses developed (under LQ#3) on lessons learned and good practices** that emerge on firm and market systems resilience. Proposed research questions include:

Option 2: What factors supported or constrained the effectiveness of PSE strategies during COVID-19? (3.2). This research question can be studied in more depth during the next phase along with some hypotheses that emerged from the research. For example, the flexibility of the implementing mechanism (contract, cooperative agreement, etc.) has a large impact on the ability of IPs to adjust. Contracts with strict performance work statements have the hardest time adjusting. On the flip side,

cooperative agreements offer the most flexibility. One unique and interesting deviation was that ERA that operated under an Award Fee Board Mechanism that prioritized fees based on CLA. This, in combination with supportive USAID technical staff, allowed for flexible and rapid adaptation. In addition, one Activity noted that diverging views on PSE within USAID Missions' can influence an IP's PSE strategy, creativity, and resulting effectiveness.

Option 3: Are there ways that USAID could reduce regulatory requirements and constraints in times of emergency that would allow for better PSE assistance? (3.5).

Additional steps USAID could take to reduce regulatory requirements and constraints in times of emergency, include:

- Build a waiver (can have limits, such as a capped ceiling on funding) for emergency situation embedded into cooperative agreement contracts;
- Hire local enumerators to ensure continuity in MEL reporting during crises (also proven to be cost efficient according to FTF ROW);
- Allowing Activities to adopt a crisis modifier or more flexibility in cooperative agreements when global shocks happen (e.g., allow grant if no grant, if no procurement fund, then allow procurement of emergency goods, etc.).
- Provide a quick contractual mechanism to inject funding in the case of a large shock. For example, in the case of the Tayar Nepal Disaster Risk Reduction and Preparedness Activity, the contract included an option for additional emergency funding in time of crisis. While this option may have been envisioned for a shock such as an earthquake, it was exercised, and additional funding provided, in the case of the COVID-19 pandemic. This funding went towards private sector engagement and interventions to increase livelihoods of rural residents.

These proposals are only illustrative at this stage. In terms of next steps, MSP will facilitate a collaborative pause and reflect exercise with the USAID Activity Manager in May 2023 to review the findings of the landscape assessment, review different ideas, and routes for the Select Deep Dive Phase and reach agreement on the most strategic use of resources (e.g., time and money) in the next phase to achieve the overall learning objectives of the study. MSP will then summarize the key decisions of the co-design exercise in an approximately one-to-three-page document, a Primary Research Plan, and share with the USAID activity manager to concur.

ANNEX I – RESEARCH QUESTIONS (LQS)

1) What were the main challenges and risks that the COVID-19 pandemic created within market systems, particularly for firms?

1.1 What type of shocks and/or risks did COVID-19 create or exacerbate for firms?

1.2 What type of challenges and/or shocks did COVID-19 create or exacerbate within market systems (e.g., supply chain and market disruption, etc.)?

2) What were the results associated with strengthened firm and market system resilience from the different PSE strategies implemented by USAID during the COVID-19 pandemic?

2.1 What types of COVID-19 shocks and/or risks (e.g., supply chain disruption, health of workers, marketing chain) were addressed by USAID's PSE strategies in order to strengthen firm/market resilience?"

2.2 How have USAID's PSE strategies applied during COVID-19 pandemic differed depending on market context, firm size/risk profile and operational modalities?

2.3 How and to what extent were USAID's PSE strategies during COVID-19 pandemic designed to go beyond firm-level resilience, to strengthen the resilience of the broader market system?

2.4 What were the results of USAID PSE strategies implemented during COVID-19 pandemic to strengthen firm and market systems resilience (examining nearer to longer²⁶-term results)?

2.5 What type of changes in firms' behavior have been observed as a result of pandemic-related risks? (e.g., coping strategies, adoption of new technologies, pivoting business model, diversifying markets, etc.)?*

2.6 In analyzing across Activities, are there groupings that emerge such as differences in findings by market context, sectors, firm type/risk profile or operational modalities?

3) What are the lessons learned around emerging good practices on firm and market system resilience that can inform future PSE programming?

3.1 To what extent were implementer-led, COVID-19 related initial assessments useful in shaping PSE strategies employed and what data points were most/least useful? *

3.2 What factors supported or constrained the effectiveness of PSE strategies during COVID-19?

3.3 Are there any other shocks and/or risks that USAID should have focused on to lead to greater results?

²⁶ We define medium to long-term results as results that can be observed two years after pandemic was declared (Jan 2022).

3.4 What should future USAID programming focus on to help reduce the impact of shocks on firms (absorptive capacity) and improve the longer-term restorative capacity of market systems?

3.5 Are there ways that USAID could reduce regulatory requirements and constraints in times of emergency that would allow for better PSE assistance?

ANNEX 2 – ACTIVITY ACRONYMS IN SAMPLE

ACTIVITY NAME	ABBREVIATION
Afghanistan Value Chains–Crops	AVC
Communities Leading Development (Guatemala)	CLD
Cooperative Development Activity 4 (Rwanda and Malawi)	CD4
Creating Economic Opportunities (Guatemala)	CEO
Economic Resilience Activity (Ukraine)	ERA
Economic Security Program (Georgia)	ESP
Feed the Future Bangladesh Horticulture, Fruits, and Non-Food Crops	FTF BHF
Feed the Future Cambodia Harvest II	FTF Harvest II
Feed the Future Egypt Rural Agribusiness Strengthening	FTF ERAS
Feed the Future Ethiopia Livelihoods for Resilience	FTF L4R
Feed the Future Kenya Crops and Dairy Market Systems	FTF KCDMS
Feed the Future Kenya Livestock Market Systems	FTF LMS
Feed the Future Knowledge-Based Integrated Sustainable Agriculture in Nepal II	FTF KISAN II
Feed the Future Mozambique Agricultural Innovations	FTF Inova
Feed the Future Nguriza Nshore (Rwanda)	FTF NN
Feed the Future Partnering for Innovation (Multiple Countries)	FTF P4I
Feed the Future Rwanda Orora Wihaze	FTF ROW
Feed the Future Strengthening Value Chains (DRC)	FTF SVC
Feed the Future Uganda Inclusive Agricultural Markets	FTF IAM
Feed the Future West Africa Trade and Investment Hub	FTF WATIH
Food Trade Coalition for Africa (Continental Africa)	FTCA
INVEST (Global Mechanism)	INVEST
Jalin (Indonesia)	Jalin
Jobs, Opportunities, and Business Success (Tunisia)	JOBS

ACTIVITY NAME	ABBREVIATION
Regional Food Balance Sheet (Continental Africa)	RFBS
Rural Access to New Opportunities in WASH (Madagascar)	RANO-WASH
Small and Medium Enterprise Activity (Pakistan)	SMEA
Transforming Market Systems (Honduras)	TMS
US-Support for Economic Growth in Asia (APEC and Indo-Pacific)	US-SEGA
Worker Wellness Alliance (Ethiopia)	WWA

ANNEX 3 – METHODOLOGY

Sample Selection

Before selecting the sample, MSP defined, in collaboration with USAID, the universe for the study. MSP defined that the population for this study consists of two levels of priority, ordered below from highest to lowest:

1. **Feed the Future Activities** active during the pandemic that by nature predominantly focus on the agricultural sector and employ private sector engagement as a core implementation strategy
2. **Additional economic growth Activities** that are not funded through Feed the Future, employ PSE as a core implementation strategy, and may focus on agricultural sector or non-agricultural sectors, such as tourism

As part of these two priorities, MSP considered Activities that impacted cross market functions, such as logistics, “last-mile” inputs and services, and access to finance and includes few non-EG additional sectors, such as health.

To identify the sample for this study, MSP undertook an iterative two-step process:

- *Define the population.* To define the population, MSP started by assembling an initial list of Activities and identified key IPs that have implemented PSE strategies to inform COVID-19 response based on the research teams’ knowledge and networks. The team also developed a list of Feed the Future and Economic Growth Activities active during the pandemic (January 2020 – January 2022) based on ForeignAssistance.gov-Dashboard (which identifies a total of +/-650 Activities and +/- 100 IPs as active during the pandemic). The team used this list as a point of reference to add any additional activities and IPs that may seem relevant. The population was developed in close collaboration with USAID and IPs. MSP, in collaboration with USAID, outreached to 16 IPs and 11 USAID PSE groups and communities to request that they prioritize and self-select priority activities for inclusion in our population.
- *Select the sample.* MSP used a **purposive sampling methodology** to select the sample (see text box for criteria).

Population Definition Criteria

- Applied PSE strategy(ies) as part of COVID-19 response
- Primarily, but not limited to, economic growth projects
- Received COVID-19 cost and/or no cost extension preferred (will be first choice for sample, to be widened if needed for other considerations)
- Was active during the height of the pandemic (from January 2020 until January 2022).
- Responsive to MSP outreach
- Interest in participating in the study
- Relevant learning and evidence

Sample Selection Criteria

- Potential for learning
- Mix of implementers
- Availability of data
- Mix of market context

- A total of 30 Activities were selected for the sample. The sample is diversified in that it includes Activities from a variety of USAID's regions, a broad range of IPs, and a mix of market context (see [Exhibit I](#), p. 7).

Data Collection

Upon confirmation of the sample selection by USAID, MSP initiated the data collection process by identifying and acquiring relevant secondary data sources for the selected activities. The secondary data served as the main data source for this Landscape Assessment. The data collection process involved conducting extensive desk research and requesting data resources from IPs and Activity teams via email. MSP conducted a thorough desk research for all 30 Activities included in the sample. Additionally, the team emailed all IPs with Activities in the sample to efficiently identify and gather relevant documentation. Out of the 30 Activity teams contacted, spanning across 16 IPs, 24 teams provided project materials for review. It should be noted that although six teams did not provide documentation, the 24 that did respond comprised 15 of the 16 IPs.

The secondary data sources collected for the study varied across activities and included a range of documents, such as activity reports (quarterly, annual, and final), key monitoring, evaluation, and learning (MEL) documents (such as performance management plans (PMPs)), Indicator Performance Tracking Tables (IPTTs), and MEL plans), technical studies (such as enterprise resilience surveys, resilience study, rapid COVID-19 impact assessment), and learning products (such as success stories, case studies, blogs, published on Agrilinks, Marketlinks, or other venues).

To strengthen the validity and reliability of our findings, MSP employed a data triangulation approach, which involved conducting video or phone interviews with relevant Activity points-of-contact in addition to requesting written documentation. The aim was to gather first-hand perspectives on the Activities and to clarify any missing or unclear information found in the written documentation. It should be noted that the interviews served as a complementary source of information to the written documentation and helped us to gain a more nuanced understanding of the Activities' PSE work. Out of the 30 sample Activities contacted for an interview, 18 agreed to participate, despite the MSP team's effort to emphasize the Landscape Assessment's importance. Scheduling challenges were the primary obstacle to speaking with activity teams, while some points-of-contact did not respond to the MSP team's outreach.

Data Analysis

The data collection process was followed by an analysis of the collected documentation. This involved assessing the quality of the documentation and identifying any gaps in the evidence. In general, when the data was readily available and comparable, the research team reviewed the value of Activities' COVID-19 supplemental funding/add-ons, how it was spent, and evaluated the achievements of targets and the magnitude of results. MSP compared the data across different market contexts, firm sizes/risk profiles, and operational modalities, as captured in the sub-research questions. To provide a more comprehensive understanding of the analysis process, it should be noted that the assessment was conducted using a mixed methods approach at three levels.

Firstly, the research team conducted a detailed analysis of each activity across the 13 sub-research

questions. The data were systematized using inductive qualitative coding, which involved an iterative process of reviewing collected qualitative data to identify emerging themes and guide the data analysis process. To facilitate accurate data coding and enable cross-activity comparison, MSP developed an **Activity Data Summary Sheet** that mirrored the sub-research questions and provided space for identifying evidence gaps.

Secondly, to ensure comparability across activities, MSP developed a complementary tool using an Excel spreadsheet, the **Sample Coding Sheet**. This tool listed over 400 variables/sub-variables that characterized activities based on various aspects such as sector, technical area, technical focus, PSE strategies, and challenges. MSP reviewed activities against this key set of variables and sub-variables, allowing for the identification of trends in findings across activities and the derivation of quantifiable results.

Finally, to answer the learning question 2.6 (*In analyzing across Activities, are there groupings that emerge such as differences in findings by market context, sectors, firm type/risk profile or operational modalities?*), the research team performed a direct cross-data analysis using the Sample Coding Sheet. The intention was to verify whether it was possible to find correlations between variables and group activities based on the variable coding process performed.

Adopting an inductive coding process, the team cross-referenced their findings to discern significant correlations that could facilitate grouping of activities or identification of patterns. For example, the team investigated whether the type or size of the firm/private sector, such as formal and informal MSMEs, had any association/correlation with the adoption of short- or long-term resilience building strategies. The team also assessed the possible correlation between market context (the income level of the country of Activity), attempts to build short or long-term resilience, and the type of PSE targeted. For instance, we considered the possibility that activities in low-income countries may have focused on building short-term resilience and/or targeting informal MSMEs. Similarly, we hypothesized that activities in countries experiencing conflicts could have prioritized building short-term resilience. However, our analysis did not yield significant findings that could enable us to group the different types of market contexts or identify patterns, despite conducting a thorough qualitative analysis. Beyond the groupings already presented in the *Findings* section, the cross-data analysis did not reveal any other significant correlations in the proposed context of the learning questions and sub-questions.

Nonetheless, conducting a more focused analysis of specific activities and variables could potentially yield more robust results pertaining to the intersection of variables. It is important to note that the absence of significant correlations in this specific case does not negate the importance of the findings presented throughout the report or their relevance to the learning questions and the objectives of this assessment.

It is worth noting that based on the availability and quality of data, the research team identified findings and evidence gaps, which are described in detail in the [Areas for Further Research Section](#) (p. 51). These findings and gaps can be used to inform future data collection efforts and guide the interpretation of study findings. Overall, this rigorous approach ensured that the study generated reliable and meaningful results that can inform future research and practice in this area.

Data Quality Assurance and Research Ethical Practices

MSP recognizes the importance of data quality assurance procedures and adherence to research ethical practices in any type of assessment and research.

To **ensure data quality**, MSP adopted a transversal approach across the team, utilizing *weekly check-in data collection and analysis team meetings* to review research practices collectively. In addition, the Project Leader and Research Methods Specialist reviewed the collected data, including the Activity Data Summary Sheet and Sample Coding Sheet tools, to identify the most robust and reliable evidence while considering possible approaches to the findings. Some anecdotal points presented in the Activities documents were also highlighted throughout the report based on this process.

Regarding **research ethics**, MSP adopted specific practices, such as using official documents published by the activities or provided directly by the contact points of each activity as a secondary data source, only authorized for use. For primary data, such as interviews, MSP respected the position of the contact points, allowing them to share only what they deemed appropriate. Contact points were free to dictate the duration of the interviews, answer only the questions they were comfortable answering, and end the interview or call at any time.

MSP considers that these practices help ensure the accuracy and reliability of research findings, promoting the transparency and validity of research results. MSP's adoption of data quality assurance procedures and research ethical practices allowed them to confidently analyze and report on their findings, providing reliable evidence that can be used for decision-making and future research.

Research Limitations

As with any research endeavor, this assessment was not without its limitations. Many of the limitations we expected in the Implementation Plan were true. The main limitation MSP found are:

- Foremost among these was the challenge of compiling and analyzing data from a variety of secondary sources, given that not all Activities had implemented special reports dedicated to documenting their COVID-19 interventions, indicators, and results. To address this limitation, the research team conducted interviews with key points of each activity to help validate and supplement the relevant findings.
- Some IP/Activity teams did not respond to contact attempts or did not share the requested documentation, leading to further evidence gaps. Despite these challenges, the research team remained committed to thoroughly analyzing the available secondary data and carefully identifying and characterizing any evidence gaps, in order to provide the most accurate and insightful assessment possible.
- Regarding the sampling plan and considering the self-selection strategy used in the population definition phase, respondents who had the most success were most likely the most eager to participate. Therefore, this population may not capture unsuccessful PSE approaches.

- In light of potential limitations pertaining to the subjective nature of data interpretation and codification, a variety of standardized tools were employed to facilitate the collection and analysis of data in the most optimal manner. Moreover, the implementation of data quality assurance strategies and tools further contributed to the mitigation of such limitations.
- One source of data was the indicators that the Activities reported against with their COVID-19 funding. A limited number of Activities had COVID-19 relevant indicators and the diversity of interventions and indicators impeded cross-activity comparisons. Also, some of the data collected from those indicators did not align with the research questions that this study is seeking to answer.
- Similarly, the scattered nature of the secondary data available and multiple sources prevented MSP to construct counterfactuals for all the research questions (i.e., what would have happened had USAID not provided COVID-19 funding).
- Differentiating the specific impact of the COVID-19 funds versus the other support being provided by the Activity and by other stakeholders (e.g., governments) was not always possible due to their intricacy in how Activities reported on them and the fact that not all Activities had COVID-19 specific indicators.
- Most firm-level technical assistance is not considered strictly PSE; yet technical assistance may be leveraged to incentivize companies to buy in and provide their own resources. This distinction can be tricky when talking about strengthening firm resilience. There may be some overlap with PSD in the examples provided in this study.

ANNEX 4 – CATEGORIZATION OF PSE STRATEGIES DEVELOPED IN RESPONSE TO COVID-19

PSE Strategy/Tactics	Interventions implemented by IPs
HELP THE PRIVATE SECTOR PIVOT THEIR BUSINESS MODEL AND REMAIN IN BUSINESS	
<p>Implement relief programs for short-term recovery</p> <ul style="list-style-type: none"> • Direct purchase and distribution of products • Cloud based assistance package • Capacity building on business operations and marketing • Offset transportation costs 	<ul style="list-style-type: none"> • Feed the Future Rwanda Orora Wihaze (FTF ROW) Activity rapidly developed and implemented a COVID-19 response mechanism to aid poultry producers in the Gakenke district in averting the collapse of the egg value chain by facilitating a route and access to a new and important domestic market as suppliers to child nutrition programs. FTF ROW initially purchased eggs directly from local producers (through producer organizations (PO) and distributed them to child nutrition programs before facilitating the emergence of a more sustainable local solution (see below). • The Creating Economic Opportunities (CEO) Activity in Guatemala implemented a crisis mitigation strategy that provided TA to MSMEs in tourism, textile, and other non-agricultural sectors on financial and commercial topics, which helped reduce the adverse impact of the pandemic on company operations (sales recovery, reduced lay-off and job recovery). • The Small and Medium Enterprise Activity (SMEA) in Pakistan launched a cloud-based assistance package (on a full-cost support basis) to support SMEs willing to continue to operate remotely during the pandemic. The package included Microsoft 365 or Google G Suite for a team of up to 10 employees for six months and has helped SMEs improve business communication, business operations, management, and remote functionality through E-management tools. • Transforming Market Systems (TMS) in Honduras launched a Small Grants Facility with a company to upgrade informal “mom-and-pop” retailers into bigger retailer convenience stores to expand local market share for fresh, quality, local foods. TMS provided, through grants, refrigeration equipment to 2,239 urban and peri-urban food retailers (70 percent of which were women-owned), and the program generated \$5,755,298 in incremental sales and 2,055 jobs. • Afghanistan Value Chain Crops (AVC) provided 30 percent shipping subsidies to anchor firms to overcome the increases in shipping costs due to the COVID-19 pandemic. As part of its COVID-19 Response Plan, the project invested \$77,000 to incentivize exports through new routes and transport means, resulting in 92 shipments to Canada, the United States, Australia, Germany, Saudi Arabia, and Japan worth over \$4.5 million—a 58:1 return on investment. • Feed the Future Kenya Livestock Market Systems (FTF LMS) conducted a rapid assessment and disbursed COVID-19 stimulus grants to support businesses in rebuilding better enterprises. In some pilot counties, LMS innovated and tested digital financial transfers to disburse cash while building access and use of digital financial services.

PSE Strategy/Tactics	Interventions implemented by IPs
<p>Support cooperatives and unions in strengthening their operations and market access to remain in business</p>	<ul style="list-style-type: none"> • Cooperative Development Activity (CD4) in Rwanda and Malawi strengthened, through remote coaching, the internal operations of cooperatives and unions, resulting in improved governance and financial management overall. • In Ukraine, Economic Resilience Activity (ERA) worked with a cooperative to establish an open-air packing and sorting house and link to new contracts with supermarkets for new products, while the co-op cost-shared the purchase of a truck for delivery.
<p>Support formal and informal businesses in pivoting their business model to position them for long-term recovery</p> <ul style="list-style-type: none"> • New function in the market system • New markets/buyers • New channels 	<ul style="list-style-type: none"> • Rwanda's FTF ROW supported, through a grant, the development of a collection center with the capacity to store up to 700,000 eggs and provided TA to help it develop its business model and build market linkage domestically for the first time to respond to the collapse of the export market in Congo. This center, the first in Gakenke, also provided the community with a reliable supply of eggs at an affordable price, improving nutrition outcomes locally. • The Feed the Future Uganda Inclusive Agricultural Markets (FTF IAM) Activity released a call for concept notes to identify and partner with lead export firms, business associations, and food processors whose capacity to sell to higher-value export markets was undermined by the COVID-19 restrictions and market volatility. TA supported agribusinesses in Uganda to reposition their business models and operational activities for recovery and increased resiliency to the secondary effects of COVID-19. • TMS partnered with 12 businesses to help them diversify their market to respond to market closure and price volatility in export markets during the pandemic. The Activity helped firms develop 17 products and market offers and secure niches nationally and internationally in commodities such as coffee, cacao, plantains, sweet potato, cassava, potato, breadfruit, fruits, vegetables, and non-timber forest products. Through these partnerships, TMS funded market feasibility analysis, product development, food safety certifications, and product packaging and marketing. These 12 firms have generated over \$41,678,781 in incremental sales as of 2022. • AVC supported small and medium-scale agribusinesses, holding inventory to establish alliances with other AVC clients to process their products and extend their shelf-life, and refocusing their efforts towards supplying the local market for the duration of the pandemic. Some firms subcontracted the processing of fresh and dried fruit into jams and marmalades for sale during Ramadan or used social media to help set up a home delivery system. • Feed the Future Cambodia Harvest II (FTF Harvest II) provided training and advice on financial and business management to businesses to help them increase their access to market and production information and improve supply chain efficiency and value addition. Over the past five years, FTF Harvest II helped 778 unique companies improve business skills and supply chain management practices – which helped them develop 140 new products and access \$7,196,821 in financing. • ERA in Ukraine provided TA to MSMEs to adapt their products to the pandemic and introduce online marketing. For example, one partner company began manufacturing PPE, and others moved to online marketing.

PSE Strategy/Tactics	Interventions implemented by IPs
<p>Digitalize supply chain</p> <ul style="list-style-type: none"> • E-commerce • E-traceability system • Online platform for transport services • Social media marketing 	<ul style="list-style-type: none"> • Feed the Future Mozambique Agricultural Innovations (FTF Inova) supported agribusinesses, through grants as part of a Challenge Fund, to develop digital innovations to improve the availability of local produce in rural areas and reduce food insecurity; examples include a 1) “farm-to-fork” online marketplace that secured traceable deliveries of safe and healthy food to markets (e.g., vacuum-sealed organic chicken) and a 2) digitalized traceability system that enabled a honey produce to better manage its supply and distribution and trace products back to each of its 1,000 individual smallholder farmers/suppliers. <ul style="list-style-type: none"> • In Georgia, the Economic Security Program (ESP) linked 120 artisans hit hard by the pandemic to the global e-commerce platform, Etsy, and accelerated the effect of this e-commerce linkage by collaborating with global payment provider PayPal. • ESP partnered with 30 hotels, guesthouses, wineries, and restaurants to develop the Tourism Matching Fund, which linked businesses with a tourism marketing firm to help develop a social media strategy and content to reach target customers. ESP also agreed to match advertising contributions of participating hotels up to 20,000 GEL. ESP partners, Steller and Trivago, helped by scaling the hotels’ reach to a global level. • In Uganda, FTF IAM partnered with a business to launch a mobile and USSD-enabled platform that allows farmers, traders, and other users (commuters) to search for available means of transport for their agro inputs and produce in a way that generates higher income. • FTF IAM collaborated with a microfinance institution to develop a digital trading platform and mobile application that brings together agro-inputs providers, mechanization service providers, finance and insurance services providers, and commodity buyers to transact with one another. • SMEA supported, through a Scale-Up grant, a motorbike delivery service in Peshawar, Pakistan, to develop its web platform and back-end architecture, financial management information system, and human resource information system. The business expanded its operations by 38 percent in a year, reaching all over Peshawar and its adjoining NMDs — enabling it to solidify its place as the largest motorbike delivery service in KP. Leveraging this success, the company won \$220,000 from the Microsoft for Startups business accelerator program. • SMEA supported, through a Scale-Up grant, a company to develop a village-to-world marketing model that allows artisans from smaller cities and villages in Pakistan to connect with global markets without the need to have digital skills – disrupting the traditional middleman business model and allowing artisans to directly sell and market their products to consumers. • ERA provided training and TA to MSMEs on social media and online marketing to help them pivot to online sales. ERA partnered with a local company that carried out online marketing of benefited local fresh produce producers. For example, healthy locally produced food was sold in “Pilates Boxes” that combined different honey, cheeses, vegetables, and fruit and distributed it to households that had purchased it online. • In Pakistan, SMEA partnered with a major multinational technology company to promote digital inclusion of women-owned

PSE Strategy/Tactics	Interventions implemented by IPs
	<p>businesses (WOB) during the pandemic, help them connect to new markets, and weather the global economic downturn. Building on its global initiative #SheMeansBusiness (which had limited traction in Pakistan), Facebook adapted its digital-marketing training modules to WOB's needs while SMEA acted as a catalyst and facilitated partner linkages through its existing networks of beneficiaries.</p>
<p>Support the development and access of key risk mitigating technologies and services needed by private sector</p> <ul style="list-style-type: none"> ● PHH and storage technologies to reduce food loss ● Scenario planning tool to improve cash flow management 	<ul style="list-style-type: none"> • In Afghanistan, AVC introduced two post-harvest handling (PHH) technologies – the “Purdue Improved Crop Storage” (PICS) bags and UC Davis’ ‘DryCards,’ initially designed for grains and pulses and adapted them for use with dried fruits and nuts value chains, which were badly impacted by the COVID-19 crisis. AVC also distributed PHH and storage guidelines for high-value crops, procured four vacuum-sealing machines, and began providing vacuum sealing services to its clients in Kabul, Mazar-e-Sharif, Kandahar, and Herat. Through this free service, agro-processors and export firms could store their products in 25 Kg vacuum sealed polypropylene bags, protecting them from pests and diseases, and slowing down the oxidation process while products could not be sold on export markets. • FTF IAM collaborated with investment transaction advisory firm Open Capital Advisors (OCA) to develop a scenario planning tool for Ugandan SMEs to forecast supply and demand, manage their supply chains effectively, and understand the cash flow implications of various COVID-19 scenarios.
<p>Support system level innovation</p> <ul style="list-style-type: none"> ● New direct food delivery models ● New domestic market opportunities 	<ul style="list-style-type: none"> • To support Honduran e-commerce, providers develop new direct food delivery options to households, TMS worked with relevant GOH agencies and chambers to develop biosecurity protocols needed by the industry to enable food delivery and disseminated training to thousands of workers in the food services sector. • To harness a new opening in the domestic market for local potato chips processing (due to disruption of potato imports by COVID-19), TMS coordinated with the Honduras National Potato Council to secure necessary clearances so that local business could import industrial-variety potato seeds from the U.S. and supported local growers to now grow for the local chip processor. TMS support ensured that many other firms could benefit from these innovations.
<p>UNLOCK AND MAINTAIN ACCESS TO FINANCE FOR FIRMS</p>	
<p>Facilitate the implementation of MSME recovery funds</p>	<ul style="list-style-type: none"> • In Rwanda, Feed the Future Nguriza Nshore (FTF NN) supported the Government of Rwanda (GoR) to develop a \$3 million MSME facility within the GoR's COVID-19 focused Economic Recovery Fund (ERF). RR worked with the GoR to map potential funders and put in place resource mobilization strategies and directly engaged with donors, investors, and other financiers on behalf of the GoR to mobilize resources. NN also provided TA to Rwanda's Business Development Fund (BDF) to develop an M&E framework and reporting plan for the Fund and to improve BDF's internal systems and processes. • Jobs, Opportunities, and Business Success (JOBS) assisted the Government of Tunisia with the design, structure, operational

PSE Strategy/Tactics	Interventions implemented by IPs
	<p>procedures, and launch of a 700 million TND (\$800,000) fund for Tunisian small businesses and firms to mitigate the economic impact of COVID-19 and linked MSMEs in need of funds to the fund.</p>
<p>Support financial institutions in providing loan to COVID-19 affected MSMEs</p>	<ul style="list-style-type: none"> •Tunisia JOBS supported partner MFIs, through a \$3.3 million COVID-19 Grant Fund, to provide new lending products through blended finance (combining grant funding with commercial lending) to thousands of vulnerable micro and small enterprises impacted by COVID-19. JOBS also provided them access to digital financial tools and tailored business coaching services. Supported MFIs assisted 16,745 MSMEs (of which 38 percent women-owned and 35 percent run by youth) with \$37 million in micro-credits. •In DRC, Feed the Future Strengthening Value Chains (FTF SVC) helped commercial banks to expand their portfolio and prepare them to lend to COVID-19 affected firms. • FTF IAM in Uganda used an innovative indefinite quantities (IQC) contract to co-design fixed-price, performance-based milestones with advisory firms who could select and work with agri-SMEs affected by COVID-19. The combination of TA and risk capital aimed at enabling investment and short-term working capital to Agri-SMEs. • FTF NN in Rwanda tailored its ongoing TA offered to MFIs and SACCOs to include training on business continuity plans and lending and recovery measures based on needs identified as part of an assessment of COVID-19's impact on MFI and SACCOs. FTF NN also partnered with AMIR and BDF to provide a month-long training on the utilization of the ERF to MFIs and SACCOs across the country. Training topics included loan appraisal, credit risk, loan recovery and recording, which equipped participants with skills on how to increase access to finance for COVID-19 affected SMEs.
<p>Facilitate digital innovation in financial sector to improve businesses' access to financial services (e.g., equity, loan, savings, digital payment)</p> <ul style="list-style-type: none"> • Branchless banking • Digital payment platform • Online marketplace for equity 	<ul style="list-style-type: none"> •Feed the Future Knowledge-Based Integrated Sustainable Agriculture in Nepal II (FTF KISAN II) facilitated branchless banking by enabling agrovets, retailers, and suppliers in rural areas to become agents on behalf of commercial banks partnered; KISAN II partnered with an established agrovet to scale up its branchless banking counter, providing financial services to 450 clients residing in remote Laljhadi Rural Municipality and providing agriculture loans to clients worth NR. 5.6 million (\$47,458). •FTF KISAN II in Nepal facilitated the development of Digital Payment Platforms, e-wallets, etc., to help agribusinesses stay competitive and conduct business safely while limiting strains on cash flow. FTF KISAN II also supported cooperatives to adopt digital payment systems for added safety and to adapt to an increasingly digitized business context. •JOBS in Tunisia developed an online marketplace, "JoussourInvest," to facilitate the application process and attract stock market brokerages looking to offer capital-market services and funding to SMEs. Since the end of September 2020, the platform has attracted over 50 investors, identified more than 2,000 SMEs in need of equity funding, and facilitated the closure of 35 transactions totaling approximately \$25 million. •Feed the Future Kenya Crops and Dairy Market Systems (FTF KCDMS) supported VSLAs to adopt ICT for savings and lending activities instead of the paper-based system utilized before the pandemic to ensure continued operations during the pandemic.

PSE Strategy/Tactics	Interventions implemented by IPs
<p>Strengthen financial institutions' capacity to manage risks and facilitate the de-risking of their loan portfolio during COVID-19</p>	<ul style="list-style-type: none"> • Feed the Future Egypt Rural Agribusiness Strengthening (FTF ERAS) conducted a virtual training titled “On-line COVID-19 Crisis Management” to 59 staff members of financial institutions to help them manage the institutions’ agriculture loan portfolio during the pandemic. • The Feed the Future West Africa Trade and Investment Hub (FTF WATIH) restructured distressed financing lines or obtained new financing lines to support operations and provided risk mitigation grants (first-loss) to financial institutions to expand the availability of working capital for SMEs. • In Rwanda, FTF NN embedded an advisor who served as the internal champion at Business Development Fund (BDF) to promote the execution of the co-guarantee arrangement for lending to agricultural SMEs in Rwanda between BDF and ACELI Africa, effectively extending the reach and availability of de-risking solutions through Rwandan financial institutions.
<p>Facilitating catalytic investment into SMEs</p>	<ul style="list-style-type: none"> • INVEST provided first loss capital and subsidies to the INVEST Tunisia Resilience Fund set up (registered in the U.S.) by subcontractor Small Enterprise Assistance Funds (SEAF), drawing on catalytic capital from INVEST paired with senior debt provided through SEAF’s COVID-19 Global Gender Lens Emergency Loan Finance LLC (C19F), a DFC funded investment vehicle. The Tunisian Resilience Fund unlocked \$4 for each \$1 of capital it deployed, for a total of \$2.5 million in available blended financing for 4-6 Tunisian gender-forward SMEs. • Under a \$10 million INVEST Italy buy-in, the second largest bank in Italy mixed a working capital loan, a government guarantee that covered 90 percent of the loan, and a USAID catalytic capital grant to SMEs for around ten percent of the loan value. In total, the bank provided \$1 million in working capital loans to three SMEs supported by \$140,000 in grants channeled, for a sevenfold leverage. Additionally, an INVEST partner established a fund to make investments to increase the production of PPE and other medical supplies. With \$1.1 million in catalytic capital from USAID, the consortium leveraged an additional \$10 million in private investments.
<p>Support MSMEs in restructuring debt and accessing new sources of financing</p>	<ul style="list-style-type: none"> • CEO in Guatemala helped MSMEs to identify debt restructuring opportunities and access to financing through the Capital Protection and Economic Reactivation Funds generated by the Government of Guatemala. • FTF KISAN II in Nepal trained partner cooperatives on liquidity management and helped them acquire wholesale loans.
<p>PROMOTE THE SAFE AND STABLE CONTINUATION OF WORKFORCE, SUPPLY CHAINS, MARKETS AND TRADE</p>	
<p>Leverage existing large/lead partners and/or MSMEs to provide COVID-19</p>	<ul style="list-style-type: none"> • FTF Inova in Mozambique co-invested with large input suppliers to embed health support services, such as providing information on COVID-19, best practices to prevent infection, and access to PPE (e.g., masks and hand sanitizers). • ESP partnered with a Georgian packaging firm to provide boxes for shipping facemasks and facilitated the shipment of over one million facemasks across all regions of the country.

PSE Strategy/Tactics	Interventions implemented by IPs
<p>related safety information, PPE and/or training to MSMEs</p>	<ul style="list-style-type: none"> • FTF WATIH scale-up companies engaged in the direct response to COVID-19, including companies working in medical apparel and PPE manufacturing. One firm reported that instead of postponing their investment plans, they entered into a new co-investment agreement with the Trade Hub to produce PPEs. • In Tunisia, JOBS supported through grants existing client firms and new leads that produce essential goods and services to combat the pandemic (e.g., supported the National Crisis Management Call Center, assisted companies to increase production of medical supplies for Tunisian healthcare workers, and supported waste management companies to help meet the increased demand for medical waste treatment services). • The Worker Wellness Alliance (WWA) in Ethiopia partnered with the Hawassa Industry Park and the City Health Department to develop the Welcome Center information packets for newly recruited female factory workers arriving during the pandemic. WWA also facilitated with the Steering Committee Community Conversations (CCs) to address stigma from the community against park workers who were perceived as highly affected by COVID-19. • SMEA collaborated with Pakistan's largest food delivery network to deliver training and food courses on online business management, marketing, culinary and kitchen safety to home chefs, more than 70 bakers, primarily owned and operated by women lunch service providers, and other small food businesses. • INVEST had a \$10 million buy-in in Italy that provided TA to businesses engaged in the research, development, manufacturing, and distribution of PPE, medical equipment, and medical supplies. • The Feed the Future Livelihoods for Resilience (FTF L4R) Activity in Ethiopia pivoted from supporting a micro-franchise approach to enhance access to soap and support handwashing in communities to developing a voucher-based model that included key distribution networks already built by the nascent micro-franchise initiative. FTF L4R also provided information on COVID-19 health and safety measures.
<p>Support local market actors (e.g., market managers and traders and market associations) to comply with local protection measures to minimize local food supply chain disruption</p>	<ul style="list-style-type: none"> • FTF SVC in DRC built the capacity of the traders association to buy in bulk and continue sourcing and selling at local markets – reducing the impact of COVID-19 on local MSMEs. • In Uganda, FTF IAM has partnered with six organizations to strengthen the capacity of market associations to manage innovative interventions that promote COVID-19 protocols and sustainable health and safety measures in 13 markets (e.g., water access associations, women's associations, driver associations, and market vendor's associations) • In Kenya, FTF LMS supported livestock market managers, in collaboration with the Livestock Market Associations and local officials, with logistics to deliver USAID Marafiki facemasks to markets, market sanitization, and trading area demarcation outside of markets in 20 secondary markets and smaller, feeder livestock markets to maintain market operations and ensure continued local trade of goods and services.

PSE Strategy/Tactics	Interventions implemented by IPs
Build and maintain private sector alliances to address COVID-19 impact on communities	<ul style="list-style-type: none"> •Guatemala Communities Leading Development (CDL) advocated for allies to join a global effort to prevent the spread of COVID-19 and address the secondary economic impacts on communities. For instance, CDL facilitated the ‘Partnering for Water’ online forum, which included the presentation of the Azure innovation strategy in Guatemala and led to the signing of an alliance with the Guatemalan Chamber of Construction to improve the quality of infrastructure in the poorest areas of Guatemala. •Madagascar RANO-WASH organized various events with diverse stakeholders, including communes, on the importance of the place of the private sector in inclusive and sustainable WASH services and the promotion of the business enabling environment in the WASH sector. RANO-WASH also supported the private sector to be more proactive and aggressive in the market.
STABILIZING LOCAL FOOD PRICES AND SUPPLIES	
Facilitate access to inputs	<ul style="list-style-type: none"> •In Kenya, FTF KCDMS has partnered with agro-dealers to co-invest in a franchise model to meet last-mile distribution of inputs to farmers in rural areas. An agro-leader distributor created a sales system to keep the shops well-stocked, allowing them to purchase on credit and repay after making sales. The firm tripled its sales in 10 months thanks to the franchise and agent model and hired 11 new staff members. •FTF IAM partnered with seven input agro-dealers/distributors to offer discounted seeds and fertilizers to about 13,000 farmers negatively impacted by COVID-19 in FTF IAM’S zones of interest. •In Indonesia, Jalin helped ambulance providers to offer last-mile pre- and peri-natal care for COVID-19 response services.
Promote domestic food production through a Challenge Fund that target innovative SMEs	<ul style="list-style-type: none"> •FTF Inova implemented a Challenge Fund that encouraged the production and processing of local food and inputs to secure local food and transport to consumers and supported SMEs to establish themselves in local markets to prevent a food security crisis due to supply chain disruption created by the pandemic.
HELP GOVERNMENT ADOPT SMART POLICIES THAT BOLSTER FOOD SECURITY, NUTRITION AND MARKET WHILE MAINTAINING SAFETY	
Build capacity of business associations to lobby the government	<ul style="list-style-type: none"> •FTF SVC partnered with the Association of Cross-border Traders (ACT) and its affiliated market women’s associations and provided them with extension and sensitization on the simplified trade regime, capacity building on market linkage and advocacy, which led them to better organize themselves and start buying and selling in a group. •The Food Trade Coalition for Africa, a policy dialogue platform, convened key public and private stakeholders through two newly created Task Forces (TF) — the Food and Nutrition Security Data and Hunger Hotspots TF and the Logistics and Trade Corridors TF — to discuss the impacts of food trade disruptions in Africa due to COVID-19 and develop policy solutions.
Facilitate the emergence of PPD to	<ul style="list-style-type: none"> •TMS supported the Government of Honduras (GOH) and organizations in deploying a crisis management framework to monitor the pandemic (developed initially in 2019 with support from TMS to address a political crisis) and initiating a planning process for

PSE Strategy/Tactics	Interventions implemented by IPs
facilitate policy reforms	the tourism sector. The tourism sector formed the Tourism Emergency Table, the first national PPD, which led to the amendment of the GOH's relief package with special provisions for the tourism sector (e.g., wage and tax relief for COVID-19 affected workers).
Facilitate the certification of firms to ensure safety	•In Honduras, TMS supported the public and private sectors to collaborate to launch a national employment training program to safely reopen visitors' attractions and certify tourism establishments adopting biosecurity protocols.

ANNEX 5 – MAIN FORMAL INDICATORS ADDED TO REPORT ON PSE STRATEGIES IMPLEMENTED IN RESPONSE TO THE PANDEMIC

Indicators Used to Track COVID-19 Interventions	Activities
<ul style="list-style-type: none"> ▪ Financing Approved and Loans in-process ▪ Sales recovery ▪ Employment recovery 	Guatemala CEO
<ul style="list-style-type: none"> ▪ Number of individual beneficiaries from vulnerable and hard-to-reach populations in the target regions (disaggregation for COVID-19) 	Ukraine ERA
<ul style="list-style-type: none"> ▪ Total number of MSMEs grantees/beneficiaries ▪ Total number of MSMEs grantees/beneficiaries with relief grant support ▪ Average percentage increase in total sales from assisted MSMEs ▪ Total number of jobs sustained and created ▪ Private capital and commercial financing leveraged for MSMEs ▪ Total number of MSMEs with increased access to commercial financing 	Tunisia JOBS
<ul style="list-style-type: none"> ▪ Number of public private partnerships (PPPs) initiated / formed as a result of USG assistance ▪ Number of private sector partnerships utilized addressing second-order COVID-19 impacts ▪ Amount of private sector funding mobilized to address the second-order impacts of COVID-19 ▪ Value of private sector leveraged (custom) 	Guatemala CLD

Indicators Used to Track COVID-19 Interventions	Activities
<ul style="list-style-type: none"> ▪ Number of youths trained in social or leadership skills through USG assisted programs (K51 YOUTH 1) ▪ Sales of firms receiving USG funded assistance (USD) (K52 EG.3.2-26) ▪ Number of firms receiving USG funded technical assistance for improving business performance (K53 EG.5.2-1) ▪ Percentage change in sales of firms after receiving USG assistance (K54 Custom 1) ▪ Number of private sector enterprises with increased access to finance due to USG assistance (K55 Custom 2) ▪ Number of migrant workers and other population engaged in agribusinesses (K56 Custom 3) ▪ Value of sales per returnees and other priority populations (USD) (K57 Custom 4) ▪ Area expanded under fine rice with USG assistance in two districts of Sudurpaschim and four districts of Lumbini province (K58 Custom 5) ▪ Area expanded under maize for feed and other industrial uses with USG assistance in 2 districts in Sudurpaschim, and 4 districts of Lumbini, Palpa, and Surkhet districts (K59 Custom 6) 	Nepal FTF KISAN II

Source: Activities' annual reports and MEL plans, authors.

ANNEX 6 – WHY FIRMS COPEd BETTER THAN OTHERS DURING COVID-19

KISAN II survey identified five major characteristics that made businesses competitive and resistant to shock during the COVID-19 pandemic. They are:

- **Efficient Supply Chain Management.** Agrovets located closer to agri-input suppliers and/or in bigger cities found it easier to maintain their inventory due to enhanced transportation access, and agrovets with more than five agri-input suppliers had significantly higher annual turnover than those with fewer suppliers.
- **Apt geographical location.** The locale of the surveyed firms played a big role for business operations during the lockdown and whole pandemic period. The more agrovets were located close to their suppliers, the better they performed
- **Efficient supply chain management.** Agrovets, traders, and rice millers who had good relationships with government officials were able to manage permits for business operation during lockdowns. Cooperatives who provided digital financial services through mobile/SMS banking were able to increase their turnover. Vegetable traders with access to cold storage or cold chambers were able to reduce their postharvest losses.
- **Efficient use of human resources.** Agrovets used their technical staff for marketing and sales of agri-inputs, including home delivery services. Cooperatives used their technical staff to provide door-to-door financial services to members to collect deposits, provide loans, and collect interest payments.
- **Diversified revenue sources.** Cooperatives with dedicated profit centers (i.e., vegetable trading, dairy, agrovet, custom hiring centers, etc.) reported higher profits, as they were not solely dependent on savings and credit services for revenue. Cooperatives with proper business planning and implementation strategies, including portfolio diversification and risk mitigation plan, performed better.

Source: "Factors that Have Enabled Private Companies to Remain Competitive During the COVID-19 Pandemic," July 2021, KISAN II

ANNEX 7 – SELECT RESOURCES

General	
Downing, J., Field, M., Ripley, M., Sebtad, J. <i>Market Systems Resilience: A Framework for Measurement</i> . USAID Building Capacity for African Agricultural Transformation (Africa Lead II). DAI Global, LLC. 2018. https://2017-2020.usaid.gov/sites/default/files/documents/1866/Market-Systems-Resilience-Measurement-Framework-Report-Final_public-August-2019.pdf .	Paper
When available, various annual, quarterly, and final reports were reviewed for all activities. These were only listed below when the annual, quarterly, or final report was the primary source of project information.	
Afghanistan Value Chains–Crops (AVC)	
Lenaghan, Tom and Alexandra Heffern. <i>How Donor-Funded Economic Growth Projects are Adapting to the Challenges of COVID-19</i> . DAI. 2020. https://dai-global-developments.com/articles/how-donor-funded-economic-growth-projects-are-adapting-to-the-challenges-of-covid-19/ .	Blog Post
Communities Leading Development (CLD)	
<i>Communities Leading Development Annual Performance Report, Fiscal Year 2020</i> . USAID Communities Leading Development Project. Catholic Relief Services. 2020.	Annual Performance Report
<i>Communities Leading Development (CLD): Collaborating with the Private Sector</i> . USAID Communities Leading Development Project. Catholic Relief Services (CRS) Guatemala. 2018,	Private Sector Alliances Strategy
<i>Communities Leading Development FY2023 Work Plan</i> . USAID Communities Leading Development Project. Catholic Relief Services. 2022.	Work Plan
Hetzel, Lisa (Deputy Chief of Party for Leverage and Alliances); Pérez Santis, Lheslye (Chief of Party)	Interview with Project Staff
CLD provided a selection of “Weekly Highlight” stories, all available on their website, that illustrate some of their work with the private sector during COVID-19: https://proyectocld.org/eventos-noticias/?lang=en	News Posts
Cooperative Development Activity 4 (CD4)	
<i>Cooperative Development Program (CD4) Midterm Evaluation Report</i> . TANGO International. 2022. https://pdf.usaid.gov/pdf_docs/PA00ZBHK.pdf	Midterm Evaluation Report
<i>COVID-19: Impact on Agricultural Cooperatives</i> . Land O’Lakes Venture37. June 5, 2020. https://www.landolakesventure37.org/insights-hub/covid-19-impact-on-agricultural-cooperatives .	Blog Post
Hamilton, Alexandra. <i>Resilient to Crises: How the Adaptive Nature of Cooperatives Has Aided in Overcoming COVID-19-Related Challenges</i> . Marketlinks. October 7, 2020.	Blog Post

https://www.marketlinks.org/blogs/resilient-crises-how-adaptive-nature-cooperatives-has-aided-overcoming-covid-19-related .	
<i>Impact of COVID-19 on Agricultural Cooperatives</i> . USAID Cooperative Development Program. Land O'Lakes Venture37. https://www.usaid.gov/documents/impact-covid-19-agricultural-cooperatives .	Study Summary Document
Niedermaier, Danielle. <i>How Strengthening Cooperatives Unlocks the Potential of Farmers and Communities</i> . Agrilinks. February 22, 2021. https://agrilinks.org/post/how-strengthening-cooperatives-unlocks-potential-farmers-and-communities .	Blog Post
Creating Economic Opportunities (CEO)	
Ochaeta, Juan (Chief of Party); Thompson, Graeme (Director of Communications)	Interview with Project Staff
Ochaeta, Juan Jose. <i>Response to COVID-19 Regional Crisis Mitigation Program for the Creating Economic Opportunities Project</i> . USAID Creating Economic Opportunities Project. 2021.	COVID-19 Response Document
<i>USAID Helps Business Survive and Thrive During the Global Pandemic</i> . USAID Creating Economic Opportunities Project. Palladium International LLC.	Success Story
Economic Resilience Activity (ERA)	
Chartock, Andrea (Technical Advisor)	
<i>Household and Business Economic Resilience Study of Government-Controlled Areas of Donetsk and Luhansk Oblasts and Sea of Azov Region in Eastern Ukraine: 2020-2021</i> . USAID/Ukraine Analytical Services in Support of the Economic Resilience Activity (ERA_AS). SSG Advisors (d/b/a Resonance). February 3, 2021.	
<i>Ukraine ERA: Pause and Reflect Session Memo – Pause and Reflect Session on Maximizing Effectiveness of Online Interventions</i> . USAID Economic Resilience Activity. DAI Global LLC. February 23, 2021.	Pause and Reflect Session Memo
<i>Ukraine COVID-19 Business Impact Survey Results</i> . American Chamber of Commerce in Ukraine and Deloitte. March 13, 2020. https://chamber.ua/news/businesses-preparing-for-a-slowdown-in-sales-and-cash-flow-challenges-due-to-covid-19-pandemic-survey-of-the-american-chamber-of-commerce-in-ukraine-and-deloitte/ and https://chamber.ua/wp-content/uploads/2020/03/AmCham_Deloitte_COVID-19_Mar2020_final-copy-EN2.pdf .	Survey Results
<i>USAID Economic Resilience Activity: Annual Report, October 01, 2020-September 30, 2021</i> . USAID Economic Resilience Activity. DAI Global LLC. 2021.	Annual Report
<i>USAID Economic Resilience Activity: Quarterly Progress Report, October 01-December 31, 2021</i> . USAID Economic Resilience Activity. DAI Global LLS. 2022.	Quarterly Report
Economic Security Program (ESP)	
Akhalaia, Giorgi (Deputy Chief of Party); Gvenetadze, David (MEL Manager); Shioshvili, Marika (Chief of Party)	Interview with Project Staff
<i>Annual Report: USAID Economic Security Program, October 1, 2019-September 30, 2020</i> .	Annual Report

USAID Economic Security Program. DAI Global LLC.	
<i>Annual Report 2021</i> . USAID Economic Security Program. DAI Global LLC.	Annual Report
Pearson, Brenda Lee, Maia Giorbelidze, Lasha Kavtaradze, Rati Gabrichidze, and Penelope Norton. <i>USAID/Georgia's Economic Security Program: Mid-Term Evaluation</i> . USAID LEAP III: Learning, Evaluation, and Analysis Project. Integra Government Services International LLC. June 2022. https://pdf.usaid.gov/pdf_docs/PA00ZGXC.pdf .	Mid-Term Evaluation
<i>USAID Economic Security Program Quarterly Report (FY20 Q2: January-March 2020)</i> . USAID Economic Security Program. DAI Global LLC. 2020.	Quarterly Report
<i>2022 Annual Report: Year 3 Achievements</i> . USAID Economic Security Program. DAI Global LLC.	Annual Report
Feed the Future Bangladesh Horticulture, Fruits, and Non-Food Crops (BHF)	
Amin, Bani (Deputy Chief of Party)	Interview with Project Staff
<i>Annual Report: October 2020-September 2021</i> . USAID Feed the Future Bangladesh Horticulture, Fruits, and Non-Food Crops Activity. Chemonics International Inc. 2021.	Annual Report
<i>USAID/Bangladesh Feed the Future Horticulture, Fruits, and Non-Food Crops Activity: Impact of USAID PSE Strategies Applied During the COVID-19 Pandemic, and Lessons Learned</i> . USAID Bangladesh Feed the Future Horticulture, Fruits, and Non-Food Crops Activity. Chemonics International Inc.	Note on PSE During COVID-19 and Lessons Learned
<i>Quarterly Progress Report: January – March 2022</i> . USAID Feed the Future Bangladesh Horticulture, Fruits, and Non-Food Crops Activity. Chemonics International Inc. 2022.	Quarterly Progress Report
Feed the Future Cambodia Harvest II	
<i>Feed the Future Cambodia Harvest II Final Report: 2017-2022</i> . USAID Feed the Future Cambodia Harvest II. Abt Associates. 2022.	Final Report
<i>Feed the Future Cambodia Harvest II FY20 Annual Report</i> . USAID Feed the Future Cambodia Harvest II. Abt Associates. 2020.	Annual Report
<i>Feed the Future Cambodia Harvest II Impact Narrative Report: Five Years of Facilitating Changes</i> . USAID Feed the Future Cambodia Harvest II. Abt Associates. Revised June 2022.	Impact Narrative Report
Feed the Future Cambodia Harvest II Final Evaluation Plan, Feed the Future Market Systems and Partnerships Activity. Prepared by Just Results. February 9, 2023.	Final Evaluation Plan
Kong, Solina. <i>Pandemic Challenges Reveal Cambodian Adaptability: A Case Study in the Vegetable Sector</i> . Marketlinks. January 13, 2021. https://www.marketlinks.org/blogs/pandemic-challenges-reveal-cambodian-adaptability-case-study-vegetable-sector .	Blog Post
Miehlbradt, Alexandra, et al. <i>Cambodia Harvest II Final Evaluation Plan</i> . USAID Feed the Future Market Systems and Partnerships (MSP) Activity. DAI Global LLC. 2023.	Final Evaluation Plan

Feed the Future Egypt Rural Agribusiness Strengthening (ERAS)	
<p><i>Feed the Future Egypt Rural Agribusiness Strengthening Project: FY20 Annual Report.</i> USAID Feed the Future Egypt Rural Agribusiness Strengthening Project. Abt Associates. 2020. https://pdf.usaid.gov/pdf_docs/PA00ZQ98.pdf.</p>	Annual Report
<p><i>Feed the Future Egypt Rural Agribusiness Strengthening Project: FY22 Annual Report.</i> USAID Feed the Future Egypt Rural Agribusiness Strengthening Project. Abt Associates. 2022. https://pdf.usaid.gov/pdf_docs/PA00ZSF8.pdf.</p>	Annual Report
<p><i>Innovations in Agribusiness Engagement: New Models from Egypt – Remote Agribusiness Engagement during COVID-19.</i> USAID Feed the Future Egypt Rural Agribusiness Strengthening Project. Abt Associates. Agrilinks. https://agrilinks.org/sites/default/files/media/file/eras-technical-brief-1.pdf.</p>	Technical Brief
<p>Smith-Rommel, Alexa. <i>Facilitating Successful Harvest Seasons During COVID-19.</i> Agrilinks. April 16, 2021. https://agrilinks.org/post/facilitating-successful-harvest-seasons-during-covid-19.</p>	Blog Post
<p><i>USAID/Egypt Private Sector Landscape Assessment Final Report.</i> USAID LEAP III: Learning, Evaluation, and Analysis Project. Integra Government Services International LLC. 2020. https://www.integrallc.com/wp-content/uploads/2020/05/Egypt-Private-Sector-Landscape-Assessment.pdf.</p>	Private Sector Landscape Assessment
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