Value Chain Analysis of the in the

Olive and Olive Oil sector

Governorate of Irbid

Jordan, 2013

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1. Executive summary

This report covers the process and results from the value chain analysis conducted on the olive sector in Irbid Governorate. The exercise was a part of the ILO project 'Enhancing access to employment and livelihoods for Jordanian host communities affected by the Syrian refugee crises' in the northern governorates of Jordan.

The project strategy aims at addressing constraints and creating better livelihoods for the large number of enterprises, women and men, affected by the refugee crisis. It endeavours to do so through four intervention areas: 1) value chain development of selected sectors in Irbid and Mafraq to stimulate job creation and enterprise growth; 2) enabling business environment improvements, including addressing labour market challenges, through public-private sector dialogue; 3) developing effective employment services and structures for employment generation; and 4) local capacity building to support business start-up and expansion through entrepreneurship capacity building.

The value chain analysis was conducted in a participatory manner and led to the identification of a number of constraints and opportunities for developing the sector. These are grouped into the following categories: 1) Improve quality and increase production with technological upgrading, 2) Market development, 3) Improve support functions and coordination, 4) Improve the enabling environment. At the end, the report presents an intervention plan for how to address the issues and provide solutions with a view to increasing employment and livelihood opportunities for host communities in the Irbid governorate.

2. Background

The value chain work is taking place in the context of the ILO project to support the enhancement of employment opportunities and livelihoods for Jordanian host communities affected by the Syrian refugee crisis. Besides sharing information on the situation of the host communities and the overall project, this section will also provide background information concerning the Governorate of Irbid as well as the olive sector and choice of value chain.

2.1 Project background

The Syrian refugee crisis continues to deepen, leading to great human tragedy. Throughout Jordan there are over a million Syrians, as of the end of 2013, from which over 560,000 are registered as refugees and more than half of whom reside in Mafraq and Irbid. Particularly characteristic of the Syrian refugee population is its vulnerability due to its predominantly high proportion of women, children and elderly. Estimates about the number of conflict affected people are expected to rise considerably as there appears to be no political solution or any end to the fighting in sight.

Serious long term consequences may be envisaged but this situation has already had some deep implications for the local communities. These people are experiencing fierce competition and increasingly being displaced in the labour market, due to the fact that Syrian workers are more competitive in terms of both wages and skills. Now the urgent concern, since Jordanian employers prefer Syrian and other non-Jordanian workers so extensively, of the Government is their response in seeking support to combat the rising unemployment rates in Jordanian host communities. Additionally, since Syrian refugees do not have official work permits, all those working are doing so on an informal basis causing the Jordanian labour market to become increasingly informalized.

Moreover, the competition for public services (education, health, sanitation etc.) as well as for jobs, has created tensions between local and refugee communities. Importantly, it is crucial to support stable conditions in Jordan, and essential to maintain the existing goodwill of the Jordanian Government and people, in order to continue receiving and managing the huge refugee inflows. Jordanian authorities are concerned about internal security, due both to potential clashes between refugees belonging to the two Syrian factions and an increase of violence, beggars and criminality, especially in Northern governorates.

The most affected governorates are Mafraq and Irbid. In the third quarter of 2013 Mafraq (including the Za'atari refugee camp) had an estimated refugee density of nearly 55 per cent, whilst Irbid was the second most affected, with a refugee density of 22 per cent.[1]

Jordan is currently seeing a moderate annual growth rate of 2.7 per cent but this is still not enough to meet the growth in the labour force, even without the influx of refugees. Every year 60,000 youth enter the labour market. Official unemployment has increased to an estimated 13.1 per cent in 2013. Women and youth are most affected, with 22.3 and 22.8 per cent official unemployment respectively. Unofficial overall unemployment is probably higher.

There is therefore an urgent need for interventions that generate jobs and improve incomes, particularly in communities that host large numbers of refugees. A recent assessment of employment generation and training in host communities conducted by the ILO, (under the framework of the consolidated host community support), also recommended that consideration should be given to rapid implementation of small employment creation projects targeted at municipalities with especially high refugee densities[2]. This calls for a series of practical local-level interventions that stimulate job creation and business growth as well as furthering an enabling environment. Solutions that, in turn, can be expected to mitigate negative employment and wage impacts from the inflow of Syrian labour in the affected governorates.

Cooperation has begun with partners in Irbid and Mafraq Governorates, as well as at a central level, to implement the start-up phase of a response to the refugee crisis. This project is implemented under the framework of the ILO support to the response to the Syrian refugee crisis. The component named '***Enhancing access to employment opportunities and livelihoods in host communities***', was in turn implemented under the framework of the UNDP project '***Mitigating the impact of the Syrian refugee crisis on Jordanian vulnerable host communities'*** and the already existing government agreement with the Ministry of Interior. As follows, the project has four interventions areas:

1. Value chain development in selected sectors within Irbid and Mafraq
2. Business enabling environment improvement, including addressing labour market challenges
3. Developing effective employment services and improving employability

[1] UNHCR: https://data.unhcr.org/syrianrefugees/country.php?id=107
[2] Host community assessment for the UN host community platform - Livelihoods and employment group (still draft)

4. Local capacity building to support business start-up and expansion

The value chain analysis of the current report belongs to component one, with all the components being complementary and supporting each other.

2.2 Irbid Governorate

The Governorate of Irbid is located in the North-West of Jordan, between the Yarmouk River basin and the Jordan Valley, most of which constitutes part of the Hawran plateau covering Northern Jordan and South-West Syria. The governorate is bordered by Syria (the Golan Heights) from the north, the Jordan River from the west, Mafraq Governorate from the East, and Jerash, Ajloun and Balqa Governorates from the south.

Estimates put the population slightly over one million, making the Governorate of Irbid the second most populated in Jordan after Amman. With the influx of over a million Syrians during the past two years, the Jordanian to foreign national's ratio altered drastically as refugees crossed into Jordan. This has had a major impact on the population of Irbid and accordingly the unemployment rate in the Governorate.

Demographics of Irbid Governorate (2004 Census)

Female to Male ratio	48.9% to 51.1%
Jordanian citizens to foreign nationals	96.6% to 3.4%
Urban population	707,420
Rural population	220,872
Total population	928,292

The Irbid Governorate is named after its capital, the largest city, and divided into nine counties called alweya (which is the plural of liwaa). Many of these departments are within the sphere of influence (and constitute districts) of metropolitan Irbid.

	Department	Arabic Name	Population (2004)	Administrative Center
1	The Capital Department (Al-Qasabeh)	لواءالقصبة	375,594	The city of Irbid
2	Bani Obaid Department	لواءبنيعبيد	93,561	Al Hisn
3	Al-Mazar Al-Shamali Department	لواءالمزارالشمالي	44,166	Al Mazar al Shamali
4	Ar Ramtha Department	لواءالرمثا	109,142	Ar Ramtha
5	Bani Kinanah Department	لواءبنيكنانة	76,398	Sama al-Rousan
6	Koura Department	لواءالكورة	91,050	Der Abi Saeed
7	Al-Aghwar Al Shamaliyyeh	لواءالأغوارالشمالية	85,203	North Shuneh
8	Taybeh Department	لواءالطيبة	29,318	Taybeh
9	Wasatieh Department	لواءالوسطية	24,046	Kufr Asad

There are three Qualified Industrial Zones (QIZ) in Irbid Governorate; 'Prince Hasan Industrial City', 'Cyber City', and 'Jordan River Crossing City'. Clothing, chemicals and electronics constitute their main exports.

2.3 The olive sector

Before choosing this industry, other potential sectors were also considered for their job creation and business generating opportunities. Numerous criteria were assessed such as; outreach to affected populations, gender, market opportunities, employment growth potential, appeal to host communities, creating employment for women, and the interests of stakeholders and potential partners. A short list was prepared and discussed with the Ministry of Interior and at forums held in both the governorates. Consequently, agro-business sectors were prioritised for the start-up phase with olives selected for Irbid and tomatoes in Mafraq.

Jordan is the 8th largest olive oil and fruit producing country in the world. There are 1.5 million trees across Jordan whose combined annual harvest, on average, yields 190,000 tons of olives per year. Historically, the olive sector is an ancient traditional source of income and livelihood in Irbid, falling under the agriculture sector in broader economic terms but still of primary importance, particularly to the rural poor households owing to the following reasons:

- Olives provide seasonal work, giving potential for increasing the household income
- Olives can be grown traditionally and without any advanced technology
- There are large areas of suitable agricultural lands in Irbid

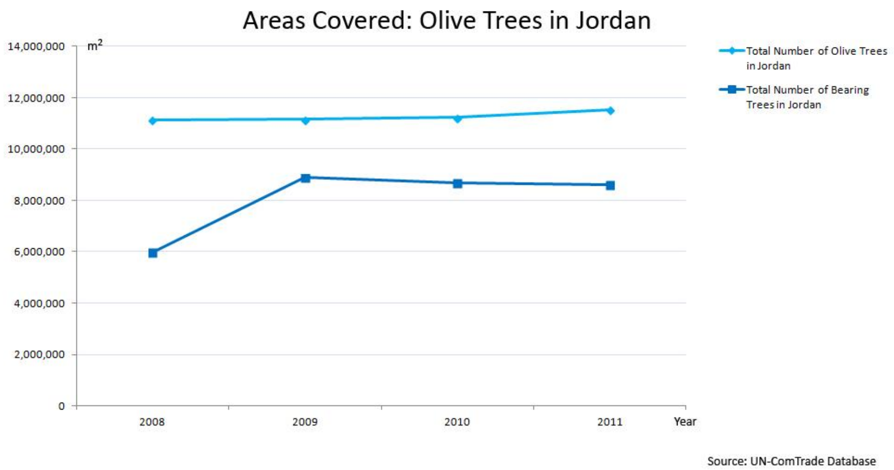
In keeping with the objectives of the project as well as the VCD philosophy, the selection of the olive sector in Irbid governorate can be justified on the basis of the points below:

- Involvement of rural / poor households is considerably high in the sector
- It is a common small scale livelihood option in the governorate
- Presence of a clear value chain
- Input resources are adequately available
- There are opportunities for both export and expanding the local market
- There is ample scope for improvements

Irbid is at the top of the Jordanian agricultural regions especially in the production of citrus fruit, olives, wheat and honey from bee keeping. Despite a 16 per cent drop in production, compared to neighbouring Governorates Irbid registered the highest production of olive oil last year with 3,429 tons, followed by Jerash and Ajloun with 2,656 and 2,576 tons respectively, according to 'Olive Oil Times'. Interestingly, although there are in total 103 oil mills in Jordan, a significant majority of presses, 51 officially, are usefully located in the Governorate of Irbid alone.

According to official figures, the Kingdom's total olive oil consumption stands at around 24,000 tons annually, equating to an average annual per capita olive oil consumption of almost four kilograms.


International Exports
Tons
5000
4500
4000
3500
3000
2500
2000
1500
1000
500
0
2008
0.50%
9.50%
20%
45%
25%
Spain
Italy
Greece
California
Other
rgin Olive Oil Exported
rgin Olive Oil Imported
erserved Olives Exported
erserved Olives Imported
JN-ComTrade Database
Source: PEAS Health


Areas Covered: Olive Trees in Jordan
m2
14,000,000
12,000,000
10,000,000
8,000,000
6,000,000
4,000,000
2,000,000
0
2008
2009
2010
2011
Year
Total Number of Olive Trees in Jordan
Total Number of Bearing Trees in Jordan
Source: UN-ComTrade Database

The olive and olive oil sector in Jordan is characterized by relatively small producers who market their produce through municipal wholesale markets or through oil press facilities. Local direct producer to consumer sales is common where the farmer sells his olive oil products to family and friends. Producers only tend to improve their production technology gradually while maintaining their traditional post-harvest practices, they're unaware or give little attention to timely collection, hygiene and other measures that secure the quality for further processing. Understandably though, their production is largely supply-driven within the current trading system that offers little incentives for improvement with regard to product quality.

At the same time, wholesalers and olive oil press owners generally appear to lack a medium or long-term marketing strategy, reflected in the absence of investment in appropriate marketing efforts, production equipment, proper oil storage facilities, etc. The exporters mainly demand bulk shipments of low quality produce, packed traditionally in large 16 Ltr. canisters by a number of producers, for an undefined target market. Shipments across the region, including the Gulf States, are customarily sold through local commission agents, without any forward sales agreements regarding quality, quantity, or price. Exporters are accustomed to responding to an oversupply-low price situation in the domestic market rather than specific requirements of well-defined target markets.

Located 700 meters above sea level, the Irbid region is already the major production area for olives and olive oil in Jordan, but never the less still has appropriate spare resources and capacity for further expansion. Higher prices achieved locally and across Gulf countries and Europe for premium quality olives and olive oil, are typically well above the cost of producing, pressing, transporting, and marketing, so there should be ample scope for improving income and job creation in the sector.

3. Analytical framework: ILOs approach to value chain analysis

The project applied the participatory value chain development methodology of ILO, which is one of ILOs main tools for employment creation. It bases itself on the ILO manual 'Value Chain Development for Decent Work – A Guide for Development Practitioners, Government and Private Sector Initiatives' (2009)[3] which is a well-tested tool that can be initiated rapidly. The strategy is to strengthen local capacity for value chain development and ensure local ownership of the process while at the same time conducting the value chain analysis.

The work was initiated with sensitization of stakeholders concerning value chain approaches and how to conduct a participatory value chain analysis, following the approach of the ILO guideline. The stakeholders were keen on the idea and methodology and it was decided to go ahead with one value chain in each governorate to start with. Following the guideline, local facilitators were trained to assess local value chains in a 'learning-by-doing approach'. Under the projects facilitation, they undertook the data collection, conducted extensive interviews and held focus group meetings with stakeholders, including market actors and target groups. Thereafter, the facilitator teams conducted

[3]http://www.ilo.org/wcmsp5/groups/public/---ed_emp/---emp_ent/---ifp_seed/documents/instructionalmaterial/wcms_115490.pdf

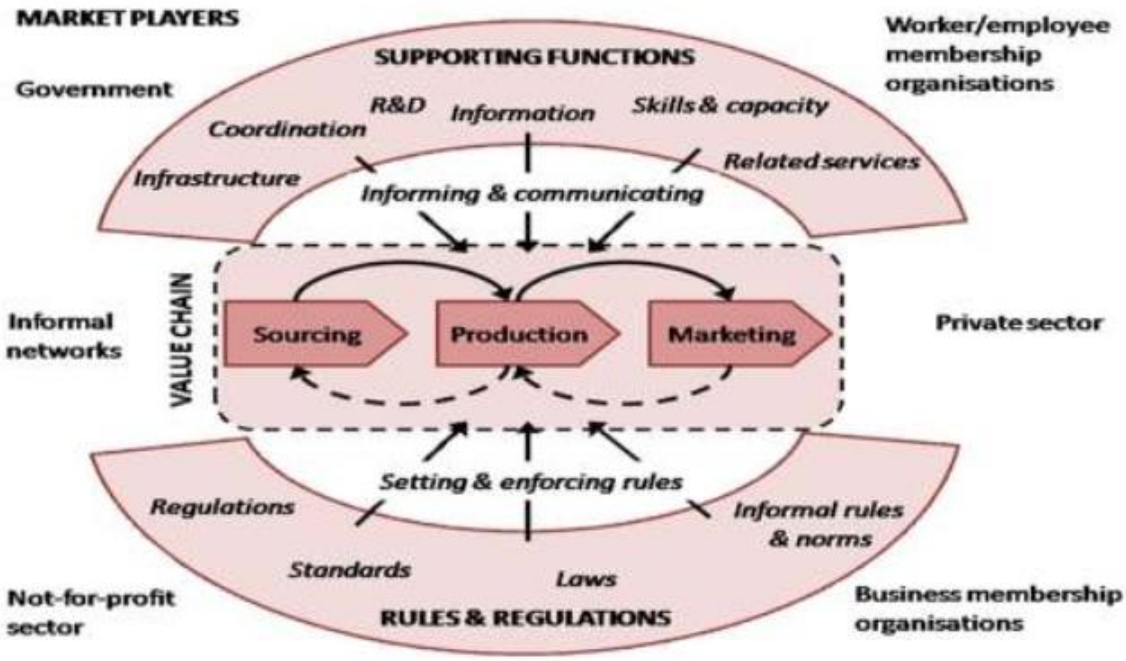
the analysis under the guidance of an ILO specialist, leading to a complete set of prioritised interventions.

3.1 The value chain

The term Value Chain refers to the fact that value is added to preliminary products through the combination of other resources (for example tools, manpower, knowledge and skills, other raw materials or preliminary products). As the product passes through several stages of the value chain, the value of the product increases.

The figure below (from the manual) sketches the value chain approach and aspects to be considered:

The market system:



Source: Springfield Centre

Taking a value chain approach to economic development and poverty reduction (that includes creation of Decent Jobs) involves addressing major constraints and capitalizing on opportunities faced by input suppliers, producers, processors, traders and other businesses at multiple levels and points along a given value chain. This will inevitably include a wide range of activities such as improving access to necessary inputs, developing the capacity and skills of human resources, improving working conditions and productivity, strengthening the delivery of business and financial services, enabling the flow of information, facilitating improved market access, or increasing access to higher-value markets or value-added products. Value chain analysis identifies opportunities and constraints of a particular local/regional sector and analyses its market integration. The end result is an action plan or implementation matrix that proposes various solutions addressing identified opportunities and constraints.

3.2 Participatory value chain development for decent work

The approach for value chain development is to strengthen local capacity for value chain development and ensure local ownership. A local lead is needed, i.e. a focal point organisation, to support the work locally. Local facilitators are trained and undertake the actual data collection and conduct the analysis under the guidance of ILO experts. This immediately addresses the specific value chain on which the work is conducted and, in turn, builds local capacity for undertaking such analysis and to address constraints. The participatory approach ensures local ownership and thereby the sustainability of the interventions. The participatory approach also advises a highly consultative methodology for both stakeholder engagement and research.

The first sensitisation workshop was held for main stakeholders of the governorate to inform about the project and to gauge the buy-in of stakeholders. Under the guidance of an ILO value chain development consultant, participants learned about the project and the value chain methodology and agreed to go ahead. Thereafter they were asked to appoint organisations and staff to join the research team. The governorates and key partners proposed individual members for the value chain teams and, immediately after finalizing all the appointments, the facilitator training started. The training applied the methodology of learning-by-doing, with a two-pronged goal whereby participants are trained in the methodology of value chain assessments while at the same time actually conducting the assessment, leading to the value chain analysis and intervention plan. See annex A for the list of the value chain team

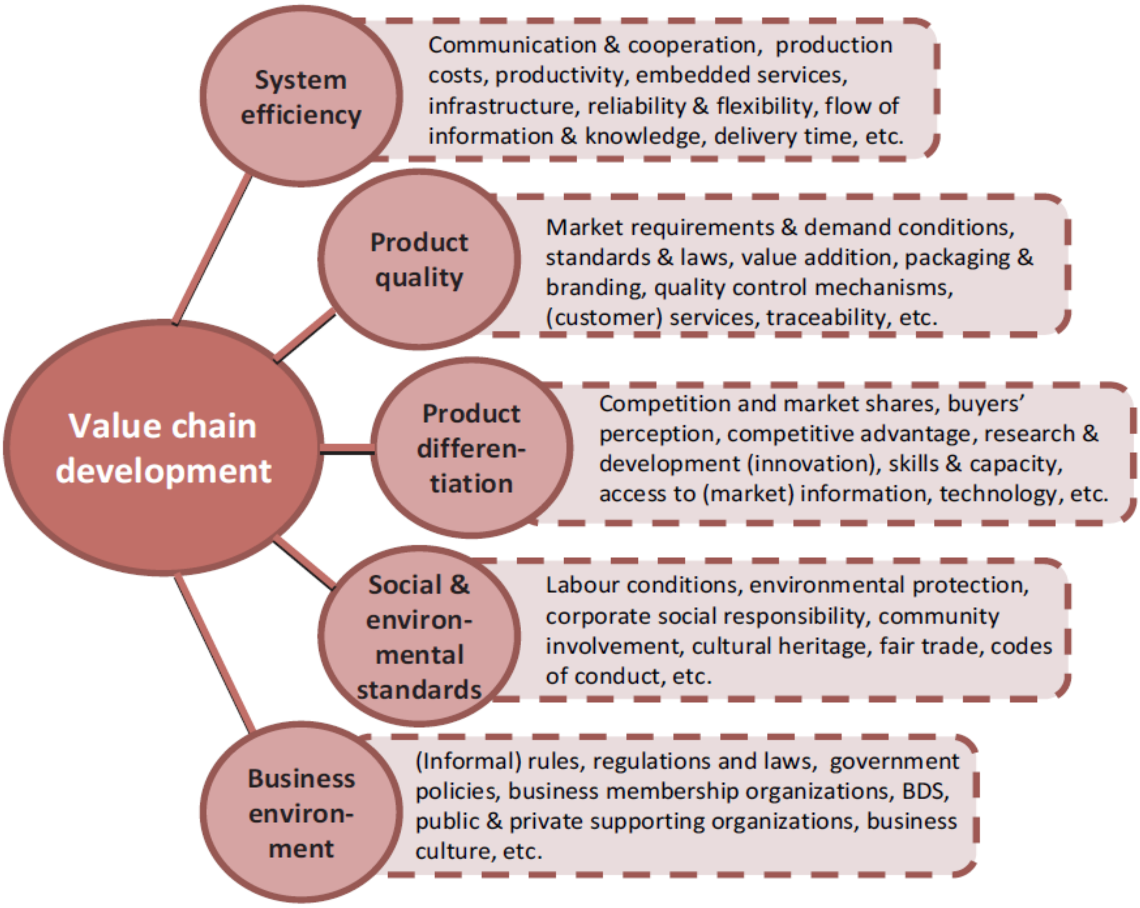
Upon completion of the facilitator training, workshops were held where the facilitator team presented their initial results in the so-called hypothesis workshop and prepared for the field research and data collection. The research phase lasted the next two weeks, where the facilitator team conducted focus group meetings and interviews, to gather data and assess challenges and opportunities in the sector. The data was processed and, finally, the findings were shared and validated with local stakeholders in the so-called presentation workshop.

Upon completion of the value chain assessments, the intervention plan was made. An important factor is that the exercise identifies what needs to be done and who can do it, whilst promoting the concept of bringing stakeholders and resources together on tackling constraints, developing opportunities, and sourcing resources jointly. Hence, more work is needed to engage other stakeholders, whether they be from central government or other development partners, to support the implementation. As for ILOs further support, a budget has been made available to start implementation during the so-called bridging phase of the project in the first half of 2014. The interventions will be implemented under the lead of local stakeholders with assistance from the ILO.

3.3 The five value chain drivers

To add a slightly more detailed set of factors that may influence the dynamics of the value chain, the ILO VCD approach emphasizes five drivers for value chain development. These are: system efficiency, product quality and specifications, product differentiation (competition), social and environmental standards (especially labour condition and practices), as well as policy and regulatory frameworks which affect the overall performance of the sector, as depicted below.

Five drivers of change for value chain development:



These aspects or drivers will be considered throughout the analysis of the value chain in the section dealing with the findings.

4. Main findings from the analysis

4.1 Growing and production

As for the growing and production process, the different issues and challenges of the sector were analysed by the research team. The issues are divided into several stages, as follows:

Planting: Although considerable acreage is already used for olive trees, it was assessed that actually this can still be increased further as a necessary part of the effort in endeavouring to expand local and international market shares. One way of increasing the acreage, as indicated by the research, is to strengthen the local **capacity for rugged land use** and reclamation of land currently not used.

The soil of Irbid is considered excellent for growing olives, and is the best in Jordan. Experts however still advise that **soil is analysed** before planting contrary to most farmers' opinion, as they consider it an extra unnecessary cost in production, consequently few conduct soil analysis. Understandably and with good reason, for it is actually difficult for them to have these tests done without considerable efforts and costs involved.

Previously the **government had provided seedlings** to farmers to introduce what was then thought to be a better and higher yielding variety. These were imported and of foreign origin but proved to be inappropriate, not thriving well in the local soil, with disappointing consequences for the quantity and quality of the harvest. This sort of negative experience left many farmers in a difficult situation and reluctant to risk any further experimentation. Confidence needs to be restored for future developments, heeding the obvious lesson from that unfortunate exercise is that, new cultivars must be properly tested and proven before being recommended to the farmers. A division of the Department of Agriculture (DoA) should be mandated and capacitated to take on a solid **quality control function** on such matters, as well as concerning other inputs like fertilisers, pesticides etc., to absolutely ensure that farmers are well-informed about the quality of inputs and that sub-standard products are promptly taken off the market.

Field care: The second step is the field care techniques, involving ploughing and weeding, pruning and inoculation of trees, irrigation and fighting pests that affect fruits and trees. The assessment showed that methods of pruning were traditional and that proven **new pruning methods,** still not introduced to the farmers, could be easily applied to gain a rapid increase in yields.

The **availability of water constitutes one of the biggest challenges** facing the sector, namely that national laws prohibit to a great extent the prospection of artesian wells*,* which are considered the main source of water in this region. Regulations enforce the overriding priority of the government to protect drinking water supplies, rather than providing water for irrigation. Obvious solutions include many measures that could be taken for **rainwater harvesting and storage,** but as yet no such measures or plans are in place. Severe lack of water sources in Jordan led to this adoption in the past of an austere policy on the usage of ground water, but now, considering modern efficient irrigation and water conservation techniques, this requires a re-evaluation of the positive economic and social benefits of well-engineered cost effective schemes that only government can coordinate. Nationally, an ever increasing demand, new industrial developments and the real threat of climate change, necessitates a need for clear dynamic water management policies, adopting regular decisions on sector's fluctuating needs for prioritised water usage. If olives are chosen as a strategic sector, clear directions for water availability should be made widely known so farmers can plan their production accordingly.

Another significant challenge is the **lack of skilled labour**. Field care activities require much professionalism, especially in pruning and pest spraying. Measure should be taken to assist and train the farmers – possibly in the form of freelance service providers or directly as employees - where local workers receive training in practical field, technical, and processing domains. Additionally, this could also be a task for the extension workers of the Department of Agriculture, although presently they are a scarce resource that in itself needs vocational training programmes to address this skills deficit.

So a **technical package should be put together with a view to increasing the yield and improving the quality** through transfer of knowledge and technology, including:

1. Use of proper cultivars that are appropriate for the area and are marketable locally and internationally.

2. Methods of use and adherence to international guidelines for pesticides and fertilizers.

3. Use of modern agricultural technologies required by Global GAP and accepted by importing countries.

4. Training the labour force on application of modern agricultural techniques covering the range from planting to proper pruning, all day-to-day operations and upto harvesting and/or processing, in order to ensure a high quality production that meets current national and international specifications.

Harvest: It is essential that harvesting takes place within a short period of time, together with sorting and packaging. Any attempt to produce high quality olive oil starts at this stage, but in Irbid there is reportedly no information on proper harvesting methods. In most cases, traditional methods are employed, particularly **hitting olive branches with a stick, which leads to damage** of the olive fruits.

Post-harvest handling: Traditional practices also dominate the post-harvest handling from which a number of shortcoming could be addressed with a view to improving the quality. After the sorting for instance, the olives are usually packed in plastic bags which if not chilled, the contained source of heat from the natural decomposition process will quicken their deterioration. The combination of crush damaged fruits and the heat tends to lead to spoiling developing between the damaged and non-damaged olive fruits, thus leading to oxidation and a lower quality of oil.

Problems arise often when the **acidity of the oil tends to be too high,** usually due to avoidable constraints in post-harvest handling. When assessing the quality of the oil it's the acidity that's considered important, the lower the acidity then the higher the quality, so for example, the best quality cold pressed virgin oil also has the lowest acidity. Most importantly during the handling, the time between harvesting and pressing should be kept as short as possible, never exceeding a maximum of 24 hours. However this crucial detail, which often seems not to be to be adhered to, must be emphasised clearly through information, and training if necessary, ensuring that the relevance of time factors are fully understood.

Overall there is a need for **transfer of know-how and more advanced technology in post-harvest handling**, including picking, grading, pressing, cooling, storage, packaging, processing, and transporting. This can be done through the following measures:

1. Continuous consultation and co-ordination with the buyers, importers and other parties involved in order to stay informed about the pre-set conditions, specifications and standards, preceding the preparation processes for marketing locally and for export marketing.

2. Investment in the picking, grading, pressing, packaging, cold storage, and other equipment needed for proper handling of products, to ensure quality preservation during production and storage.

3. Training technical staff who are able to prepare the product within the required specifications, efficiency, and at minimum cost.

4. Providing the pressing centres with high quality raw materials, in order to be able to maintain high quality production at all stages towards reaching the consumer.

5. Maintain complete sanitary conditions inside and outside the centres through installing appropriate systems and training specialized staff.

6. Installing proper systems and following appropriate measures and practices to insure fulfilling all production and value adding requirements.

7. Acquiring certificates and licenses that attest to the conformity of the products and the production practices employed to attain the requirements.

Pressing: The press mill and the pressing process is a decisive factor in the quality of production. However the process, from the reception of the olives until the final product, including cleaning, washing and pressing takes place in a very basic way. In fact, the research shows that the **majority of press mills in Irbid governorate do not comply with the minimum quality management criteria** for press mills. Moreover, the cleaning of pressing machines between one pressing and another rarely takes place, indicating that **hygiene appears to be a problem, so introduction of better standards and quality management systems, such as the Hazard Analysis and Critical Control Points (HACCP) system, should be considered**. Finally, there is no quality control immediately following pressing, which properly should take place, to ensure that any oxidation processes, which may have occurred, did not spoil the oil.

Pro-poor livelihood creation: Realizing the potential for modernisation and expansion, it was established that there is further scope for promoting livelihood opportunities in the olive sector. Besides job creation in farming and existing enterprises, there is also the option of assisting new entrepreneurs in engaging in new **value adding activities** as well as assisting growers in conducting more value added activities themselves. Activities could include pickling of olives, production of soap and other cosmetic products, as well as boutique olive oil production. Methods should be tested first and pilot projects should be run to trial the approaches which in turn can then be more widely introduced. **Assessing the market for such cottage-industry production must be captured in a market study.**

Opportunities exist, especially to **engage women in household production** of olive oil soap and cosmetics, as well as a wide range of pickled olive products, by building their capacity and introducing collaboration with micro-financing institutions. This can be done through organized partnership with local technical stakeholders, such as IRADA, to conduct the technical capacity building and relevant feasibility studies.

Research showed that there is **little consideration for environmental aspects, for example** in dealing with waste water from the pressing process. Lacking attention to environmental aspects of the production may also affect the competitiveness of the industry as international buyers have high demands regarding production methods, including considerations for social and environmental standards. Hence, there is a need to create **awareness, access to environmentally friendly solutions and incentives for investment in environmentally friendly production processes.** Solutions that improve the competitiveness of the end product can lead to multiple advantages and spin offs apart from decreasing the negative effects on the environment. Basic ideas may include recycling tree leaves into fertilizers, but technical solutions, such as a treatment plant for phenol extraction from the olive oil production water (Al-Zeebaar), has in this example a useful by-product which can be sold separately, and the immense benefit of phenol-free production/pressing water reused for irrigation.

Finally, the issues of **access to finance** were brought up and it was recommended that measures are taken to provide soft loans designed to increase acreage and improve quality. This would also be relevant vis-à-vis small scale entrepreneurs, interested in starting cottage industry style olive products, and can be linked with ILOs entrepreneurship training programmes, like for example 'My First Business', which has emphasis on accessing finance.

4.2 Marketing

Support is needed for **conducting a market study** to explore internal and external opportunities, and prepare a **marketing strategy** to assist local businesses in reaching both local and international markets. It should cover the full range of olive and olive oil products, and be relevant for both farmers, small scale olive product producers and up to larger manufacturers.

The study should also consider the possibility of developing a **special brand name and label for the olive products originating from Irbid**, particularly suitable for the smaller producers working together on joint marketing. The label should also include information on quality certification etc.

All olive oil producers express ambitions to export their olive oil overseas **but few consider and understand the requirements of foreign markets** and how to fulfil them, whether concerning product specifications or the size of bottles and their information labelling. The analysis confirmed that the role of olive farmers ends after production, with a complete lack of any consideration for marketing beyond local "farm-gate" consumers. Education and practical help is needed through **support from qualified business service provider**s to assist the sector in improving its approach to export markets and more sophisticated consumers. Moreover, there are no efforts in endeavouring to cooperate in marketing or to generate economies of scale on more advanced product promotion. **Packaging is also a constraint,** severely limited to one shape and size of canister with a capacity of 16 litres. Reportedly, only very few facilities sell the olive oil in bottles with proper labelling and specifications on the product. So in order to reach new markets and expand existing markets there is a **need for greater variety in packaging options**. Establishing a joint facilities centre or possibly a marketing cooperative could support this process.

Modern well-informed consumers are increasingly aware and demanding, avoiding products where there is **no quality control and quality certification**. Endeavouring to reach new markets beyond the farm-gate clearly requires proper labelling and quality control, but independent approval and monitoring is a crucially important parameter. Reportedly, no facilities are available locally for farmers to conduct this testing, so stakeholders suggested the idea **of establishing laboratory and testing facilities in Irbid,** so producers will not have to go to Amman to access these services.

Finally, the research also showed that there is an issue with **international freight out of Jordan which reportedly is much more expensive** than for competing olive oil producers in the region. The reasons for this must be explored and a co-operation with the freight companies initiated to ensure that Jordan is able to export on equal footing with its competitors.

4.3 The supporting functions

Supporting functions include the widest range of institutions, structures and establishments such as governmental organizations and private sector or civil society organizations that somehow can be considered a support or service provider for the sector. The supporting factors include coordination between stakeholders both internally and externally, infrastructure, information and data, skills and capacity, as well as research and development.

This section will share the findings reached by the team as a result of the focus group interviews and workshops that were conducted in terms of assessing the supporting functions. What is relevant is the extent to which they address the needs and issues of the olive sector in the Irbid governorate.

Coordination and system efficiency: It was established that there is poor coordination and cooperation, which in turn impacts negatively on all stakeholders in the value chain. The research showed that coordination and cooperation is low priority for the stakeholders in the sector and that there is **little understanding of the advantages of collaboration and joining forces**.

The research pinpointed that the lack of coordination and cooperation is an issue in several areas and can be considered further by dividing matters into internal and external issues:

Internal coordination: Better coordination is needed among farmers, among pressing mills' owners, among traders and exporters as well as between all the stakeholders, as a group. The most obvious solution is the **establishment of a local business association,** specifically for the interests of the Irbid olive industry. This would create a platform for stimulating collaboration and dialogue between stakeholders, on how to make the most of the opportunities offered, and jointly address the challenges. It would be able to advocate for regulatory and public policy reforms relevant to the locality and sector, to engage in a constructive dialogue with external stakeholders, and to enhance coordination and collaboration locally amongst the members. Moreover, there were suggestions on establishing a marketing cooperative which could also be done under the wings of the business association.

ILO has a programme for the establishment of business associations and it is recommended that it is introduced to create awareness and understanding of the role a business association can play as well as benefits and obligations of its members. Moreover, the ILO programme for cooperatives training 'My Coop' has recently been made available in Arabic and could also prove useful to create awareness on advantages of working in a cooperative and train interested stakeholders in doing so.

External coordination: Numerous issues result from the sector's external environment such that local stakeholders must realize the necessity to engage with the external stakeholders to address the mutual challenges. Hence, devising a coordination mechanism between the local value chain stakeholders and other external stakeholders, particularly the government which has a huge influence on how well the sector is developing, should be a priority. A number of suggestions for addressing the lack of cooperation came out of the research, including the **creation of a coordination group or platform** overseeing and monitoring the initiatives for improving the sector. It could take the form of **'an Olive Oil Board' or 'Forum'.** The Board should have all levels of the value chain represented, i.e. representatives of farmers, press mills, producers, exporters, Departments of Agriculture, Trade and Industry, Environment, Labour, and Governorate of Irbid.

The duties of the Board could be the following:

1. To facilitate the implementation of olive oil related activities and conduct dialogue workshops, by selecting and inviting a number of relevant local actors and national level organizations working in Irbid, to discuss the range of challenges and opportunities for the sector.

2. The board will assess proposals, validate them and ensure their implementation.

3. The board will take action to identify and mobilize needed resources.

4. The Board will be a platform on which all concerned with the olives business (public, private sectors and civil society organizations) can have continued dialogue to address issues inhibiting the development of the sector.

Moreover, stakeholders pointing out that **clear strategic direction for development of the sector is missing**.

It also appears that there is **a coordination problem from the side of government** and that there may be a confusion in the mandates between several ministries and governmental agencies that explains an absence in some forms of cooperation and coordination. The Ministry of Agriculture has established a special division for olive oil but it is felt that more could be done to help the farmers. The Board may also contribute to a better organised effort on the side of government, possibly under the leadership of the Department of Agriculture and its olive division.

Infrastructure: These services comprise of agricultural feeder roads, sanitary drainage, as well as electricity supplies, and generally the availability of most of these services is acceptable. Some complain about the prices of electricity and suggest one solution would be to introduce **cheaper and sustainable sources of energy**, such as solar panels.

The need to rehabilitate and **repair feeder roads** was also raised. The poor state of these roads is a serious problem, impeding access to the farmers' lands and increased wear and tear, resulting in higher vehicle maintenance costs. Moreover, most significantly, it also increases the risk of damage to the olives during transportation.

Information and research: Despite the availability of specialized departments in research (National Centre for Agricultural Research) and information (Department of Olive of the Ministry of

Agriculture), there seems to be a lack of human resources and insufficient funds for ongoing research work. This of course has implications for the quality of research as consequently the application of new knowledge and methods needs to be sustained over the long term. Allocating **more resources for both conducting research and disseminating knowledge** to growers, through training and advisory services, is the key to enabling them to move beyond traditional methods.

Skills and capacities: Some public agencies, such as the Ministry of Agriculture in all its divisions and the National Centre for Agricultural Research, in addition to non-governmental Organizations (NGOs), seek to offer miscellaneous training programmes. However, most of this training is not relevant or targeting field work, just where the need actually seems to be the highest. The **little field-based training** available is supposed to be carried out by agricultural engineers from governmental extension services but apparently their small transportation budgets are hindering the effective roll-out of training services, especially for the farmers in remote areas. As mentioned earlier, the sector overall **needs more qualified labour**, which should be considered in the education planning processes, leading to a provision of vocational training courses targeting farmers, press mills owners and households, to provide the skills that drive improved production and quality.

Currently, hardly any private sector training or service providers exist in this area, as it is hard for them to develop their operations business model within a culture that expects all services and training to be for free. Understandably, since the potential clients would mostly be poor peasant farmers, changing this culture is unlikely as long as government services remain free, even if they are not sufficient.

Access to finance is a constraint for many operators in the sector just as in all other sectors. **Better access to advisory services to assist businesses in tapping into both financial and non-financial services** is also needed. The latter is in fact often a necessary step before accessing finance, as some small scale entrepreneurs and farmers often need assistance in articulating their needs and ideas, in the form of a business plan that can be presented to financial institutions.

Concerning supporting factors, a number of items to be improved came out of the research:

- Establishment of a centre for storing, packaging, and marketing (possibly under the managerial construct of a cooperative)
- Support university research centres to increase focus on olives
- Create awareness of advantages in establishing cooperatives for olive producers in the Irbid governorate and develop/strengthen systems for supporting establishment processes.
- Strengthening the role and capacity of agricultural extension services and increased field training
- Establishment of a local olive oil laboratory in Irbid which can deliver services at reasonable prices

4.4 The enabling environment

Any economic sector is influenced by a number of factors that go beyond direct production related activities, such as the rules and regulations governing the geographical and sector's area, including informal rules and social values.

Law and regulations: Value chains do not exist in isolation but are embedded into a highly complex social, economic, political and cultural environment, which determines the nature and success of business transactions within the chain (e.g. investments or business start-ups). The business environment can be seen as consisting of all factors that influence the individual enterprise, the whole business community as well as the market. The market in turn is influenced by regulations, institutions and interventions that immediately affect a particular sector, such as labour regulations.

Despite the existence of national standards and regulations for agricultural production, there is little enforcement. In particular, farmers find that national legislation is not considering their interests. The research showed significant concerns about some laws and regulations in the sector, for instance the **opening of the national markets for olive oil imported from other countries**, leading to steep competition for the local production especially on price. Moreover, the sector is being undermined as it faces a threat in the form of **counterfeit olive oil smuggled in** from the neighbouring countries at highly competitive prices.

Social and environmental standards: Consumers are becoming increasingly aware of social and environmental standards and are increasingly demanding products that fulfil these requirements. Retail and multinational companies are feeling pressure from consumer organizations, media, governments and NGOs to improve social standards in their supply/retail chains and to minimize environmental impact. The ILO's International Labour Standards are playing an increasingly important role and are being included in codes of conduct of private sector CSR initiatives. Here again, it is more than a matter of doing business in a socially responsible way: it is in the commercial interests of companies to react to this consumer demand. Ensuring good social and environmental standards also means being able to trace products and services all the way back to their origin. This obviously requires that businesses along the value chain cooperate.

Across the olive value chain in Irbid there are only a few producers with an understanding of the demands of more sophisticated consumers and generally there is **very little knowledge of social and environmental standards, which will be very decisive in endeavours to reach international consumers.** Therefore efforts are needed, to sensitise both farmers and producers as well as other value chain stakeholders, to the importance of respecting decent standards across the value chain and for all stakeholders to agree on doing so, as any weak links can prove detrimental for all the farmers and businesses in the sector.

A recent classification of press mills as industrial establishments has **increased the rate of taxes on pressing operations,** in addition to the increasingly higher costs of energy. Therefore, pressing operations have become the most expensive in the region, which of course influences the competitiveness of the industry overall. The tax pressure is reportedly also a burden on the operations of the farmers. A dialogue should be initiated to assess the taxation of the industry and whether incentives encouraging upgrading within the industry can be introduced. Views were often expressed that the tax regime is generally not conducive towards agricultural activities.

The farmers think that employment laws do not concern them but increasingly they need to be more aware now, they need workers but few Jordanians are prepared to work on the farms, in a situation where they have to **hire migrant labour**. The procedures in the Department of Labour are complex, cumbersome and costly. At the same time, it appears that **labour regulations are rarely enforced** at farms and other establishments in the value chain. There are for example often no facilities for female workers and no inspections checking for child labour. Moreover, most workers are informal which means that their rights are not legally covered.

The research showed that stakeholders think that **government policies are weak as they fail to support the sector**. This includes aspects such as quality control, import and export policies, taxation and also direct technical support. The inspection function for the local produce is not effective and fraud occurs, which carries the risk of bringing down the industry as a whole. Moreover, the endeavours to stop smuggled olive oil coming in from neighbouring countries are not successful. Farmers consider that the governmental policy of granting construction licenses in lands classified as "agricultural" confirms their feeling that the state is not supportive of agriculture.

Traditions also play a role on the value chain. Both farmers and consumers believe that the traditional production models are the most secure. However, as mentioned earlier, there are shortcomings in terms of good practices for hygiene and other aspects which need to be addressed to strengthen the competitiveness of the sector. This should also be communicated to the consumers as a part of the marketing, where the general public is to an increasing extent aware of food safety issues, confirming that **safe food is a strong marketing aspect**.

A number of issues were raised by stakeholders during the research process concerning laws, public policies and procedures that would need addressing at policy level:

- Advocate to stop import of olives and olive oil (both legal and illegal)
- Advocate to reduce the costs, especially electricity and tax
- Change management systems in the Ministry of Agriculture
- Review laws and regulations that govern the sector and the extent to which they are conducive and protect farmers
- Consider the press mill as an agricultural sector, not an industrial sector (because of its taxation group)

4.5 Decent Work in the olive value chain and gender issues

On the farm, at field level, farmers employ workers coming mainly from Egypt and Syria. These workers must be registered with the Department of Labour but most actually remain informal. The **working conditions for foreign workers is reportedly substandard** and as many work informally, it means that contracts and rights as stipulated in the labour laws are not enforced. Thus the regulations on working environment, including health and safety, are mostly not adhered to and the salaries may be under minimal wage, as well as a number of other requirements that are not met.

Moreover, there is reportedly also extensive **child labour taking place** in agriculture. Expanding these sorts of jobs is not our goal and must be deterred completely by introducing decent work at field level, as a priority.

At the same time, it is important that the value chain interventions aim at increasing higher value adding jobs down-stream of the value chain so that it is not just farm jobs created but also factory jobs, production, transport, and cottage industry self-employment opportunities as well as jobs is sales, marketing and a number of auxiliary functions.

To lift the whole sector with a view to creating more and better jobs, there is a need for all potential partners to work together. Currently, there is **no structure for dialogue between employers and employees** and there is no labour union representation in the governorate. It is recommended that endeavours are made to engage both employers and workers' representatives in the process of using the olive sector as a lever for job creation and economic growth.

The governorate is currently in the process of establishing a Local Employment Council, with the assistance of ILO (component three). The Council will be able to support stakeholders in entering into tripartite dialogue (government, employers and employee representatives) and finding mutual benefits.

Concerning gender, there are opportunities for women to get involved in the higher value activities, especially with small home or village based businesses producing high quality oil, pickled olives, soap and other cosmetic products. The project is at the same time, introducing entrepreneurship education for women entrepreneurs which can be combined with technical training.

5. Intervention matrix

The approach is to take advantage of what is currently available in the form of local resources and services, and focus to gather key stakeholders to work together in order to improve the quality of the product and the opening of new markets, while at the same time improving the framework conditions for the sector overall. This includes dealing with the major challenges facing the olive sector in Irbid, specifically in relation to costs at all stages of production and the lack of cooperation between farmers and government institutions.

Based on the findings, intervention areas have been identified. Together with stakeholders from the sector, the core team has formulated intervention proposals and activities which it believes will improve the conditions in the olive value chain, create more income and pro-poor growth and hopefully make the sector more competitive. These are presented in the intervention matrix. Not surprisingly, there are topics that are overlapping between the categories but they are still presented in each intervention area to have the complete picture group by group.

The Department of Agriculture has been appointed as main partner by the governorate. It is however recommended that a task force and a larger group of partners become involved as 'responsible partners' (therefore the column is left blank until stakeholders have gone through this process and decided).

Constraints and opportunities	Interventions	Activities	Responsible partner	Expected outcomes
Intervention area 1: Improve quality and increase production with technological upgrading				
Production can be increased Low quality	Through the usage of good agriculture practices as well as the plantation of new fields. Increasing the yield and improving the quality through transfer of knowledge and technology, including: 1. Use of proper cultivars that are appropriate for the area and are marketable locally and internationally. 2. Methods of use of pesticides and fertilizers permitted internationally. 3. Use of modern agricultural technologies required by Global GAP and accepted by importing countries. 4. Training labour force on application of modern agricultural techniques covering the range from planting, to proper pruning, to day-to-day operations, until harvesting and/or processing, in order to secure a high quality production that meets the national and international specifications.	Conduct awareness campaigns Conduct farmer and producers training Training of trainers – both agricultural extension officers and private sector trainers		Production increased and quality improve
	Transfer of know-how and more advanced technology in the areas of picking, grading, pressing, cooling, storage, packaging, processing, and transporting. This can be done through the following measures: 1. Continuous consultation and co-ordination with the buyers, importers, and the parties involved in	Conduct awareness campaigns Conduct farmer and producers training Training of trainers – both agricultural extension officers and private sector trainers		

	order to stay informed about the pre-set conditions, specifications, and standards that precede the preparation processes for marketing locally and for export marketing. 2. Promote investment in picking, grading, pressing, packaging, cold storage, and equipment needed to ensure proper handling of products and preserving its quality during its stay in the storage. 3. Training technical staff that are able to prepare the product within the required specifications, efficiency, and at minimum costs. 4. Providing the Pressing Centres with high quality raw materials, in order to be able to maintain high quality products at all stages until reaching the consumer. 5. Maintain complete sanitary conditions inside and outside the Centres through installing appropriate systems and training specialized staff. 6. Installing proper systems and following appropriate measures and practices to insure fulfilling all production and value adding requirements. 7. Acquiring certificates and licenses that attest to the conformity of the products and the production practices to achieve the requirements.			
Quality of olive oil is low and no distinction made between high and low quality oil	Adopt better standards in agricultural practices leading to engagement in new markets Introduction of standards, such as the Hazard Analysis and Critical Control Points (HACCP) system	Training in better pruning methods Training in post-harvest handling Training for value chain stakeholders to understand international standards for olive oil production Training in quality management systems		

		Capacity building of the government quality control function and possibly training of private sector service providers in the field of quality management systems		
No services to assist farmers and press mills	Establish a service centre, offering assistance in storing, packaging, marketing etc.	Prepare a concept note for the service centre, based on a sustainable business model Seek funding		
No facilities to support environment friendly processing	Make available facilities to enable the industry to be more environment friendly Introduce systems for rainwater harvesting to reduce dependency on wells	Establishment of fertilizers facility to recycle tree leaves Establishment of treatment plant for phenol extraction of the olive oil production water (Al-Zeebaar) Information campaign on rainwater harvesting and on access to technology, advisory services and finance		
Poor access to finance to increase acreage and improve quality.	Facilitate farmers and producers get better access to finance	Assess current finance institutions offering loans and assess why these are not utilised Build capacity of finance providers to offer loans to farmers and producers Build capacity of farmers and producers to access loans, such as preparation of business plans (through ILO entrepreneurship programmes)		
Intervention area 2: Market development				
Few smallholder livelihood improvement opportunities	Increasing the number of people, especially women, that get livelihood opportunities in the olive sector through technical training and entrepreneurship development	Training in artisanal/cottage industry production of olive based products, such as pickling of olives, production of soap and other cosmetic products as well as boutique olive oil production		More differentiation of products

		Combine technical training with entrepreneurship training, for example 'My First Business' which also helps access finance		A more competitive sector with understanding of international parameters affecting competitiveness More income from more sales
No joint marketing efforts	Establish a structure for joint marketing, possibly in the form of a marketing cooperative	Assess interest and drive among oil producers If sufficient interest is present, proceed with assistance in training and practicalities/legalities in setting up the structure, while ensuring strong local ownership		
Limited knowledge about new market opportunities	Prepare a market study to explore international and domestic markets and supply and prepare a marketing plan to address these opportunities and overcome challenges related to accessing new and/or existing markets.	Draft ToRs and recruit experts Conduct study Prepare marketing plan		
Few services and technical assistance available to the sector	Support from qualified business service providers to assist the sector in improving its approach to export markets and more sophisticated consumers	Training of business development service providers in both technical and managerial competencies for the sector		
No packaging services available	Find and capacitate service provider to offer services or create a joint facilities centre that can offer packaging services	Training and capacity building		
No quality control and quality certification	Find and capacitate service providers to offer quality control and certification services Establish laboratory and testing facilities in Irbid	Training and capacity building Investment in lab facilities and technical training		
High freight prices, rendering the	Identify reasons for the high prices and negotiate with freight industry on how to have more	Set up dialogue forum		

sector uncompetitive	competitive prices			
Intervention area 3: Improve support functions and coordination				
Poor internal coordination between stakeholders	Enhance cooperation and exchange of information between olive farmers Encourage establishment of cooperatives, associations and joint facilities that can provide services in, for example ,packaging and marketing services to members	Sensitization meetings to build awareness on advantages of cooperation, running a small business association and advocating for government support Support to establish a business association and/or marketing cooperative (if stakeholders desire this) Conduct ILOs 'MyCoop' training Conduct ILOs 'Small Business Association' training		Stakeholder s empowered and capacitated to address challenges themselves
Poor external cooperation and coordination and no mechanism for promoting the interests of the sector	Create a forum or 'olive sector board' for stakeholders in the sector, both private sector and government. Formulate governorate level strategy for the development of the olive and olive oil sector	Organise regular meetings (monthly?) Support the chambers of commerce and industry to include agriculture and strengthen their capacity to assist small agro-businesses Recruit specialist and draft strategy		Better support leading to better methods and know-how which in turn improves products and business
Expensive electricity	Introduce cheaper and sustainable sources of energy, such as solar panels	Conduct a sensitization campaign on options for alternative energy and financing		
Poor condition of roads	Improve agricultural feeder road	Raise issue with the Department of transport Seek resources for getting roads repaired		
Lack of human resources and budget for research	Strengthen capacity of local research institutions for conducting research and disseminating knowledge to farmers and producers	Technical assistance from national level institutions		

work				
Little training targeting farmers at field level and poor availability of extension services	Develop more relevant and targeted field-based training and extension services	Assess current availability of field training and extension service vis-à-vis the need Develop capacity and secure resources for training and services		
Poor access to advisory services and financial services	Better access to advisory services to assist businesses in tapping into both financial and non-financial services (in conjunction with component 4 on entrepreneurship development and business development services)	Build capacity of local service providers to offer training and advise on business development		
Intervention area 4: Improve the enabling environment				
Government policies are considered weak as they fail to support the sector	Create platform for addressing the challenges of the sector Increase dialogue and advocacy capacity of the stakeholders in the value chain to address issues vis-à-vis government and other relevant stakeholders (possibly in conjunction with component two on improving the business environment of Irbid Governorate)	Hold dialogue forum, possibly on the initiative of the olive oil board, forum or business association Prepare evidence-based arguments for ways of addressing challenges and creating opportunities Include the agricultural unions and cooperatives in governmental related decision making processes		Dialogue leading to addressing of problems, better business and livelihoods
Strong competition from imported olive	Identify ways of protecting the olive oil sector against both legal and illegal imported olive oil	Assess if the olive sector can be protected against competition from imported oil, at least temporarily		

oil		Strengthen measures to stop the influx of counterfeit olive oil smuggled in from the neighbouring countries		
High taxes on pressing operations	Reduce taxes to assist the sector	Advocate for recategorisation from industrial to agricultural and/or direct tax exemptions		
Labour law not enforced and cumbersome to hire foreign labour	Implementation of the labour law to ensure a level playing field, reduce informality and child labour Make it easier to hire migrant labour if Jordanians are not interested in the jobs	Assess the current state of implementation of the labour law Identify shortcomings and conduct awareness campaign on rectifying shortcomings Review procedures for getting work permits for foreign workers		
Little knowledge of social and environmental standards, which will prove to be very decisive in endeavours to reach international costumers	Increase knowledge of social and environmental standards	Conduct assessment to identify deficits in terms of knowledge and implementation of social (incl. labour) and environmental standards Conduct training for extension service trainers to train farmers Cooperate with international buyers to understand their requirements, possibly in the form of a buyer-seller forum		

Institutional structures for implementation needs further decisions from the group of local stakeholders. As many stakeholders as possible are needed to support the implementation of the plan and stakeholders are aware that the interventions are not designed to be supported only by ILO but both support and funding is needed from external sources. Please see the next and final section for recommendations and follow-up activities.

6. Recommendations and next steps

Other follow-up actions and recommendations include the following:

- The analysis of the findings and proposed solutions should be further reviewed and revised in a verification workshop with project beneficiaries, i.e. farmers, both large and small and other businesses operating in the olive sector.
- Then the report should be presented to the Local Committee meeting to get comments, feedback and inputs as soon as possible.
- The responsible partners should be more defined and allow for a wider group of local organisations to implement interventions, in cooperation with Department of Agriculture which remains the main partner. The Local Committee meetings and verification workshop can be used for gathering inputs and securing commitment.
- The Local Committee of the governorate has overall responsibility for monitoring implementation but it is recommended that a task force is formed which will be responsible for securing smooth implementation on a day-to-day basis. The task force should be led by either DoA or the governor's office and regular meetings – for example monthly – should be held to ensure the coordination and monitoring of implementation of sector specific activities.
- ILO and local partners already agreed on which activities will be supported by ILO for the first period (first half of 2014). Further partnerships and sources of funding need to be identified.
- The intervention matrix should be seen as a living document that can be revised when needed.
- Proper monitoring and documentation system for value chain development activities should be established for the project. The larger ILO project 'Local Economic Development for enhancing access to employment and livelihood opportunities for host communities' is expected to start in the course of 2014. A monitoring framework based on the DCED guidelines is envisaged and the olive value chain should be captured in this framework.
- A gender specialist should be invited to assess possible gender dimensions in the value chain and adjust interventions to take into account the different needs and roles of women and men by promoting equal opportunities for both sexes.

- The implementation should be pro-poor and to ensure support to vulnerable groups, such as women, as well as promoting a culture of dialogue. Promoting decent work is essential to the project and should be integrated into the planning process, contracting and implementation.

- It should be considered how a coordination mechanism with other initiatives in the sector can be organised, including with other development partners, such as UNDP, FAO, UNIDO, UNFPA, EU and USAID. The Ministry of Interior is working on establishing a value chain development committee, which may be a good body for this.

In sum, there exists great opportunities for expanding the olive sector and use it as a vehicle for creating income, business and livelihood opportunities. A number of issues will however need to be tackled and it will take effort, initiative and cooperation from all stakeholders in and around the value chain to succeed in addressing the constraints and taking advantage of the opportunities offered.

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Annex A: Members of the value chain team

No	Name	Organization
1	Bassam Fraihat	Irbid Governorate
2	Ahmad Nseir	Irbid Governorate
3	Mofid Haddad	Agriculture Directorate
4	Hussein Qouraan	Labor Directorate
5	Farid El-Rousan	Chamber of Commerce
6	Khloud Trad	National Women Organization – Nabatiyeh
7	Abir El-Jondi	National Center for Research and Agricultural Services
8	Mohamad El-Waked	Labour Directorate
9	Abdel Karim Shboul	Agriculture Fund
10	Khaled Al-Zalek	Agriculture Fund
11	Maher El-Khawasna	Industry Directorate
12	Shihada El-Qouraan	Environment Directorate
13	Yousef Tawalba	Cooperative Directorate